

FROM CUSTOMER INQUIRY TO SOLAR INSTALLATION

Shubham Solar Solutions (Solar Energy & Renewable Energy Solutions)

Business: Solar Energy & Renewable Energy Solutions

Business Need: The business needed a more structured way to manage sales operations and solar installation projects.

Centralized Information: Keep customer information in one place.

Standardized Pre-Sales: Create a structured process for handling customer requirements.

Connected Sales & Projects: Connect sales activities directly with project execution.



The complete customer journey was brought into one connected business workflow.

Case Study

PROBLEM & CHALLENGES

CORE ISSUE: Manual coordination made information movement and progress tracking difficult.

SPREADSHEETS:

Lead and customer data was maintained across spreadsheets and different channels.

FOLLOW-UPS:

Pending customer activities were difficult to track consistently.

TEAM HANDOVERS:

Pre-Sales and Sales followed different working processes.

PROJECT START:

Project execution began manually after deal confirmation.

VISIBILITY: Management had limited visibility into sales and project progress.

BUSINESS NEED

Lead Management + Sales Process + Team Coordination + Project Execution

THE GOAL

Replace disconnected handovers with a structured process.

Case Study

THE ZOHO SOLUTION

A CONNECTED ECOSYSTEM DESIGNED AROUND THE CUSTOMER JOURNEY

ZOHO CRM: Centralized leads, customer information, pre-sales and sales pipeline.

BLUEPRINT: Defined stages, transitions and validations for the pre-sales process.

AUTOMATION: Reduced repetitive activities and manual coordination.

ZOHO PROJECTS: Standardized post-sale execution with tasks and project templates.

CONNECTED BUSINESS FLOW

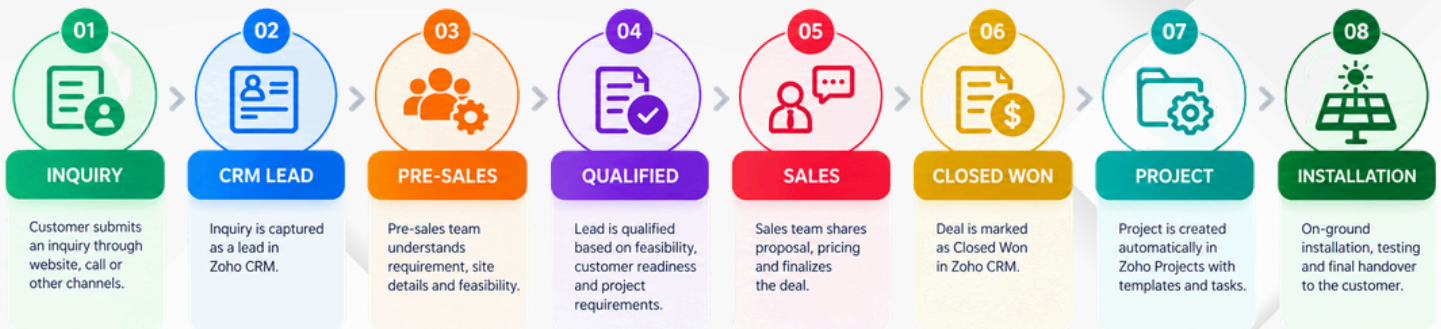


STANDARDIZED PROJECT STAGES



Case Study

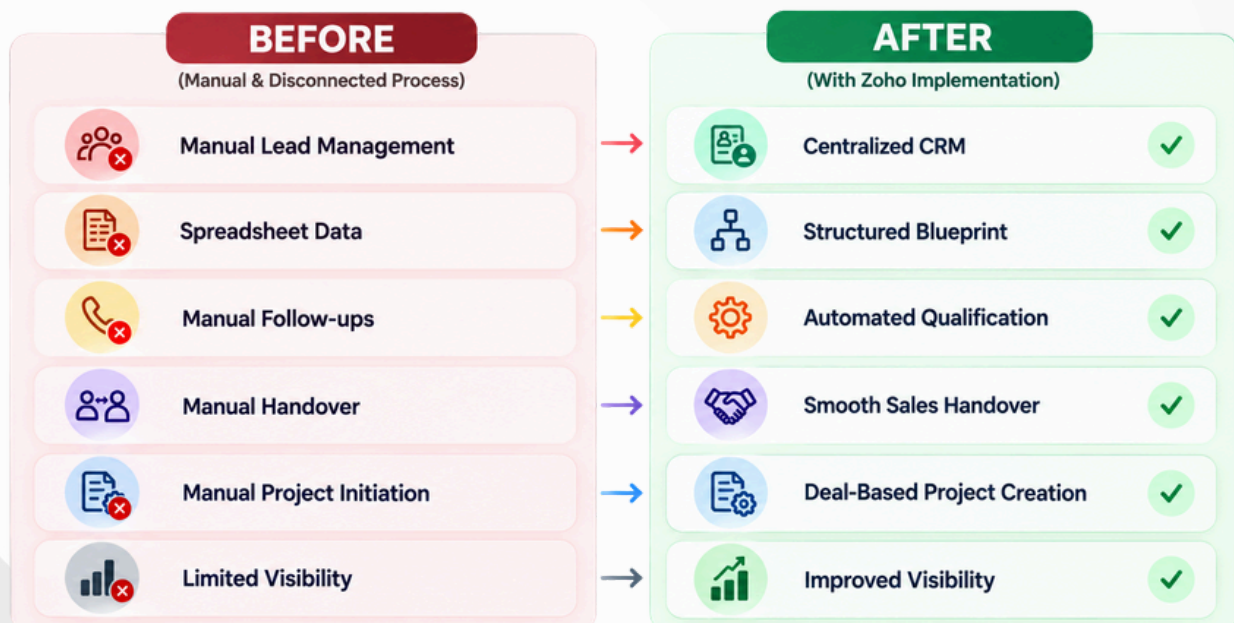
PROCESS AUTOMATION



WHAT THE AUTOMATION ENABLED

- Centralized CRM
- Structured Blueprint
- Automated Qualification
- Smooth Sales Handover
- Deal-Based Project Creation
- Standardized Project Execution

RESULTS & BUSINESS IMPACT



Case Study

KEY BUSINESS IMPACT

- **CENTRALIZED INFORMATION**
- **BETTER FOLLOW-UP**
- **TEAM COORDINATION**
- **FASTER INITIATION**
- **PROJECT VISIBILITY**
- **SCALABLE PROCESS**

FINAL STATEMENT

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