CASE STUDY

Shubham Solar Solutions

Transforming Solar Sales & Project Operations with Zoho CRM and Zoho Projects

INDUSTRY	Solar Energy & Renewable Energy Solutions
TECHNOLOGY STACK	Zoho CRM | Zoho CRM Blueprint | Workflow Automation | Zoho Projects | Custom Integrations

1. Overview

Shubham Solar Solutions needed a structured and centralized system to manage its growing solar sales operations and installation projects. Manual spreadsheets, inconsistent follow-ups, disconnected team processes, and manual project initiation limited operational visibility and efficiency.

Using Zoho CRM and Zoho Projects, a connected business workflow was implemented to streamline customer inquiry management, standardize pre-sales activities, improve sales coordination, and initiate project execution following successful deal closure.

Key takeaways

- Centralized customer and lead management.
- Standardized pre-sales and sales processes using Zoho CRM Blueprint.
- Reduced manual data entry and team handovers.
- Connected sales closure with project initiation.
- Improved visibility into sales pipelines and project execution.
- Established a scalable operational framework for business growth.

2. Executive Summary

Shubham Solar Solutions operates in the solar energy and renewable energy sector, where effective customer management, requirement assessment, sales coordination, and timely installation execution are essential to delivering a consistent customer experience.

As the business needed a more organized way to manage customer inquiries and installation projects, a connected digital solution was implemented using Zoho CRM and Zoho Projects. Zoho CRM became the centralized platform for customer information, lead qualification, pre-sales activities, and sales pipeline management. Zoho CRM Blueprint helped enforce a structured process, while workflow automation reduced repetitive tasks and manual coordination. Zoho Projects supported project planning, task assignment, progress tracking, and installation execution.

The resulting solution connected the complete customer journey—from the first inquiry to the final solar installation—within a structured business process.

3. Problem Statement and Key Challenges

Before implementation, Shubham Solar Solutions relied heavily on spreadsheets, manual communication, and disconnected processes to manage sales and project activities. As operations grew, these practices made it increasingly difficult to maintain consistent follow-ups, share accurate customer information, and monitor the progress of sales opportunities and installation projects.

Fragmented Lead Management: Customer inquiries and lead details were maintained across spreadsheets and different communication channels, making it difficult to maintain a reliable, centralized customer record.

Inconsistent Follow-ups: The team lacked a unified mechanism to track pending follow-ups and customer interactions, increasing the risk of delayed responses and missed activities.

Unstructured Pre-Sales Process: Pre-sales activities did not follow a standardized workflow, making it difficult to ensure that all required customer information was collected before advancing an opportunity.

Manual Sales Handover: Customer requirements and discussions had to be manually communicated from the Pre-Sales Team to the Sales Team, creating repetitive work and potential information gaps.

Limited Sales Pipeline Visibility: Management had limited visibility into opportunity stages, ongoing negotiations, and deals requiring attention.

Manual Project Initiation: Project execution began through manual coordination after deal confirmation, delaying the transition from sales to implementation.

Limited Project Tracking: Without a connected project management process, monitoring documentation, material planning, procurement, installation, quality checking, commissioning, and project closure was more difficult.

The business needed a centralized solution that connected lead management, sales activities, team coordination, and project execution.

4. Evaluation of the Problem

The implementation approach focused on identifying process gaps between customer inquiry management, pre-sales qualification, sales conversion, and project execution. The existing workflow was evaluated to determine where manual data entry, inconsistent processes, and disconnected information created operational challenges.

- **Customer data management:** Establish a centralized source of customer and project requirement information.
- **Process standardization:** Define mandatory stages and transitions for pre-sales and sales activities.
- **Workflow automation:** Reduce repetitive data entry and manual coordination between teams.
- **Sales-to-project integration:** Connect successful deal closure with a standardized project execution process.

Based on these requirements, Zoho CRM was selected to manage the customer lifecycle and sales process, while Zoho Projects was used to manage project execution. Blueprint and workflow automation were incorporated to create a more controlled and connected operational environment.

5. Proposed Solutions

5.1 Zoho CRM — Centralized Lead Management

Zoho CRM was configured to capture customer information and solar project requirements in one centralized platform.

Key information captured included:

- Customer name and contact details
- Project location and customer type
- Solar capacity requirement
- Electricity consumption and average monthly electricity bill
- Budget information and lead source
- Site survey details
- Project requirements and additional notes

This structure gave Pre-Sales and Sales teams access to the information needed to understand customer requirements and manage opportunities effectively.

5.2 Zoho CRM Blueprint — Standardized Pre-Sales Process

A structured Blueprint was implemented to guide the Pre-Sales Team through a defined sequence of activities.

New Lead → Follow-up → Meeting Booked → Requirement Discussion → Site Survey / Information Collection → Quotation Preparation

Defined transitions and validations helped maintain process consistency, capture required information, and reduce the likelihood of leads being moved forward without completing the necessary steps.

5.3 Workflow Automation — Lead Qualification and Sales Handover

The lead conversion process was organized so that qualified leads could be converted into the appropriate CRM records. The standard conversion process created an Account, Contact, and Deal, reducing repetitive manual data entry and enabling the Sales Team to work with structured customer information.

Qualified Lead → Sales Team Assignment → Customer Meeting → Commercial Discussion → Negotiation → Final Quotation → Deal Closed - Won

This provided better visibility into opportunity progress and helped management identify deals requiring attention.

5.4 Zoho Projects — Connected Project Execution

Zoho Projects was incorporated to manage installation activities after successful deal closure. The project execution structure covered:

- **Documentation:** Maintaining customer and project documentation.
- **Material Planning:** Identifying the required equipment and materials.
- **Procurement:** Tracking material requirements and procurement activities.
- **Installation:** Managing solar installation activities.
- **Quality Checking:** Verifying installation quality and project requirements.
- **Commissioning:** Completing operational checks and system commissioning.
- **Project Closure:** Finalizing documentation and project completion.

Project templates helped establish a consistent execution structure and made it easier for teams to track tasks and progress.

5.5 Sales-to-Project Integration

The solution connected sales closure with project initiation.

Deal Closed - Won → Project Created → Project Template Applied → Tasks Generated → Team Assigned → Progress Monitored → Installation Completed

This created a more structured transition between the Sales Team and the Project Execution Team.

6. Implementation

Phase 1: CRM Configuration

Zoho CRM lead fields were customized to capture customer contact details, solar requirements, project location, budget, lead source, and site survey information.

Phase 2: Pre-Sales Process Configuration

Zoho CRM Blueprint was configured to establish a standardized pre-sales process with defined stages, transitions, and validations.

Phase 3: Sales Pipeline and Conversion
The sales pipeline was structured to support qualification, sales assignment, meetings, commercial discussions, negotiation, quotation, and deal closure. Lead conversion supported the creation of Accounts, Contacts, and Deals.

Phase 4: Workflow Automation
Automation was introduced to reduce repetitive data entry and improve coordination across the sales process.

Phase 5: Zoho Projects Configuration
A project execution structure was established to organize documentation, material planning, procurement, installation, quality checking, commissioning, and closure.

Phase 6: Sales-to-Project Workflow
The deal closure process was connected with project initiation so that successful sales opportunities could progress into structured project execution.

The implementation brought the different operational stages into one connected workflow, helping reduce dependency on manual handovers.

Implementation note: Implementation duration, migration details, and formal user acceptance results were not provided in the available project information and should be added if verified.

7. Results and Business Impact

- **Centralized Customer Information:** Customer details and solar project requirements could be maintained in one CRM platform, reducing the need to search across separate spreadsheets and communication channels.
- **Improved Follow-up Management:** The structured CRM process improved visibility into customer activities and pending follow-ups.
- **Standardized Business Processes:** Blueprint-driven stages and transitions provided a consistent framework for handling pre-sales activities and progressing leads through the defined workflow.
- **Improved Team Coordination:** Structured lead conversion and information sharing reduced the need for repetitive manual handovers between Pre-Sales and Sales teams.
- **More Organized Sales Pipeline:** The defined sales stages improved visibility into opportunity progress, negotiations, quotations, and deal closure.
- **Streamlined Project Initiation:** Connecting deal closure with project creation established a structured transition from sales to project execution.
- **Better Project Visibility:** Zoho Projects provided a dedicated environment for organizing tasks, assigning responsibilities, and monitoring installation progress.
- **Scalable Operational Foundation:** The connected workflow established a foundation that can support future business growth and further process automation.

Measurement note: Quantitative results such as percentage reduction in follow-up time, improvement in lead conversion, reduction in project initiation time, and total projects managed were not available. These metrics should only be included after verification.

8. Business Transformation

BEFORE IMPLEMENTATION	AFTER IMPLEMENTATION
Manual Lead Management ↓ Spreadsheet-Based Data ↓	Centralized CRM ↓ Structured Blueprint Process ↓

Manual Follow-ups ↓ Manual Team Handover ↓ Manual Project Initiation ↓ Limited Visibility	Automated Lead Qualification ↓ Organized Sales Handover ↓ Deal-Based Project Creation ↓ Standardized Project Execution ↓ Improved Visibility

9. Conclusion

The Zoho CRM and Zoho Projects implementation helped Shubham Solar Solutions move from a manually managed business process toward a more structured and connected digital workflow.

By centralizing customer information, introducing a Blueprint-driven pre-sales process, organizing the sales pipeline, and connecting successful deal closure with project execution, the solution improved coordination across the customer lifecycle.

The implementation established a unified operational framework covering customer inquiry, requirement assessment, sales conversion, project planning, and solar installation completion.

With Zoho CRM supporting customer and sales management and Zoho Projects supporting execution, Shubham Solar Solutions now has a scalable foundation for improving process consistency, reducing manual dependency, and supporting future business growth.

From Customer Inquiry to Solar Installation — One Connected Business Process.

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