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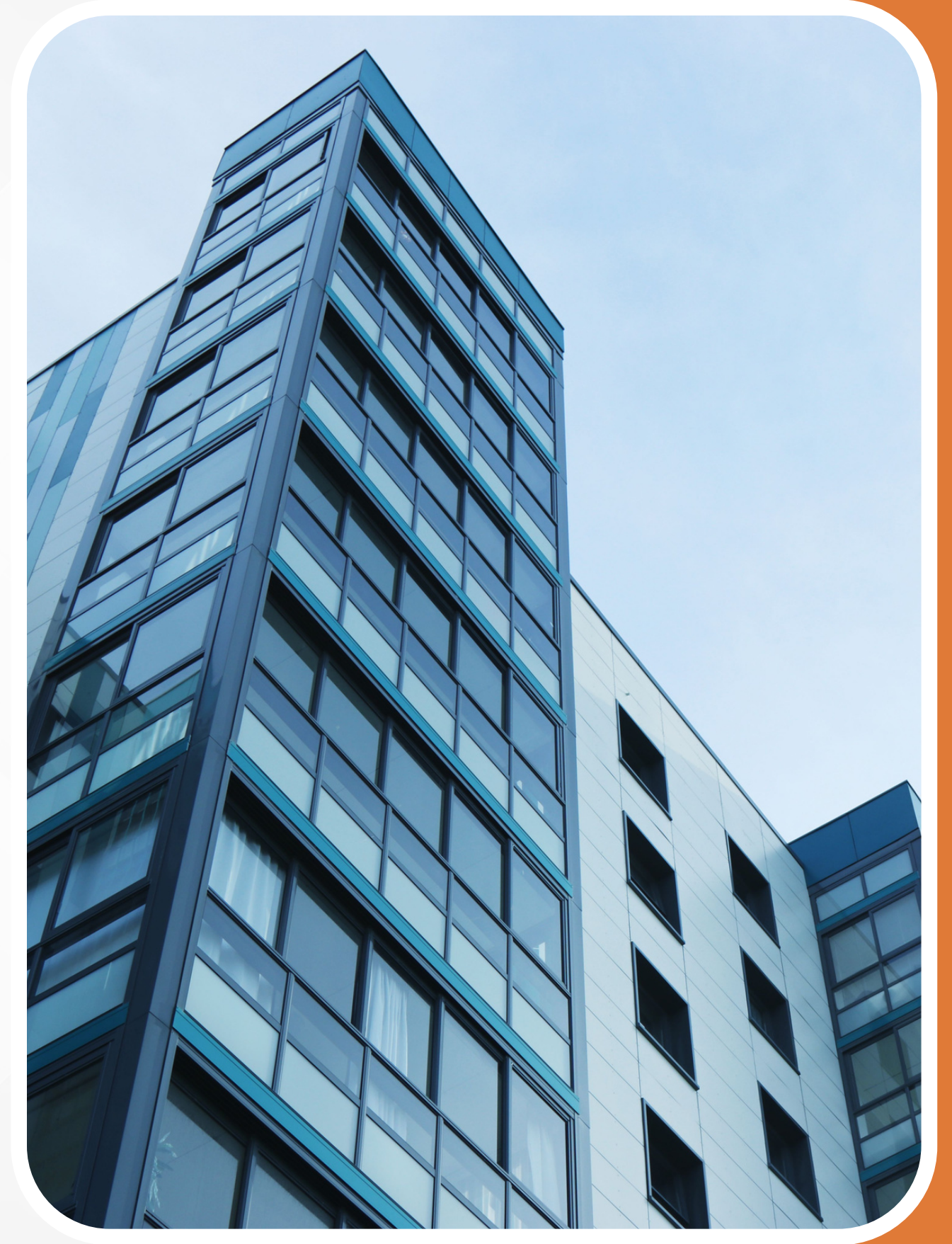
INSPIRED AND TRUSTED SINCE 1987

Client Name: Hussain Popat

Country: Kenya

Total Users: 60

Subscription: Zoho One



ABOUT

Computech is an established IT solutions company with more than 38 years of experience serving businesses across East Africa. The company operates in five countries in the region and has built a strong reputation for reliability and service.

Its team provides a wide range of IT services to help organizations meet their business goals and improve their operations. Over the years, Computech has developed close partnerships with major technology providers, allowing it to deliver effective and customized solutions for each client's specific needs.



PROJECT OVERVIEW

Computech Limited aimed to establish a fully integrated sales-to-service cycle within Zoho One, encompassing every stage from lead capture to deal approval, contract management, and service delivery. The primary objective was to automate lead-to-deal creation and post-close contract tracking for SLA and TCF agreements, enabling opportunities to move directly from Zoho CRM into Zoho Desk. The initiative also focused on improving visibility and compliance by maintaining consistent data, enforcing approval processes, and providing Sales, Finance, and Support teams with real-time insights into renewals, cash flow, and SLA performance.

PROJECT OBJECTIVE

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CHALLENGES

The company faced several operational hurdles in its earlier setup. Without automated lead-to-deal transitions, opportunities were often delayed or lost. Manual approvals and inconsistent data entry reduced the reliability of reporting, and the absence of post-close visibility created gaps in SLA tracking and cash flow monitoring. CRM and Desk functioned in isolation, preventing teams from accessing real-time service performance data. Renewal reminders and follow-ups depended heavily on manual effort, which frequently caused delays or missed deadlines. These issues affected overall transparency, efficiency, and regulatory compliance.

SOLUTIONS

Unicloud delivered a fully customized Zoho One solution designed for Computech Limited's multi-segment business model. The system connected every aspect of the sales and service process, from lead qualification to contract execution and SLA monitoring. Blueprints and workflows reduced repetitive tasks and improved compliance, while integration between Zoho CRM and Desk provided a single source of truth for client contracts and service obligations.

Automated renewal notifications and structured validation checkpoints gave the company full visibility and control over the customer lifecycle. Teams were able to work collaboratively with accurate data and actionable insights, eliminating delays caused by manual processes.

FEATURES & FUNCTIONALITY

1. Lead Management

- Multi-stage lead qualification blueprint for structured intake
- Web form integrations for automated lead capture
- Auto-assignment rules and task creation for timely follow-up

2. Deal Pipeline Management

- Approval-trigger stages for deal progression
- Mandatory fields and document attachment requirements to ensure compliance
- Auditable pipeline with rules to track approvals and deal status

3. Approval Workflows

- Technical, finance, and legal approval paths with configurable thresholds
- Automated reminders and escalation for pending approvals
- SLA tracking for approvals to ensure timely processing

4. Contract and Project Automation

- CRM-based contract templates for different client types (government and non-government)
- Integration with Zoho Sign and SharePoint for digital signing and storage
- Automated project creation triggered by signed contracts
- Predefined tasks and Gantt templates with resource allocation rules

5. Support and SLA Management (Desk Integration)

- SLA policies for response and resolution times
- Automatic ticket creation from projects
- Escalation matrix to manage delayed responses or unresolved tickets

6. Data Integration and Validation

- Unified data layer across CRM, Projects, and Desk
- Bi-directional sync with error-handling protocols
- Web form, Zoho Sign, and email gateway integrations for end-to-end connectivity

7. Testing and Quality Assurance

- Smoke testing of all core automations
- Validation of document generation and permission sets
- User Acceptance Testing (UAT) with super-users for approvals, SLAs, and contract types

CONCLUSION

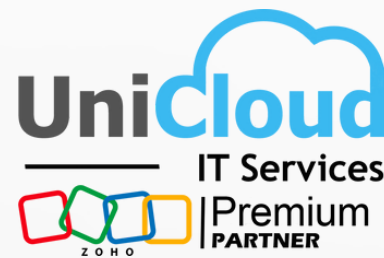
After UniCloud's implementation of Zoho One, Computech Limited operates with a centralized, automated, and transparent system bridging Sales, Finance, and Service functions. Manual processes were replaced with structured workflows that ensure every opportunity, contract, and renewal is managed effectively. Integration between CRM and Desk improved accuracy and decision-making, while automated notifications and validations reduced administrative effort. Computech's teams are now able to focus on client engagement and growth, supported by reliable data and clear operational oversight. This transformation positions the company for scalable growth, stronger client relationships, and improved operational governance.

ABOUT US

Founded on September 12, 2018, UniCloud IT Services is a trusted cloud service provider specializing in ZOHO solutions. Our team of experienced developers brings over seven years of combined expertise, delivering tailored services that help businesses across industries achieve their goals.

To date, we have successfully completed 1,000+ projects for over 5,000 clients, maintaining a 95% project success rate and strong client retention. Our team holds multiple ZOHO certifications, reflecting our commitment to quality, security, and reliable support.

UniCloud continues to expand its services, partnering with organizations of all sizes to implement effective, technology-driven solutions.



<https://www.uniclouditservices.com>