



Client Name: Rahul Pundir

Country: India

Total Users: 5

Subscription: Zoho CRM Plus



ABOUT

Sohana Hospital is a well-established super specialty hospital based in Mohali, India, founded in 1995. It offers advanced medical infrastructure, ultra-modern operation theatres, and a patient-friendly environment. The hospital provides comprehensive healthcare across more than 28 specialties with a team of over 1,500 medical and support staff available round the clock. It is nationally accredited by NABL, NABH, and ISO, reflecting its commitment to high standards of care.

The hospital is equipped with advanced medical technology, including AI-integrated diagnostic systems and robotic surgical facilities. With affordable treatment packages, partnerships with major insurance providers, and active community health programs, Sohana Hospital focuses on delivering reliable, patient-centric healthcare to its community.

PROJECT OVERVIEW

Sohana Hospital wanted a centralized system to manage leads and enquiries from multiple sources, including website forms, Meta Ads, Google Ads, and phone interactions. The hospital required a solution that could capture, track, and convert leads efficiently, while providing clear visibility into lead sources, status, and conversion metrics. UniCloud IT Services was engaged to implement this system using Zoho CRM.

PROJECT OBJECTIVES

The objective of the project was to implement a Lead and Enquiry Management System in Zoho CRM that could manage the entire lead lifecycle, from initial capture to conversion. The system aimed to bring together leads from multiple channels into a single platform, reduce manual errors in data management, provide clear visibility into lead sources and performance, and ensure accurate conversion of qualified leads into Accounts, Contacts, and Deals. Additionally, the solution was expected to support timely follow-ups and allow tracking of lead-to-opportunity conversion times.

CHALLENGES

Sohana Hospital faced several challenges in managing leads effectively. Leads were coming from multiple sources, such as website forms, social media platforms, Google Ads campaigns, and phone enquiries, which made tracking and managing them difficult. Manual entry of leads resulted in delays, errors, and inconsistent data. There was no structured process to manage follow-ups or to monitor lead progression, which affected conversion rates. Additionally, the hospital lacked visibility into the performance of campaigns and could not accurately measure ROI for different lead sources.



SOLUTIONS

Collaborating with UniCloud IT Services, Sohana Hospital implemented a comprehensive Lead and Enquiry Management System within Zoho CRM. The solution included configuring lead fields for standardized data capture, defining a Lead Status Blueprint to track lead progression from initial contact to consultation, and automating the conversion of leads into Accounts, Contacts, and Deals. UniCloud integrated 33 website forms and connected Meta Ads (Facebook and Instagram) and Google Ads campaigns to automatically capture leads and track campaign performance. Conditional fields, automated tasks, and reporting dashboards were set up to support the sales team in managing follow-ups, tracking conversions, and analyzing the effectiveness of different lead sources.

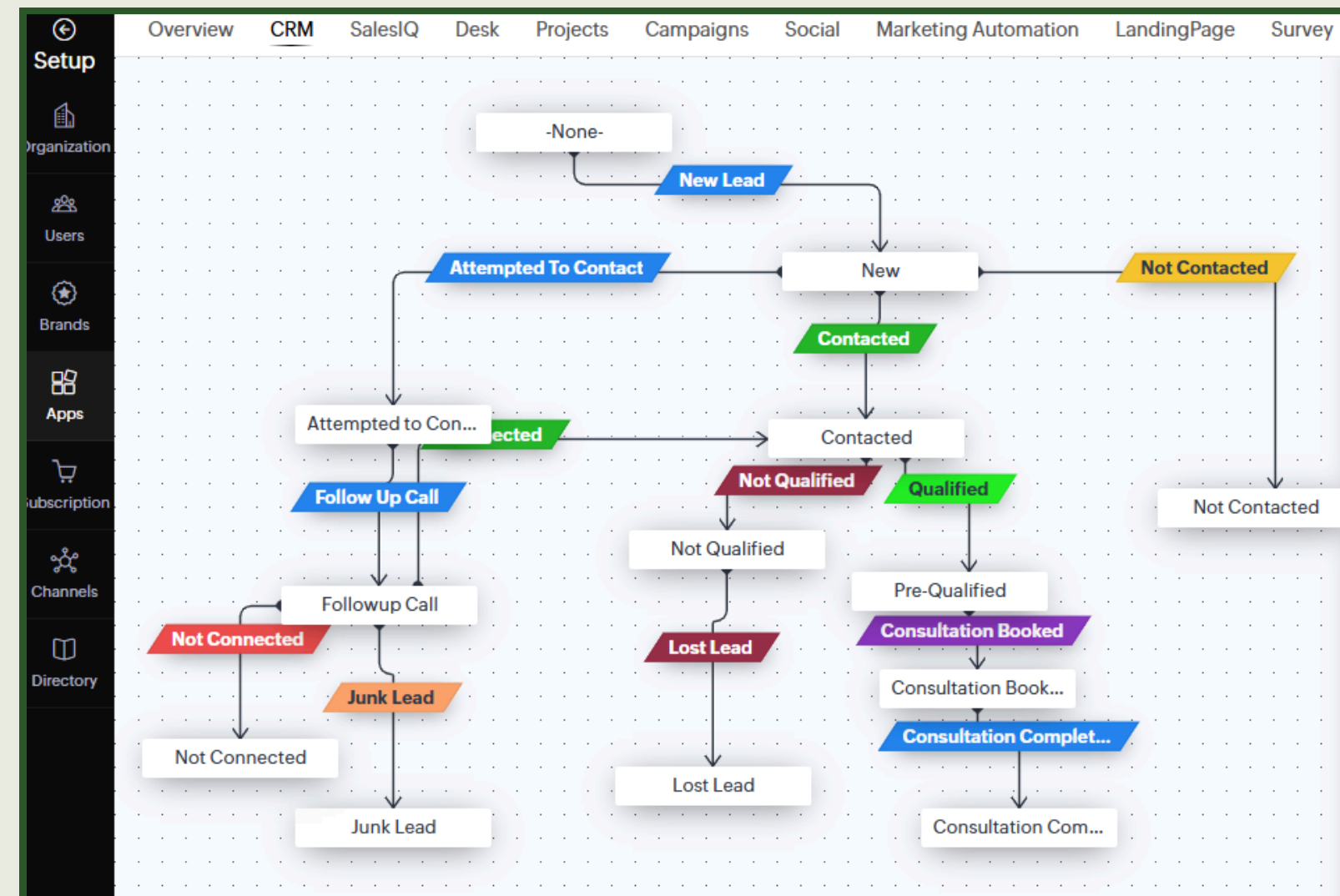
FUNCTIONALITY & FEATURES

LEAD FIELDS:

Configured dropdowns for Source, Type, and Status to ensure consistent and accurate lead data capture.

LEAD STATUS BLUEPRINT:

Defined clear paths for lead progression, covering attempted contact, qualification, consultation booking, and completion stages.



CONDITIONAL FIELDS:

Automatically displays the Lost Reason field when a lead is marked as Lost to capture relevant details.

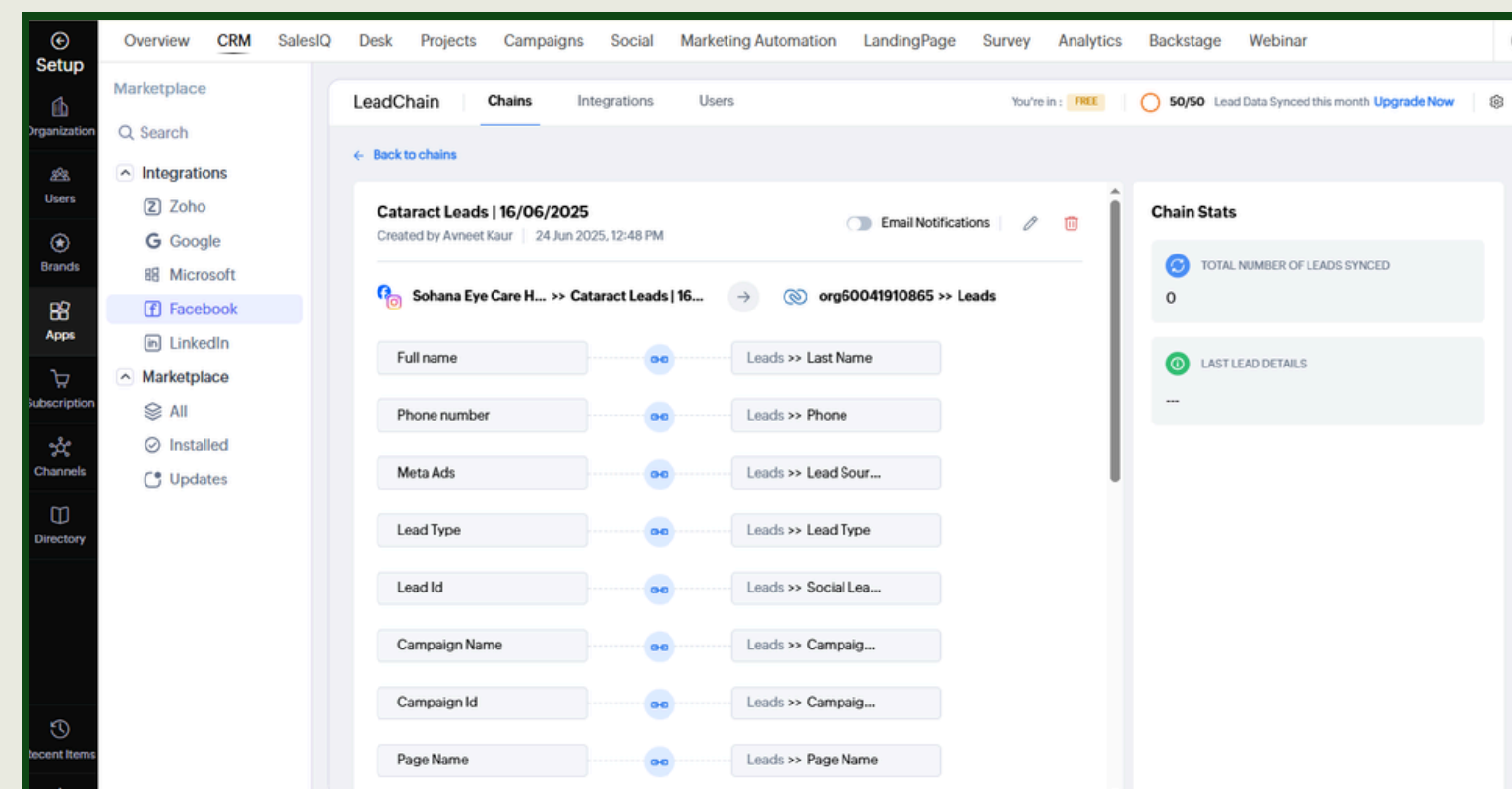
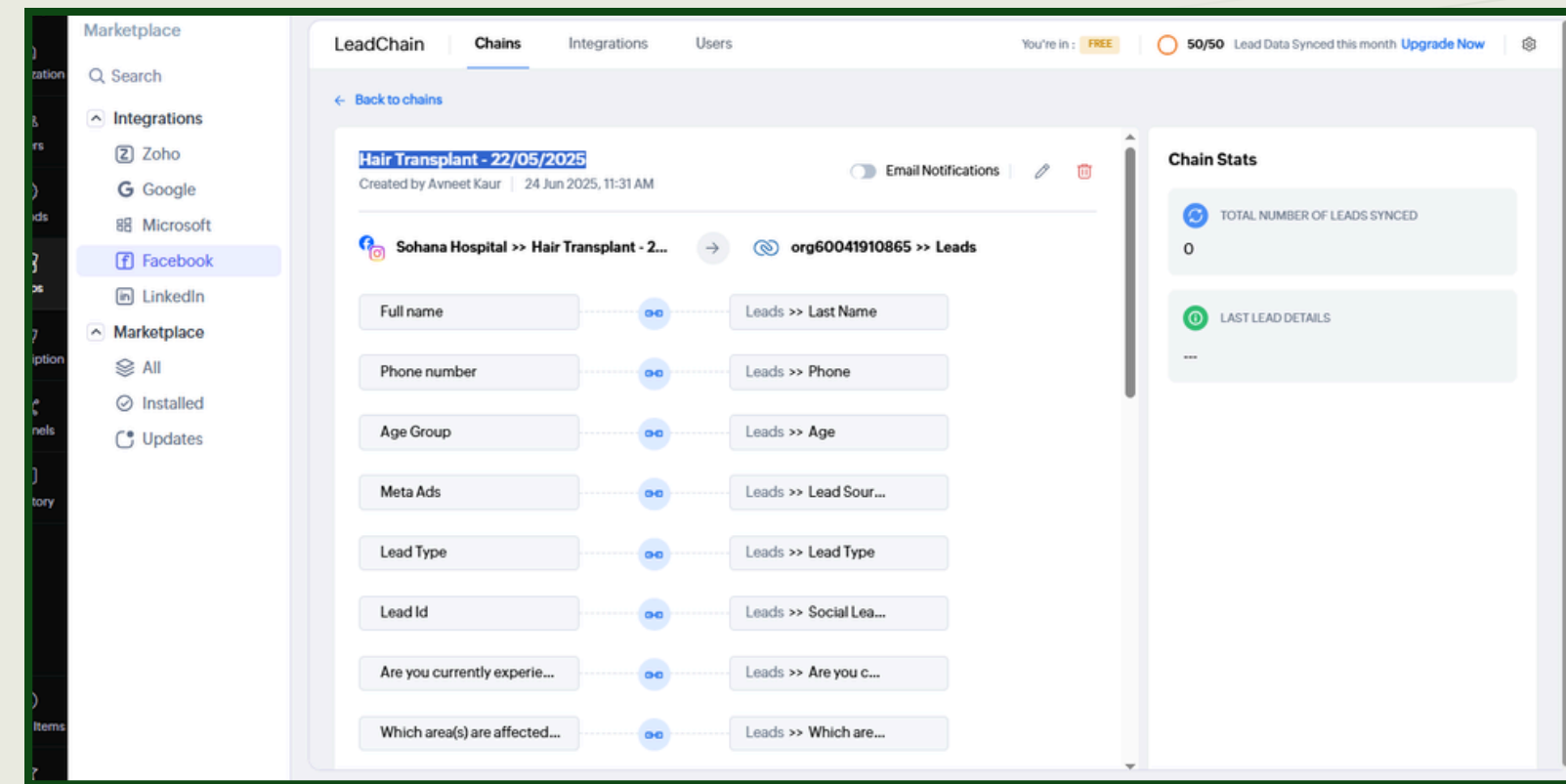
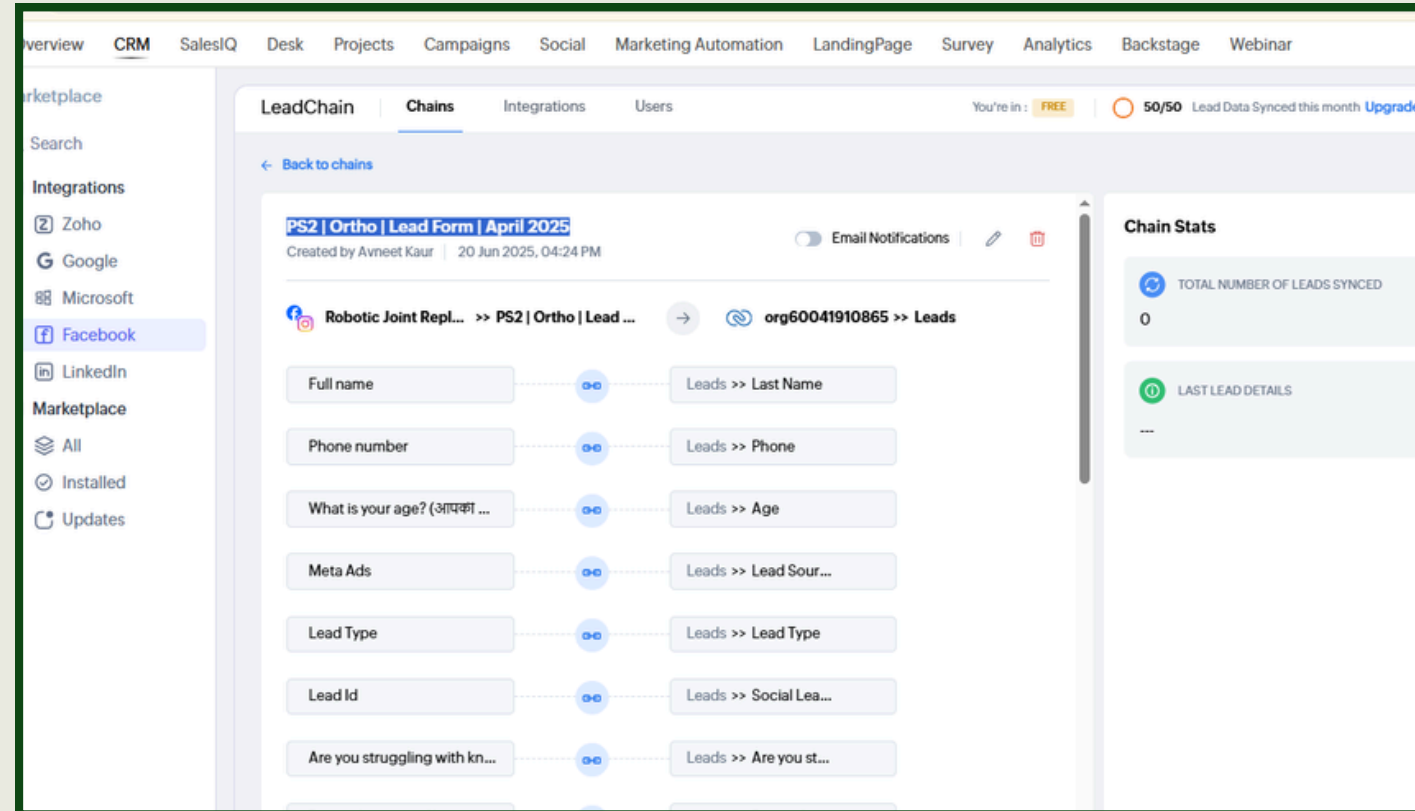
LEAD CONVERSION:

Automatically converts qualified leads into Accounts, Contacts, and Deals once consultations are completed.

Sort Show/Hide Visuals Underlying Data Themes   						
1	Month & Year	Lead Source	Lead Status	Converted Date	Avg Conversion Time (Days)	Converted Leads Count
	Jun 2025	-No Value-	Consultation Completed	02 Jun, 2025	0.00	3
				02 Jun, 2025		3
			Consultation Completed			3
	Jun 2025	-No Value-				3
2		Advertisement	Consultation Completed	02 Jun, 2025	0.00	1
				02 Jun, 2025		1
			Consultation Completed			1
		Advertisement			1	
3		Web Forms-Website	Consultation Completed	02 Jun, 2025	0.00	1
				02 Jun, 2025		1
			Consultation Completed			1
		Web Forms-Website			1	
	Jun 2025					5
Grand Total						5

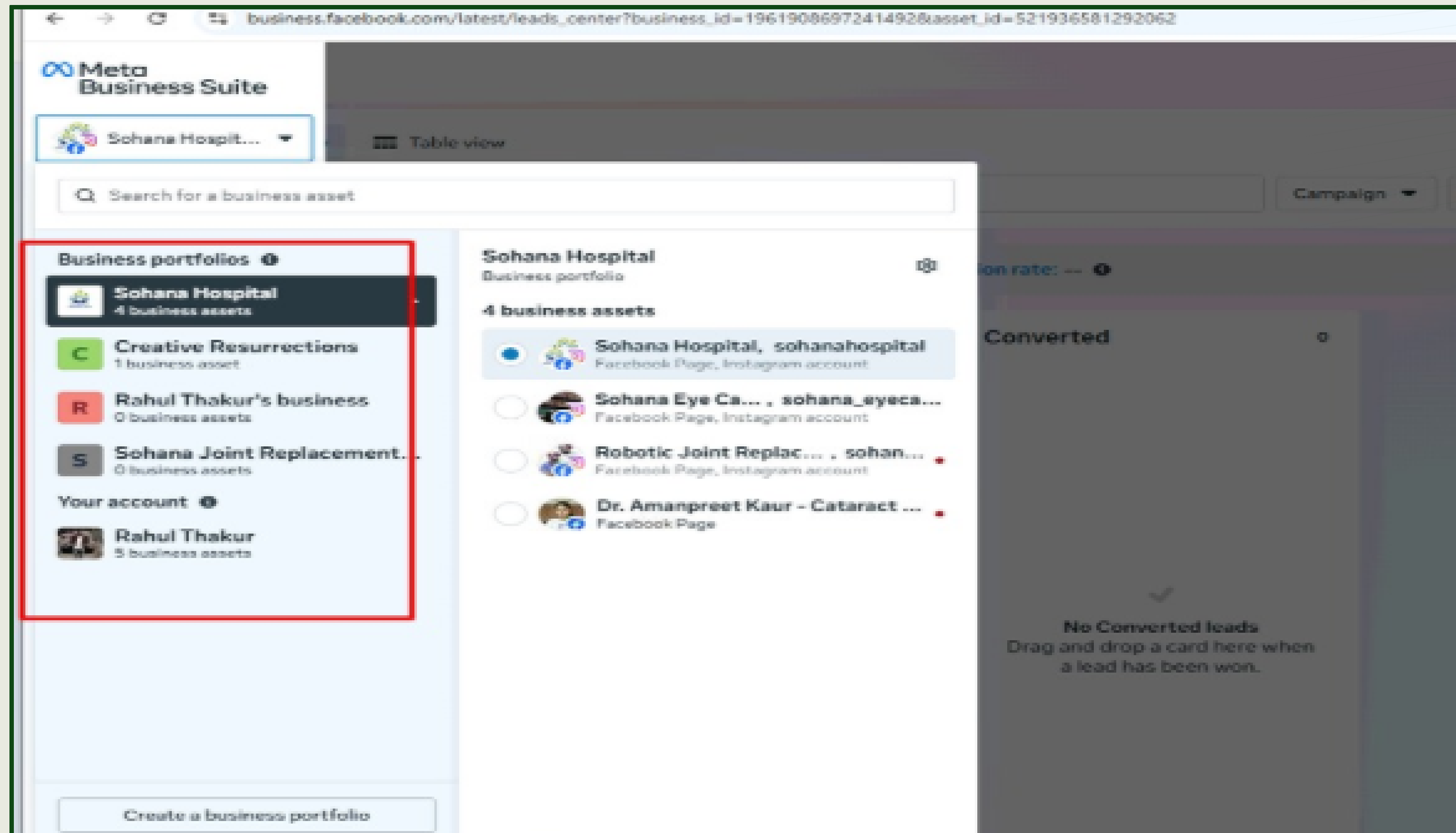
WEBSITE FORMS INTEGRATION:

Captures leads from 33 forms across various departments and campaigns directly into Zoho CRM.



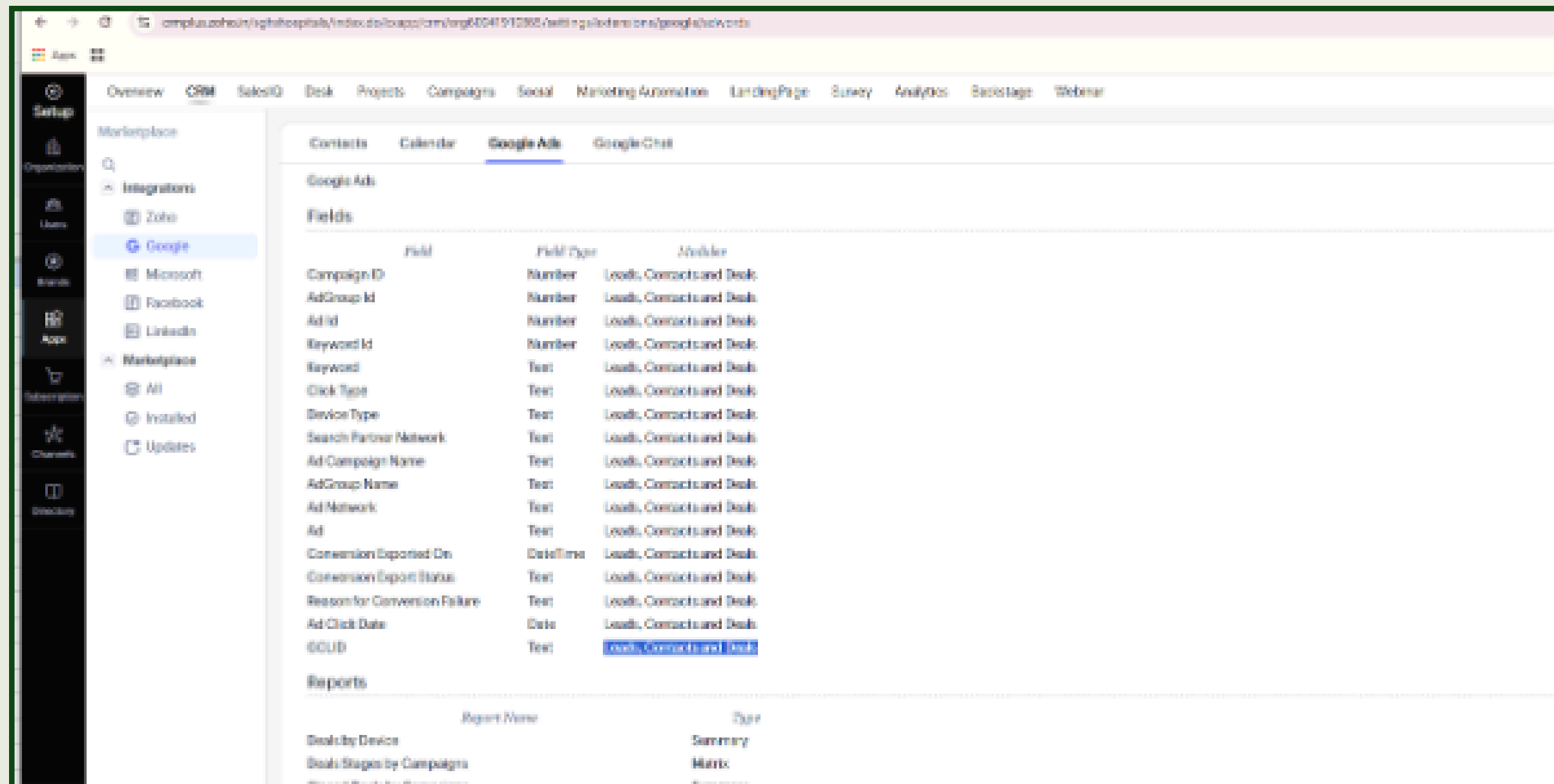
META ADS INTEGRATION:

Automatically imports leads from Facebook and Instagram campaigns for better tracking.



GOOGLE ADS INTEGRATION:

Captures leads from Google Ads campaigns and allows tracking of campaign performance and ROI.



REPORTING AND ANALYTICS:

Provides insights on lead sources, status, conversion metrics, and average lead-to-opportunity conversion times.

CONCLUSION

The implementation provided Sohana Hospital with a structured and reliable system to manage leads and enquiries from multiple channels. The hospital now has accurate data capture, better visibility into lead sources and statuses, and the ability to track campaign performance effectively. The system reduces manual errors, supports timely follow-ups, and ensures that qualified leads are converted efficiently into patients, improving overall lead management and operational efficiency.

ABOUT US

Founded on September 12, 2018, Unicloud IT Services is a trusted cloud service provider specializing in ZOHU 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 ZOHU 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.



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