



Client Name: Rohit Aggarwal

Country: Indian

Total Users: 62

Subscription: Zone One



ABOUT

RiskBerg Consulting, based in Delhi, India, is a CERT-In empanelled security auditor specializing in digital, cyber, technology, and enterprise risk management. The company provides expert-led services, including vulnerability assessments, penetration testing, incident response, third-party risk management, and security architecture review. RiskBerg supports organizations in achieving compliance with global standards and regulations while delivering tailored risk and compliance solutions that enable secure and sustainable business growth.



PROJECT OVERVIEW

The project involved implementing and customizing Zoho CRM for Risk Barg Pvt. Ltd. with the goal of optimizing their sales workflows, automating routine tasks, and enabling real-time visibility across the sales pipeline. UniCloud IT Services collaborated closely with the client to understand their business model, sales process, and reporting requirements to design a CRM system tailored to their specific needs. The solution was structured to empower both the sales team and management with an efficient, automated, and data-driven environment that improved productivity and strategic decision-making.

PROJECT OBJECTIVE

The main objective of the project was to build a customized Zoho CRM system that enhanced Risk Barg's lead and deal management capabilities while automating key parts of their sales operations. The system aimed to streamline the lead-to-deal conversion process, ensure better tracking of customer interactions, and provide actionable insights through comprehensive dashboards and reports. Additionally, the implementation sought to minimize manual work by introducing workflow automation and standardized processes, enabling the sales team to operate more efficiently and maintain consistency in client engagement.

CHALLENGES

Before the CRM implementation, Risk Barg Pvt. Ltd. managed most of its lead and deal activities manually, resulting in inconsistent follow-ups, delayed responses, and missed opportunities. The lack of automation led to inefficiencies in tracking sales progress and customer communication. Management also faced difficulties in obtaining real-time performance insights, making it challenging to assess productivity or forecast sales trends. Furthermore, repetitive administrative tasks consumed valuable time that could have been better spent on nurturing client relationships. UniCloud IT Services identified these pain points and worked to design a CRM solution that would automate routine processes, improve tracking accuracy, and enhance overall operational visibility.



SOLUTION

UniCloud IT Services partnered with Risk Barg Pvt. Ltd. to design and deploy a fully customized Zoho CRM system aligned with their existing workflows. The solution focused on automation, data accuracy, and actionable insights. Key processes such as lead assignment, follow-ups, and pipeline tracking were automated to ensure consistent communication and timely updates. Custom modules, fields, and layouts were implemented to capture essential business data and reflect Risk Barg's internal sales structure. A blueprint was designed to standardize the sales journey from lead creation to deal closure, ensuring each stage was well-documented and trackable. Additionally, real-time dashboards and reports were configured to give management instant visibility into performance metrics, conversion rates, and sales activity. Through close collaboration and iterative testing, UniCloud IT Services delivered a scalable, efficient, and user-friendly CRM solution that significantly improved data management and workflow execution.

FUNCTIONALITY & FEATURES

- Custom fields and layouts across Lead, Contact, Deal, and Account modules.
- Automated lead assignment and follow-up reminders.
- Blueprint configuration for a standardized and traceable sales process.
- Custom buttons for quick actions such as creating deals, sending emails, and updating stages.
- Real-time dashboards for sales tracking, conversion rates, and lead source analysis.
- Predictive reporting tools for performance monitoring and KPI measurement.

CONCLUSION

The Zoho CRM implementation for Risk Barg Pvt. Ltd. transformed their manual sales operations into a structured, automated, and data-driven system. The new setup provided better visibility into the sales funnel, improved follow-up consistency, and enhanced decision-making capabilities for management.

By leveraging UniCloud IT Services' expertise, Risk Barg Pvt. Ltd. now benefits from a scalable CRM platform that supports growth, strengthens customer relationships, and ensures long-term efficiency in managing their sales and client engagement processes.

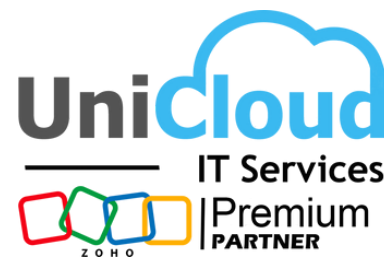


ABOUT US

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.



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