

fima | CARLO FRATTINI®
r u b i n e t t e r i e

Client Name: Bhavnesh

Country: India

Total Users: 2

Subscription: Zoho CRM Enterprise



ABOUT

FIMA is a growth-focused organization seeking to modernize its lead management and customer engagement processes through a centralized CRM ecosystem. The objective was to eliminate fragmented lead handling, improve sales responsiveness, and create a scalable framework for managing leads from multiple acquisition channels while ensuring complete visibility into customer interactions and sales performance.



PROJECT OVERVIEW

The FIMA project involved the implementation of a comprehensive Zoho CRM Enterprise solution designed to automate lead capture, qualification, assignment, communication tracking, and sales monitoring. The solution integrated multiple customer touchpoints, including website inquiries, WhatsApp communication, email interactions, and telephony systems into a unified platform. The implementation also incorporated AI-driven insights, lead escalation mechanisms, automated follow-up workflows, sales activity tracking, and performance reporting to help management gain real-time visibility into lead progression and conversion metrics.

PROJECT OBJECTIVES

The primary objective of the project was to establish a centralized lead management ecosystem capable of:

- Capturing and managing leads from multiple channels.
- Automating lead assignment and follow-up processes.
- Enabling WhatsApp and telephony integration within CRM.
- Improving lead response time and sales accountability.
- Implementing escalation mechanisms for unattended leads.
- Providing management with actionable sales and conversion insights.
- Leveraging AI-powered analysis to improve customer engagement and sales outcomes.
- Creating a scalable CRM infrastructure capable of supporting future business growth.

BUSINESS CHALLENGES

Created and configured Lead, Account, Contact, and Deal modules with custom fields.

1. Fragmented Lead Management

Leads originated from multiple sources but lacked a centralized system for tracking, resulting in inconsistent follow-ups and reduced conversion efficiency.

2. Limited Visibility

Management had minimal visibility into sales team activities, lead status progression, and overall conversion performance.

3. Delayed Lead Response

Missed follow-ups and delayed customer engagement increased the risk of losing potential business opportunities.

4. Absence of Escalation Framework

There was no automated mechanism to identify neglected leads or reassign them to managers when sales representatives failed to respond.

5. Disconnected Communication Channels

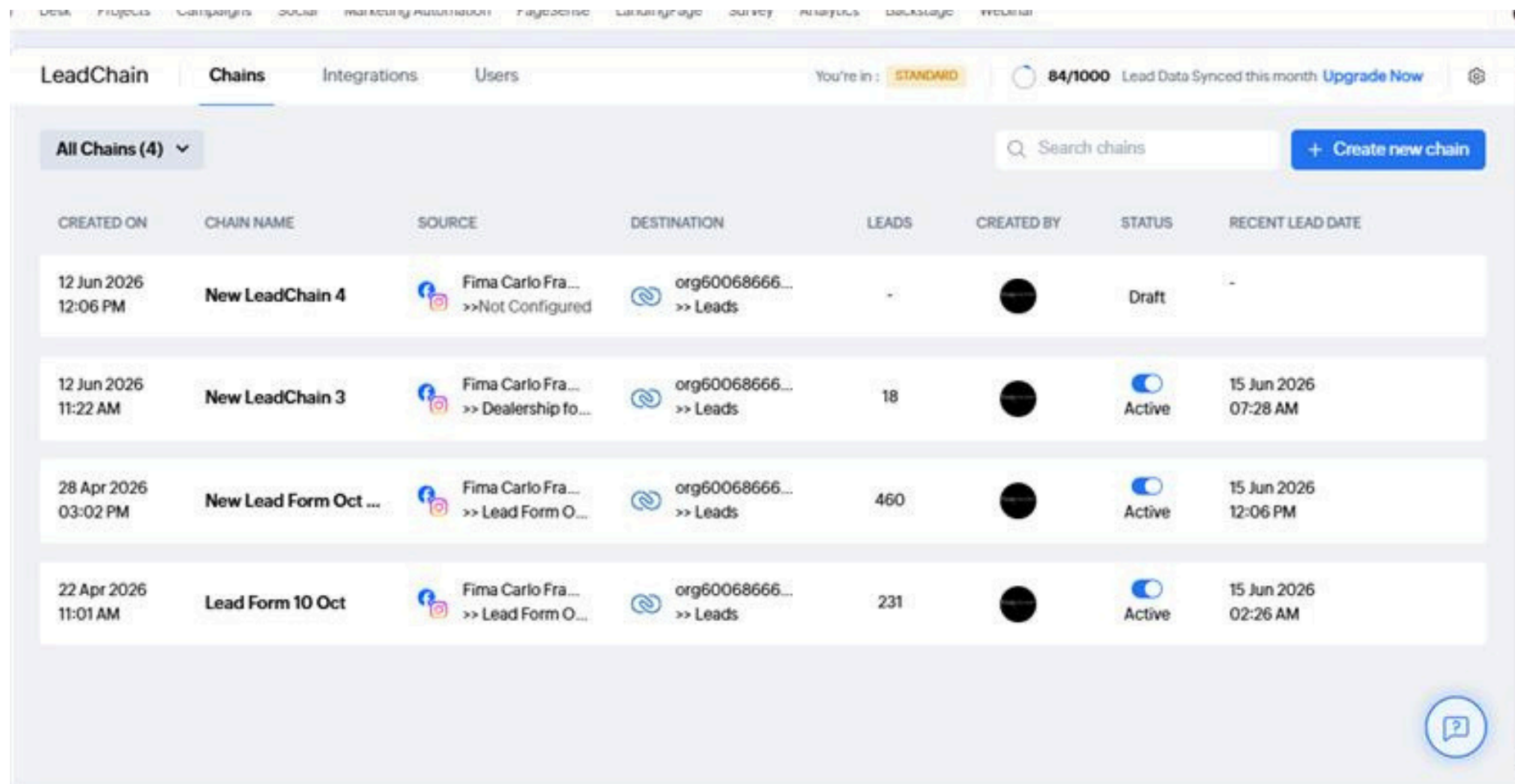
Customer conversations occurring through WhatsApp, phone calls, and emails were not consolidated into a single customer record, limiting customer context and historical visibility.

SOLUTION DELIVERED

UniCloud designed and implemented a robust Zoho CRM Enterprise ecosystem with advanced automation and omnichannel communication capabilities.

1. Centralized Lead Management

- Lead capture from multiple channels.
- Automated lead assignment workflows.
- Unified lead lifecycle tracking.
- Structured sales pipeline management.



The screenshot displays the Zoho CRM LeadChain interface. At the top, there are navigation tabs for 'LeadChain', 'Chains', 'Integrations', and 'Users'. The current view is 'Chains', showing a list of lead chains. The table has columns for 'CREATED ON', 'CHAIN NAME', 'SOURCE', 'DESTINATION', 'LEADS', 'CREATED BY', 'STATUS', and 'RECENT LEAD DATE'. There are four rows of data, each representing a different lead chain configuration.

CREATED ON	CHAIN NAME	SOURCE	DESTINATION	LEADS	CREATED BY	STATUS	RECENT LEAD DATE
12 Jun 2026 12:06 PM	New LeadChain 4	Fima Carlo Fra... >>Not Configured	org60068666... >> Leads	-		Draft	-
12 Jun 2026 11:22 AM	New LeadChain 3	Fima Carlo Fra... >> Dealership fo...	org60068666... >> Leads	18		Active	15 Jun 2026 07:28 AM
28 Apr 2026 03:02 PM	New Lead Form Oct ...	Fima Carlo Fra... >> Lead Form O...	org60068666... >> Leads	460		Active	15 Jun 2026 12:06 PM
22 Apr 2026 11:01 AM	Lead Form 10 Oct	Fima Carlo Fra... >> Lead Form O...	org60068666... >> Leads	231		Active	15 Jun 2026 02:26 AM

2. WhatsApp Integration

- WhatsApp Business API integration.
- Complete conversation visibility within CRM.
- Automated communication logging.
- Customer interaction history attached to lead records.

3. Telephony & AI Enablement

- Third-party IVR integration framework.
- Call recording integration architecture.
- AI-based call analysis and sales intelligence.
- Customer interaction monitoring for quality improvement.

4. Lead Governance Automation

- Automated hourly reminders for unattended leads.
- Escalation workflows after defined inactivity periods.
- Manager reassignment mechanisms.
- Mandatory lead closure reason tracking.
- Lost opportunity analysis and reporting.

5. Sales Performance Reporting

- Lead source analytics.
- Conversion tracking dashboards.
- Sales performance monitoring.
- Trend analysis and disposition reporting.
- Activity-based performance insights.



6. AI & Intelligent Automation

- AI-assisted lead monitoring.
- Automated workflow execution.
- Intelligent lead management processes.
- Enhanced operational efficiency through CRM automation.

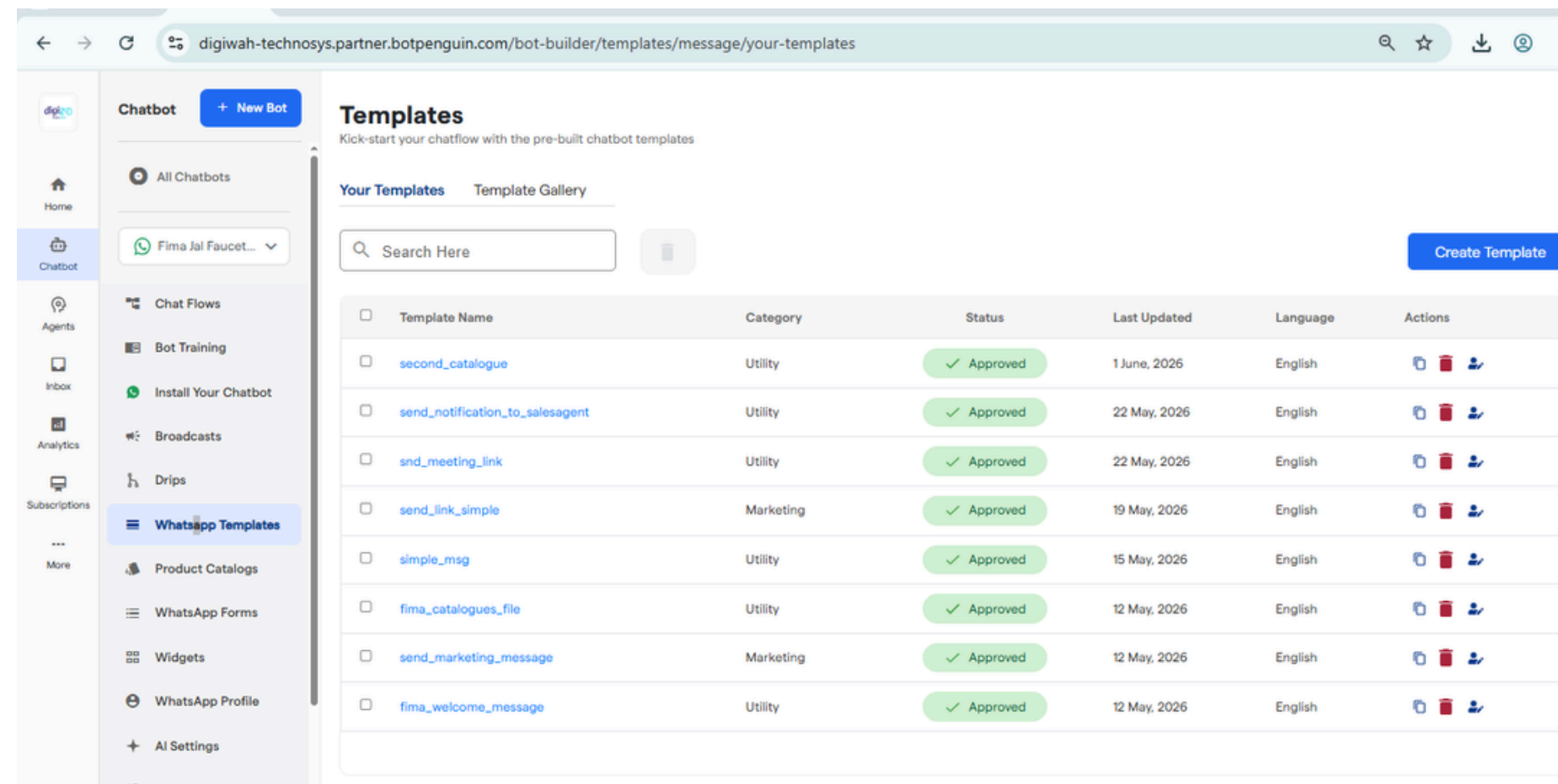
TECHNICAL ARCHITECTURE

1. Platform

- Zoho CRM Enterprise

2. Integrations

- WhatsApp Business API
- Google Lead Sources
- Third-Party IVR / Telephony System
- AI Call Analysis Engine



3. Automation Components

- Workflow Rules
- Assignment Rules
- Escalation Logic
- Reminder Automation
- Deluge Custom Functions
- Reporting Dashboards
- Lead Lifecycle Management Framework

The screenshot shows a CRM interface with a top navigation bar containing: Overview, CRM, SalesIQ, Desk, Projects, Campaigns, Social, Marketing Automation, PageSense, LandingPage, Survey, Analytics, Backstage, Webinar, and CommandCenter. On the left, a sidebar menu includes: Setup Home, Search, Set up your CRM, Modules and Fields, Pipelines, Wizards, Kiosk Studio, Canvas, Customize Home p..., Translations, Templates, Teamspace, Automation (expanded), Workflow Rules (selected), Actions, Schedules, Assignment, Scoring Rules, Cadences, Process Manag..., Blueprint, Approval Processes, and Review Processes. The main content area is titled 'Rules' and 'Usage'. It features a search bar, a 'Zia Workflow Creation using Zia' link, and buttons for 'Reorder Rules' and 'Create Rule'. Below is a table of automation rules:

<input type="checkbox"/>	Rule Name	All	Execute On	Actions	Modified On	Status
<input type="checkbox"/>	Big Deal Rule	Deals	Create or Edit	1	02/04/2026	On
<input type="checkbox"/>	Send Meeting Details Msg On Wha...	Meetings	Create	1	25/05/2026	Off
<input type="checkbox"/>	Send Messages on whatsapp	Marketing	Create	1	05/06/2026	On
<input type="checkbox"/>	Notify Lead Assigned Sales Agent ...	Leads	Modified	1	25/05/2026	Off
<input type="checkbox"/>	copy of Send meeting link	Meetings	Create	1	25/05/2026	On
<input type="checkbox"/>	Create_Task_For_Follow-Up	Leads	Create	1	21/05/2026	On
<input type="checkbox"/>	lead reassignment	Leads	Create or Edit	1	20/05/2026	Off
<input type="checkbox"/>	Send Welcome Msg On Whatsapp ...	Leads	Create	3	05/06/2026	On
<input type="checkbox"/>	Update Name	Leads	Create	1	27/04/2026	On
<input type="checkbox"/>	Update Last Modify Time in lead	Leads	Modified	1	21/05/2026	On
<input type="checkbox"/>	Update Lead Status to Win	Leads	Modified	1	25/05/2026	On
<input type="checkbox"/>	Copy of Notify Lead Assigned Sale...	Leads	Modified	1	25/05/2026	On
<input type="checkbox"/>	Update Reason for lost and which ...	Leads	Modified	2	25/05/2026	On

4. Security & Governance

- Role-Based Access Control
- Audit Trail Visibility
- Lead Ownership Governance
- Sales Activity Monitoring

RESULTS & BUSINESS IMPACT

The implemented solution transformed FIMA's lead management process by:

- Creating a single source of truth for all sales activities.
- Reducing lead leakage through automated follow-up mechanisms.
- Improving accountability across sales teams.
- Enhancing customer engagement through integrated communication channels.
- Providing management with real-time sales visibility.
- Establishing a scalable CRM foundation for future growth.
- Streamlining sales operations through automation and AI-powered insights.

CONCLUSION

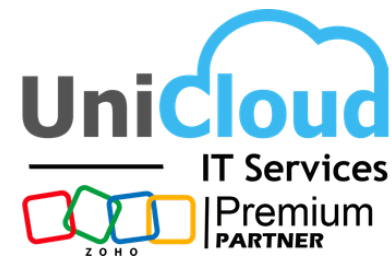
The FIMA Zoho CRM Enterprise implementation successfully transformed a fragmented sales process into a structured, automated, and insight-driven lead management ecosystem. By integrating lead capture, WhatsApp communication, telephony systems, AI-assisted analytics, and governance workflows into a centralized CRM platform, UniCloud delivered a scalable solution that enhanced sales efficiency, improved lead accountability, and empowered management with actionable business intelligence. The result was a future-ready CRM environment designed to support sustainable growth, operational excellence, and superior customer engagement.

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>