UniCloud IT Services

ZOHO

Zoho Premium Partner

ShipGlobal.in®

**Client Name:** Yatharth Tyagi

**Country:** India

**Total Users:** 220

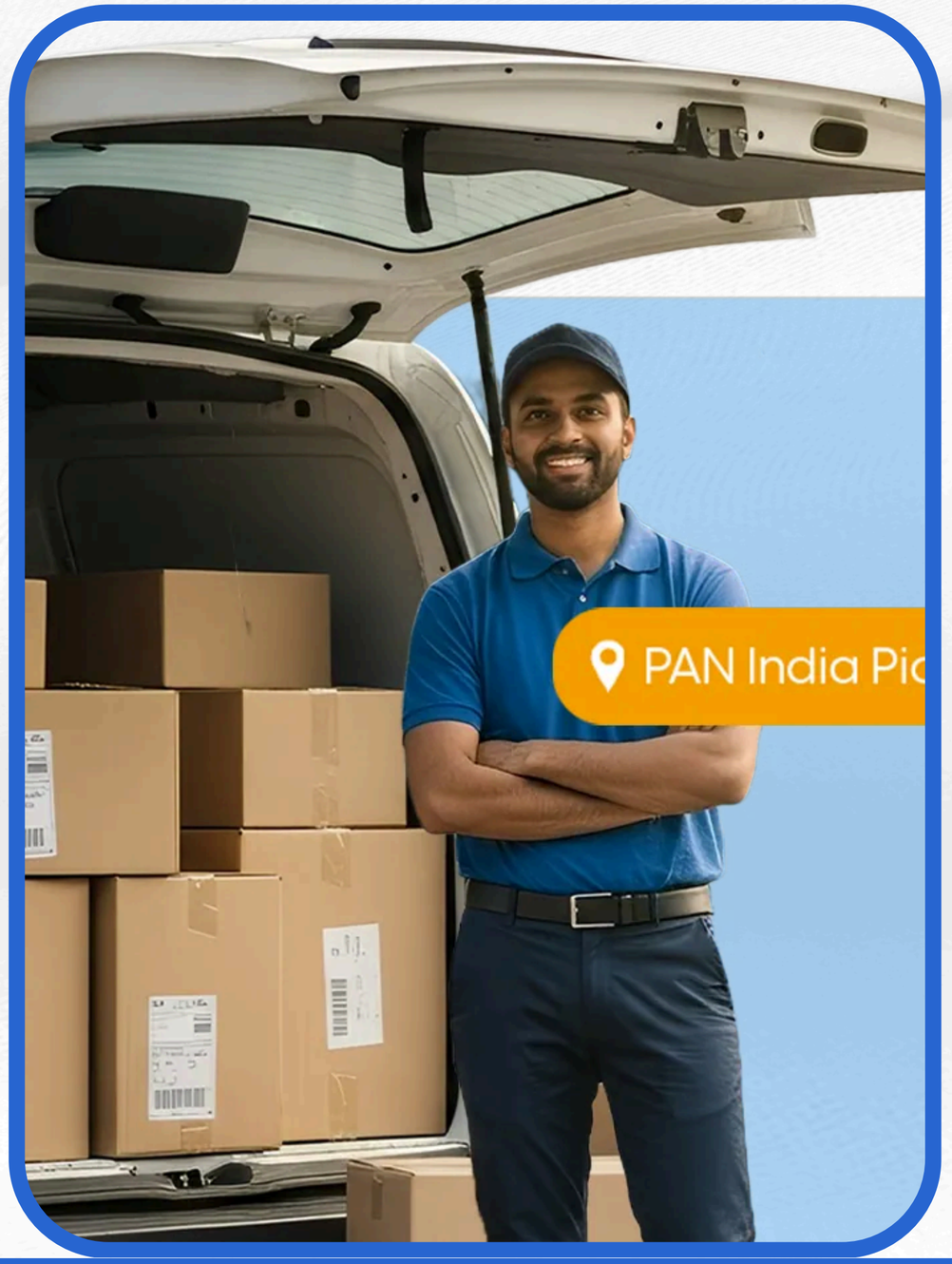
**Subscription:** Zoho One



# ABOUT THE CLIENT

ShipGlobal.in is an Indian eCommerce logistics and global shipping company that helps exporters, marketplace sellers, D2C brands and individuals ship internationally. It reports more than 25,000 exporters, over 1 crore orders shipped and delivery to 220+ countries. Its services cover marketplace integration with platforms such as Amazon, eBay, Etsy and Walmart, dropshipping, B2B shipments, door-to-door delivery with PAN India pickup, and export documentation and customs clearance support.

The company works through regional offices across India, including Delhi, Jaipur, Surat, Ahmedabad, Mumbai, Chennai, Lucknow and Ludhiana, and attracts new exporters through its website, shipping rate quote forms, partnerships and a franchise programme.



# PROJECT OVERVIEW

ShipGlobal.in receives enquiries every day from sellers who want shipping rates for different destinations, weights, product types and shipment types. These enquiries have to be captured, assigned to the right sales team, followed up and converted into active shippers. The client needed one system to manage this whole journey for a large team. We implemented and customized Zoho CRM for 220 users to run lead management, follow-ups, pipeline tracking and reporting.

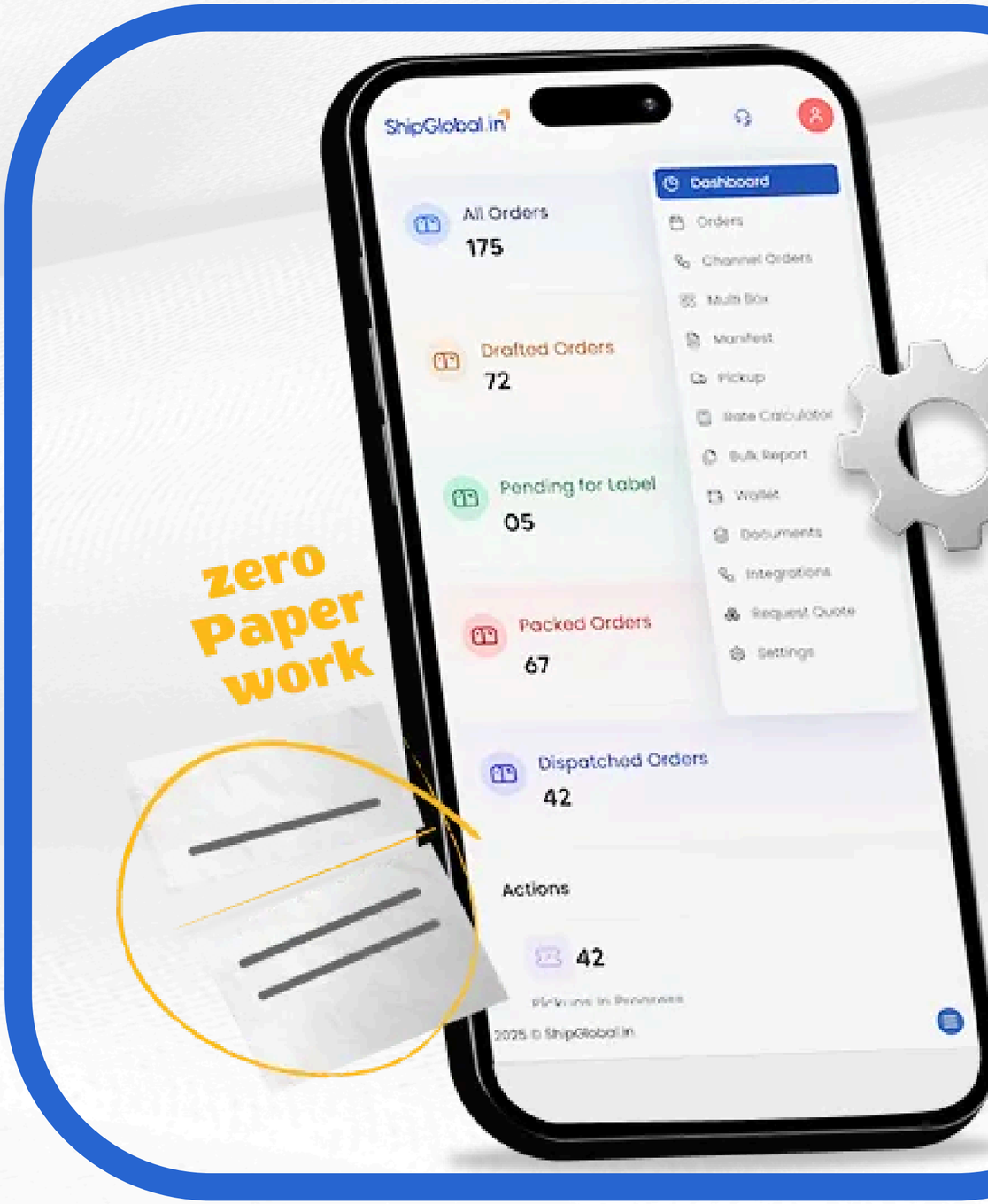
# PROJECT OBJECTIVES

The objective was a CRM that captures every enquiry automatically, routes it to the right team without manual effort, and gives management a clear view of leads, conversions and team performance across regions.

# CHALLENGES

Before the project, the client faced the following challenges:

- Enquiries came in through several channels, including website quote forms, sign-ups, partners and calls, and were not held in one place.
- Lead details such as shipment type, product, weight band, destination country and shipping frequency had to be copied by hand.
- Leads had to be assigned manually across regional teams, which slowed first response.
- With 220 users, there was no common sales process, so follow-ups and statuses varied from person to person.
- Management had limited visibility of conversion rates, lost leads and team performance.



# SOLUTIONS

UniCloud IT Services designed and implemented a Zoho CRM setup tailored to the client's sales process. It has the following parts.

### Lead Capture from Website and Forms

We connected the website quote and sign-up forms to Zoho CRM so that every enquiry becomes a lead automatically. The lead carries the fields the sales team needs: product type, packet weight, destination country, shipment type (eCommerce, D2C, new seller, courier aggregator or B2B) and shipment frequency. Duplicate checks prevent the same seller from being entered twice.

### Automatic Lead Assignment

Assignment rules route each lead to the right team based on region, shipment type and workload. New leads reach a sales user within moments, which shortens the time to first response.

### Standard Sales Process and Follow-Ups

We defined one lead and deal process for all users, with clear statuses from new enquiry through to active shipper. Tasks and follow-up reminders are created automatically at each stage, and activities such as calls, emails and meetings are logged against the record.

## Pipeline Management

Qualified leads convert into deals, which move through stages such as Qualification, Rate Quote Shared, Negotiation, Account Created and First Shipment, or Closed Lost. Deal records show owner, expected revenue, closing date and next action.

## Roles, Profiles and Data Access

With 220 users, we set up roles and profiles so that each person sees the data they need. Sales executives see their own leads, team leads see their team, and regional and senior managers see their wider scope.

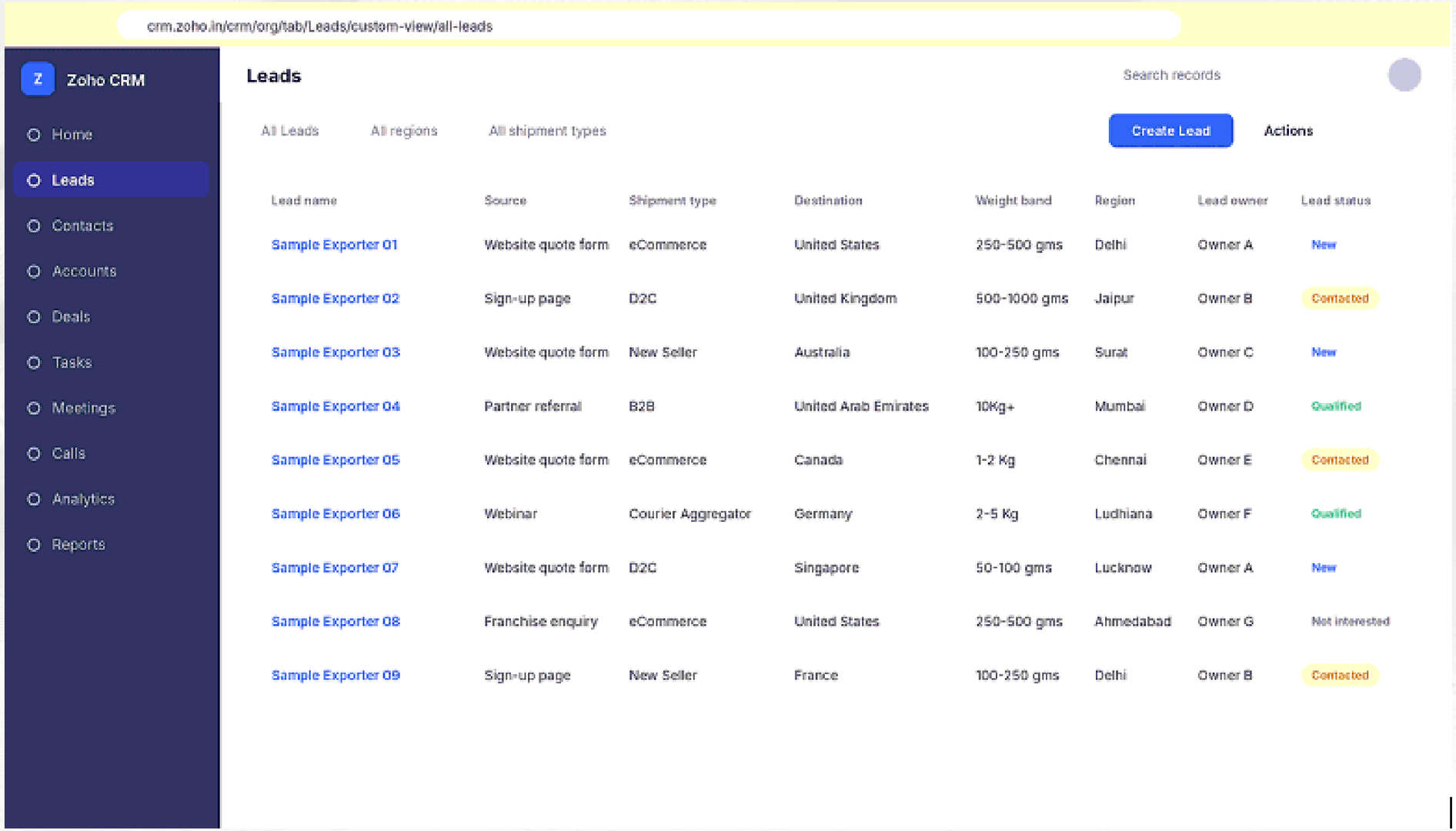
## Dashboards and Reports

We built dashboards on the client's business logic. They show leads by source, leads by status, conversion by region, deals by stage and performance by sales user, with filters for date, region, owner and shipment type.

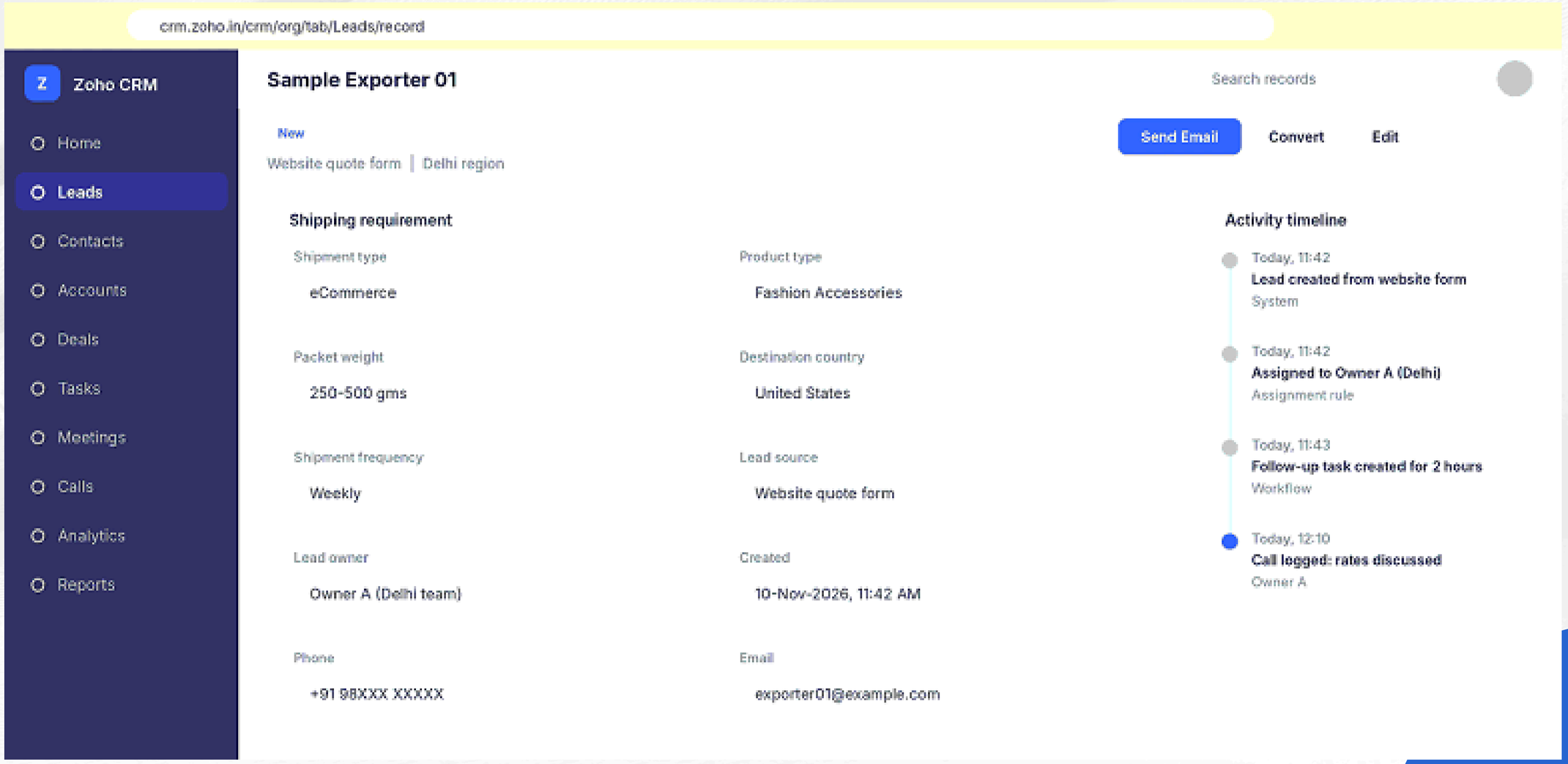
# FEATURES AND FUNCTIONALITIES

- Zoho CRM implemented for 220 users.
- Website quote and sign-up forms connected to CRM leads.
- Custom fields for shipment type, product type, weight band, destination and frequency.
- Duplicate detection and automatic lead assignment by region and workload.
- One standard lead-to-deal process with automated tasks and reminders.
- Pipeline view for deals with stage, owner and expected revenue.
- Role and profile based data access for sales, team leads and managers.
- Dashboards and reports with filters.

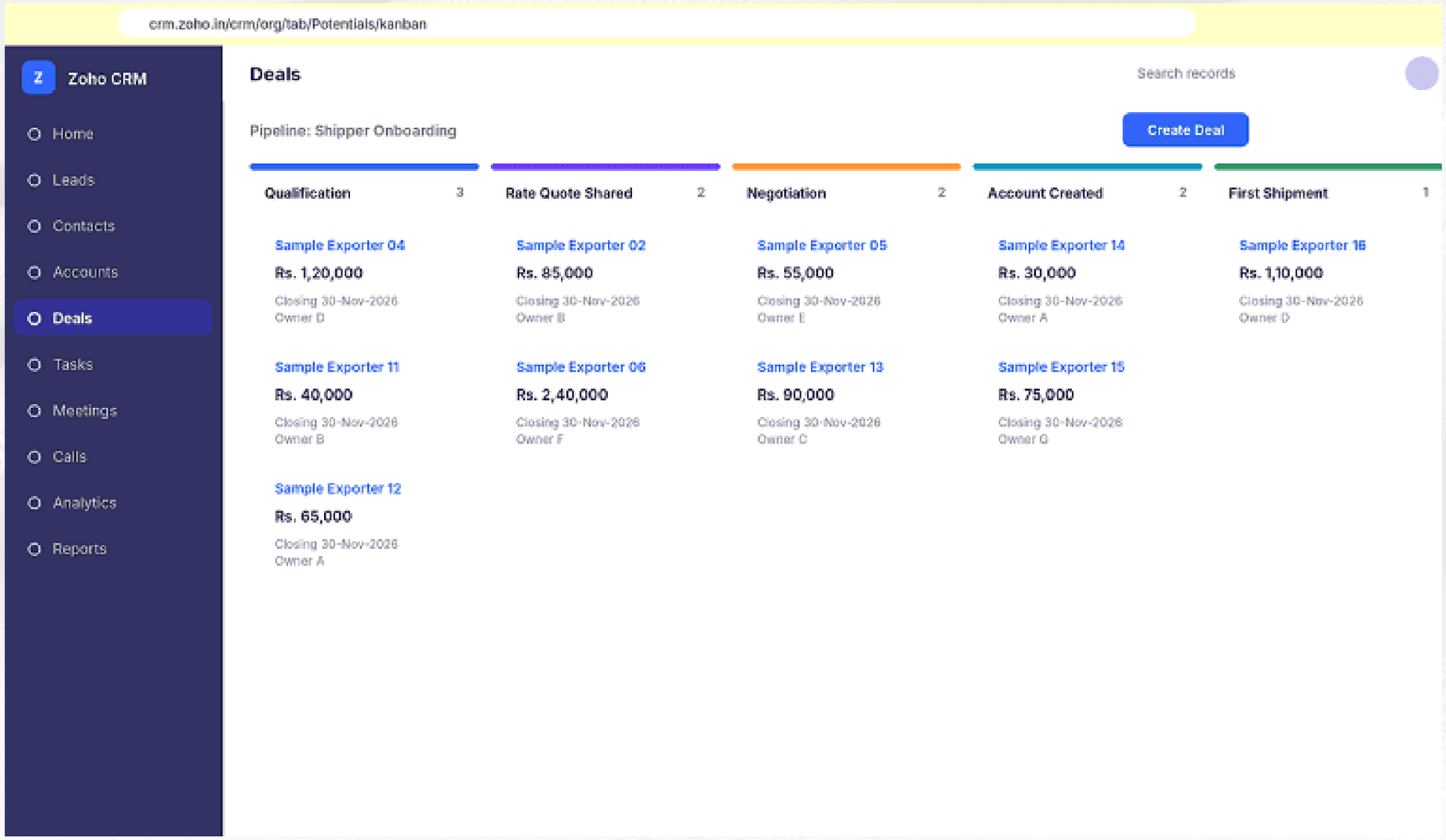
# Figure 1: Leads list. New enquiries with source, shipment type, destination, owner and status.



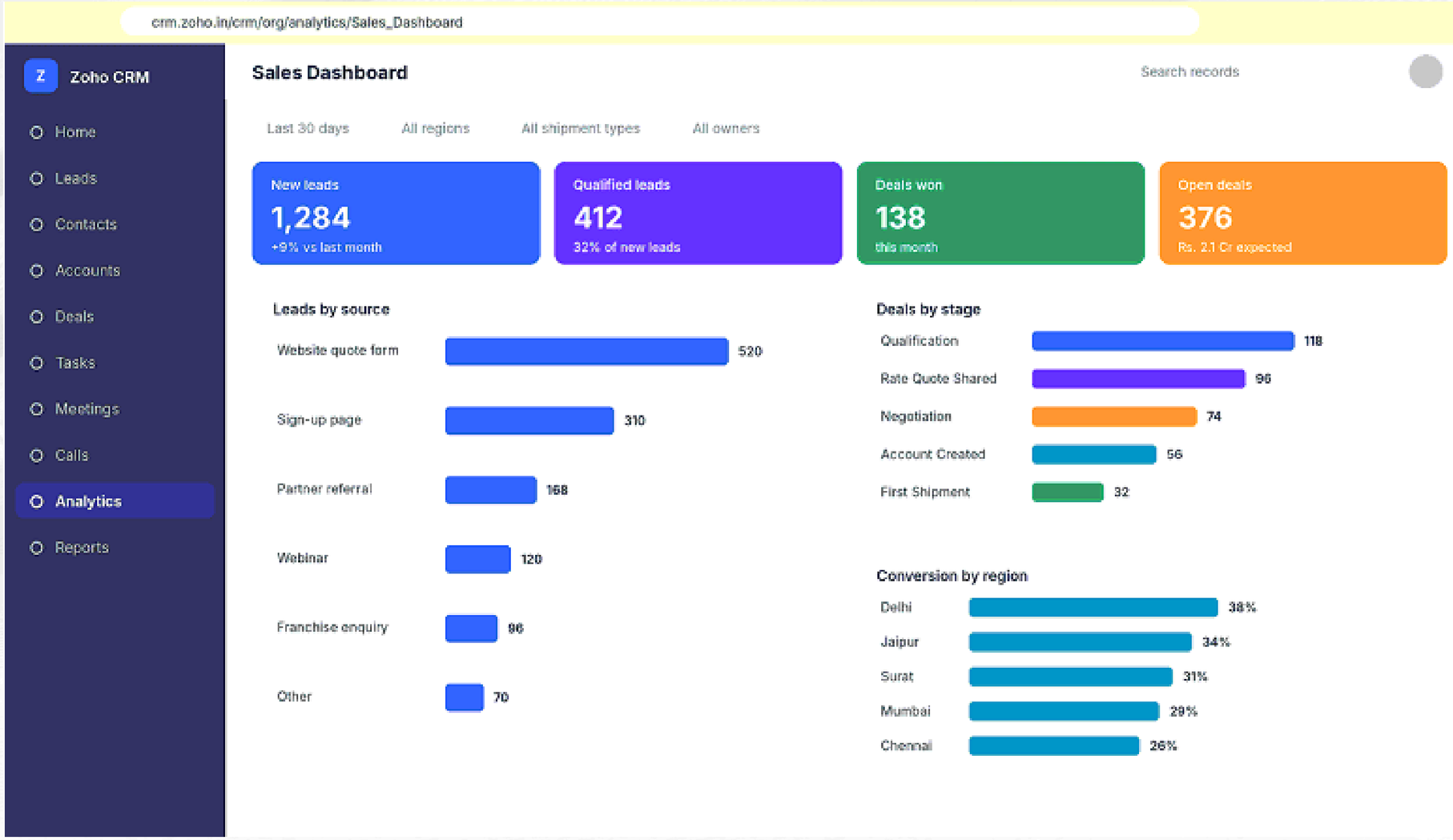
# Figure 2: Lead record. Shipping requirement details, assigned owner and activity timeline.



# Figure 3: Deals pipeline. Deals by stage from qualification to first shipment.



# Figure 4: Sales dashboard. Leads by source, conversion by region and team performance.



# Conclusion

Zoho CRM now gives ShipGlobal.in one place to capture, assign, follow up and convert shipping enquiries across its regional teams. Every lead arrives with the shipping details the sales team needs, goes to the right owner automatically, and moves through a common process that all 220 users follow.

Management gets a live view of leads, conversions and team performance. This supports the company's growth as it serves more exporters and regions, and the CRM can be extended with further automation, integrations and reports as the business scales.

# 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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