



RevInfotech
revolution redefined



Portfolio
of
ZOHO CRM
SETUP-
Healthcare
Industry

+1 949-108-0179



www.revinfotech.com



7th Floor, Welldone Tech Park
Sohna Road, Gurgaon



VERSION:

DATE	AUTHOR	VERSION	CHANGE SUMMARY
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Portfolio of ZOHO

Overview:-

Revinfotech Pvt. Ltd. is a trusted implementation partner for end-to-end digital transformation, leveraging **Zoho's One Suite** to build highly customized CRM and marketing ecosystems for enterprises across healthcare, SaaS, real estate, and education sectors. Elite Med Listings, a prominent healthcare listings platform, partnered with us to streamline fragmented operations, automate workflows, and enhance customer engagement. By leveraging **Zoho CRM, Zoho Campaigns, Zoho Analytics, and Zoho Sites**, we built an integrated solution that centralized their processes and delivered measurable business impact.

Project Overview

- **Client:** Elite Med Listings (USA)
- **Industry:** Healthcare Listings, Digital Health
- **Duration:** 2.5 Months
- **Location:** USA

Elite Med Listings is a healthcare listing platform helping users discover verified medical professionals. They needed to unify their operations, reduce manual entry, and automate email campaigns, customer feedback collection, and reporting. Our team implemented a tailored Zoho One CRM system to meet these goals.

Project Objectives:-

- Set up Zoho One CRM to centralize customer and support data
- Develop custom modules for chat summaries, feedback, and support tickets
- Automate workflows to eliminate manual processes
- Enable targeted email campaigns using Zoho Campaigns
- Design mobile-responsive microsites with Zoho Sites
- Create dashboards in Zoho Analytics for real-time insights

Our Solution

Custom Zoho One CRM Implementation for Elite Med Listings

- **Zoho CRM Setup:** Implemented a centralized CRM with modules for support tickets, user feedback, and chat logs.
- **Workflow Automation:** Built automated workflows using Zoho Automation to handle ticketing, lead follow-ups, and internal task creation.
- **Zoho Campaigns:** Developed branded email campaigns for lead nurturing and service follow-ups.
- **Zoho Analytics:** Created interactive dashboards for tracking lead status, ticket

response time, campaign performance, and customer segmentation.

- **Zoho Sites:** Built two mobile-friendly microsites with lead capture forms and healthcare content.

Technology Stack

Technology	Description
Zoho CRM	CRM platform for lead, support, and user data
Zoho Automation	Automated workflows for internal tasks and follow-ups
Zoho Campaigns	Email marketing automation with templates and segmentation
Zoho Analytics	Real-time reports and dashboards
Zoho Sites	Microsite builder for customer engagement and lead capture

Business Impact

Metric	Before	After	Improvement
Ticket Response Time	>24 hrs (manual)	<2 hrs (automated routing)	90% faster support
Data Entry Errors	Frequent manual errors	Automated workflows	Eliminated manual input
Email Engagement Rate	Low (<10%)	25%+ open rate with segmented lists	3X more engagement
Data Visibility	Fragmented across tools	Unified dashboards in Zoho Analytics	Real-time insights
Website Conversion	Basic contact form	Microsites with lead forms	2X more conversions
Weekly Admin Time	10+ hrs/week	<2 hrs/week with automation	8+ hrs/week saved

RevInfotech's Role in Elite Med Listings' CRM Transformation

- Implemented Zoho CRM with custom modules for support, chat, and feedback
- Built automation to assign, escalate, and close tickets automatically
- Developed campaign templates and workflows using Zoho Campaigns
- Created role-specific dashboards using Zoho Analytics

- Built and launched mobile-friendly microsites in Zoho Sites
- Provided hands-on training and post-launch support

Why Choose RevInfotech for ZOHO Implementation?

- Expertise in Zoho One Suite – CRM, Campaigns, Analytics, and Sites
- Experience in Healthcare, Listings, and Digital Lead Management
- Tailored custom module and automation development
- Strong focus on data accuracy, efficiency, and client-specific workflows
- End-to-end CRM setup, training, and long-term support

Workflow of the Solution

Lead Capture & Qualification

Modules Used: Zoho CRM, Zoho Sites, Custom Modules

Details:

- Leads captured from microsite forms and routed via workflows
- Key data fields: specialty, location, engagement type
- Leads assigned automatically to agents

Client Benefits:

- Faster response time
- No lead leakage
- Better lead qualification

Automated Support Workflow

Modules Used: Zoho CRM, ZOHO Automation

Details:

- Support tickets created via chat or feedback forms
- Automated triaging and resolution workflows
- Custom SLAs and task escalations

Client Benefits:

- Improved customer satisfaction
- Reduced manual workload
- Faster support resolution

Email Communication Standardization

Modules Used: Zoho Campaigns, Zoho Analytics

Details:

- Branded templates for newsletters and updates
- Automated sends based on user actions and stage
- Dashboards tracking open rates, click-through, and bounce

Client Benefits:

- Higher engagement
- Actionable campaign insights
- Better list segmentation