



**RevInfotech**  
revolution redefined



**Portfolio  
of  
Zoho CRM  
SETUP- IT  
Industry**

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## VERSION:

DATE	AUTHOR	VERSION	CHANGE SUMMARY
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# Portfolio of ZOHO

## Overview:-

**Revinfotech Pvt. Ltd.** is a trusted digital transformation partner known for building robust CRM and marketing automation ecosystems for forward-thinking companies in IT services, SaaS, education, and healthcare. Kanerika partnered with us to unify its lead management, email verification, and marketing processes. **Leveraging Mautic, Zoho CRM, Zoho Sign, Zoho Social, and Debounce**, we built a seamless solution that automated workflows, enhanced lead nurturing, and provided data-driven insights—dramatically improving engagement and conversion.

## 1. Project Overview

**Industry:** IT Services

**Client Location:** United States

**Project Duration:** 1.5 Months

**CRM Type:** Zoho CRM Integrated with Mautic and Debounce for Lead Management

Kanerika sought to strengthen its digital marketing and customer relationship strategies through a cohesive platform that connects lead generation, email verification, and marketing engagement tools. Disparate systems created inefficiencies in lead follow-ups and email performance. Our role was to develop an integrated solution that delivers operational harmony, automation, and visibility throughout the marketing lifecycle.

## 2. Key Objectives

- Centralize lead data and automate syncing across platforms.
- Validate email lists using real-time verification to boost deliverability.
- Personalize marketing through behavior-based automation.
- Streamline follow-ups, meeting scheduling, and document handling.
- Launch responsive microsites for engagement and lead capture.
- Unify data for campaign optimization through analytics.

## 3. Our Solution:

### Mautic + Zoho CRM + Debounce Integration

We created a custom ecosystem that unites campaign management, CRM, and lead verification into one efficient workflow.

### Mautic Configuration and Integration

- Configured Mautic on a custom domain to enhance sender reputation.
- Synced lead data between Mautic and Zoho CRM.
- Managed campaigns, email tracking, and interaction-based automations.

**Tech:** Mautic + CRM API + Campaign Automation Scripts

## Debounce Email Verification

- Integrated Debounce for real-time email checks during lead capture.
- Performed bulk list cleaning and flagging invalid emails.
- Embedded verification insights into Mautic reports.

**Tech:** Debounce API + Email Validation Logic

## Zoho CRM + Marketing Automation

- Customized lead pipelines, follow-up triggers, and assignment workflows.
- Integrated Zoho Sign for digital documentation.
- Connected Zoho Social to track and manage brand engagement across channels.

**Tech:** Zoho CRM + Zoho Sign + Zoho Social + Custom Functions

## Microsite Development via Zoho Sites

- Designed and deployed two mobile-responsive microsites.
- Configured domain registration and hosting.
- Applied UX best practices to optimize navigation and conversion.

**Platform:** Zoho Sites + Custom Styling + Mobile Optimization

# 4. Technical Stack

Component	Details
Backend	Zoho CRM (Deluge), Mautic, Debounce APIs
Frontend	Zoho Sites + CRM Portals
API Integration	Mautic, Zoho CRM, Debounce, Zoho Social
Reporting	Mautic Reports + Zoho Dashboards
Hosting	Zoho Cloud + Dedicated Mautic Hosting
Security	Role-based Access + SSL Secured APIs
QA	Manual Testing + Lead Journey Simulations

## 5. Business Impact

Metric	Before Integration	After Integration	Improvement
Email Deliverability	Low, error-prone	Verified & optimized	92% open rate increase
Lead Follow-Up Speed	Delayed & manual	Automated & timely	70% faster response time
Marketing Engagement	Generic campaigns	Behavior-based targeting	Improved conversion rate
Campaign Visibility	Fragmented	Centralized insights	Real-time tracking
Website Responsiveness	Lacking mobile design	Fully optimized microsities	Higher lead capture rate

## 6. Revinfotech's Role

- Evaluated Kanerika's fragmented marketing systems.
- Designed an integrated architecture across Mautic, Zoho, and Debounce.
- Developed custom workflows and verification pipelines.
- Set up responsive microsities and connected social engagement channels.
- Delivered full-cycle implementation including UAT, training, and rollout.

## 7. Why Revinfotech?

- Deep domain expertise in CRM + Marketing automation.
- Certified Zoho and Mautic implementation partner.
- Experience with real-time API integrations and UX-driven design.
- Proven track record with enterprise-grade IT services firms.
- End-to-end services from strategy to support.

## 8. Client Testimonial

### **Project Sponsor, Kanerika**

“Revinfotech’s Team – from the first day we spoke, I knew instinctively that your product and services were a perfect fit for my business needs. Furthermore, I have been pleasantly surprised by your courteous manners and professionalism, coupled with your prompt attention to my countless requests. You patiently 'listened' to all my queries and have relentlessly, in collaboration with your team, found practical solutions. I thank you for all your efforts and wish you continued success.”

