



ZOHO CRM IMPLEMENTATION

Bringing Customer Enquiries and Sales Follow-Ups Together

Industry focus: Residential Property Services

BUSINESS OVERVIEW

A residential property services company manages enquiries from homeowners, landlords, tenants and property investors. Requests may relate to inspections, maintenance, leasing or property-management consultations. The team needs to respond quickly, understand each contact's requirements and keep a clear record of every conversation. Zoho CRM can provide a central place to organize leads, contacts, deals and follow-up activities.

Project snapshot

Area	Solution focus
Industry	Residential property services and property management
Platform	Zoho CRM with selected workflow and reporting capabilities
Core challenge	Enquiries, contact history, reminders and service opportunities tracked across disconnected tools
Primary goal	Standardize lead intake, assign responsibility and improve visibility of follow-up activity
Delivery approach	Discovery, CRM configuration, data preparation, integrations, testing, training and launch

Executive summary

The company receives requests through website forms, phone calls, email and referral partners. Details are recorded inconsistently, and staff may need to search inboxes or spreadsheets to understand whether a homeowner has already been contacted, which property is involved or what action was promised. Managers also need a clearer view of enquiry volumes, response activity and potential service opportunities.

Liyan IT Solution's proposed Zoho CRM approach establishes a structured process for capturing enquiries, recording property and contact context, assigning leads, managing follow-ups and tracking qualified opportunities. Standard fields, workflow rules and dashboards can help the team work from shared information and make handoffs more consistent.

Intended business outcome

Create a more reliable enquiry-management process, reduce dependence on personal reminders and give managers a clearer view of lead ownership, follow-up status and pipeline activity.

SOLUTION PRINCIPLE

Keep the CRM practical for day-to-day use: capture the information staff need, define who owns each enquiry and make the next action visible.

01 | Business challenges and requirements

Property-service enquiries can be time-sensitive and involve several steps. A homeowner may request a rental appraisal, ask for maintenance support or enquire about property management. The company needs to distinguish the request type, understand the relevant property and make sure that the right person follows up.

Key challenges in the scenario

- Enquiry details from web forms, telephone calls and referrals are recorded in different formats.
- Staff cannot always see the latest conversation or promised next step without checking multiple inboxes.
- New enquiries may not be assigned consistently by service type, location or team availability.
- Follow-up reminders depend on individual habits, making delays harder to spot.
- Property-related requests can be mixed together with general contact records, making prioritization difficult.
- Managers lack a consistent view of lead sources, response activity, conversion and unresolved enquiries.
- Duplicate contacts and incomplete information reduce confidence in reports and customer history.

Requirements mapped to Zoho CRM

Requirement	Proposed approach
Central lead records	Capture contact details, enquiry type, source, preferred contact method and assigned owner.
Contact and account history	Maintain contact and organization details with a timeline of relevant calls, emails, meetings and tasks.
Property context	Use agreed fields or related records for property address/reference, service type and request status, subject to the final data model.
Lead assignment	Route enquiries by service category, location or team responsibility using supported assignment features.
Follow-up discipline	Create tasks and reminders for first contact, inspections, consultations and outstanding responses.
Pipeline visibility	Track qualified service opportunities through assessment, proposal, decision and outcome.
Reporting	Review enquiry source, response activity, service category, conversion and overdue follow-ups.

Discovery questions

Liyan IT Solution would confirm the current enquiry channels, user roles, property data structure, existing CRM or spreadsheets, privacy requirements, reporting needs and integrations. If the business requires detailed property portfolios, tenancy management, maintenance scheduling or accounting, these may need a dedicated property-management system or separately scoped integration rather than being assumed to be native Zoho CRM functions.

SUCCESS MEASURES

Establish a baseline for enquiry response time, percentage of leads assigned, overdue follow-ups, data completeness, qualified-opportunity conversion and user adoption.

02 | Proposed Zoho CRM solution design

The proposed setup uses Zoho CRM as the shared workspace for enquiries and sales-related follow-ups. The final configuration should prioritize standard CRM functionality and add custom modules or integrations only when the requirements justify them.

Core CRM components

Component	Role in the property-services workflow
Leads	Capture new enquiries before qualification, including service type, source, location and contact preference.
Contacts	Maintain homeowner, landlord, tenant or investor contact details and interaction history as appropriate.
Accounts	Represent partner organizations, property businesses or other organizations where relevant.
Deals	Track qualified opportunities such as property-management consultations or service proposals.
Activities	Record calls, meetings, inspections, tasks and follow-up dates against the relevant CRM record.
Custom fields / related records	Store agreed property reference and request details where the approved data model requires them.
Workflow rules	Create task reminders, field updates or notifications for defined business events where supported.
Reports and dashboards	Show lead sources, response status, pipeline stage, overdue tasks and outcomes.

Example lead and opportunity stages

New enquiry — Record contact details, source, property reference if available and requested service.

Assigned — The appropriate team member accepts responsibility for the enquiry.

Contact attempted — A call, email or other agreed first-response action has been recorded.

Qualified — The team confirms the service need, location, timing and relevant decision-maker.

Consultation / inspection — A meeting, property visit or service assessment is arranged and tracked.

Proposal / service recommendation — The scope, expected costs and next steps are shared where relevant.

Decision pending — The team follows up on questions, approvals or outstanding information.

Won / closed — Record the outcome and agreed next step, such as onboarding or a service handover.

Website and system integration

Website forms can be connected to Zoho CRM through supported forms, connectors or APIs. Field mapping should preserve enquiry source, service type and consent choices, while duplicate handling and error logging should be tested. Calendar, email, telephony, property-management, accounting or maintenance systems should be scoped after confirming the tools already used and the data that needs to be exchanged.

DATA QUALITY AND ACCESS

Define required fields, ownership, duplicate rules and role-based access. Import cleaned and approved records in test batches, reconcile counts and key fields, and obtain business approval before production migration.

03 | Workflow automation and reporting

The aim is to make enquiry handling consistent without creating unnecessary notifications or forcing every request through the same process. Rules should reflect service urgency, ownership and the next action required.

Illustrative enquiry-to-service workflow

1. Capture the enquiry

A homeowner or landlord submits a website form or contacts the team. Zoho CRM records the available contact details, source, service type and property reference.

2. Assign responsibility

The enquiry is assigned based on agreed criteria such as location, service category or team ownership. The responsible person receives a task or notification.

3. Review and qualify

Staff confirm the request, urgency, relevant property information and the best way to contact the person. Incomplete records are updated.

4. Make first contact

The team records the call or email, the outcome and the next action. Unanswered enquiries remain visible for follow-up.

5. Arrange a consultation or inspection

A task or meeting captures the appointment, owner and required preparation. Relevant notes remain linked to the contact or opportunity.

6. Track the service opportunity

Where a paid service or property-management engagement is being considered, a deal records stage, expected value, decision date and next step.

7. Close and hand over

The result is recorded and, where needed, a handover task is created for the team or external system responsible for delivery.

Automation candidates

- Create a first-contact task when a new enquiry is assigned.
- Notify a team lead when an enquiry remains unassigned beyond an agreed period.
- Set reminders for consultations, inspections and promised follow-up dates.
- Flag records missing essential service or property information.
- Require a reason when a qualified opportunity is closed without conversion.
- Create a handover task when a service opportunity is marked won, where that workflow is appropriate.

Management dashboards

Report	Question it helps answer
Enquiries by source	Which channels bring in the most enquiries and qualified opportunities?
Response and assignment	How quickly are new enquiries assigned and contacted?
Service category	Which service types generate the most requests and opportunities?
Overdue follow-ups	Which enquiries or deals need immediate attention?
Pipeline and outcomes	How many opportunities are active, won or closed without conversion?

REPORTING DISCIPLINE

Agree definitions and ownership for each metric. A dashboard should help staff take action, not simply display counts; review the quality of source and status data regularly.

04 | Implementation roadmap and expected outcomes

A phased rollout gives the company time to validate its enquiry categories, confirm property-related data requirements and test assignment and follow-up rules before staff depend on the new process.

Suggested delivery roadmap

Phase	Key activities	Deliverable
1. Discover	Review enquiry channels, service categories, roles, data sources, privacy and objectives.	Approved requirements and scope
2. Design	Define lead stages, property fields, ownership, permissions, pipeline and reports.	CRM data and process design
3. Configure	Set up Zoho CRM fields, layouts, views, pipelines, supported workflows and dashboards.	Configured test environment
4. Prepare & connect	Clean and map records, test imports, connect approved forms and selected systems.	Validated data and integrations
5. Test & train	Test assignment, reminders, permissions, duplicate handling, reports and user scenarios.	User acceptance sign-off
6. Launch & improve	Go live, support users, review adoption and refine processes using actual usage data.	Live CRM and improvement backlog

Expected business benefits

- A shared view of enquiries, contacts and related conversations.
- Clearer ownership and more consistent follow-up practices.
- Improved visibility into enquiry sources, service categories and active opportunities.
- Reduced dependence on individual spreadsheets and personal reminders.
- More structured handoffs when a qualified request becomes a service engagement.
- A foundation for connecting website forms and other business tools where required.

How outcomes should be reviewed

Review performance at 30, 60 and 90 days after launch. Compare actual response times, assignment rates, overdue tasks, data completeness, conversion and user adoption with the baseline. Use feedback from staff to refine the process and avoid adding fields or notifications that do not support a clear business need.

Why Liyan IT Solution

Liyan IT Solution helps businesses plan and implement CRM solutions through process discovery, configuration, workflow automation, data migration, integration and ongoing support. For this scenario, the focus is on making enquiry ownership clear, keeping customer context accessible and giving managers practical reporting.

LET'S DISCUSS YOUR Zoho CRM REQUIREMENTS

Tell Liyan IT Solution about your enquiry channels, service process, existing systems and reporting needs. We can help define a Zoho CRM setup that fits your team and operational requirements.

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