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Cloud Analogy
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Zoho CRM

Sales Funnel Dashboard & Forecasting Automation in Zoho CRM

Client



Industry

Multi-Brand Sales Operations

Technologies Used





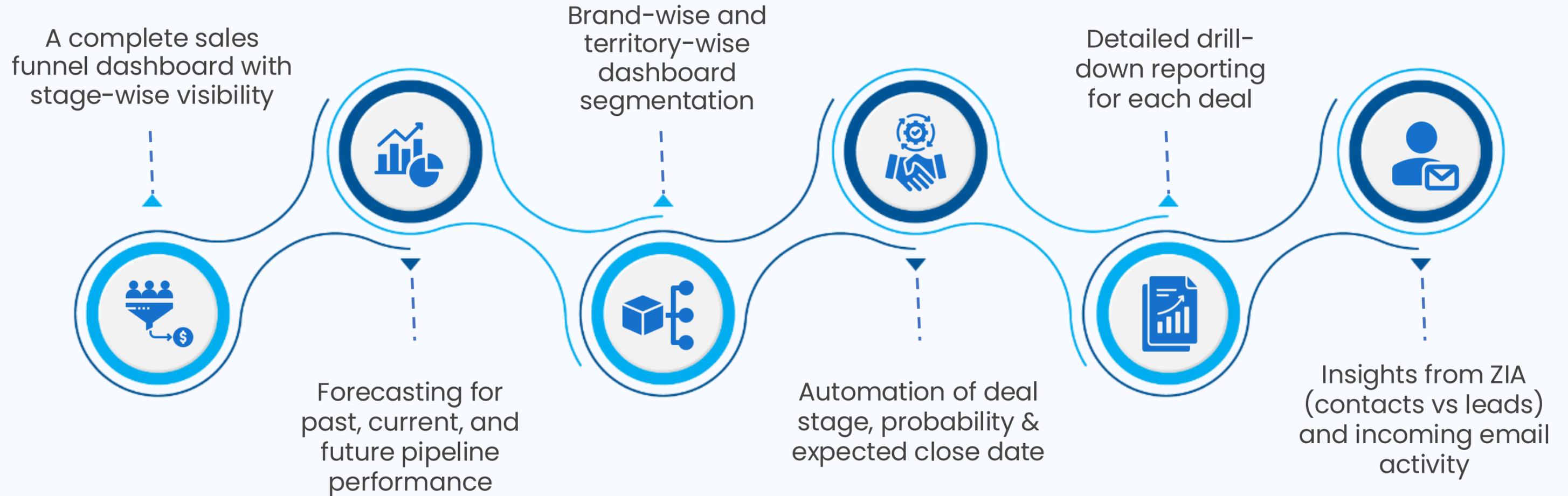
Client Overview

1. A multi-brand sales organization managing deals across various territories and product categories.
2. Relied heavily on Zoho CRM for tracking deal stages, owners, and quotation-linked progress.
3. Needed a unified reporting system that could highlight stage-wise deal movement, forecasting trends, and brand-wise performance.
4. Required deep visibility into past, current, and future pipeline performance with drill-down insights.





Client Requirements





Our Solution



Automated Deal Pipeline Management

- Standardized stages: Prospecting → Won/Lost
- Auto-updated stage, probability & close dates via quotation activity



Advanced Sales Funnel Dashboard

- Global filters: territory, close date, stage & probability
- 12-month history, current month & 12-month forecast
- Deal value grouping (e.g., ₹50K+) for high-level insights



Detailed Drill-Down Reporting

- 58 deal-level data points including account, amount, stage, reps & contacts
- Fully mapped via Zoho automations



Brand-Wise & Owner-Wise Dashboards

- Separate dashboards per brand with deal counts, stages & forecasts



ZIA & Email Analytics

- ZIA-created leads vs contacts
- Email activity tracking for leads & contacts

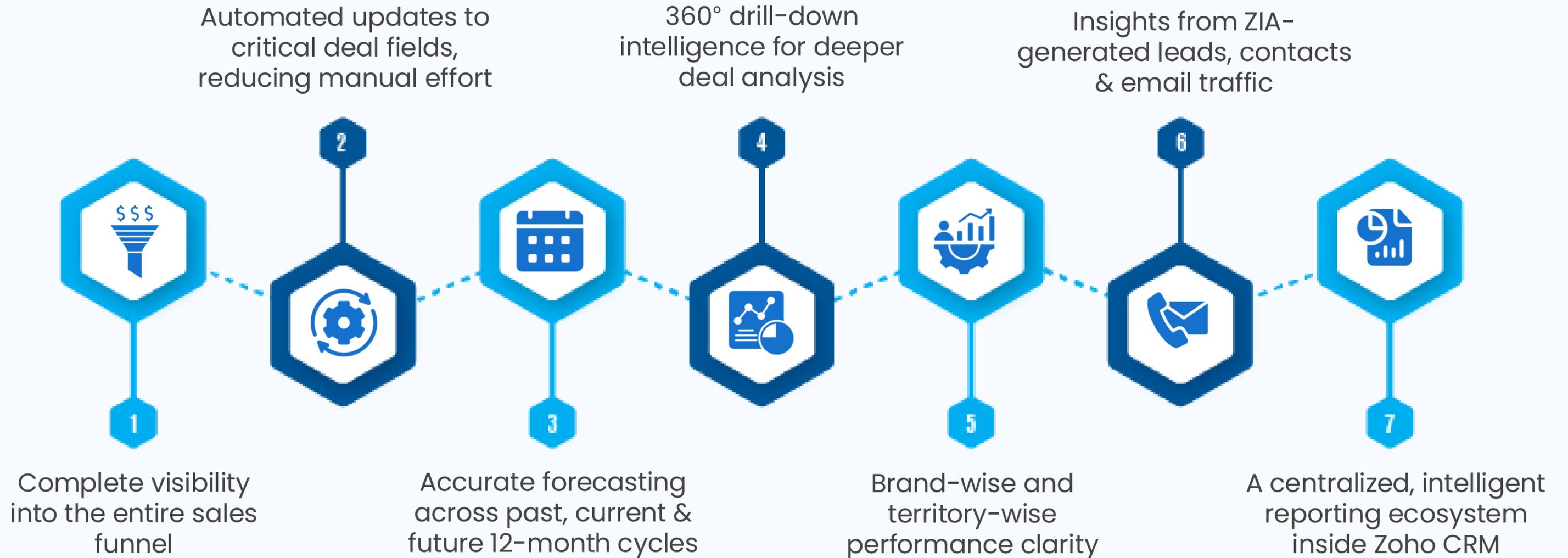


Forecasting & Stage Analysis

- Historical, current & future performance
- Stage-wise bifurcation with drill-downs



Results Achieved



Our Clientele





Thankyou

Cloud Analogy — CRM Consulting, Automation & Integration Experts