

CASE STUDY

Turning School Outreach Into a Structured Sales Engine with Zoho CRM

How Nexivo helped BRYT Learning Technologies replace scattered lead tracking with one centralized Zoho CRM platform, built to manage schools, field visits, and sales opportunities in one place.



BRYT Learning Technologies

"Every child deserves a bright future"



One CRM. Every school, lead, and visit in one place.

About the Client

BRYT Learning Technologies is focused on transforming educational institutions through innovative learning solutions and technology-driven engagement. As the organization expanded its sales operations and school outreach, it needed a centralized platform to manage leads, school accounts, field activities, and sales opportunities.

To build a scalable sales process, BRYT partnered with Nexivo to implement Zoho CRM under Zoho One, creating a structured framework for lead management, field sales tracking, deal progression, and team collaboration.

Key Challenges

- Fragmented lead & account data:** no centralized system to manage leads, school accounts, contacts, and opportunities.
- Inconsistent sales process:** lead qualification and deal progression were tracked manually, with no standard method.
- Scattered stakeholder management:** school decision-makers and their opportunities were hard to track together.
- Low field visibility:** little insight into field sales activity or school visit history.
- Manual follow-up tracking:** milestones and follow-ups depended entirely on someone remembering.
- No role-based access:** Sales, Operations, Finance, and Management shared no structured permission model.
- No standardized workflows:** lead qualification and conversion varied from rep to rep.
- Adoption risk:** rolling out one CRM meant training a team used to working independently.

Let's Build Your Zoho Ecosystem

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ACTION

Our Solution

- Configured Zoho CRM user hierarchy with role-based access for Sales, Operations, Finance, and Management teams.
- Lead Management:** customized lead stages, website and marketing channel capture, and historical lead imports.
- Lead-to-Deal Conversion:** automated conversion process with account and contact linkage.
- Accounts & Contacts:** structured management of schools, principals, coordinators, and key decision-makers.
- Mobile Field Tracking:** check-in and check-out with geo-location, visit notes, purpose, and next actions.
- Workflow Automation:** follow-ups, payment updates, and milestone reminders trigger automatically, with tasks assigned by organizational hierarchy.
- Delivered structured user training, workflow documentation, and full system handover across all teams.

RESULT

Results Achieved

- One centralized platform now manages every school, stakeholder, lead, and opportunity.
- Lead qualification and conversion follow one standardized, repeatable process.
- Field visibility improved through mobile-based visit tracking and geo-location capture.
- Manual effort dropped through automated task creation and follow-up reminders.

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Teams Aligned

Sales, Operations, Finance, and Management now work from one shared system.

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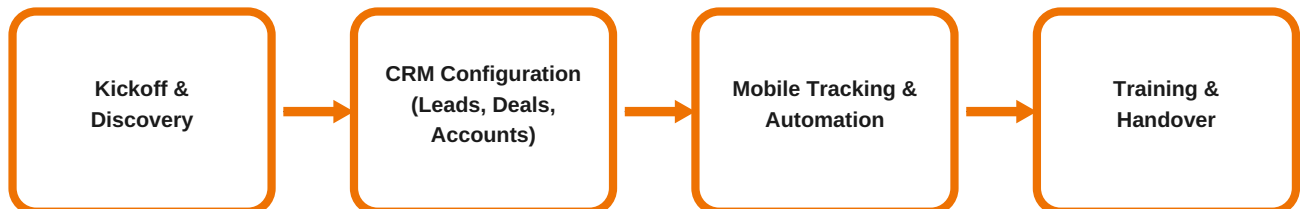
Centralized Platform

Every school, lead, and opportunity lives in a single CRM.

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Manual Reminders

Follow-ups and milestones now trigger on their own.



How it rolled out: discovery to handover, one phase at a time.

“With a strong CRM foundation now in place, BRYT is positioned to expand school outreach, deepen stakeholder engagement, and scale sales operations with confidence.”

NEXIVO AT A GLANCE

Nexivo is a Zoho-only company and an award-winning Zoho Partner, helping businesses simplify and automate critical business functions since becoming a Zoho Partner in 2019. Our people-centric approach starts with understanding how your business works, the challenges you face, and what you want to achieve. We then recommend and implement the right Zoho solutions, tailored to your processes, to solve real business challenges and create lasting value. With hands-on Zoho expertise and dedicated support, we work alongside our customers from problem identification to implementation and beyond. We Make Zoho Work for You.