

CASE STUDY

Turning Coaching Operations Into a Connected Lead-to-Payment Journey with Zoho

How Nexivo helped Slow Burn Method Health replace disconnected lead, batch, payment, and marketing processes with one centralized Zoho CRM and Zoho Campaigns ecosystem.



**Slow Burn Method
Health Private Limited**
*Health and wellness coaching
programs*



One ecosystem. Every lead, batch, payment, and campaign in one place.

About the Client

Slow Burn Method Health Private Limited (SBM) is a health and wellness organization focused on delivering structured coaching programs, wellness transformations, and customer engagement initiatives. As the organization scaled its coaching programs and customer acquisition efforts, it required a centralized platform to manage leads, customer journeys, batch enrollments, coach assignments, payments, communications, and marketing campaigns.

To streamline operations and create a scalable customer lifecycle management system, SBM partnered with Nexivo to implement an integrated Zoho ecosystem comprising Zoho CRM and Zoho Campaigns. The objective was to automate lead management, customer onboarding, quotation and payment processes, WhatsApp communication, batch management, and email marketing while improving visibility across sales and customer engagement activities.

Key Challenges

- 1 Fragmented customer data:** no centralized system to manage leads, customers, coaches, batches, programs, and opportunities.
- 2 Manual lead handling:** lead assignment, qualification, and follow-up were manual, delaying customer engagement.
- 3 Scattered interactions:** email, WhatsApp, calls, meetings, and follow-ups were hard to track in one place.
- 4 No automated workflows:** nothing automated for lead nurturing and customer onboarding.
- 5 Disconnected batch management:** coaching batches, coach allocations, and program enrollments ran on separate processes.
- 6 Manual quotes and payments:** quotation generation, payment tracking, and invoice creation caused inefficiencies.
- 7 Limited visibility:** little insight into customer engagement, campaign performance, and sales pipeline progression.
- 8 No marketing automation:** needed integrated email campaigns, contact segmentation, scoring, and follow-up journeys.

Let's Build Your Zoho Ecosystem

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ACTION

Our Solution

- **Integrated Zoho ecosystem:** Zoho CRM and Zoho Campaigns together, with role-based access, profiles, and data-sharing rules.
- **Lead Management:** stages, sources, website and Meta lead capture, duplicate control, and automated qualification and conversion.
- **Communication:** WhatsApp workflows with tracked responses, plus CRM email tracking.
- **Contacts & Activities:** centralized customer information, Tasks, Meetings, Calls, and automated follow-ups.
- **Coaching Operations:** custom Batches and Coaches modules for allocations and assignments, plus program management.
- **Opportunities & Payments:** stage-wise pipelines, Razorpay payment links, status tracking, and automated invoices.
- **Email Marketing:** Zoho Campaigns with CRM sync, segmentation, contact scoring, signup forms, and nurturing journeys.
- **Reports & Dashboards:** KPIs, sales performance, engagement, and campaign effectiveness.
- **Testing & Go-Live:** functional testing, UAT, workflow validation, user training, and go-live support.

RESULT

Results Achieved

- Lead, customer, coaching, payment, and marketing activities unified in one Zoho ecosystem.
- Faster lead response through automated assignment, qualification, and WhatsApp communication.
- Less manual effort in quotations, payment tracking, invoicing, and follow-ups.
- Clearer visibility into programs, batches, coaches, opportunities, and customer journeys.
- Stronger engagement through integrated email campaigns, automated workflows, and targeted communication.
- Smoother payment collection through gateway integration and automated status updates.
- Higher efficiency through workflow automation, centralized reporting, and standardized processes.
- Better decisions through real-time dashboards, customer insights, and campaign analytics.

2

Zoho Products Connected

Zoho CRM and Zoho Campaigns work as one ecosystem.

1

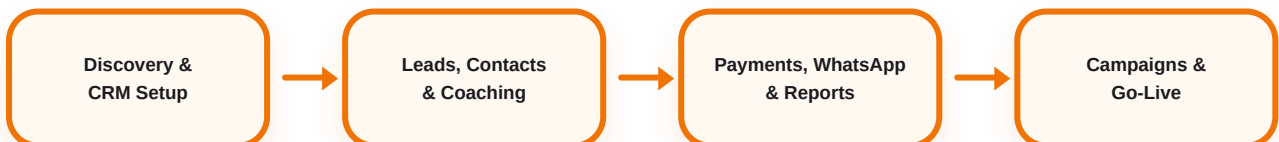
Unified Lifecycle

Lead capture to payment collection and marketing engagement.

17

Implementation Steps

Delivered from discovery workshops to go-live support.



How it rolled out: discovery to go-live, one phase at a time.

With a structured Zoho ecosystem now in place, Slow Burn Method Health is well-positioned to scale its wellness programs, improve customer retention, and support future business growth through enhanced automation and data-driven decision-making.

"The Nexivo Team has provided very good support, especially while working under tight timelines. The team has been more than willing to assist with requirements, and support was extended even on weekends. Similar issues faced earlier were addressed and resolved to satisfaction, and there is confidence that the team will continue supporting us effectively throughout the support and maintenance period."

— SLOW BURN METHOD | Client Testimonial

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.