

# Zoho CRM Case Study

How Sumo Tech Optimised Korridor's Sales and Finance Operations with Zoho CRM





# Overview

Korridor Holdings, a fast-growing FinTech company based in South Africa, partnered with Sumo Tech, a Zoho Partner and implementation specialist, to modernise and align its customer relationship management system. The initiative focused on restructuring Zoho CRM to integrate both sales and finance processes, streamline lead management, and enhance visibility across departments. Through a phased approach, Sumo Tech implemented major improvements, including territory segmentation and a complete Leads Module optimisation. The project transformed how Korridor's teams manage accounts, track customer interactions, and analyse performance across regions.



# Key Takeaways



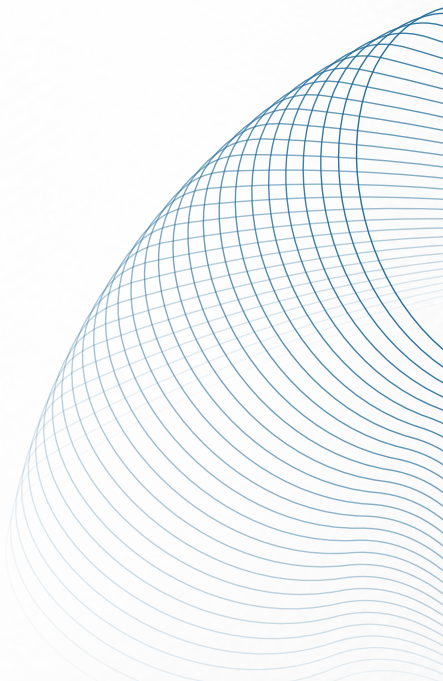
- 1** Unified CRM aligned with both finance and sales policies.
- 2** Automated lead tracking and conversion with real-time reporting.
- 3** Territory-based account allocation and regional reporting.
- 4** Improved user adoption through training and customised workflows.





# Executive Summary

Korridor operates within the FinTech sector, offers a single, cashless system for planning and paying for en route expenses like fuel, tolls, and border fees, and provides fleet management tools. The platform integrates technology such as real-time tracking, electronic payments, and a network of service points to streamline complex cross border operations across multiple African countries. The company's previous CRM setup was primarily sales-oriented, creating misalignment with financial processes and limiting visibility into customer data, performance tracking, and invoicing accuracy.



# Problem Statement and Key Challenges

- 1 Sales and Finance Misalignment**

The existing CRM was built around sales workflows, making it difficult to sync financial data, invoice details, and wallet balances across systems.
- 2 Lack of Territory-Based Visibility**

Customer accounts were not properly segmented by region or currency, complicating account ownership and reporting.
- 3 Inefficient Lead Management**

The process for handling new, cold, and reactivated leads lacked standardisation, resulting in poor visibility across the lead lifecycle.
- 4 Minimal Reporting and Analytics**

There was no consolidated dashboard showing regional performance, account health, or conversion rates.
- 5 Data Inconsistency**

Duplicate records and redundant fields cluttered the CRM, reducing data integrity and usability.
- 6 Limited Automation**

Manual allocation of leads and accounts led to delays in follow-ups and inconsistent sales tracking.



# Evaluation of the Problem

Sumo Tech conducted in-depth discovery workshops and requirements-gathering sessions with Korridor's sales and finance teams. The analysis focused on identifying process inefficiencies and aligning system configuration with the company's evolving business model.

## Key Evaluation Activities:

- Mapping the existing lead-to-account conversion flow.
- Identifying bottlenecks between CRM and financial reporting processes.
- Reviewing territory and region structures for alignment with VOIP and regional sales policies.
- Assessing data quality and redundancy within the CRM.



# Proposed Solution

Sumo Tech proposed a two-part CRM transformation covering both system alignment and lead management optimisation.

## . CRM Adjustment & Integration

- Rebuilt the CRM architecture to align with Korridor's finance policies.
- Established territory management rules for accurate account assignment by country, region, and currency.
- Cleaned and standardized customer data to improve accuracy and reporting.
- Implemented workflows and assignment rules to automate account allocation.

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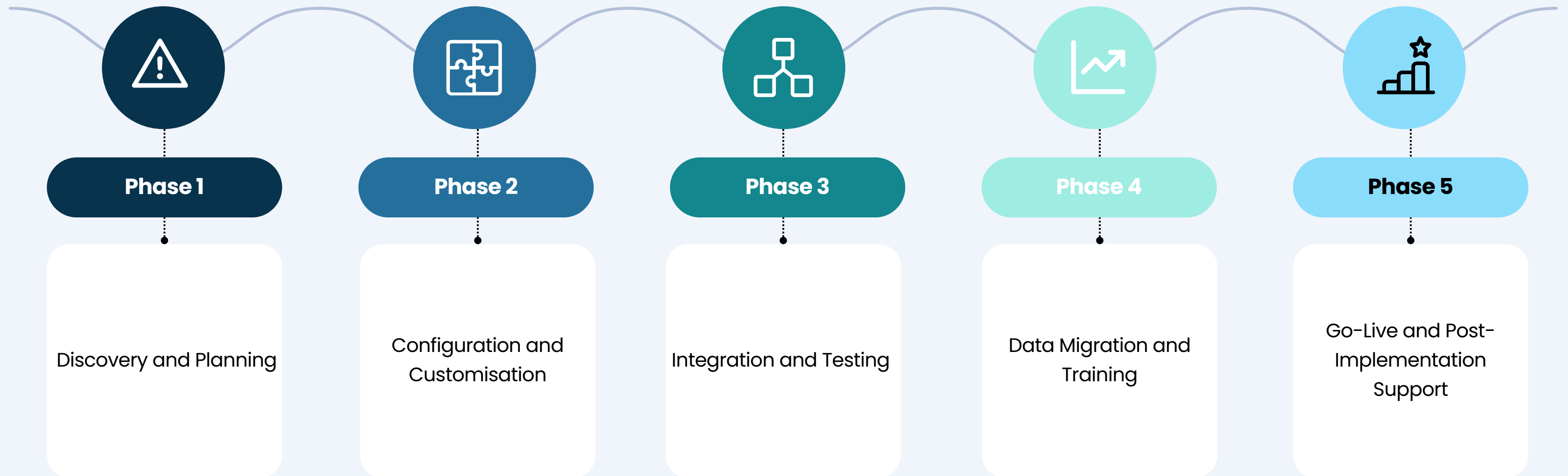
*Sumo Tech's approach emphasised automation, scalability, and usability, ensuring that CRM data seamlessly supported both operational and financial goals.*

## Leads Module Implementation

- Designed a structured lead management process that differentiates between hot, cold, and reactivation leads.
- Configured automations for lead assignment, follow-up tasks, and reactivation workflows.
- Introduced lead nurturing cadences—custom sequences for new, inactive, and marketing-qualified leads.
- Integrated external lead sources from Google, Instagram, and the corporate website, feeding directly into Zoho CRM.
- Created custom email templates, lead status workflows, and a qualification pipeline for consistent sales tracking.



# Implementation





# Results

After implementation, Korridor experienced immediate improvements in efficiency, visibility, and cross-departmental collaboration.

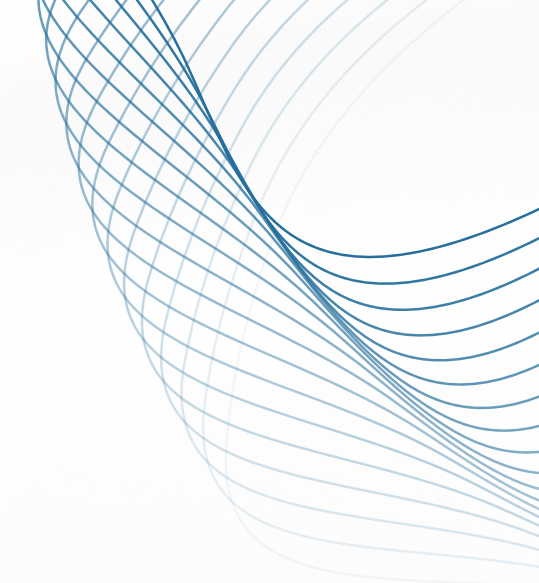
- 30% faster lead response times due to automated task creation and email notifications.
- Streamlined territory management, allowing regional sales teams to access accurate, localised data.
- Significant data cleanup, improving the reliability of reports and dashboards.
- Improved collaboration between sales and finance, enabling better forecasting and customer service.
- Enhanced user adoption, with teams now using a single system for leads, accounts, and financial data.



# Final Thoughts

This project demonstrated how strategic alignment between business processes and technology can transform organisational efficiency. Sumo Tech's expert implementation of Zoho CRM gave Korridor a unified system that supports its entire customer lifecycle—from lead generation to financial reconciliation.

By combining territory management, lead automation, and finance integration, Korridor now operates with clarity, speed, and accuracy. The collaboration stands as a strong example of how Zoho's ecosystem, when implemented with precision and insight, can drive tangible business value.



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