



NBS Mechanical A Case Study Overview

HOW NBS MECHANICAL TRANSFORMED THEIR SALES & SERVICE OPERATIONS USING ZOHO CRM



OVERVIEW

NBS Mechanical, a leading distributor of solar energy, power backup, and power-quality products in the UAE, faced challenges managing customer enquiries, tracking sales pipelines, and maintaining data across multiple teams. With increasing product demand and internal workflow complexity, the business needed a centralized and structured CRM system.

The Solution:

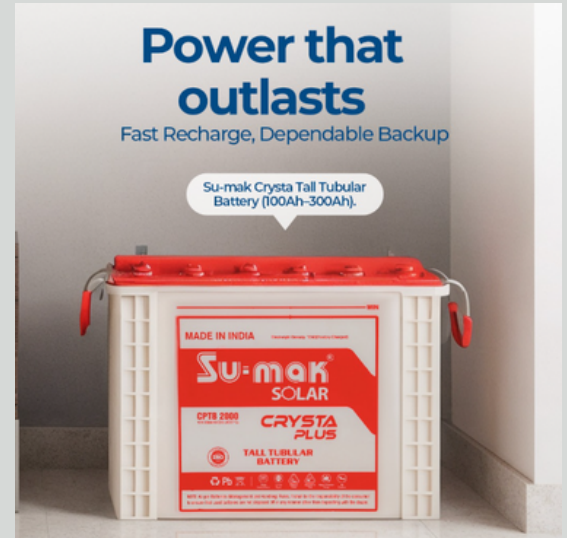
Zoho CRM—implemented by Zopreneurs (Premium Zoho Partner)—helped NBS Mechanical streamline customer data, automate sales processes, and improve operational efficiency across departments

Key Takeaways

- Automated pipeline
- Centralized enquiries
- Instant reporting
- Strong follow-ups
- Better user adoption

EXECUTIVE SUMMARY

NBS Mechanical (NBS) is a UAE-based distributor of solar energy, power backup, and power-quality products, known for fast availability, easy accessibility, strong post-sales support, and customer-focused service. As enquiries grew across sectors like construction, oil & gas, mechanical and electrical engineering, NBS required a modern CRM to centralize operations and maintain consistent, high-quality service delivery.



PROBLEM STATEMENT AND KEY CHALLENGES

- No centralized system

Manual tracking caused errors and missing data.

- Unstructured pipeline

Enquiries and quotations weren't tracked properly, causing delays.

- No automation

Teams handled repetitive tasks manually.

- Weak reporting

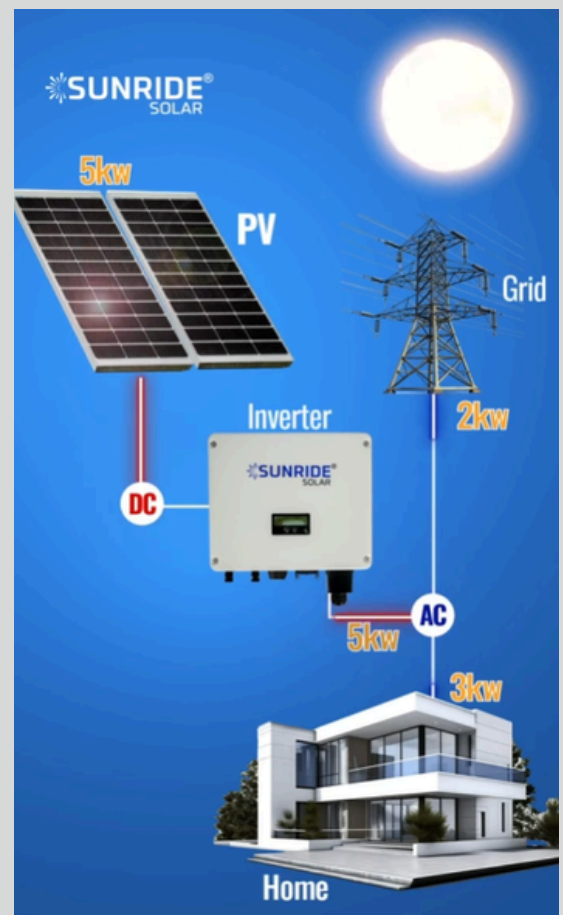
Lack of dashboards slowed decision-making.

*Our team was spending too much time on manual tasks.
We were losing productivity and missing crucial follow-ups.*

— Customer Representative

EVALUATION OF THE PROBLEM

Zopreneurs conducted detailed discovery sessions with NBS Mechanical's stakeholders and assessed their entire lead-to-deal lifecycle, manual quotation processes, data inconsistencies, follow-up gaps, and the need for automation and improved reporting. Based on this evaluation, our experts concluded that a fully customized Zoho CRM setup—with tailored modules, automated pipelines, and structured workflows—would perfectly address their operational challenges and support their business model.



PROPOSED SOLUTIONS

Zopreneurs recommended a fully customized Zoho CRM setup, including:

1. Complete Database Management

Modules configured:

- Leads
- Contacts
- Accounts
- Deals
- Custom Modules for Sales & Service Enquiry
- Tasks, Calls & Meetings

2. Automated Lead Management

- Auto-capture leads from contact forms
- Auto-assignment of leads to admins
- Instant welcome emails with company profile

3. Custom Sales Pipeline Automation

- Auto-generated enquiry numbers (NBS_0000_MMYYYY)
- Supplier quotation uploads
- Automated follow-up reminders
- Automated emails based on quotation status
- Warranty reminders at 2, 4, and 6 months

4. Custom Modules

- Sales Enquiry
- Service Enquiry (with auto-generated service numbers)

5. User Management Setup

- Admin roles
- Permission levels
- Layout rules

6. Reports & Dashboards

- Sales performance
- Enquiry status reports
- Follow-up tracking
- Productivity dashboards

This solution directly addressed all major challenges faced by NBS Mechanical.



IMPLEMENTATION

- Duration: 6–8 weeks
- Additional Services: User & Admin Training, Data Migration Support, AMC for continued support

RESULT

- 100% centralized customer database
- Strong follow-up culture with automated reminders
- Enhanced decision-making via dashboards
- Improved user adoption and CRM-first work culture
- Higher customer satisfaction through quicker, organized responses



“We appreciate the excellent work done by Zopreneurs in customizing and implementing Zoho CRM, Books and Inventory for our operations. The system was tailored to our needs, integrated smoothly with our existing tools, and the support provided was timely and effective. The improvements in lead management and reporting have been significant. Thank you for your professionalism and commitment.”

— Nazeer Basha Syed

