Trigya Innovations

How Om Insurance & Finance Services Centralized Clients, Policies, and Accounts with Zoho

As Om Insurance & Finance Services grew, managing clients, policies, renewals, and commissions through manual tools became increasingly risky. Client data, policy timelines, and financial records were scattered across spreadsheets, making follow-ups inconsistent and revenue visibility unclear.

Trigya Innovations stepped in to replace fragmentation with structure. By implementing **Zoho CRM** for client and policy management and **Zoho Books** for accounting and financial control, Trigya created a connected system that aligned sales activity with financial records. The result was fewer missed renewals, clearer cash flow visibility, and a scalable operating model built on accuracy and accountability.

Case Study of Om Insurance & Finance Services

1. A Descriptive Title Card

Trigya Innovations strengthens Om Insurance & Finance Services' operational efficiency with Zoho CRM and Zoho Books—enabling structured client management, policy tracking, and accurate financial control.

2. Overview

Om Insurance & Finance Services operates in the **insurance and financial services sector**, managing multiple clients across insurance policies, renewals, commissions, and financial transactions. The business depends heavily on timely follow-ups, accurate client records, and

clear financial reconciliation.

As the client base expanded, managing leads, policies, renewals, and accounting through manual tools and spreadsheets became increasingly inefficient. Client information, policy status, and financial data existed in silos, limiting visibility and increasing the risk of missed renewals and revenue leakage.

To address these challenges, Om Insurance & Finance Services partnered with **Trigya Innovations** to implement **Zoho CRM and Zoho Books**, creating a connected system for client operations and financial management.

3. Executive Summary

Om Insurance & Finance Services required a **centralized platform** to manage client relationships, policy lifecycles, and financial records without increasing administrative overhead.

Trigya Innovations implemented **Zoho CRM** to structure lead management, client data, and policy follow-ups, alongside **Zoho Books** to manage invoicing, commissions, expenses, and financial reporting. The combined solution replaced fragmented workflows with a **single, reliable operational and financial backbone**.

4. Problem Statement and Key Challenges

As Om Insurance & Finance Services scaled its operations, several gaps became evident:

Key Challenges

- **Unstructured Client & Policy Tracking**
  Client details, policy information, and renewal dates were managed manually, increasing the risk of missed follow-ups.

- **Limited Visibility into Sales Pipelines**
  Leads and prospects were not tracked through defined stages, making it difficult to forecast revenue.

- **Manual Renewal & Follow-Up Processes**
  Policy renewals relied heavily on individual reminders rather than system-driven alerts.

- **Disconnected Finance Operations**
  Invoicing, commission tracking, and expense management were handled separately from client data.

- **Time-Consuming Accounting & Reconciliation**
  Manual financial entries slowed reporting and increased the chance of errors.

5. Evaluation of the Problem

Trigya Innovations conducted a detailed assessment of Om Insurance & Finance Services' workflows, focusing on:

- Lead intake and client onboarding processes
- Policy lifecycle and renewal management
- Sales follow-ups and revenue visibility
- Accounting workflows, invoicing, and commission tracking
- Data duplication between sales and finance

The evaluation highlighted the need for **tight integration between CRM and accounting**, rather than isolated tools.

6. Proposed Solutions

Trigya Innovations recommended a combined implementation of **Zoho CRM and Zoho Books**, tailored to the insurance and financial services model.

Zoho CRM

- Centralized client and prospect database
- Structured sales and policy pipelines
- Automated follow-ups and renewal reminders
- Activity tracking for calls, meetings, and emails
- Improved visibility into conversion and renewal performance

Zoho Books

- Invoicing and receipt management
- Commission and expense tracking

- Accurate revenue and cash flow visibility
- Automated financial reports and compliance-ready records
- Integration with Zoho CRM for seamless data flow

Together, these solutions created a **single source of truth** for both client operations and financial management.

7. Implementation

The implementation followed a structured approach:

- Process mapping for CRM and accounting workflows
- CRM configuration aligned to insurance sales and renewals
- Financial setup in Zoho Books with reporting structures
- Data migration and system integration
- User training and go-live support

This ensured minimal disruption while driving adoption across teams.

8. Result

The Zoho implementation delivered clear operational and financial benefits for Om Insurance & Finance Services:

- Centralized visibility into clients, policies, and renewals
- Reduced missed follow-ups and renewal delays
- Clear sales pipeline and revenue tracking
- Faster, more accurate accounting and reporting
- Reduced manual effort across sales and finance

With Zoho CRM and Zoho Books in place, Om Insurance & Finance Services transitioned from reactive, manual operations to a **structured, scalable, and data-driven business model**.

Shared Estimate:- Click here

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