

# Delivering **Next-Gen** Customer Insights Across the

**CRM ECOSYSTEM**



# CRM Clientele



**MaxHealth**  
YOUR HEALTH INSURANCE HERO

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**mahindra**  
**EMIRATES VEHICLE ARMOURING**

# CASE STUDIES

# MaxHealth

# A Healthcare Enterprise CRM Platform

Built a centralized MaxHealth CRM to track all business projects, sales pipelines, client engagements, and operational workflows – enabling complete visibility and control across departments.

Reporting

Sales Automation

Analytics

CRM Platform & Role-Based Access

Business Project Tracking

## Results

### Increased Accessibility

- All projects, client accounts, leads, and opportunities are managed in a centralized CRM, replacing fragmented spreadsheets and manual tracking.
- Real-time, role-based dashboards give leadership and departments clear visibility into project status, deal stages, revenue forecasts, and team performance—without manual reporting.

### Optimized Workflows

- Automated workflows and digital tracking of leads, opportunities, proposals, tasks, milestones, and dependencies streamline operations and improve coordination across sales, operations, and delivery teams.
- Centralized communication logs capture all calls, emails, and meetings against clients and projects, ensuring complete visibility and accountability.

### Improved Management

- Advanced reporting and analytics provide insights into conversion rates, project profitability, team productivity, and bottlenecks.
- Role-based access ensures sales, operations, management, and finance teams view only relevant data.
- Management can quickly identify high-value projects, delays, and resource gaps for faster corrective action.

# Development Phase

## Roadblocks

- Lack of a unified system to track multiple business projects, clients, and pipelines simultaneously.
- Heavy reliance on manual reporting leading to data inconsistency and delayed insights.
- Difficulty in aligning sales activities with project execution and delivery timelines.
- No centralized audit trail for tasks, updates, approvals, and stakeholder communication.
- Need for scalability as business volume and team size increase.

## Tech Approach

- Designed and implemented a custom CRM platform tailored to MaxHealth's business and project-tracking needs.
- Built structured CRM modules for lead and opportunity management, project and milestone tracking, tasks and activities, client and account management, and document and proposal tracking.
- Developed real-time dashboards and reports for management, sales heads, and project owners.
- Implemented AI-assisted role-based access control to intelligently secure sensitive business data.
- Enabled audit logs and activity timelines to maintain transparency and accountability.
- Designed the CRM to be scalable and configurable, supporting future integrations and workflow enhancements.

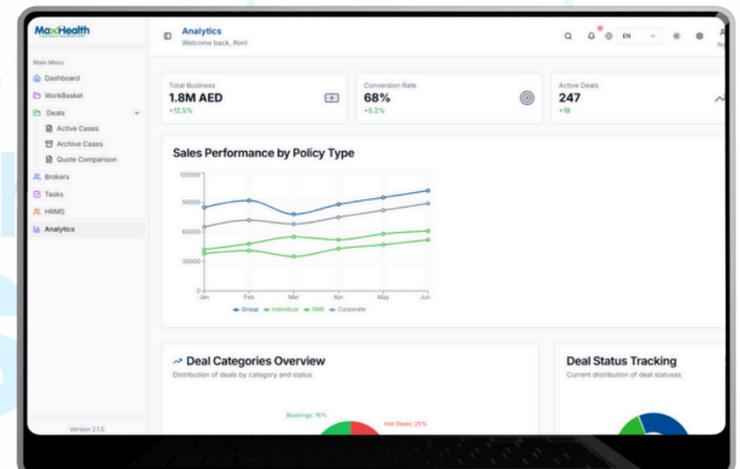
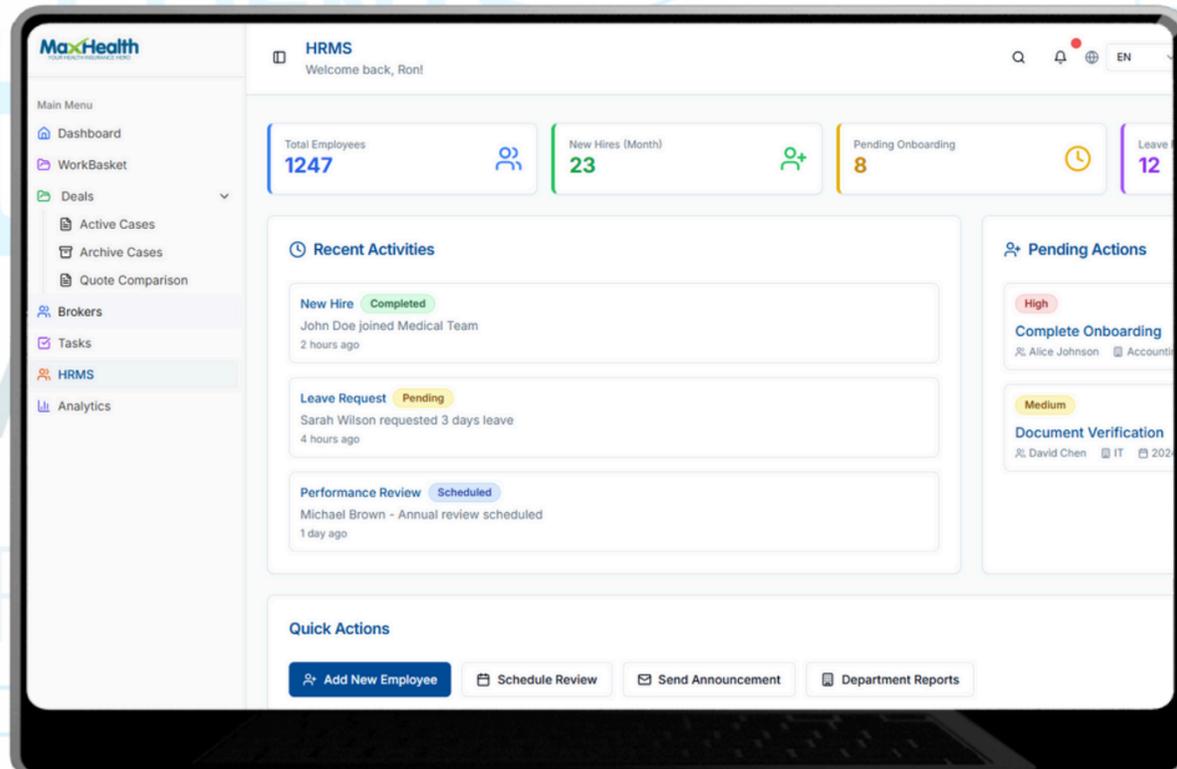
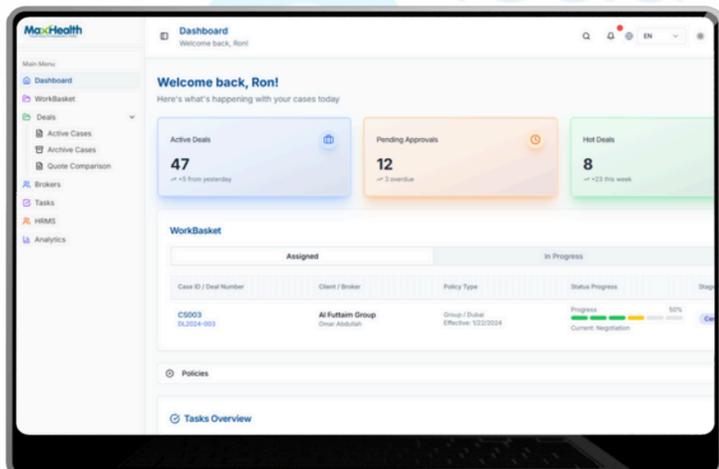
## Takeaways

- A centralized CRM significantly improves business visibility and control across sales and operations.
- Automating project and deal tracking reduces manual effort and operational risk.
- Real-time analytics empower leadership to make faster, data-driven decisions.
- Role-based access and structured workflows ensure accountability across teams.
- A customized CRM aligns more closely with business processes than generic off-the-shelf tools.
- AI-powered insights and automation proactively identify opportunities, predict risks, and optimize customer engagement.

## Tech Stack



# Smart CRM Experience



# mahindra

# A Global Defense & Armored Vehicle Manufacturer

Built a fully integrated ERP System for Mahindra Armored to manage sales, purchase, production, inventory, and finance – with a centralized approval workflow connecting every department.



## Results

### Increased Accessibility

- Implemented a centralized ERP to track all orders from quotation to final delivery, replacing disconnected tools and manual coordination.
- Enabled multi-level, department-wise approval workflows with real-time status visibility to improve alignment, reduce delays, and enhance accountability.

### Optimized Workflows

- Automated sales orders to trigger purchase, production, and inventory workflows, ensuring seamless cross-department handoffs.
- Linked purchase approvals to budgets and finance checks, giving production teams accurate inputs and reducing rework and delays.

### Improved Management

- Enabled finance teams to track costing, budgets, payments, and approvals, while maintaining real-time inventory updates across purchase, production, and dispatch.
- Delivered management dashboards with visibility into order lifecycles, approval bottlenecks, production status, and financial exposure.

# Development Phase

## Roadblocks

- Complex approval hierarchies across multiple departments and stakeholders.
- Lack of synchronization between sales orders, procurement, production schedules, and finance approvals.
- Manual approval processes causing delays, errors, and limited traceability.
- Difficulty tracking order status across departments in real time.
- Need for strict control, auditability, and compliance due to the nature of armored vehicle manufacturing.

## Tech Approach

- Designed and implemented a custom ERP platform tailored to Mahindra Armored's manufacturing and compliance needs.
- Built AI-enabled core ERP modules covering sales orders and quotations, purchase and vendor management, production planning and tracking, inventory and warehouse management, and finance with intelligent budget approvals.
- Implemented a rule-based approval engine supporting multi-level, department-specific approvals.
- Ensured end-to-end traceability: every action, approval, and change is logged for audits.
- Created role-based dashboards for executives, department heads, and operational teams.
- Enabled seamless data flow between modules so decisions in one department automatically reflect across the system.

## Takeaways

- A centralized ERP eliminates silos and ensures smooth coordination across sales, production, procurement, and finance.
- Approval-driven workflows significantly reduce operational risk and unauthorized actions.
- Real-time visibility into orders and approvals improves delivery timelines and customer satisfaction.
- Integrated inventory and finance controls prevent cost overruns and material shortages.
- Custom ERP solutions provide better alignment with complex manufacturing processes than generic platforms.
- AI-driven analytics and predictive insights enable proactive decision-making, demand forecasting, and risk mitigation across operations.

## Tech Stack



# Smart CRM Experience

