



**KIT Global gets
greater visibility
into business data
using Zoho CRM**



The Company

[KIT Global](#) offers a broad spectrum of digital marketing services, catering to both B2B and B2C clients. With services like SEO, CPA (cost per action) models, mobile app marketing, and more, they help businesses enhance their online presence and drive growth. Operating across APAC, Latin America, and Europe, KIT Global continues to expand its reach.

KIT Global's flagship offering is the [KIT Platform](#), an innovative digital marketplace designed to connect businesses with expert marketing partners. Here, businesses can choose from over 200 services on the Platform. KIT Global manages the entire project lifecycle, ensuring seamless execution. For partners and businesses expanding into new markets, KIT Global acts as a bridge, handling contracts and managing the legal and financial complexities across regions. They facilitate the sales process and provide full transparency by consolidating all project documents, accounting reports, and performance data in one accessible platform.

We spoke to Vera Soenkóva, KIT Global's Product Manager, to understand how KIT Global works and how [Zoho CRM](#) helped their growth. Her team of developers is responsible for KIT Global's digital presence, from design to development.

The Partner

[EasyToCheck](#) is a premium Zoho Partner based in India, specializing in Zoho CRM and [Zoho Creator](#). As a certified solutions Partner, they played a crucial role in helping KIT Global during the initial customization phase. From system selection to adding new users, EasyToCheck offered expert consultation and technical support.

"It was really important for us to have some tech consultants and developers at this stage when we're just adopting new products, so it was good for support," Soenkóva said. With their hands-on experience of working with Zoho CRM, the Partner made suggestions on how to make better use of the products. She says it helps to have that kind of support, which is not just technical but also understanding towards business needs.

"It's comfortable to have a partner that not only takes your tasks directly but really brings something to the table and gives you a holistic view of how the business would work with a Zoho Books and CRM integration from the Indian customer's perspective."



Vera Soenkóva,
Product Manager, KIT Global

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Introducing Zoho CRM

KIT Global's platform-based business model needed to remain agile in response to shifting market demands, local holidays, pricing fluctuations, and purchasing behaviors across different regions. As they continued to adjust products to meet market needs and onboard new local partners, their business needed a dynamic solution for managing everything.

Initially, KIT Global set up Zoho CRM for the sales team to keep all their information in one place. After the initial administrator left, Soenkóva took up the mantle to set up Zoho CRM for the whole company and took care of new developments.

Soenkóva said that while initially taking up the additional responsibility was a challenge, she soon started having fun with the interface.

“It’s run from my own experience with the product. I was really excited about how we could adjust almost everything, from the user interface to layouts. It was so easy and so understandable. Zoho is a really good ecosystem for me.”

— Vera Soenkóva, Product Manager, KIT Global

The Challenge

Before Zoho CRM, the sales team at KIT Global used Sheets and Excel to manage data. They needed to keep track of data from multiple offices in different regions, and tracking it in separate sheets created data silos. "We needed to choose the right system and check all those boxes like data storage, localization, and budgeting," Soenkóva said. Zoho CRM fit all of their requirements.

The Solution

Tracking the tangible benefits of marketing events

One of KIT Global's major marketing channels is their participation at global events and conferences. Before Zoho CRM, anyone travelling to these events needed to fill out forms manually to keep track of their gathered leads. They had no way of tracking the impact their presence made at these events, like revenue generation or lead conversion. They needed to understand whether attending the events was worth it. "The information was always in sheets, and, of course, there was a struggle," Soenkóva said.

This is when she suggested they start using the Campaigns module in Zoho CRM to track their events: “It’s linked with Leads and Opportunities so you can see the impact through actual numbers.” They linked KIT Global’s website, along with all their regional websites, to Zoho CRM. This allowed all the gathered leads to appear in Zoho CRM automatically.

Soenkóva said that it was a breakthrough moment when marketing realized that Zoho CRM could help them, too—not just sales. This enabled them to have more transparency on the statistics between qualified leads. Now, instead of relying on sales for the details of campaign performances, marketing has a clear picture of the results. Adding filters to the Leads and Opportunities modules has helped them determine which lead sources are most effective and focus their marketing activities there.

Greater data visibility using customized modules and sales pipelines

Zoho CRM was first set up for the sales team and country managers. To keep track of each office’s sales performance separately, KIT Global created a customized field called “Office.” This cross-module field lists all their office locations with linked performance data. Here, they just have to select the office they want to see and adjust the territory management accordingly. They’ve also applied rules for offices in different regions that determine how leads are assigned to sales teams.

The sales pipeline is customized according to the unique business needs of the customer. Stages such as onboarding, preparing for launch, and advertising campaigns are added. These are time-sensitive stages and need to be monitored carefully to ensure they provide the best, on-time service to their clients and partners.

Once a new office is opened, or changes are made in layouts, all archival leads data can be filtered and mass updated.

“Mass update is another killer feature for me from Zoho CRM because sometimes you add something new, but you don’t want to lose your archive.”



Vera Soenkova,
Product Manager, KIT Global



Lead nurturing with Blueprints and email templates

Leads are time sensitive, and there are time limits set by sales managers for how long a lead can be considered fresh. To keep track of this, blueprints are used to send email notifications to salespeople and to set and change lead stages. The emails are created using templates available in Zoho CRM and customized to add lead and product details.

Customer insights using Zia

Zoho’s AI assistant Zia gets insights from lead lists that sales managers pull from the CRM, giving them more precise and effective data faster.

When someone from sales attends an event and gets a lead, sometimes there’s only a company name or email, which isn’t enough information to go to them with a proposal. The sales team can now use Zia to get more information about leads, and it prepares them to reach out to the client with better chances of getting their business. Soenkova said, “I used Zia, and I was really impressed by how easy and precise the information was.”

Business insights from reports

The reports in Zoho CRM help KIT Global get insights into each regional office's performance. Using customized filters, they pull reports about which products sell best in each region, which partners are most effective, and which products are bringing in the most revenue in different locations. They single out specific lead source data for a particular product in any region to determine its performance.

Soenkóva gave an example of a report she recently built when she needed daily data for new launches in Indonesia. By using filters like lead source and platform region, she got live data for the project and shared the insights with the product manager. This data helped move the project along while eliminating potential bottlenecks.

Revenue tracking with Customized dashboards and sales pipelines

The sales manager dashboard is customized to show the statistics of leads per month, the number of opportunities created per month, and lead ratings, showing a complete picture of how close they are to their revenue goal.

There's also a monthly pipeline that shows what stages aren't effective. This helps them decide what can be done to fix issues. It also shows which lead sources to invest in more, judging by their lead conversion rates. Top lead owners can see the effectiveness of team members, customers who are bringing the most revenue, top industries where products are performing well, and each region's loyal customers. Based on these insights, they build precise strategies to promote their platform and make product recommendations to customers.

Storing vendors and products

At KIT Global, the Vendor module in Zoho CRM is used for tracking platform service providers. “The Vendor module fits perfectly with our needs to store partners’ information and link them with products,” Soenkóva said. The Products module is connected to the Opportunities module, giving a complete picture of the entire process in the CRM. The entire catalog is also integrated with KIT Global’s showcase and allows sales managers to see the real-time availability status of products for clients, their regional placement, and pricing.

Soenkóva found it easiest to build on Zoho CRM’s pre-existing structure.

“For a unique business scenario like ours, we need to customize, and it’s great to have a customizable product like Zoho CRM. For an experienced user like me, it takes just two clicks, and it does the magic. For automation, I spend maybe an hour understanding how to achieve it.”

— **Vera Soenkóva, Product Manager, KIT Global**

She adds that a lot can be done without any coding. “I can feel the power of making something by myself, and it works. It helps the people in their everyday lives. It gets me excited, like a child.”

Testing with Sandbox

Building a system of that complexity means a lot of trial and error. Sandbox in Zoho CRM gives KIT Global the opportunity to test out scenarios before implementing them live. “There’s a lot of testing, and we don’t want to bomb our sales funnel with test data. Sandbox is a safe environment for this,” Soenkóva said.

Looking forward

KIT Global is currently working closely with the Partner to integrate Zoho CRM with [Zoho Books](#). EasyToCheck presented KIT Global with the right architecture for this integration and helped them write functions for their customizations. “Since we chose this ecosystem of Zoho, it was logical to store our finance data in Books,” Soenkóva said. So far, there’s been a disconnect between the sales team and the accounts team. With this integration, they’ll be able to create a link between Opportunities and Payments from clients in one screen. This will give a financial view to both sales and accounts and keep them on the same page.

For KIT Global itself, the team has already successfully launched client and partner cabinets and plans to link them even more closely with Zoho CRM to provide a single data flow.