



Case Study

MiHaven – Zoho CRM
Implementation for SDA
Provider



THE CHALLENGE

MiHaven is an NDIS housing provider that needed a way to track and manage the builds and the rooms that were supplied to people in need of care. They were struggling to bring together a number of spreadsheets and disconnected systems to get the data and reporting they needed to run their business effectively.

The goal was to provide better care to residents while maximising returns for investors. This meant tracking complex layers of room types, NDIS entitlements, contract renewals and vacancies.

THE SOLUTION

CRM Build-Out

- Customized fields for SDA-specific data capture
- Sales pipeline configuration with defined stages and probabilities
- Integration of URL links to external platforms for seamless navigation

Data Migration & Setup

- Transferred existing data from Monday.com and spreadsheets into Zoho CRM
- Implemented lead capture website forms embedded directly into the CRM
- Fully integrated email system to centralize communication

User Enablement

- Conducted tailored training sessions for all 10 users
- Provided onboarding documentation to facilitate continued use
- Built workflow automations to support MiHaven's internal processes

"The future of business lies in how well you know your customers and CRM is your map."

In today's fast-paced, digital-first world, generic messages and one-size-fits-all strategies no longer work. Customers expect personalised experiences, timely responses, and genuine relationships.

OUTCOME

Following the implementation, MiHaven experienced a marked improvement in operational efficiency. The team gained better visibility into their sales pipeline, reduced manual data entry, and automated several time-consuming reporting tasks. Staff adoption was high thanks to the tailored training sessions, and MiHaven now uses Zoho CRM as a central hub for managing stakeholders and tracking EOIs effectively.

This project successfully transformed MiHaven's fragmented system landscape into a unified, scalable CRM solution, aligning with their growth and operational goals.

Key Points

- **Better visibility over facilities bookings**
- **Reports take seconds, not days**
- **Optimised asset usage maximising investment returns for clients.**



At Relevate, we help businesses streamline operations and scale through smart technology and meaningful connections. Beyond CRM implementations and business automation, we offer a full suite of services including Dev-as-a-Service, virtual staffing to meet hiring needs at competitive rates, website maintenance, technology health checks, IT managed services, and strategic advisory.



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