

Case Study

PolyNovo - CRM | Inventory
| Sign | Books | Creator

THE CHALLENGE

PolyNovo is a medical solutions company based in Melbourne, specializing in synthetic skin technologies. As their business expanded, especially with international growth in sight, their reliance on MYOB proved limiting, particularly due to the lack of dedicated CRM functionality. To improve automation, gain deeper visibility across operations, enhance their marketing capabilities, and unlock their capability to scale internationally and globally, PolyNovo decided to migrate to Zoho CRM.



Relevate impressed with their professionalism, innovation, and seamless collaboration, consistently delivering results that exceeded expectations.

THE SOLUTION

The project kicked off with a two-week CRM setup using real PolyNovo data to build out complex many-to-many relationships between doctors, surgeons, and hospitals. Custom fields were added to capture critical contact, affiliation, and sales info. Once the structure was set, data was imported into Zoho CRM to validate the field setup and relationships. The team also integrated email and authenticated PolyNovo's domain to ensure secure, streamlined communication.

-Philip Scorgie - CIO at PolyNovo

After the initial build, an on-site workshop mapped sales workflows, identified needed templates, and explored automation opportunities. A four-week implementation followed with weekly check-ins, delivering multi-contact tracking, workflow automation, custom email templates, and advanced reporting, boosting efficiency and visibility across the sales process.

THE OUTCOME

Zoho CRM gave PolyNovo clearer visibility into sales, streamlined operations, and faster user adoption through training and templates. With automation, custom reports, and centralized contact management, the team now makes smarter decisions and is set up with a scalable system that supports ongoing growth.



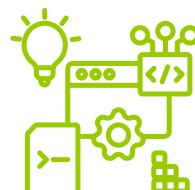
Customised CRM



User Training



Email Integration



Business Workflow Automations

Relevate partnered with PolyNovo to address their core requirements across CRM setup, process mapping, automation, and training. Relevate collaborated closely with PolyNovo to successfully implement a solution that would meet their operational and strategic needs, covering everything from CRM setup and data preparation to automation, workflow mapping, and user training.



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