



Zoho CRM Implementation Practices by Industry

Insurance

Policy- and claims-centric CRM replacing the generic Leads/Contacts/Deals structure with insurance-specific modules.

Custom Modules & Fields

- Custom modules: Insurance Policies, Policy Holders, Premium Plans, Life Advisors/Agents
- Separate layouts per line of business: Health, Auto, Life, Property
- Subforms for multi-policy holders and conditional/validation rules for accurate data entry

Key Workflows & Automation

- Blueprint-enforced pipeline: lead -> quote -> underwriting -> issued policy -> renewal
- Policy renewal reminder automation to reduce lapses
- Claims: assignment rules route claims to the right handler; approval processes for claims resolution
- Commission tracking synced to an agency management or commission platform

Integrations & Compliance Notes

- Zoho Sign for policy documents and agreements
- OCR-based intake for scanned referral/application forms into qualified leads
- Zoho Analytics for retention and producer/advisor performance
- Zoho Desk for policyholder service ticketing by tier/department