

Matrix Booking – End-to-End Zoho One Implementation

Customer: [Matrix Booking](#)

Partner: Axithorn

Project Title

Comprehensive CRM and
Business Automation
Implementation for Matrix
Booking with Zoho One

Customer Business

Matrix Booking – UK-based
workplace management
platform providing Software-
as-a-Service resource booking
and collaboration software

Implementation Partner

Axithorn – Zoho Premium
Partner

Introduction

About Axithorn

Axithorn is a UK-based Zoho Premium Partner specialising in CRM implementation, systems integration, and business automation for SMEs. We focus on designing scalable Zoho solutions that reduce manual workload, improve visibility, and support long-term growth.

Our approach combines technical expertise with a deep understanding of business processes, ensuring that each implementation delivers measurable value whilst remaining adaptable to future needs.

About Matrix Booking

Matrix Booking is a workplace management platform providing world-leading Software-as-a-Service resource booking and workplace collaboration software. Its design and advanced functionality enable organisations to optimise desk, resource, room, and estate usage.

Supporting organisations globally with workplace solutions for over a decade, providing an easy way to book office space through intuitive and user-friendly applications. Prior to this engagement, Matrix Booking required comprehensive CRM configuration and systems integration to streamline their sales, marketing, and customer support operations.

Customer Background

Matrix Booking operates in the workplace management and resource booking industry, providing comprehensive Software-as-a-Service solutions that enable organisations to optimise desk, resource, room, and estate usage. As a trusted provider serving diverse sectors with sophisticated booking and collaboration solutions, the business requires integrated systems to handle complex customer relationships, subscription management, and technical support operations.

CRM Configuration

Configuring a comprehensive CRM system to manage complex sales cycles for workplace management solutions, tracking prospects through lengthy decision processes, and maintaining organized customer data from previous systems

Email Marketing Integration

Implementing Zoho Campaigns for email outreach and prospect tracking, ensuring coordinated marketing efforts and effective lead nurturing throughout the customer journey

Lead Generation & Capture

Deploying Zoho Forms to capture customer interactions effectively, including integration with proprietary software to automate free trial applications and streamline user access management

Customer Support Integration

Embedding SalesIQ within their application to handle customer support requests efficiently and enable agents to find timely resolutions for user inquiries and technical issues

As the business expanded and customer portfolios became more complex, Matrix Booking needed sophisticated systems to support their growing customer base whilst maintaining the high standards of service and technical excellence that define their market position in workplace management solutions.

Project Background

This comprehensive engagement represented a strategic initiative to implement and optimize Matrix Booking's customer relationship management and business operations infrastructure, transforming disconnected systems into an integrated Zoho One ecosystem. The project evolved from initial CRM configuration needs into a complete business automation solution focused on sales efficiency, customer support excellence, and operational integration.

01

CRM Configuration & Data Migration

Comprehensive CRM setup with data migration from previous systems, enabling centralized management of all sales and prospecting activities for workplace management solutions

03

Forms & Trial Management

Deployment of Zoho Forms for customer interaction capture, including integration with proprietary software for automated free trial application management and user access provisioning

02

Email Marketing Integration

Implementation of Zoho Campaigns for coordinated email outreach and prospect tracking, integrated with CRM for comprehensive lead nurturing and customer communication

04

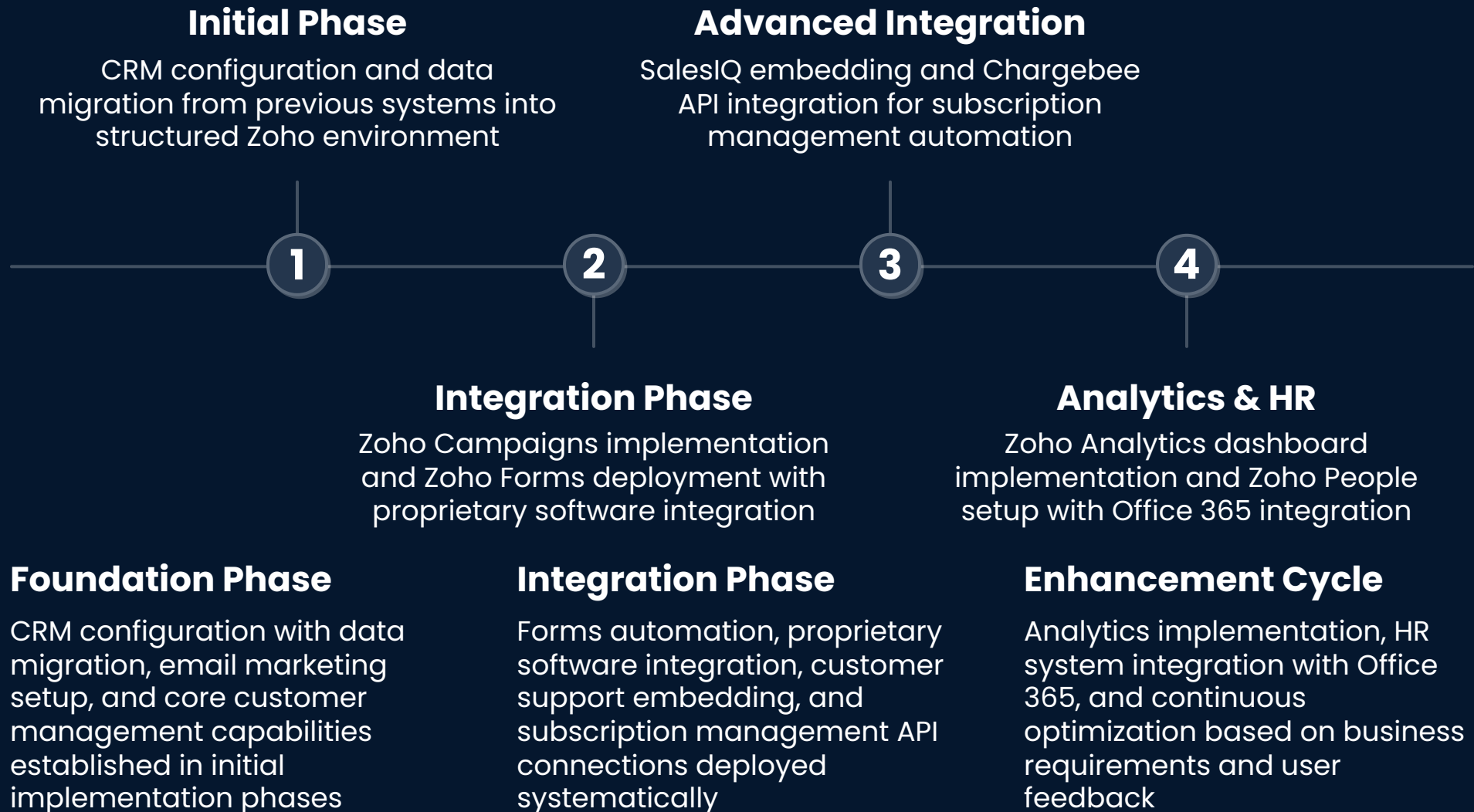
Support & Subscription Integration

SalesIQ implementation within their application for customer support, plus API integration with Chargebee for subscription management, ensuring centralized and real-time customer data

The engagement began with CRM configuration requirements but quickly expanded into a comprehensive business transformation initiative. This integrated approach allowed Matrix Booking to realize immediate operational improvements whilst building towards a fully connected solution supporting their technical excellence and customer service standards.

□ The project's success stemmed from understanding the unique challenges of a SaaS workplace management business, ensuring each implementation phase delivered measurable operational improvements whilst preserving the innovation and customer service excellence that define Matrix Booking's market position.

Duration of the Project



The phased delivery approach enabled Matrix Booking to adopt integrated systems progressively, ensuring team confidence and maintaining business continuity whilst building towards a comprehensive, fully integrated business automation platform.

Problem Statement

Matrix Booking faced operational challenges that required comprehensive systems integration and automation to support their growing SaaS business. The need for coordinated CRM, marketing, customer support, and subscription management systems was critical for maintaining service excellence whilst scaling operations effectively.

Fragmented Customer Data

Customer and prospect information spread across multiple systems with no centralized management. Sales and prospecting activities required unified CRM configuration to maintain consistency and visibility across the customer journey.

Manual Marketing Processes

Email marketing and prospect tracking handled through separate systems with limited integration. Marketing campaigns required coordination with sales activities and customer data for effective lead nurturing.

Disconnected Forms & Trials

Customer interaction capture and free trial management processed manually with limited automation. Integration with proprietary software needed to streamline user access and application management processes.

Support System Integration

Customer support requests handled separately from main application with limited agent efficiency. SalesIQ integration needed within their application to provide timely resolutions and comprehensive customer service.

Subscription Management Complexity

Subscription management through Chargebee operated independently from customer data systems. API integration required to maintain centralized, real-time customer information and billing coordination.

Limited Business Intelligence

No comprehensive reporting across departments with limited visibility into cross-functional performance metrics. Analytics needed for strategic decision-making and operational optimization across all business areas.

The goal was to create an integrated Zoho One ecosystem that unified CRM, marketing, customer support, subscription management, and business intelligence, whilst maintaining seamless integration with existing proprietary systems and third-party services.

Statement of Work

The project scope was designed to address Matrix Booking's comprehensive business automation requirements whilst establishing integrated systems that support their SaaS business model. The agreed deliverables balanced technical sophistication with practical operational value tailored to the workplace management industry.



CRM Configuration & Data Migration

- Comprehensive CRM setup with data migration from previous systems
- Centralized management of all sales and prospecting activities
- Structured customer data architecture for SaaS business operations



Email Marketing Integration

- Zoho Campaigns implementation for email outreach coordination
- Prospect tracking integration with CRM for unified lead management
- Automated marketing workflows and campaign performance tracking



Forms & Trial Automation

- Zoho Forms deployment for comprehensive customer interaction capture
- Integration with proprietary software for automated trial management
- Streamlined user access provisioning and application processing



Customer Support Integration

- SalesIQ embedding within Matrix Booking application
- Comprehensive customer support request management
- Agent efficiency optimization for timely issue resolution



Subscription Management API

- Chargebee API integration for centralized subscription management
- Real-time customer data synchronization and billing coordination
- Comprehensive subscription lifecycle tracking and management



Analytics & HR Integration

- Zoho Analytics implementation for cross-departmental reporting
- Zoho People setup with Office 365 calendar synchronization
- Employee training record management and business intelligence dashboards

The comprehensive approach ensured Matrix Booking could operate with integrated systems across all business functions, maintaining their technical innovation and customer service excellence whilst dramatically improving operational efficiency and business intelligence capabilities.

Deliverables

The implementation delivered a comprehensive suite of integrated capabilities designed to transform Matrix Booking's operations into a unified business automation platform. Each deliverable was configured to address specific operational requirements whilst supporting the company's growth trajectory in the competitive workplace management market.

1 Configured CRM with Migrated Data

Complete CRM configuration with data migration from previous systems, enabling centralized management of all sales and prospecting activities. Custom setup designed specifically for SaaS business needs including customer lifecycle management, prospect tracking, and comprehensive relationship management.

2 Integrated Email Marketing Platform

Zoho Campaigns implementation providing coordinated email outreach capabilities with comprehensive prospect tracking. Integration with CRM ensures unified lead management and effective customer communication throughout the entire sales and marketing funnel.

3 Automated Forms & Trial Management

Zoho Forms deployment for comprehensive customer interaction capture with seamless integration to proprietary software. Automated free trial application management and user access provisioning eliminate manual processes whilst ensuring rapid customer onboarding.

4 Embedded Customer Support System

SalesIQ integration directly within Matrix Booking application enabling efficient customer support request handling. Agents can provide timely resolutions with comprehensive access to customer context and interaction history.

5 Subscription Management API Integration

Comprehensive Chargebee API integration ensuring centralized subscription management with real-time customer data synchronization. Automated billing coordination and subscription lifecycle tracking provide complete visibility and control over customer relationships.

6 Cross-Departmental Analytics Platform

Zoho Analytics implementation providing comprehensive reporting and dashboard capabilities across all departments. Real-time insights support strategic decision-making and operational optimization throughout the organization.

7 HR System with Office 365 Integration

Zoho People setup for employee management with seamless Office 365 calendar synchronization. Automated time-off request management and employee training record system with custom functions connecting learning management capabilities.

☐ All deliverables were designed to work as an integrated ecosystem, ensuring Matrix Booking could operate with enterprise-level efficiency whilst maintaining their innovation and customer service excellence that has established their leadership position in workplace management solutions.

Solution Overview

The implemented solution leverages multiple Zoho One applications working together as an integrated ecosystem, specifically configured for SaaS business operations. Each component was selected and configured to address the unique requirements of customer relationship management, marketing automation, subscription billing, and comprehensive business intelligence in the workplace management industry.



Zoho CRM

Central hub managing all customer relationships with comprehensive sales and prospecting activity coordination. Custom configuration for SaaS business operations including customer lifecycle management, prospect tracking, and integrated marketing campaign coordination, replacing fragmented customer management with unified automation.



Zoho Campaigns

Comprehensive email marketing platform integrated directly with CRM for coordinated prospect tracking and customer outreach. Automated marketing workflows ensure effective lead nurturing whilst maintaining consistent customer communication throughout the sales process.



Zoho Forms & SalesIQ

Automated customer interaction capture system integrated with proprietary software for trial management, plus embedded support system within Matrix Booking application. Comprehensive customer service capabilities with timely issue resolution and streamlined user experience.



Chargebee Integration

API-based subscription management integration ensuring centralized customer data with real-time synchronization. Automated billing coordination and subscription lifecycle tracking maintain comprehensive visibility across all customer relationships and revenue streams.



Analytics & People Management

Zoho Analytics providing cross-departmental reporting and business intelligence, plus Zoho People integrated with Office 365 for comprehensive HR management. Custom functions enable employee training record management and strategic performance tracking.

Together, these integrated solutions provide complete business automation from initial prospect engagement through to customer support and subscription management, enabling Matrix Booking to operate with enterprise-level efficiency whilst preserving their technical innovation and customer service excellence.

Third-Party Integrations

The project's success depended on seamless integration with Matrix Booking's existing proprietary software and essential third-party services. Rather than requiring system replacement, Axithorn designed integrations that enhanced existing capabilities whilst adding comprehensive business automation functionality.



Proprietary Software Integration

Zoho Forms integration with Matrix Booking's existing software infrastructure for automated free trial application management and user access provisioning



Chargebee API Connection

Comprehensive API integration with Chargebee subscription management platform ensuring centralized customer data and real-time billing synchronization



Office 365 Synchronization

Zoho People integration with Office 365 calendar systems for automated holiday management and employee training record coordination

Integration Architecture

The integration layer was designed with business continuity and data integrity as primary considerations. API connections provide reliable, real-time synchronization between Zoho systems and external platforms, whilst application embedding ensures seamless user experience without workflow disruption.

Automated data validation and error handling mechanisms ensure consistency across all integrated systems, with comprehensive logging enabling rapid issue resolution and maintaining operational reliability throughout daily business operations.

These integrations allowed Matrix Booking to maintain their established software architecture and operational processes whilst benefiting from comprehensive business automation, ensuring no disruption to customer experience during the transformation process.

Business Benefits

- Preserved investment in existing proprietary software infrastructure
- Eliminated manual data entry between systems through API automation
- Centralized customer data with real-time subscription management
- Seamless customer support experience within existing application
- Automated employee management with Office 365 coordination
- Comprehensive business intelligence across all integrated platforms

Outcomes

Following the comprehensive implementation, Matrix Booking achieved significant improvements across customer relationship management, marketing coordination, subscription management, and operational efficiency. The solution delivered measurable benefits whilst establishing a platform for continued growth and service excellence.

Key Achievements

Unified Customer Management

Complete centralization of customer and prospect data with comprehensive CRM configuration enabling coordinated sales and prospecting activities. Integrated systems replaced fragmented data management with streamlined automation across all customer touchpoints.

Marketing & Lead Automation

Zoho Campaigns integration provides coordinated email marketing with comprehensive prospect tracking directly connected to CRM. Forms automation eliminates manual customer interaction processing whilst ensuring immediate qualification and response.

Seamless Customer Support

SalesIQ embedding within Matrix Booking application enables efficient customer support request management with comprehensive agent capabilities. Customer service quality enhanced whilst maintaining rapid resolution times and comprehensive interaction tracking.

Integrated Subscription Management

Chargebee API integration provides centralized subscription management with real-time customer data synchronization. Comprehensive billing coordination and subscription lifecycle tracking ensure complete visibility and automated process management.

The solution continues to evolve with Matrix Booking's business requirements. The comprehensive Zoho One implementation provides a scalable foundation for continued expansion whilst maintaining the technical excellence and customer service standards that define their market leadership.

Business Impact

The implemented solution delivered substantial positive business impact across all dimensions of Matrix Booking's operations. Beyond immediate efficiency gains, the system enabled strategic improvements in customer management, marketing coordination, and business intelligence that support sustainable growth in the competitive workplace management market.

Complete Business Integration

Comprehensive automation across CRM, marketing, customer support, and subscription management operations. Integrated systems enable coordinated business activities whilst freeing the team to focus on product innovation and customer success rather than administrative processes.

Enhanced Customer Experience

Seamless customer journey from initial engagement through support interactions with comprehensive automation. Trial management integration and embedded support system ensure rapid onboarding and effective issue resolution maintaining competitive service standards.

Streamlined Marketing Operations

Zoho Campaigns integration provides coordinated email marketing with comprehensive prospect tracking and lead nurturing. Marketing automation ensures consistent customer communication whilst maintaining detailed analytics for campaign optimization and strategic planning.

Operational Efficiency Transformation

API integrations eliminate manual data entry whilst maintaining real-time synchronization across all business systems. Automated workflows ensure consistent operations whilst providing comprehensive visibility into performance metrics and business intelligence.

Strategic Business Intelligence

Zoho Analytics dashboard providing comprehensive cross-departmental reporting and performance insights. Data-driven decision making supports strategic planning whilst automated reporting ensures accurate business oversight and operational optimization.

Strategic Value

Beyond operational improvements, the solution positioned Matrix Booking for sustainable growth by establishing scalable business processes, enhancing customer experience capabilities, and creating a comprehensive data foundation for strategic decision-making in the competitive workplace management market.

The integrated system supports future expansion into new service areas or market segments without requiring fundamental architectural changes, ensuring long-term return on investment and continued competitive advantage.

Ongoing Partnership

The collaborative approach with Axithorn ensures the system continues evolving with business needs. Regular reviews identify enhancement opportunities, new automation possibilities, and additional features that support continued growth and operational excellence.

This continuous improvement cycle maximizes value realization whilst ensuring the system remains aligned with Matrix Booking's innovation standards and customer service excellence throughout their market evolution.

Overall, the system enabled Matrix Booking to operate with enhanced efficiency whilst preserving their technical innovation and customer service character, supporting sustainable growth and strengthened competitive positioning in the workplace management market.

Customer Statement

We have used James from Axithorn for about 5 years, he has always been invaluable in supporting us with our implementation of Zoho CRM, and our subsequent adoption of several other Zoho One modules. James is unquestionably a Zoho Subject Matter Expert, and can always be relied upon to ensure Zoho works as efficiently as possible for our business.

James is also adept at integrating Zoho with other external systems. Always a pleasure to work with, definitely one of our key business partners.

Through this comprehensive implementation, we now have complete integration between our CRM, email marketing through Zoho Campaigns, customer interaction capture via Zoho Forms, and embedded customer support through SalesIQ. The API integration with Chargebee keeps all our subscription data centralized and updated in real-time.

Zoho Analytics provides us with the insights we need across all departments, whilst Zoho People handles our employee management seamlessly integrated with our Office 365 environment. The transformation has been remarkable and continues to deliver real value to our business operations.

— **Karl Breeze, CEO, Matrix Booking**

Long-term Partnership

The testimonial highlights a five-year collaborative relationship characterized by continuous support and strategic guidance.

Understanding the evolving needs of a SaaS workplace management business guided every implementation decision throughout the extended partnership.

Technical Expertise

Complex business integration requirements including CRM configuration, marketing automation, subscription management APIs, and customer support embedding were addressed through deep Zoho platform expertise and creative solutions tailored to industry needs.

Ongoing Value Creation

The commitment to continuous improvement and strategic partnership ensures Matrix Booking can rely on their integrated Zoho ecosystem for daily operations whilst continuing to enhance capabilities as their business evolves in the competitive workplace management market.