Advanced International Journal for Research (AIJFR)
E-ISSN: 3048-7641 ● Website: www.aijfr.com ● Email: editor@aijfr.com

Connect to Convert - Case Study
A Case Study on CRM-Driven Sales Enablement and Training at BNM Business Solutions LLP

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DOI: https://doi.org/10.63363/aijfr.2026.v07i06.9203

Abstract

This case study examines how BNM Business Solutions LLP, a small real estate sales-support consulting firm operating in the Mumbai Metropolitan Region, addressed a lead-conversion and data-quality problem on its Godrej Varanya (Kharghar) engagement through a combination of CRM data auditing and sales-enablement training design. Drawing on first-hand internship observation, the case traces the problem from diagnosis — an eleven-issue technical assessment of the firm's Runo CRM data — through to the design of a cold-calling playbook and training material intended to close the resulting performance gap. The case is intended for classroom discussion of training-needs diagnosis, sales-enablement design, and the choice of training method in small, resource-constrained organizations.

Keywords: sales enablement, CRM, training needs analysis, real estate, small business, cold-calling, blended learning

1. Introduction and Background

Mumbai Metropolitan Region (MMR) real estate developer can use BNM Business Solutions LLP's services for sales-enablement and Management Information Systems (MIS). The service can take the burden of the lead follow-up and conversion process, which is a labor-intensive and time-consuming task, off the shoulders of the developer, such as Godrej Properties, and handle the client project CRM data and the performance of their call team. This eliminates the need for them to create large in-house calling teams on each project.

Throughout the time frame of this case, BNM's main focus was lending a helping hand to Godrej Properties' Varanya residential project in Kharghar, Navi Mumbai. This specific project had a very competitive micro-market scenario with a limited number of qualified household-leads that were being competing by multiple developers. Here, BNM and its client's bottom line are both affected by the tele-calling team's proficiency and productivity. Government of India (2016): The Real Estate (Regulation and Development) Act, 2016 regulates the functioning of this market with respect to housing.

2. The Problem

The Godrej Varanya project's BNM calling team worked with the Runo CRM software to handle calls, leads and follow-ups. With passage of time, it became an informal concern of the firm's leadership, including the Director, Mr. Vikram and the Co-Manager, Ms. Alisha, that the leads produced did not correlate with the project's performance of converting products. The upper management of the company did not make any assumptions about a problem in the product or market; they actually performed a diagnostic test to verify the reliability of the data and procedure.

The data which was exported from Runo CRM was required to be put into an excel inspection workbook with numerous sheets that needed to be built by an employee of the MIS team. This workbook was to contain summaries of calls with the customer, checking data errors and analysing the most optimal call times. The realization emerged during this diagnostic process that there was a deeper issue that was creating a departure from the initial perception: the CRM data was inconsistent and would impact any study of conversion rates and likely would reflect uneven behavior among the calling crew. A comprehensive technical evaluation report detailing eleven issues was created from the exercise. Specific and recurring problems were identified, including inconsistent labeling of call outcomes, missing lead data and delayed or inconsistent data entry after the call.

This discovery removed the focus from "how do we get callers to convert leads" and instead put it on "how do we make the CRM system and its users produce the data that is reliable enough to be managed and enhanced to drive conversion in the first place!".

3. Diagnosis: Why the Problem Existed

This mismatch of data quality and performance came about because of three interconnected reasons:

Absence of standardised procedure. Although there was a technological ability for calling staff to capture full and organised call data, there was no consistent internal norm for the use of specific fields in the Runo CRM.

Skill gap in calling technique. The Godrej Varanya team were identified by BNM's leadership to be a transaction that is highly sensitive to trust and valued, and thus a more powerful and consistent approach to cold-calling is needed, aside from the data issue.

R**esource constraints typical of a small firm.** Small business, with limited resources. As the lean and flat organizational structure of BNM, there was no central department of Learning and Development or a big CRM administration function to handle these issues. Rather, it was decided that the small project team in charge of the engagement would also be responsible for addressing the data-quality and skill gaps.

4. The Intervention

Based on these findings, the BNM management has asked the MIS/internship group to provide two related products;

1. **A cold-calling playbook**, that is designed to create a standard for the practice of cold calling. It contains scripts to start the conversation, to ask structured questions about needs, to address objections about price, location and time, and a script to end the conversation in the hope of a site visit.
2. **PowerPoint training decks**, that the calling team can use to go over the playbook material and remember to utilize the Runo CRM system correctly and consistently. This will support them with the new calling strategy as part of the technical evaluation, to resolve the data-quality issues.

The leadership of the firm provided this material in an experiential, learn-by-doing manner, in direct, face-to-face coaching (as opposed to formal and rigid approaches; Kolb, 1984), consistent with BNM's generally flat, informal, high-trust working culture. This was, far from a formal classroom-based curriculum or an external training vendor.

5. Outcome and Learning Points

Although a company of this nature would not typically do a formal, statistically isolated testing of one training intervention, this case study offers insight for other small businesses that are CRM dependent and struggling with sales enablement and training design issues:

- **Diagnosing a performance problem before designing training for it matters.** The decision of what to train, before diagnosing a performance issue, is important. Before creating a training program to correct a performance problem, it is crucial to define the problem or issue. Without analyzing the CRM data (BNM internship work records, 2026), BNM would have jumped directly to "more cold-calling training" without realizing that the more fundamental data quality issue is being ignored in any performance analysis.
- T**raining content and data-system discipline are linked, not separate, problems** Cold-calling playbook and CRM-usage correction – they are not separate problems, but linked. This is because the training content and the training discipline of the data-system are not independent, but intertwined challenges in a CRM-driven sales organization.
- **A small firm's existing culture is itself a training-delivery asset.** The culture of a small business is a training asset in and of itself. Training may be carried out using the existing culture of a small business. This intervention was quickly and immediately put into place by BNM's leadership, due to the company's flat, coaching-based high trust culture, which meant that no investments or construction of formal training infrastructure was needed.

6. Discussion Questions

1. What are your thoughts on how BNM's leadership can help enforce the new cold-calling playbook and CRM conventions? One shot in the classroom, self-paced e-learning or ongoing "mentoring" on the job? Back up your claim with evidence from a well-established training-design or training-needs framework (e.g., Kirkpatrick & Kirkpatrick, 2006; Kolb, 1984).

2. How does the size and organizational culture of a firm like BNM (flat, informal, founder-led) change the kind of training intervention that is practical, compared to a large, multi-layered corporate sales organization?
3. What are some ways for BNM to reduce the risk of overloading the calling team with multiple data quality and/or sales technique fixes in one training session? What danger might this entail?
4. What are the long-term (Kirkpatrick & Kirkpatrick, 2006) continuous assessment measures that the company can implement using its existing Runo CRM data to check if the intervention improved the data quality and conversion success of its CRM in the long run?

7. Conclusion

The BNM Business Solutions LLP case illustrates this situation well: they are very small sales-support organizations and rely on CRM, and often they find it difficult to distinguish between "people problems" and "systems/process problems"—both need to be identified in order to be able to design successful interventions. A small business can develop a training intervention that is indeed suitable to the context they are working in while not using a huge L&D budget or infrastructure, as in the firm's case, which was a mix of a cold calling playbook and CRM usage correction. This is provided in the company's leadership relationship of the coaching style.

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