

Business Process Automation

Zoho One Implementation & Digital Process Transformation

Client: **Climeto Sustainable Services Private Limited**

Industry: Sustainable Services / Environmental Solutions

Solution Type : Zoho One Implementation & Business Process Automation

Zoho Applications: CRM • Projects • People • Recruit • Expense • Books • Mail • Social • Campaign

PROJECT OVERVIEW

Climeto Sustainable Services Private Limited provides sustainable solutions and manages multiple business operations across sales, projects, compliance, HR, recruitment, finance and employee management.

As the organization expanded, Climeto needed a centralized digital ecosystem to streamline processes, improve collaboration, automate repetitive workflows and gain better visibility across departments.

Case Study

Key Business Challenges

- Sales and purchase leads lacked proper categorization
- Limited visibility into lead and sales pipelines
- Manual project creation after deal closure
- No structured exception approval process
- Difficulty tracking project progress
- Manual HR, attendance and expense processes
- Recruitment required better automation
- Limited cross-department reporting
- Communication and notifications required automation

The Goal

Connect business operations through one structured and automated Zoho ecosystem.

SOLUTION

The Solution

Zoho One applications were configured and customized according to Climeto's department-wise business requirements.

Integrated Zoho Ecosystem

- Zoho CRM: Lead, deal & sales process management
- Zoho Projects: Automated project & task management
- Zoho People: HR, attendance & employee management
- Zoho Recruit: Recruitment & candidate management

Case Study

- Zoho Expense: Expense, approval & reimbursement management
- Zoho Books: Finance integration
- Zoho Mail: Domain, email & account management
- Zoho Social: Social media workflow & approvals
- Zoho Campaign: Email marketing & campaign management

Approach

Centralize → Connect → Automate → Monitor

The implementation focused on connecting departmental processes instead of managing them as isolated workflows.

SALES & PROJECT AUTOMATION

Zoho CRM was customized to improve lead and deal management and provide better visibility across the sales process.

Lead Management

- Lead creation & dashboard customization
- Lead-to-deal conversion mapping
- Lead and Deal field mapping
- Sales & Purchase lead categorization
- Category-wise reporting
- Date & BD-user based reporting

Case Study

Sales Pipeline



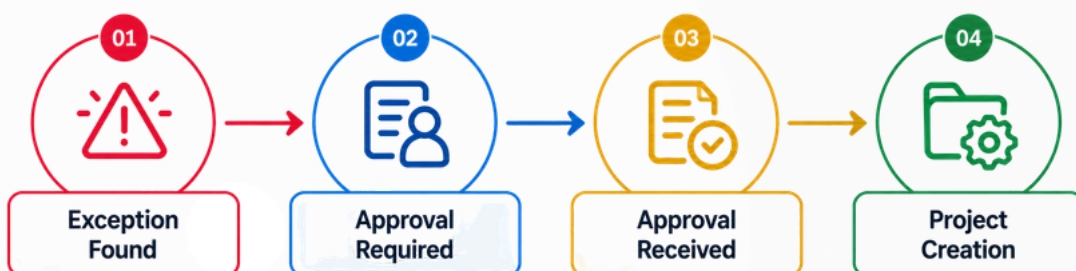
Zoho Projects Automation

Project creation and management were connected with CRM conditions.

Automated Flow

Deal Won

- **Condition Verification**
- **Project Created**
- **Template Applied**
- **Task Assignment**
- **Progress Monitoring**



Case Study

HR, RECRUITMENT & EXPENSE

Zoho People was configured to manage employee-related processes.

Key Areas

- Organization & user setup
- Attendance policy
- Attendance visibility & permissions
- Geo restriction & location validation
- Remote check-in
- Leave management
- Employee onboarding
- Document management
- Performance management
- HR help desk

Recruitment Automation

Zoho Recruit streamlined the recruitment process through:



Case Study

COMMUNICATION & AUTOMATION

Additional Zoho applications were configured to improve communication, marketing workflows and internal notifications.

- **Zoho Mail:** Domain Verification • Email Aliases • Account Creation • Mail Migration
- **Zoho Social:** Social Media Management • Content Approval • Message Monitoring • Live Streaming Scheduling
- **Zoho Campaign:** Campaign Management • Email Marketing
- **Zoho Cliq & Zoho Flow:** Automated Messages • Notification Workflows • Integration Testing

Connected Business Ecosystem



Case Study

BUSINESS BENEFITS

The Zoho One implementation helped Climeto move from fragmented manual operations toward a more structured and connected digital ecosystem.

- **Key Benefits**
- **Centralized Data**
- **Improved Sales Visibility**
- **Automated Project Creation**
- **Faster Approvals**
- **Streamlined HR Operations**
- **Recruitment Automation**
- **Automated Expense Management**
- **Better Collaboration**
- **Real-Time Visibility**

PROJECT OUTCOME

The customized Zoho implementation helped streamline sales, projects, HR, recruitment, finance and communication processes while reducing manual effort and improving visibility across departments.

CLIMETO × ZOHO ONE

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