CASE STUDY

Climeto Sustainable Services Private Limited

Transforming Sales & Project Operations with Zoho CRM and Zoho Projects

INDUSTRY	Sustainable Services / Environmental Solutions
TECHNOLOGY STACK	Zoho CRM | Zoho CRM Blueprint | Workflow Automation | Zoho Projects | Custom Integrations

1. Overview

Climeto Sustainable Services Private Limited implemented Zoho One applications to improve operational efficiency and automate business processes across sales, project management, HR, recruitment, finance, and communication. The implementation included Zoho CRM customization, automated project creation, approval workflows, employee management, recruitment automation, and expense management. Integration between Zoho applications helped centralize business data, reduce manual efforts, improve interdepartmental collaboration, and provide better visibility into business performance through dashboards and reports.

Key Takeaways

Centralized customer and lead management.
Standardized pre-sales and sales processes using Zoho CRM Blueprint.
Reduced manual data entry and team handovers.
Connected sales closure with project initiation.
Improved visibility into sales pipelines and project execution.
Established a scalable operational framework for business growth.

2. Executive Summary

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3. Problem Statement and Key Challenges

Climeto Sustainable Services Private Limited faced several challenges in managing its business operations efficiently. The major issues included:

- Lead Management: Improper categorization of sales and purchase leads.
- Sales Tracking: Limited visibility into deal stages, sales pipelines, and performance reports.
- Project Management: Manual project creation after deal closure and difficulty tracking progress.
- Approval Process: Lack of structured workflows for handling exceptions.
- HR Management: Need for customized attendance policies, employee permissions, and leave management.
- Recruitment: Limited automation in candidate tracking, interview notifications, and hiring workflows.
- Expense Management: Manual expense recording, approvals, and reimbursement processes.
- Reporting and Communication: Lack of centralized reporting, automated notifications, and smooth coordination between departments.

4. Evaluation of the Problem

The evaluation of Climeto Sustainable Services Private Limited's business processes identified the following areas requiring improvement:Sales and CRM: Existing lead management and deal tracking processes required better categorization, field mapping, and reporting.Workflow Automation: Manual project creation and unstructured exception approvals highlighted the need for automated workflows.Project Management: Project templates, task assignments, team permissions, and progress monitoring required systematic configuration.Human Resource Management: Employee attendance, leave management, location validation, onboarding, and document management needed customization.Recruitment Process: Candidate management, interview notifications, and hiring workflows required automation.Expense Management: Manual expense recording, approval, and reimbursement processes needed to be streamlined.Application Integration: Integration between Zoho CRM, Projects, People, Recruit, Expense, and Books was necessary to improve data flow and coordination.Reporting and Communication: Centralized dashboards, automated notifications, and reporting were required to improve operational visibility and decision-making.

5. Proposed Solutions

To address the operational challenges faced by Climeto Sustainable Services Private Limited, a customized Zoho One solution was proposed to automate workflows, centralize business data, and improve coordination across

departments.

- CRM Optimization: Customize Zoho CRM to manage sales and purchase leads, improve deal tracking, configure field mapping, and generate category-wise reports and dashboards.
- Workflow Automation: Integrate Zoho CRM with Zoho Projects to automate project creation after deal closure, apply service-specific project templates, and assign tasks to the relevant teams.
- Exception Approval Management: Implement approval workflows for deals involving exceptions to ensure project creation proceeds only after the required approval.
- HR Process Automation: Configure Zoho People for attendance tracking, geo-restrictions, remote check-ins, leave management, employee onboarding, and document management.
- Recruitment Management: Automate job opening management, candidate tracking, interview notifications, and integration between Zoho Recruit and Zoho People.
- Expense and Finance Management: Streamline expense recording, approval, reimbursement, and travel expense processes through Zoho Expense and Zoho Books integration.
- Communication and Marketing: Configure Zoho Mail, Zoho Social, Zoho Campaigns, Zoho Cliq, and Zoho Flow to improve communication, manage marketing activities, and automate notifications.
- Reporting and Monitoring: Develop customized dashboards and reports to provide better visibility into sales performance, project progress, employee activities, and overall business operations.

6. Implementation

The Zoho One solution was implemented at Climeto Sustainable Services Private Limited by configuring and integrating applications according to the company’s business requirements.

- Zoho CRM Implementation: Customized lead and deal modules, sales and purchase categorization, field mapping, dashboards, notifications, and reporting.
- Zoho Projects Integration: Automated project creation based on deal closure, configured service-specific project templates, assigned tasks, and enabled progress monitoring.
- Approval Workflow Configuration: Implemented exception-handling workflows to ensure the required approval was obtained before project creation.
- Zoho People Configuration: Set up employee roles, attendance policies, geo-restrictions, remote check-ins, leave management, onboarding, and employee document management.
- Zoho Recruit Setup: Configured job openings, candidate management, interview notifications, hiring manager permissions, and integration with Zoho People.
- Zoho Expense and Books Integration: Configured expense categories, approval processes, reimbursements, travel expenses, and finance integration.
- Communication Tools Setup: Configured Zoho Mail and domain settings, established Zoho Social approval workflows, and set up Zoho Campaigns for email marketing.
- Workflow and Notification Automation: Utilized Zoho Cliq and Zoho Flow to automate notifications, improve interdepartmental communication, and test integrations.
- Testing and Validation: Verified workflows, field mappings, permissions, notifications, and application integrations to ensure the configured processes aligned with business requirements.

7. Results and Business Impact

The implementation of Zoho One applications helped Climeto Sustainable Services Private Limited establish a more structured, connected, and automated business environment.

- Improved Sales Management: Better lead categorization, deal tracking, and sales pipeline visibility through customized Zoho CRM dashboards and reports.
- Automated Project Execution: Reduce manual intervention in project creation through CRM integration, conditional workflows, and predefined project templates.
- Efficient Approval Management: Improved handling of exception cases through structured approval workflows.
- Streamlined HR Operations: Better management of employee attendance, leave, onboarding, documents, and HR activities using Zoho People.
- Enhanced Recruitment: More organized candidate tracking, interview notifications, and hiring workflows through Zoho Recruit.
- Simplified Expense Management: Improved expense recording, approval, reimbursement, and financial coordination through Zoho Expense and Zoho Books integration.
- Better Team Collaboration: Enhanced communication and coordination across departments using integrated Zoho applications and automated notifications.
- Centralized Reporting: Improved visibility into business activities through customized dashboards, reports, and centralized data management.
- Increased Operational Efficiency: Reduced dependence on manual processes and established a scalable digital workflow to support future business growth.

8. Business Transformation

BEFORE IMPLEMENTATION	AFTER IMPLEMENTATION
Manual Lead Management	Centralized Lead Management in Zoho CRM
Improper Lead Categorization	Structured Sales and Purchase Categorization
Manual Data Entry and Tracking	Centralized Business Data
Manual Follow-ups	Automated Notifications and Reminders
Limited Sales Pipeline Visibility	Customized CRM Dashboards and Reports
Manual Team Handover	Organized Sales-to-Project Handover
Manual Project Creation	Automated Deal-Based Project Creation
Unstructured Exception Handling	Workflow-Based Approval Process
Separate HR Processes	Centralized HR Management in Zoho People
Manual Recruitment Activities	Automated Recruitment Workflows
Manual Expense Processing	Structured Expense Approval and Reimbursement
Limited Business Visibility	Integrated Reporting and Operational Monitoring

9. Conclusion

The implementation of Zoho One applications transformed Climeto Sustainable Services Private Limited's manual business processes into a centralized and automated digital ecosystem. Customized Zoho CRM workflows improved lead and deal management, while Zoho Projects enabled automated project creation and structured execution. Zoho People, Zoho Recruit, and Zoho Expense streamlined HR, recruitment, and financial operations. Integration with other Zoho applications enhanced communication, reporting, and collaboration across departments. Overall, the solution improved operational efficiency, reduced manual efforts, strengthened process management, and established a scalable foundation for future business growth.

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