

# CASE STUDY

## ZOHO FOR BUSINESS CONSULTING SERVICES INDUSTRY

One of the leading company which provides managed services in the field of Advisory, Transactions, Business Setup, Compliance, Accounting, and Taxation.

Simplifying Managed services for you to scale up and succeed.



Simplify, Scale Up and Succeed

### COMPANY LOCATION



Hyderabad, Telangana

### INDUSTRY



Business Consulting Services

### APPLICATION REPLACED



Microsoft Office, Excel

### ZOHO SERVICES



Zoho One

### OBJECTIVES:

The company aims to solve business challenges & and provide innovative solutions so that you can focus on your core business operations.

AGSuite Technologies implements such a solution using "ZOHO" that meets all requirements as per their business needs

**PROJECT NAME:** Zoho One Implementation

# CASE STUDY

## THE CHALLENGE:

The company was using multiple disparate tools and solutions that were not integrated to manage its daily operations and was finding it a challenge to accurately enter customer details in every app and keep them updated. They realized that they needed a solution that was naturally integrated and that would provide solutions to manage all business functions.

## THE SOLUTION:

The company reviewed numerous solutions and found that the Zoho One suite had a considerable advantage in terms of seamless integration between all the apps needed for their sales, finance, client support, and staff management processes.

To implement the Zoho One Solution they came across the Zoho partners for better support, customization, and implementation services and they chose AGSuite Technologies as their implementation partner.

The organization in association with AGSuite Technologies implements such a solution using "ZOHO" that meets all their requirements.

Implementation was straightforward and their employees adopted Zoho One eagerly as they could see that the solution made their work life easier. Every team member was given training from the IT department with the help of Zoho One training videos for each application.

When it came to transitioning to remote work, the team was already set up for success.

The sales team uses Zoho CRM to track and interact with customers through the lead generation cycle.

The finance team uses Zoho Books to manage their billing and expenditures and all

The development team uses Zoho Creator to develop the application seamlessly with minimum coding effort

The company also uses Zoho People, which plays an essential role in managing HR activities. Team member onboarding, leave requests, appraisals, timesheets, goal tracking, birthday announcements, loan requests, and attendance check-in and check-out are managed and tracked with Zoho People.

# CASE STUDY

The HR team also uses Zoho Recruit for the recruitment process. From generating questionnaires to conducting interviews and reviewing resumes, the entire recruitment process flows smoothly with Recruit.

Zoho Project to manage multiple projects for the organization. It helps to navigate different factors like time, money, documents, employees, resources, clients and stakeholders, invoices, reports, and more—all from a single platform.

To manage hassle-free interaction with social media customers we integrated Zoho Social. Zoho Social is a social media management tool that helps businesses and agencies expand and grow their social media presence. From a single interface, Social can help you post, schedule, monitor, and measure your social media content across multiple social media platforms.

## ZOHO ONE IMPLEMENTATION, CUSTOMIZATION AND SUPPORT

Application	Status
Zoho CRM	✓ Done
Zoho Books	✓ Done
Zoho Creator	✓ Done
Zoho People	✓ Done
Zoho Project	✓ Done
Zoho Social	✓ Done