

DRIVING OPERATIONAL EXCELLENCE THROUGH ZOHO

Unifying Sales, Marketing, Recruitment and Payroll Operations with a Connected Zoho Ecosystem

A STRONGER
TOMORROW
TOGETHER

IMPLEMENTED SOLUTION



Zoho People Plus

Payroll | Recruit



Zoho One

CRM | Marketing Automation



STREAMLINED
HR OPERATIONS



IMPROVED
SALES PRODUCTIVITY



POWERED
MARKETING CAMPAIGNS



AUTOMATED
PROCESSES



GREATER
BUSINESS VISIBILITY

PEOPLE.
PROCESSES.
PROGRESS.
TOGETHER.



Greater
People
Brighter
Businesses

Invensoft

Together we can achieve more with Zoho.



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Partner



GrowBeyond Tech
Building Solutions For Growth

CASE STUDY

1. Invensoft Technologies Pvt. Ltd. case study

Unifying Sales, Marketing, Recruitment and Payroll Operations with Zoho

Zoho People Plus (Payroll & Recruit) | Zoho One (CRM & Marketing Automation)

2. Overview

Invensoft Technologies engaged GrowBeyond Tech to implement a connected Zoho environment across sales, marketing, recruitment and payroll. The engagement focused on:

- Configuring Zoho CRM for structured lead and sales management.
- Designing journeys and templates in Zoho Marketing Automation.
- Implementing Zoho People Plus and complete Zoho Payroll.
- Initial Support in setting up the Zoho Recruit.

3. Executive Summary

Invensoft needed one operating environment for sales, marketing, recruitment and payroll, together with a controlled transition of recruitment data from Freshworks. Disconnected processes increased manual coordination and limited visibility.

GrowBeyond Tech implemented Zoho One CRM and Marketing Automation, configured Zoho People Plus and Zoho Payroll, and given initial support to setting up Zoho Recruit. The engagement covered configuration, automation, migration validation, payroll testing, training and handover.

4. Problem Statement and Key Challenges

1. **Disconnected operations:** Sales, marketing, recruitment and payroll required a unified platform and clearer visibility.
2. **Sales-process visibility:** Lead sources, prospect stages and follow-up required a structured Zoho CRM workflow.
3. **Campaign execution:** Marketing required automated journeys, reusable templates and repeatable follow-up.
4. **Payroll implementation:** Employee data, salary structures, components, revisions, arrears and validation required complete setup.
5. **Recruitment data migration:** Freshworks recruitment records needs to be mapped and migrated in Zoho Recruit.

5. Evaluation of the Problem

GrowBeyond Tech reviewed the As-Is sales, marketing, people and payroll.





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The design used Zoho-native capabilities for CRM automation, marketing journeys, People Plus, Payroll and Recruit, supported by controlled data mapping, validation and user enablement.

6. Proposed Solution(s)

1. Zoho One CRM sales and workflow automation

- Configured leads, accounts, contacts and opportunities for consistent sales tracking.
- Defined sales stages, source tracking and customer segmentation.
- Automated follow-ups and management visibility through workflows and dashboards.

2. Zoho Marketing Automation journey and campaign management

- Designed customer journeys aligned with lead and engagement stages.
- Created reusable campaign templates for consistent communication.
- Aligned CRM data with targeted campaign execution and follow-up.

3. Zoho People Plus and complete Payroll implementation

- Configured employee data, salary structures, payroll components and statutory settings.
- Supported salary revisions, arrears, payroll preparation and validation.
- Trained the team on payroll processing, testing and issue handling.

7. Implementation

The solution was implemented through six focused phases:

- Phase 1: Requirements gathering and As-Is process documentation.
- Phase 2: Zoho One CRM configuration, sales stages and workflows.
- Phase 3: Marketing journeys, campaign structure and templates.
- Phase 4: Zoho People Plus and complete Payroll configuration and testing.
- Phase 5: Initial Support for data setup from freshworks to Zoho Recruit.
- Phase 6: UAT, training, stabilization and production handover

8. Result

1. **Connected operating environment:** Sales, marketing, recruitment and payroll are supported within the Zoho ecosystem.
2. **Structured sales management:** CRM stages, workflows and source tracking improve follow-up visibility.
3. **Repeatable marketing execution:** Automated journeys and templates support consistent campaigns.
4. **Complete payroll enablement:** People Plus and Payroll provide configured salary and processing controls.
5. **Improved operational control:** Connected processes and user guidance reduce manual coordination.





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Implementation Highlight

GrowBeyond Tech implemented a connected Zoho environment spanning CRM, Marketing Automation, People Plus, Payroll and Zoho Recruit.

Connected across four business workstreams

Client Testimonial

"GrowBeyond Tech helped us connect sales, marketing, recruitment and payroll through the Zoho ecosystem. Their support with complete payroll implementation and the Zoho Recruit improved visibility, consistency and operational control."

—CEO, Invensoft Technologies Pvt. Ltd.

Operational outcome tracking

The implementation established a clear before-and-after operating model for the following activities:

Outcome measure	Before implementation	After implementation
Sales and marketing operations	Lead follow-up and campaign activities required manual coordination across separate operating processes.	Zoho CRM and Marketing Automation provide structured pipelines, workflows, journeys and reusable campaign templates.
Payroll and people operations	Employee and payroll activities required detailed setup, manual preparation and repeated validation.	Zoho People Plus and Zoho Payroll provide configured employee, salary and payroll processes with guided validation.

Invensoft Technologies now has a connected Zoho foundation across sales, marketing, recruitment and payroll, with structured workflows, provided initial support for migrating recruitment data, configured payroll processes and improved operational control.

