

CASE STUDY

Building a Unified Zoho Ecosystem Across Two Continents

How Nexivo Consulting helped Vorizo Info Tech Pvt Ltd bring Sales, Recruitment, HR, Payroll, Finance and Workplace collaboration onto one connected Zoho platform — for teams operating across India and the US.

Client **Vorizo Info Tech Pvt Ltd** | IT Services



9 Zoho applications, one connected platform

About the Engagement

Nexivo partnered with Vorizo Info Tech to design and deploy an integrated Zoho ecosystem tailored to the needs of a growing IT services business operating across India and the US. The brief called for tools that were scalable, secure and reliable across every function — and solutions that would bridge the gap between technology and day-to-day business operations.

Drawing on our team's experience across CRM, HR, payroll, finance and cloud collaboration, Nexivo delivered a phased, agile implementation designed to produce measurable, lasting outcomes for Vorizo — and a foundation the business can continue to build on.

Key Challenges

- 1 Fragmented CRM & regional visibility** — India and US customer operations run separately, with no unified way to track Accounts, Contacts, Deals and regional sales performance.
- 2 Manual HR & recruitment** — job requisitions, candidate tracking, interview scheduling and onboarding all handled manually, slowing the employee lifecycle.
- 3 Disconnected attendance & payroll** — attendance, leave, ESS access, payroll and document management spread across unconnected systems.
- 4 Mailbox migration & contract visibility** — migrating mailboxes, contacts and calendars off Microsoft O365 while keeping contracts manually tracked outside the CRM.
- 5 Legacy finance & limited automation** — dependency on legacy accounting tools, no centralized live chat, and limited reporting standardization across HR, Sales, Finance and Support.

Let's Build Your Zoho Ecosystem

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ACTION

Our Approach

- Kickoff sessions and requirement discovery workshops, with business process documentation prepared for every department.
- Zoho CRM configured with Accounts, Contacts, Deals, Activities, role-based access, validation rules and regional dashboards for India and US operations.
- Zoho Recruit deployed for job requisitions, candidate management, interview scheduling, offer management and job board integrations.
- Zoho People configured for onboarding, ESS, attendance policies, leave workflows, document management and exit workflows.
- Zoho Contracts linked to CRM accounts for centralized contract lifecycle visibility.
- Zoho Books set up with organization structure, taxation, chart of accounts and user roles for India operations.
- Zoho SalesIQ live chat connected to CRM for lead creation and customer engagement.
- Zoho Payroll configured with salary structures and statutory compliance for FY 2025–26.
- Functional testing, UAT, user training and post-implementation support delivered via a phased agile methodology with weekly status tracking.

RESULT

Results Achieved

- Customer, recruitment, HR, finance, payroll and communication management centralized into one Zoho ecosystem.
- Operational visibility improved across India and US teams through role-based access and consolidated dashboards.
- Manual effort reduced in recruitment, onboarding, payroll, attendance and contract management through automation.
- Candidate and employee lifecycle streamlined with structured approvals and ESS functionality.
- Finance process efficiency improved through accounting automation and standardized taxation.



9 Zoho Apps

CRM, Recruit, People, Workplace, Contracts, Books, SalesIQ, Payroll & Campaigns — unified on one platform.



2 Regions

India and US operations unified under centralized, role-based visibility.



Full Lifecycle

Recruitment through exit — and payroll through statutory compliance — fully automated end to end.

Looking Ahead

- ✓ **Scalable foundation**
A structured, secure Zoho ecosystem built to support Vorizo's continued growth.
- ✓ **Better employee & customer experience**
Streamlined workflows across HR, sales and support functions.
- ✓ **Standardized decision-making**
Centralized dashboards and reporting supporting faster, better-informed decisions.
- ✓ **Cross-functional coordination**
Improved transparency and adoption through structured training and support.

ABOUT NEXIVO

Nexivo is a Zoho-only company that has spent the last six years helping customers automate critical business functions on the Zoho platform. Ranked the No. 1 Zoho Premium Partner in 2023, our team of Certified Zoho Experts follows process-driven implementation methodologies with live project collaboration and dedicated post-execution support for every customer. We call ourselves the “Scientists of Zoho” — and we’d be glad to be your Business Growth Acceleration Partner.