

CASE STUDY

Turning Excel-Based Project Tracking Into a Standardized Project Engine with Zoho Projects

How Nexivo helped Laxai replace Excel-based tracking with one centralized Zoho Projects platform for planning, tasks, budgets, and collaboration.



Laxai
Pharmaceutical research



One platform. Every project, task, and budget in one place.

About the Client

Laxai is a pharmaceutical research organization managing multiple research and operational projects simultaneously. As the number of projects increased, the organization required a centralized project management solution to streamline project planning, task management, budget tracking, and team collaboration.

To improve project execution and eliminate manual processes, Laxai partnered with Nexivo to implement Zoho Projects, creating a standardized project management framework with automation, budget tracking, and task monitoring.

Key Challenges

- 1 Manual project management:** projects were run on Excel sheets.
- 2 No standard process:** no standardized way to create new projects.
- 3 No due-date notifications:** no automated email notifications based on task due dates.
- 4 Delayed tasks:** difficulty tracking delayed tasks.
- 5 No budget visibility:** no view of PO Budget, Planned Budget, Actual Budget, and budget utilization percentages.
- 6 Manual budget calculations:** budget figures were maintained by hand.
- 7 Limited task notifications:** no option to email notifications for specific project tasks.
- 8 Unassigned tasks:** tasks were not assigned to individual users.
- 9 No personal task view:** users could not see all tasks assigned to them.

Let's Build Your Zoho Ecosystem

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ACTION

Our Solution

- **Centralized platform:** Zoho Projects for planning, tasks, budgets, and collaboration in one place.
- **Project templates:** standardized templates with predefined milestones, task lists, and tasks; new projects created from them.
- **Task dependencies:** configured within templates to improve scheduling.
- **Workflow & alerts:** workflow rules and email alerts for task due dates and task-based notifications.
- **Budget fields:** custom fields for PO Budget, Planned Budget, and Actual Budget.
- **Custom functions:** automatically calculate and update budget values and percentages.
- **Task assignment:** user-wise assignment, with every user able to monitor all assigned tasks.
- **Progress monitoring:** project managers track delayed tasks and overall project progress.
- **Discovery to handover:** requirement sessions, process analysis, UAT, user training, and project handover.

RESULT

Results Achieved

- Excel-based project management replaced with Zoho Projects.
- Standardized, reusable templates for project creation, reducing creation time.
- Improved project scheduling using task dependencies.
- Automated email notifications for task due dates.
- Improved visibility into delayed tasks.
- Automated PO, Planned, and Actual Budget and percentage calculations, reducing manual effort.
- Improved task ownership through user-wise task assignment.
- Users can easily monitor all tasks assigned to them.

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Centralized Platform

Zoho Projects replaces Excel-based tracking.

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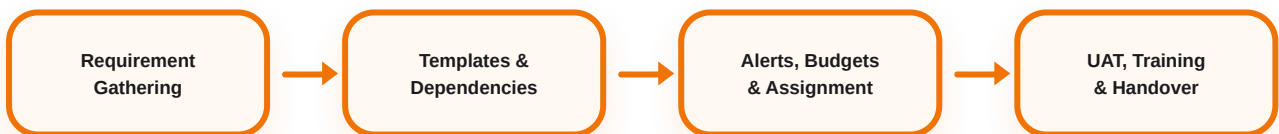
Budget Values Automated

PO Budget, Planned Budget, and Actual Budget.

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Implementation Steps

From requirement gathering to project handover.



How it rolled out: discovery to handover, one phase at a time.

CONCLUSION

The Laxai implementation successfully established a centralized project management system using Zoho Projects. By replacing Excel-based project tracking with standardized templates, automated workflows, and task dependencies, the organization improved project execution and monitoring.

The implementation automated task notifications, simplified budget tracking through custom fields and functions, and improved accountability by assigning tasks to individual users.

With a structured project management framework now in place, Laxai is better equipped to manage multiple projects efficiently, monitor budgets accurately, and improve collaboration across teams.

"We appreciate the support and collaboration provided by the Nexivo team throughout the project.

We had a good experience working with Nexivo on our project. The team was professional, responsive, and supportive throughout the engagement. Their commitment to timelines and proactive communication contributed significantly to the smooth execution of the project. We appreciate their efforts and look forward to future collaborations.

Wishing the Nexivo team continued success."

LAXAI | Client Testimonial

NEXIVO AT A GLANCE

Nexivo is a Zoho-only company and an award-winning Zoho Partner, helping businesses simplify and automate critical business functions since becoming a Zoho Partner in 2019. Our people-centric approach starts with understanding how your business works, the challenges you face, and what you want to achieve. We then recommend and implement the right Zoho solutions, tailored to your processes, to solve real business challenges and create lasting value. With hands-on Zoho expertise and dedicated support, we work alongside our customers from problem identification to implementation and beyond. We Make Zoho Work for You.