Lirik

Client Name : Gaurav Agarwal

Country : India

Users : 707

Subscription : Zoho One

ABOUT

Lirik is a global business transformation leader, specializing in Salesforce, NetSuite, and data-driven solutions. With over 250 Salesforce experts, 50 data scientists, and proven expertise in AI and ML, Lirik has earned a Five-Star AppExchange rating and completed 1,000+ Salesforce and 200+ NetSuite implementations. Their innovative data solutions enable smarter decisions, operational efficiency, and personalized customer experiences, empowering businesses to achieve their goals.

PROJECT OVERVIEW:

Unicloud IT Services collaborated with Lirik to transform their operational processes by implementing and customizing the Zoho One suite. The project involved configuring Zoho Projects, Zoho People, and Zoho Sign to address Lirik's specific business challenges. Unicloud's goal was to create an integrated system that streamlined project management, simplified employee record handling, and automated e-signature workflows, ultimately reducing manual effort, enhancing collaboration, and ensuring compliance with industry standards.

PROJECT OBJECTIVE:

The primary objective of this project was to deliver a tailored solution using Zoho One applications to address Lirik's operational needs. The focus was on improving project management workflows through Zoho Projects, simplifying employee management processes with Zoho People, and automating document signing and approval workflows using Zoho Sign. This comprehensive approach aimed to help Lirik save time, boost productivity, and establish a centralized system to enhance collaboration and streamline their overall operations.

CHALLENGES:

Lirik encountered several operational challenges that impeded their efficiency and growth. Managing project workflows was disorganized, with scattered processes making it difficult to track tasks, milestones, and ensure timely delivery. Human resource processes, including employee data management, attendance tracking, and leave approvals, were handled manually, leading to errors and inefficiencies. Document management was another bottleneck, as the absence of an automated solution for signing and approving contracts, HR agreements, and other critical documents consumed valuable time. Additionally, the use of fragmented systems for different functions resulted in disconnected workflows, making it difficult to manage operations cohesively.

SOLUTION:

Unicloud IT Services implemented a tailored Zoho One solution to address Lirik's operational challenges. Zoho Projects was configured to improve task management, with features for milestone tracking, time tracking, and task dependencies. Collaboration tools like feeds, comments, and document sharing were set up for better team communication. Zoho People centralized employee data, defined roles, and automated attendance and leave management, reducing manual efforts. Timesheet logging helped track project work and evaluate performance. Custom workflows were created for onboarding and offboarding processes. Zoho Sign was integrated to handle document approval workflows, with templates for contracts and HR agreements, and security measures like multi-factor authentication ensured compliance with e-signature regulations.

FEATURES AND FUNCTIONALITIES

Zoho Projects:

1. Organization Setup
- The company profile was created, including details such as company name, time zone, and currency.
- Users were invited and assigned roles (Admin, Manager, Employee, etc.).
- Teams were defined to group users for better collaboration.

2. Project Creation
- Projects were created based on business requirements.
- Milestones were set within each project to track progress effectively.
- Task lists were created under milestones, tasks were assigned to team members, and due dates were set.
- Dependencies were linked between tasks to manage relationships (e.g., Finish-to-Start, Start-to-Start).

3. Workflow and Automation
- Custom workflows were designed to manage task statuses (To Do → In Progress → Done).
- Automation rules were set up to trigger task updates, reminders, and notifications.
- Custom fields were added to tasks and projects to capture additional information.

4. Time Management
- Timesheet functionality was enabled to log hours for tasks.
- Billable and non-billable hours were classified for invoicing purposes.
- Task reminders were set to ensure on-time completion.

5. Collaboration Tools
- Feeds and comments were utilized for project updates and task-related discussions.
- Project documents were uploaded and managed within Zoho Projects.
- Real-time chat was enabled for quick communication between team members.

6. Reporting and Analytics
- Dashboards were customized to monitor KPIs, workloads, and project progress.
- Gantt charts were used to visualize project timelines and task dependencies.
- Reports were generated for task progress, user performance, time logs, and issue tracking.

7. Integrations
- Zoho Projects was integrated with other Zoho applications such as Zoho CRM, Zoho Books, and Zoho Analytics.
- Third-party tools like Slack and Microsoft Teams were also integrated.
- APIs were utilized for custom integrations.

8. Mobile Accessibility
- The Zoho Projects mobile app was installed, enabling project management on the go.
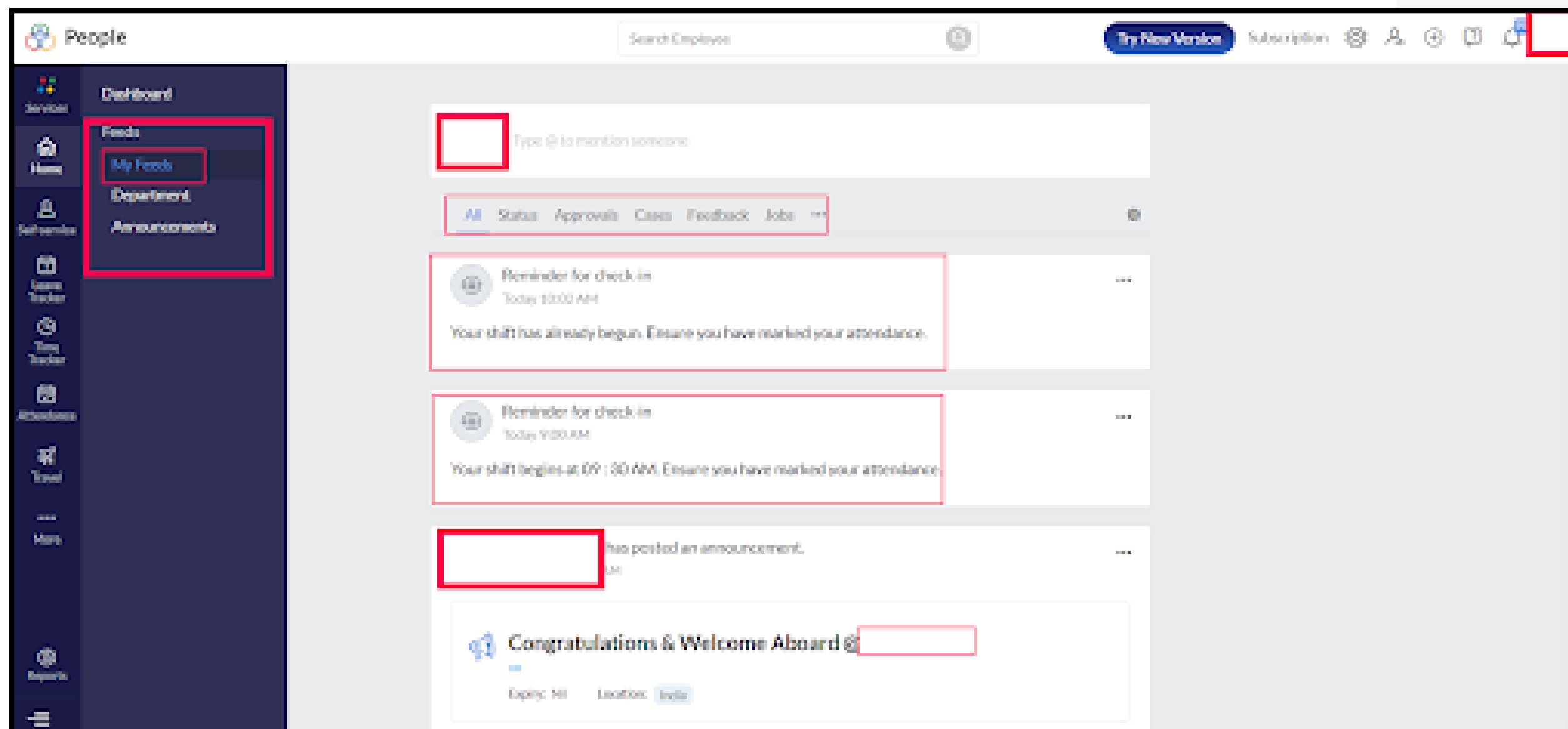
8. Project Templates

- Reusable templates were created for similar projects to save time and improve efficiency.

9. Client Collaboration

- A client portal was set up to allow clients to view project progress.
- Permissions were configured to control what clients could access regarding tasks and updates.

Zoho People

1. Company Configuration
- Company details such as name, address, and time zone were configured.
- Working hours, holidays, and shifts were set up according to business requirements.

2. Employee Management
- Employee details were added either manually or through CSV import.
- Roles, departments, and locations were defined for all employees.
- Permissions and approval workflows were configured based on employee roles.
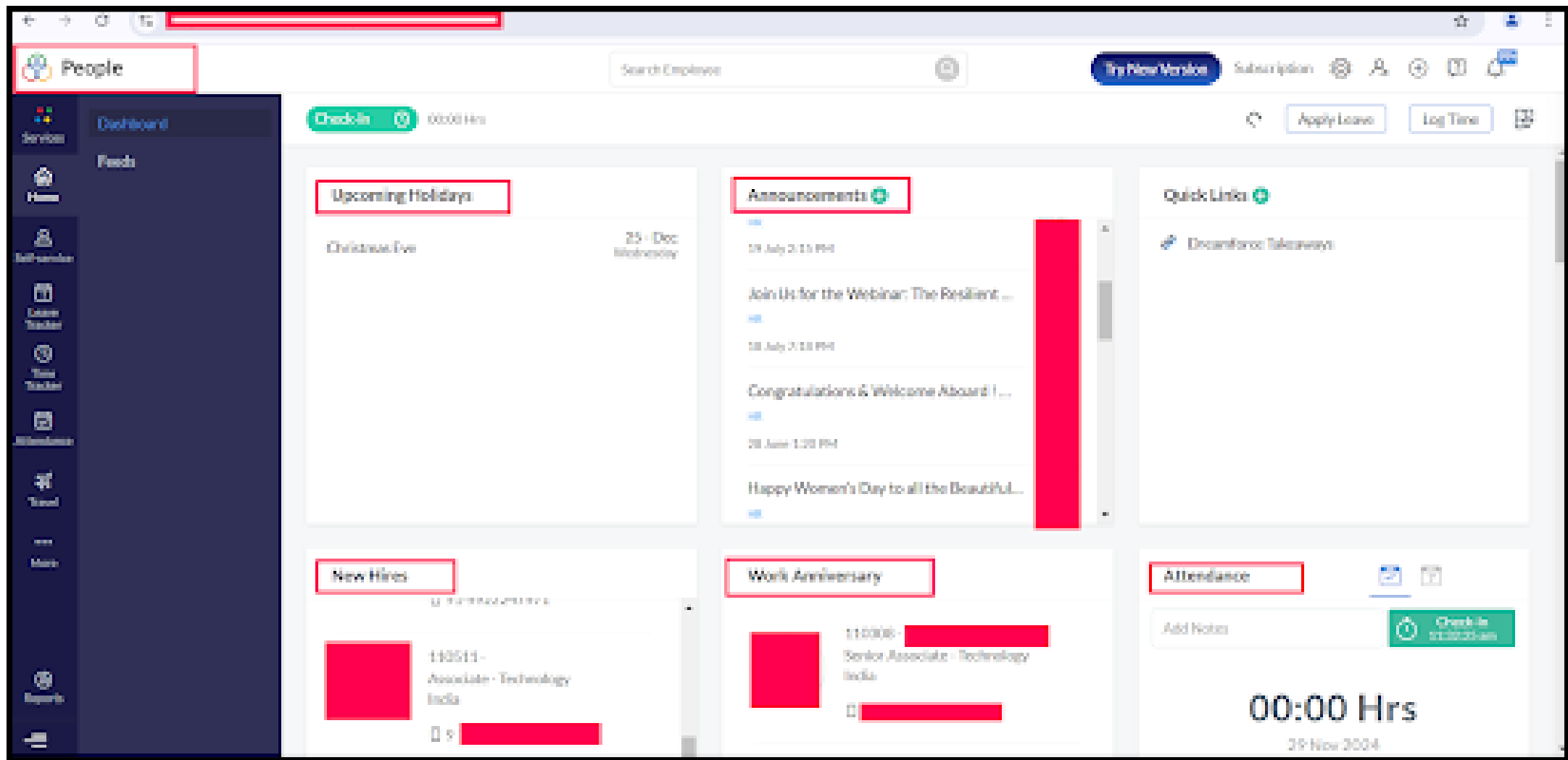
3. Attendance & Leave Management
- Attendance policies were set up, including biometric integrations, IP-based logins, or Zoho People Kiosk
- Leave types, leave balances, and approval workflows were configured.
- Shift management and overtime calculations were set up to manage work schedules.

4. Timesheet and Project Tracking
- The timesheet module was enabled to track hours worked on specific projects.
- Tasks were created for employees to log their time and track project work.

5. Performance Management
- Goals and KRAs (Key Result Areas) were set up for employee performance tracking.
- Performance appraisal cycles were configured, including 360-degree feedback and self-assessment forms.
- A rewards and recognition system was implemented to acknowledge top performers.
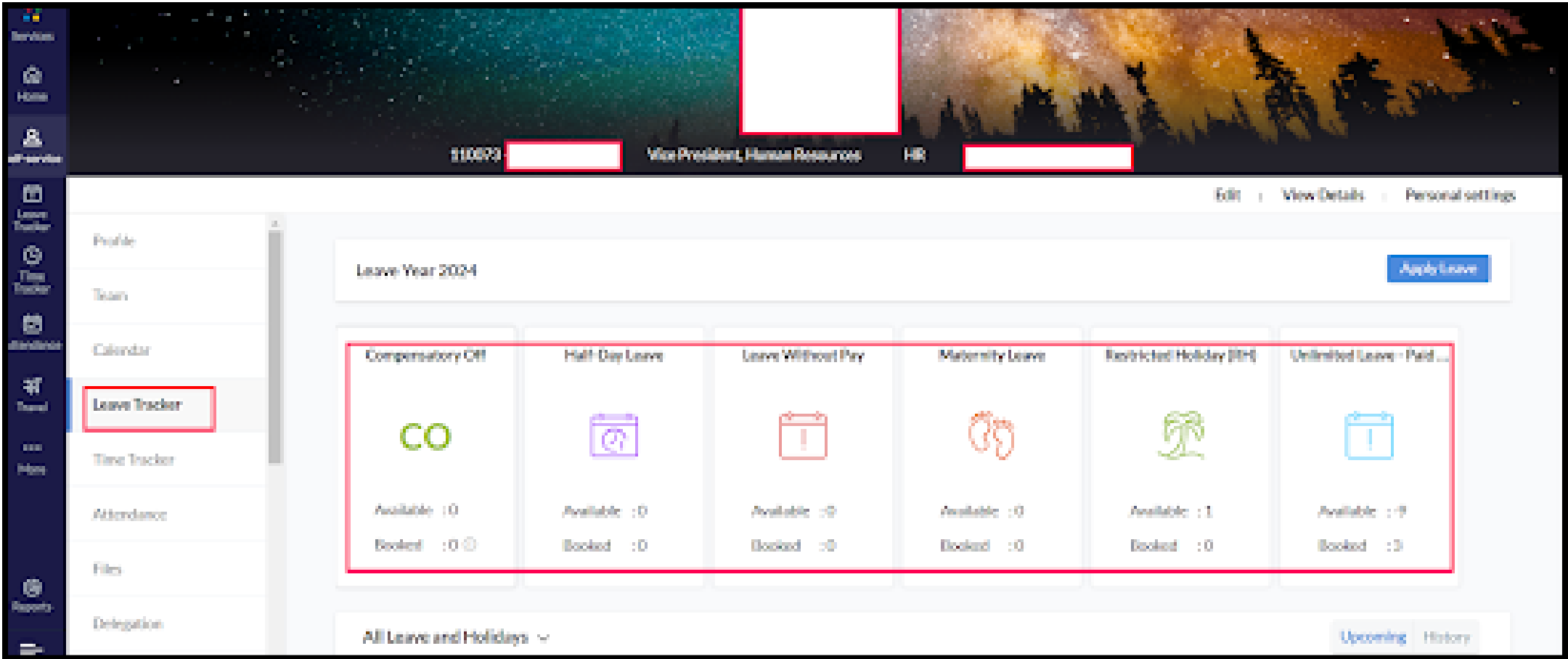
ZOHO SIGN

1. Organization Setup
- Company branding, including logo, name, and address, was added to Zoho Sign.
- User roles (admin, sender, signer) were defined for different responsibilities.

2. **Document Templates**
- Document templates for contracts, HR agreements, NDAs, and other legal documents were created.
- Signature fields, date fields, and custom text boxes were included in templates to capture required information.

3. Workflow Automation
- Document sending and approval workflows were automated to reduce manual intervention.
- Expiry dates and reminders were configured for each document.

4. Integrations
- Zoho Sign was integrated with Zoho People to handle HR document signing efficiently.
- Zoho CRM, Zoho Books, and third-party tools were connected for enhanced functionality.

5. Security and Compliance
- Multi-factor authentication was enabled to increase security.
- The system was configured to comply with e-signature laws, such as the ESIGN Act and eIDAS regulations.

6. User Training
- Employees were trained on how to send, receive, and sign documents using Zoho Sign.
- Guidance on using the Zoho Sign mobile app was also provided to ensure accessibility.
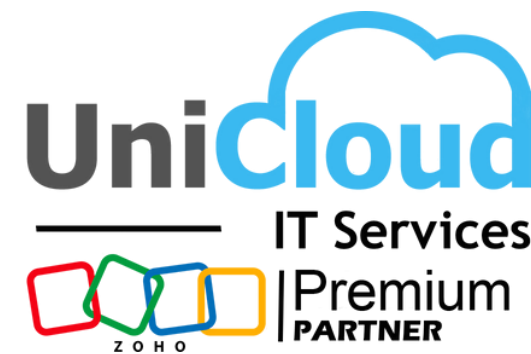
CONCLUSION:

The implementation of Zoho One applications allowed Lirik to address their operational challenges effectively. By setting up Zoho Projects, the company gained better control over project timelines, task dependencies, and team collaboration. Zoho People streamlined HR processes, reducing manual intervention and enhancing employee management. Zoho Sign ensured faster and more secure document approvals, saving time and improving compliance.

With these changes, Lirik now operates with improved efficiency and a more cohesive workflow, empowering them to focus on growth and strategic initiatives.

ABOUT US:

Unicloud IT Services was officially launched in the year 2018 on the 12th of September. Unicloud IT Services is a cloud service provider company. With over total experience of more than 7 years, Unicloud's developers are committed to providing dedicated services for ZOHO products to its clients. Unicloud has a high rate of client retention and successful deliveries. We have more than 4000+ customers to whom we have provided the services and been providing support. Unicloud has completed 897+ Projects along with more than 4000+ satisfied customers and with a project succession rate of 95% to date and continuously working on more projects from different industries.

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