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1. Title Card

Project Title:

End-to-End Zoho One Transformation: From Demand Generation to Employee Accountability

Customer Name: Keshav Metals Pvt. Ltd., Aurangabad

Director: Mr. Raman Ajgaonkar



Partner Name: VIJAY COPOLYMERS (CoachTech Strategies)

Director : Harshavardhan Chhallani



2. Introduction

Partner Overview:

VIJAY COPOLYMERS is a Zoho Authorized Partner with over 35+ years of combined expertise across the manufacturing and IT sectors. Under its strategic coaching brand CoachTech, the partner delivers Strategy Coaching and Strategy Advisory integrated with Zoho technology implementations. The engagement model combines business strategy clarity, technology execution, structured training, and change management, supported by an in-house team of trainers and implementation specialists to ensure sustainable adoption and scalability.

Customer Overview:

Keshav Metals Pvt. Ltd. is a 20+ year-old manufacturing organization specializing in customized and specialized steel solutions catering to the automotive, white goods, and industrial sectors across India. The organization employs approximately 35+ white- and blue-collar employees, with an annual revenue range of INR 10–50 Crores.

3. Customer Background

Keshav Metals Pvt. Ltd. manufactures specialized and customized steel solutions with operations spanning the following departments:

- Marketing
- Sales
- Strategy
- Operations
- Finance
- Dispatch
- IT
- Customer Support

Prior to this project, the organization relied on Google Sheets, Tally, and manual systems, all functioning independently with no system integration, resulting in fragmented data and limited operational visibility.

4. Project Background

This engagement was an end-to-end Zoho One implementation covering:

- Strategic alignment and solution architecture
- Demand generation (marketing & sales enablement)
- Operations and process automation
- Employee accountability and performance tracking
- Training, culture building, and change management

Additional scope included:

- Website and landing page design
- Custom business solutions aligned with CoachTech strategic frameworks
- Data migration of 20,000+ SKUs
- Multiple third-party integrations

Over 20+ Zoho One applications were implemented as part of this transformation.

5. Duration of the Project

- Project Start Date: 22 March 2025
- Project End Date: December 2025

Next Phase (Planned):

- End-to-end finance implementation
 - E-commerce enablement
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6. Problem Statement

The customer faced several critical business challenges:

- Severe operational inefficiencies due to data silos across departments
 - Lack of real-time reporting and dashboards for management
 - Delayed decision-making caused by localized and manual data handling
 - Management presence required daily at the corporate office, averaging 7–8 hours per day
 - No defined roadmap for scalability or structured growth
 - Heavy dependency on manual processes, typical of traditional manufacturing setups
 - Despite strong product quality, market presence and customer segmentation were weak
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7. Statement of Work (SOW)

The agreed scope included:

- Reducing management dependency on physical office presence to one day per month
 - Designing real-time dashboards for key business processes
 - Implementing an employee accountability framework
 - Establishing a recruitment-to-retirement employee lifecycle system
 - End-to-end Zoho One configuration, adoption, and governance
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8. Deliverables

- Complete Zoho One implementation executed in phased milestones
 - Weekly strategic coaching sessions with leadership
 - Weekly technical training sessions for operational teams
 - A structured week-by-week implementation roadmap, from domain mapping to advanced reporting
 - Creation of a continuous learning ecosystem using Zoho Learn (HeroBook)
 - Strategic setup of a dedicated Training & Culture department under CoachTech guidance
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9. Solution Overview

A comprehensive solution architecture was designed across Zoho One, including but not limited to:

- Zoho CRM: Sales automation, pipeline management, quotations, dashboards
- Zoho Marketing Automation & Campaigns: Demand generation strategy and execution
- Zoho Desk: Customer support and ticketing
- Zoho Projects: Project and task governance
- Zoho Recruit: Hiring and onboarding workflows
- Zoho Creator: Custom applications aligned to business strategy
- Zoho Learn: Continuous learning and knowledge management
- Zoho Vault, Sign, OneAuth: Security, compliance, and access control
- Zoho Analytics: Role-based dashboards for employees, operations, leadership, and scaling

Detailed workflows, blueprints (with Poka-Yoke controls), and multi-level dashboards were implemented to ensure consistency, accountability, and scalability.

10. Third-Party Integrations

The project included integrations with:

- Microsoft 365 (Outlook, Calendar, Teams, Bookings, etc)
- Google Sheets
- Social media platforms
- Cloud storage solutions

These integrations enabled seamless data flow and collaboration across platforms.

11. Outcomes

- Management office visits reduced from daily to fortnightly, with a target of one day per month by March 2026
 - 100% onboarding of white-collar employees onto Zoho One
 - Real-time dashboards for daily operations, weekly reviews, and accountability tracking
 - Quotation turnaround time reduced from 2–2.5 days to under 15 minutes
 - ~80% digital adoption achieved across the organization
 - Blueprint-driven processes ensured continuity despite employee attrition
 - Sales operations fully transitioned to Zoho CRM
 - Marketing systems scheduled to go live within 15 days
 - Ticketing System running successfully in the organization
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12. Business Impact

- Significant reduction in manual effort and dependency on individuals
 - Faster decision-making through real-time visibility
 - Improved employee accountability and ownership
 - Enhanced scalability readiness through standardized processes
 - Leadership bandwidth freed for strategic growth instead of daily operations
 - Client now strategically focuses on high profit customers
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13. Zoho Team Involved

Minimal assistance was required from the Zoho Corporate team, as the project was largely executed independently by the partner.

14. Customer Statement

“Our Zoho One implementation with VIJAY COPOLYMERS (CoachTech Strategies) has been an excellent experience for Keshav Metals Pvt. Ltd. What stood out from the beginning was their focus on first clarifying why we wanted to implement Zoho and aligning it with our business objectives before moving to execution.

The entire journey—from onboarding to ongoing support and final handover—was smooth and well-structured. To date, we have raised 100+ support tickets across multiple Zoho applications, all of which were handled promptly and effectively.

Today, we have real-time visibility into our business, clear employee accountability, and defined process ownership across departments. We highly recommend MSMEs to implement Zoho One with the CoachTech team at VIJAY COPOLYMERS for a structured, scalable digital transformation.”

— Raman Ajgaonkar
Director, Keshav Metals Pvt. Ltd.

ADDITION 1: Expanded Partner Overview (CoachTech Emphasis)

Partner Overview (Enhanced):

VIJAY COPOLYMERS is a Zoho Authorized Partner with over **35+ years of combined experience** across the **manufacturing and IT domains**. Under its proprietary consulting framework **CoachTech Strategies**, the partner delivers **strategy-led digital transformation**, where **business clarity precedes technology execution**.

CoachTech Strategies integrates:

- **Strategic Coaching**
- **Business Process Architecture**
- **Technology Enablement using Zoho One**
- **Training, Culture & Accountability Systems**

Unlike conventional implementations, CoachTech follows a **“Why → What → How → Execute → Govern”** approach, ensuring that Zoho applications are not merely deployed, but **embedded into the organization’s operating rhythm**. This is executed through an in-house team of **strategy coaches, functional consultants, trainers, and support specialists**, enabling smooth adoption across leadership, white-collar, and blue-collar teams.

Manufacturing and IT being the core domains, VIJAY COPOLYMERS ensures **process clarity, forecasting visibility, and scalability readiness** through disciplined execution and governance.

ADDITION 2: CoachTech Strategic Framework

CoachTech Strategy Framework Applied

The project was executed using the **CoachTech 5-Layer Transformation Framework**:

1. **Strategic Clarity Layer**
 - Defined business vision, growth roadmap, and scalability intent
 - Identified leadership bottlenecks and decision dependencies
2. **Demand Generation Layer**
 - Market positioning analysis
 - Customer segmentation refinement
 - Sales funnel and demand tracking architecture
3. **Process & Accountability Layer**
 - Role-wise responsibility mapping
 - Process ownership definition
 - Poka-Yoke-based blueprinting to reduce dependency on individuals
4. **Technology Enablement Layer (Zoho One)**
 - Tool-to-process mapping (not tool-first implementation)

- Custom workflows, automation, dashboards, and controls
- 5. **Culture, Training & Governance Layer**
 - Continuous learning via Zoho Learn (HeroBook)
 - Weekly coaching cadence
 - KPI-driven accountability reviews

This framework ensured that Zoho One became a **business operating system**, not just a software suite.

ADDITION 3: Enhanced Project Background (CoachTech Angle)

Project Background (Enhanced):

This engagement was not a conventional software implementation. It was a **strategy-driven organizational transformation**, where Zoho One acted as the **execution backbone** of CoachTech Strategies.

The scope covered:

- Leadership coaching aligned to business outcomes
- Demand generation architecture (Marketing → Sales → Conversion)
- Operational governance and accountability systems
- Employee lifecycle management (Recruitment to Retirement)
- Culture building through structured training and knowledge systems

Custom CoachTech-designed solutions were implemented using **Zoho Creator and Analytics**, ensuring alignment between **strategic intent and daily execution**.

ADDITION 4: Statement of Work (CoachTech-Specific Expansion)

Statement of Work (Enhanced):

In addition to Zoho One implementation, the partner committed to:

- Reducing leadership operational dependency through **system-driven governance**
- Ensuring **management presence requirement reduced to one day per month**
- Designing **role-based dashboards** aligned with leadership, operations, and growth
- Establishing an **employee accountability and ownership framework**
- Creating a **Recruitment-to-Retirement lifecycle system**
- Embedding **weekly strategic coaching and execution reviews**
- Driving **culture change through training, not enforcement**

ADDITION 5: Deliverables – CoachTech Value Add

CoachTech-Specific Deliverables Included:

- Weekly **Leadership Coaching Sessions** (Strategy & Decision Enablement)
- Weekly **Functional & Technical Training Sessions**
- Role-wise **Accountability Dashboards**
- Process playbooks embedded in **Zoho Learn**
- Creation of a **dedicated Training & Culture Department**
- Internal champions trained for long-term governance
- Adoption metrics tracking and corrective interventions

ADDITION 6: Outcomes (CoachTech Impact Language)

Additional Outcomes Enabled by CoachTech Strategies:

- Leadership transitioned from **hands-on execution to strategic oversight**
- Decision-making shifted from **intuition-based to data-backed**
- Accountability moved from **verbal follow-ups to dashboard-driven ownership**
- Process continuity ensured despite employee attrition
- Cultural shift from “manual comfort” to “system discipline”

ADDITION 7: Business Impact (CoachTech Framing)

CoachTech-Led Business Impact:

- Organization now operates on a **system-driven cadence**
- Leadership time reclaimed for **growth and market expansion**
- Processes designed for **scalability beyond current revenue**
- Technology adoption sustained through **training and coaching**
- Zoho One positioned as a **long-term business platform**, not a one-time project