

ZOHO CRM & ZOHO PEOPLE IMPLEMENTATION FOR TOFA LIMITED

INTRODUCTION

Tofa Limited, a leading power solutions provider and electrical engineering firm, sought to enhance both its human resource and sales management processes. The company required a robust system to streamline HR functions and optimize lead management, sales tracking, and customer conversion

To achieve this, Tofa Limited implemented Zoho People to automate HR processes and Zoho CRM to structure its sales workflows. Our team facilitated the implementation, configuration, and training for both platforms, ensuring smooth adoption and operational efficiency.

BUSINESS NAME & PROFILE

- **COMPANY NAME** TOFA Limited
- **INDUSTRY:** Power Solutions & Electrical Engineering
- **TYPE** B2B
- **HQ:** Lagos, Nigeria
- **USERS:** 55

SELECTION CRITERIA

- Industry-Specific Solution
- Proper Partner Support
- Budget-Friendly
- Capability to Customize
- Fast Go-Live

CASE STUDY



PROBLEM STATEMENT

Tofa Limited faced challenges in both HR and sales processes due to manual operations and inefficient tracking mechanisms. The HR team struggled with leave and attendance management, while the sales team lacked structured workflows for lead tracking and customer conversion. These inefficiencies resulted in delays, errors, and a lack of real-time insights into workforce productivity and sales performance. To overcome these issues, the company required an integrated system to streamline HR processes and automate the sales pipeline.

PROJECT OBJECTIVES

1. Zoho People Implementation

The objective was to deploy key HR modules within Zoho People to enhance efficiency and reduce manual workload. The focus areas included:

- Employee Self-Service
- Leave Management
- Attendance Tracking
- Reports & Analytics
- Feeds & Announcements

2. Zoho CRM Implementation

The goal was to optimize the sales process through structured workflows, automation, and reporting. The key focus areas included:

- Lead Capture & Management
- Prospect & Deal Tracking
- Customer Identification & Classification
- Lead Qualification & Sales Process Optimization
- Deal Management & Workflow Automation
- Sales Performance Dashboards
- Custom Reporting for Revenue & Conversion Rates
- Reminders for Expiring Contracts

CASE STUDY



IMPLEMENTATION PROCESS

HR & Sales System Configuration

To streamline HR and sales operations, we implemented and customized Zoho People and Zoho CRM:

- **HR Modules:** Configured employee self-service, leave management, attendance tracking, organizational structure, reports, and announcements.
- **Sales Modules:** Set up lead management, deal tracking, customer segmentation, automated workflows, and sales performance dashboards.

CUSTOMIZATION & CHALLENGES

- **Zoho CRM:** Custom reporting and contract expiration reminders required extensive fine-tuning to meet business needs.



RISK MANAGEMENT

Key Risks & Mitigation Strategies:

- **Data Migration Risks:** Careful validation and verification of uploaded employee and sales data.
- **User Adoption:** Conducted hands-on training and provided detailed user guides.
- **Subscription Limitations:** Advised on potential upgrades for additional module access.

SELECTION CRITERIA

All identified risks were successfully managed, ensuring a smooth implementation.

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QUALITY ASSURANCE

To guarantee system efficiency, the following quality assurance measures were taken:

- **Configuration Testing:** Ensured proper system functionality
- **User Acceptance Testing (UAT):** Conducted with key stakeholders to refine configurations
- **Training Feedback:** Addressed user concerns to improve system understanding.

The project met all quality standards, and the client was satisfied with the implementation.



RESULTS & IMPACT

- **Increased HR Efficiency:** Automated HR tasks, reducing manual workload.
- **Improved Employee Experience:** Provided self-service features for easy access to HR services.
- **Enhanced Data Organization:** Centralized employee information in a structured system.



FUTURE PLANS

We are committed to further optimizing our HR and sales processes. As we continue to grow, we will explore additional Zoho features and consider upgrading our subscription for advanced functionalities. The implementation has been a game-changer, and we look forward to leveraging more capabilities.

— Mr. Abboud & Ms. Joy
Stakeholders, Tofa Limited

CLIENT TESTIMONIAL



Joy Negodu

HR Manager, Tofa Limited

Hello there. Reviewing the Zoho platform, we have found it to be highly beneficial, particularly in the area of attendance tracking. We are now able to monitor attendance effectively, which was one of our main objectives. The platform has been a great help so far.

Additionally, your customer service is exceptional. Your team is always available to assist whenever issues arise, and your prompt response in resolving concerns is truly commendable.

I sincerely appreciate your dedication and support.

My name is Joy Negodu, and I want to express my gratitude.
Keep up the great work!

CASE STUDY



CONCLUSION & ACKNOWLEDGMENTS

The Zoho People Implementation and Training project has been successfully completed, equipping Tofa Limited with an efficient and user-friendly HR management system. We extend our appreciation to the stakeholders and users for their collaboration and commitment throughout the project.

NEXT STEPS

- Monitor system usage and gather feedback for continuous improvement.
- Assist the client in upgrading the subscription if they wish to access additional features like the Performance module.
- Integrate additional HR documents such as company policies and welcome videos once provided

With Zoho People now in place, Tofa Limited is well-positioned for streamlined HR management and enhanced operational efficiency.

ABOUT VIRTUAL FLUX

Virtual Flux Integrated Services Limited is a leading IT solutions provider specializing in Zoho One implementation, workflow automation, and business process optimization. With a strong focus on customer success, Virtual Flux has helped businesses across Nigeria streamline operations, improve efficiency, and drive growth through technology.

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