

Pleco x Zoho

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What's in Store

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- The Approach
- The Breakdown
- Summaries
- Recommendations

The Problem Space

- Company operations require numerous apps and services to complete separate but related tasks.
 - **HR and project management tasks utilize most** of these services (Lattice, Harvest, JIRA, Trello, DocuSign, Breezy)

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How might we align HR and project tasks with project and employee goals to ensure better time, project, and HR management?

The Approach

- Research team is set to interview 6 separate leadership and HR individuals about:
 - HR tasks and management
 - Time management
 - Employee life cycle
 - Internal team operations
 - Project management across teams
 - Communication styles across teams
- Research team is also set to conduct competitive analysis and audit
- Meet with Zoho Sales and Development team weekly to discuss Zoho operations and capabilities

The Breakdown

- Team conducted competitive analysis and audit of the Zoho One platform in comparison to current Pleco operations and interview feedback
- Analysis and audit were completed based on:
 - Interview feedback
 - Current company operations
 - Aligning Zoho app or service to its designated Pleco-specific department or task

Analysis & Audit Summaries

Human Resources

App	Functions	Recommendation	Reasoning
Recruit	<ul style="list-style-type: none"> Recruitment Hiring 	Yes	<ul style="list-style-type: none"> Can replace BreezyHR. Can replace DocuSign with any esign integration (replace with Zoho Sign or connect to DocuSign).
People	<ul style="list-style-type: none"> Onboarding Timesheets with optional integrations with Projects and Sprints Employee growth PTO requests and approvals 	Yes	<ul style="list-style-type: none"> Everything is in one place. Timesheet integration can simplify the time logging, approving, and assigning processes. Growth tracking and goals can be brought in through Performance or created as a new service on People. Can replace Lattice, Harvest, and PTO requests through Teams.
Learn	<ul style="list-style-type: none"> Onboarding Training Professional Development 	Yes	<ul style="list-style-type: none"> Easy to use and set up. Can replace Confluence and Trainual.
Sign	<ul style="list-style-type: none"> E-signing forms and contracts 	Yes	<ul style="list-style-type: none"> Can replace DocuSign. Integrates with Forms, Contracts, CRM, People, Recruit, and Microsoft Office, Outlook, and Teams. Can be used for HR and business. Can be shared internally and externally - people signing do not need to have a Zoho account.

Business and Sales

App	Functions	Recommendation	Reasoning
CRM	<ul style="list-style-type: none">• Billing, Invoices, Quotes• Reports and Insights• Client management and information• Connects to Projects• Can be personalized - Keri adjusted features to make more like Bigin	Yes	<ul style="list-style-type: none">• Everything is in one place.• Client and lead information is accessible and organized.• Connects to Projects.
Bigin	<ul style="list-style-type: none">• Similar to CRM but more limited in what you can do with it.	No	<ul style="list-style-type: none">• Easy to use, but ultimately not connected to anything else.• Too small and limited for what we need.• Alternative: CRM

Project Management

App	Functions	Recommendation	Reasoning
Projects	<ul style="list-style-type: none">• Timesheet integration with People – manual or automatic sync (every 3 hours)• Task tracking and management• Task assignments	Yes	<ul style="list-style-type: none">• Can replace JIRA, Trello, and Harvest.
Sprints	<ul style="list-style-type: none">• Timesheet integration with People• Task tracking and management• Task assignments	Yes	<ul style="list-style-type: none">• Can replace JIRA, Trello, and Harvest.• Hesitation: Timesheet creations and submissions are not as intuitive or efficient as Projects.

Marketing

App	Functions	Recommendation	Reasoning
Campaigns	<ul style="list-style-type: none">• Custom design email campaigns and email designs.	Yes	<ul style="list-style-type: none">• Syncs to company email.• Can share both internally and externally, with as little or as many points of contact as you wish.• Simple templates.• Minor bugs interfere with how recipients are addressed in email.
Forms	<ul style="list-style-type: none">• Create and share forms for HR, research, applications, and more.• Integrates with Zoho and non-Zoho apps.	Yes	<ul style="list-style-type: none">• Integrates with other apps including People, CRM, Projects, Recruit, Campaigns, and Microsoft Teams.• Can share both internally and externally.• Can also be used for surveys for user research.• Can embed into website.• Simple templates.
Survey	<ul style="list-style-type: none">• Create and share surveys• Access forms	Yes	<ul style="list-style-type: none">• Is integrated into other apps – but just Forms, CRM, Sheet, Sales IQ, and Google Sheets.• Can share both internally and externally.• Can also be used for surveys for user research.• Simple templates.

Productivity

App	Functions	Recommendation	Reasoning
Cliq	<ul style="list-style-type: none"> Instant messaging Team messaging 	No	<ul style="list-style-type: none"> Text editing is not intuitive - it is very limited. Teams accomplishes what we need for messaging, announcements, team communications, meetings, and calendar.
Meeting	<ul style="list-style-type: none"> Virtual meetings 	No	
Calendar	<ul style="list-style-type: none"> Calendar 	No	<ul style="list-style-type: none"> Teams and Outlook accomplish what we need for scheduling, reminders, and other calendar-related tasks and features. Invites to some emails are immediately sent to Spam/Junk.
Mail	<ul style="list-style-type: none"> Email 	No	<ul style="list-style-type: none"> Outlook accomplishes our email needs. Mail already syncs with Outlook, so all emails sent through Zoho are linked to both Outlook and the app that sent the action via email.
Connect	<ul style="list-style-type: none"> “Social Media” for internal team members <ul style="list-style-type: none"> Similar to Company, Team, and Social channels in Slack. Company announcements Project Management 	No	<ul style="list-style-type: none"> Changing current interactions within Teams could achieve similar goals. Example changes: <ul style="list-style-type: none"> Increase employee x company engagement <ul style="list-style-type: none"> More announcements/posts in General Create non-work-related channels (pets, articles, etc.) Create channels for project teams <ul style="list-style-type: none"> “Start conversation” in team Channels when messaging teams instead of group chats SharePoint for these teams would be created automatically
WorkDrive	<ul style="list-style-type: none"> Cloud file storage and access Built-in document editors: <ul style="list-style-type: none"> Writer – Word processing Sheet – Spreadsheets Show – Presentations Notebook – Note-taking 	No	<ul style="list-style-type: none"> Microsoft Office, OneDrive, and SharePoint accomplish these tasks and processes – and with more features, functions, and capabilities. Changing how we use SharePoint could improve cloud and company-wide access to project files. Examples changes: <ul style="list-style-type: none"> Creating Teams/Channels for new and existing projects to set precedent for and practice new process flow to keep files and communications together

Other

App	Functions	Recommendation	Reasoning
Analytics (Business Process)	<ul style="list-style-type: none">• Inputting and accessing data reports and summaries of various available or imported data.• Applicable to client leads, sales performances, revenue, plus anything else you want to import or review data for.	Yes	<ul style="list-style-type: none">• Okay for basic analytics, but it does not have the organization capacity or setup for large sets of data.• Good for Pleco data; would not use for client data.• Convenient for looking at data already in Zoho.• Not a need. CRM shows data, summaries, and reports that are of main interest in Analytics.
Contracts (Legal)	<ul style="list-style-type: none">• Create and store contracts to be shared with clients, employees, new hires, etc.	Yes	<ul style="list-style-type: none">• Many templates available. Can create custom templates• When integrated with Sign, this can replace DocuSign.• Easy to collaborate/negotiate on contracts• Contracts sent to other parties can be downloaded into a PDF or Word Doc by other party
Expense (Finance)	<ul style="list-style-type: none">• Receipts• Expense tracking	Yes	<ul style="list-style-type: none">• Easy to upload receipts – whether from email or directly into Expense• Can use Zoho Analytics on Expense

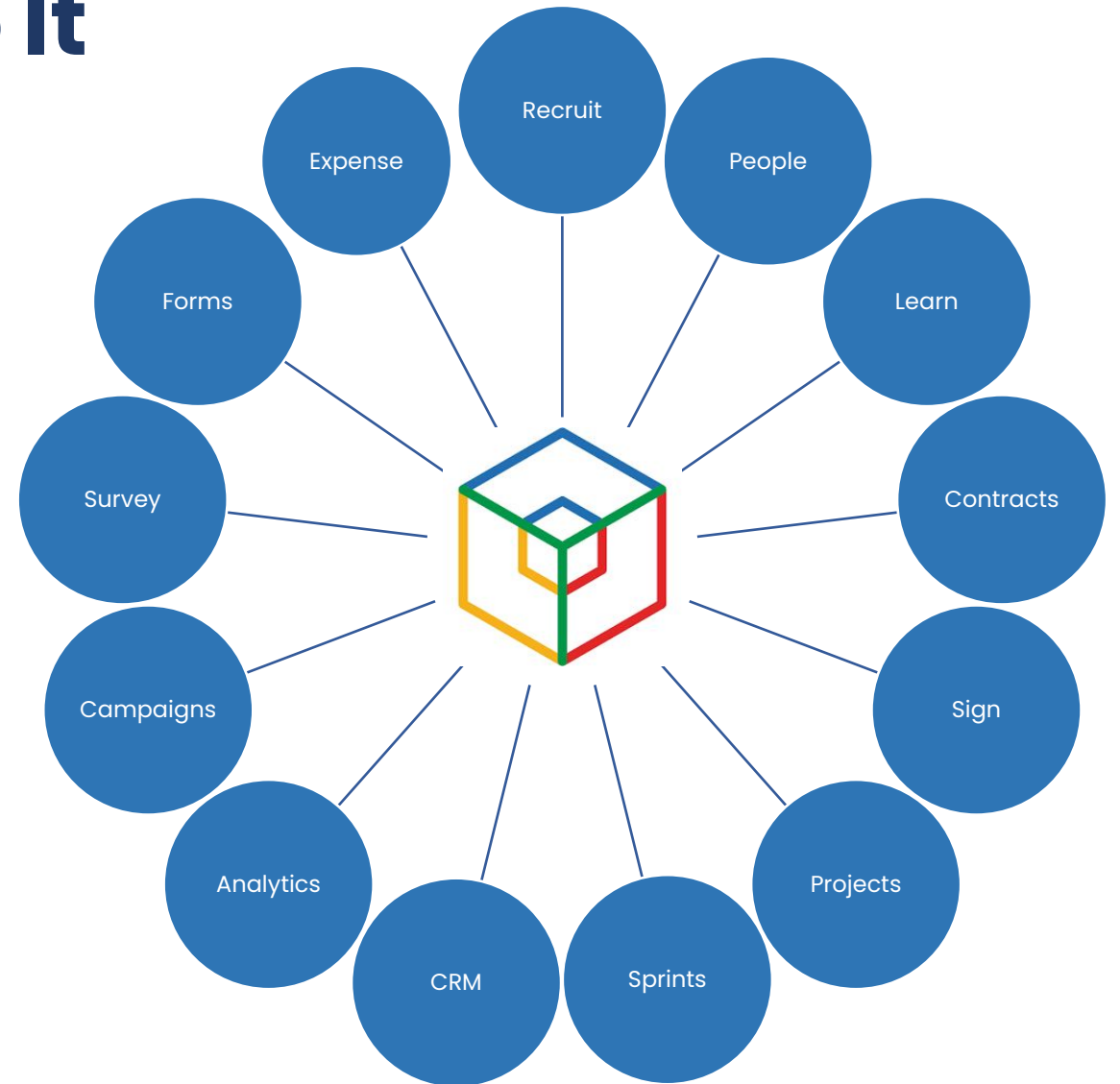
Summary of Compatible Zoho Apps

App	Department	Replacing	Summary
Recruit	<ul style="list-style-type: none"> Human Resources 	<ul style="list-style-type: none"> BreezyHR DocuSign 	Zoho would be a great tool for us to use for HR processes. It accomplishes all our needs, all in one place.
People	<ul style="list-style-type: none"> Human Resources 	<ul style="list-style-type: none"> Harvest Lattice Teams (PTO flow) 	
Learn	<ul style="list-style-type: none"> Human Resources Productivity 	<ul style="list-style-type: none"> Trainual Confluence 	
Expense	<ul style="list-style-type: none"> Finance 		Simple and accessible way to track any and all expenses
Contracts	<ul style="list-style-type: none"> Human Resources Business 	<ul style="list-style-type: none"> DocuSign 	Being multipurpose, this can be used for more than one department for different document types.
Sign			
Projects	<ul style="list-style-type: none"> Productivity Project Management 	<ul style="list-style-type: none"> JIRA Trello Harvest 	The integration between Projects and People, and Sprints and People, allows for project, task, and time management and tracking to be all in one place.
Projects			
CRM	<ul style="list-style-type: none"> Business Sales 		The personalization and organization makes it a great place for Pleco to track, view, and update goals, reports, client information, and more.
Analytics			
Forms	<ul style="list-style-type: none"> Marketing Human Resources Business Productivity 	<ul style="list-style-type: none"> DocuSign 	With its personalization and multipurpose apps, they integrate with other Zoho apps that we could use, and non-Zoho apps we already use.
Campaigns			
Survey			

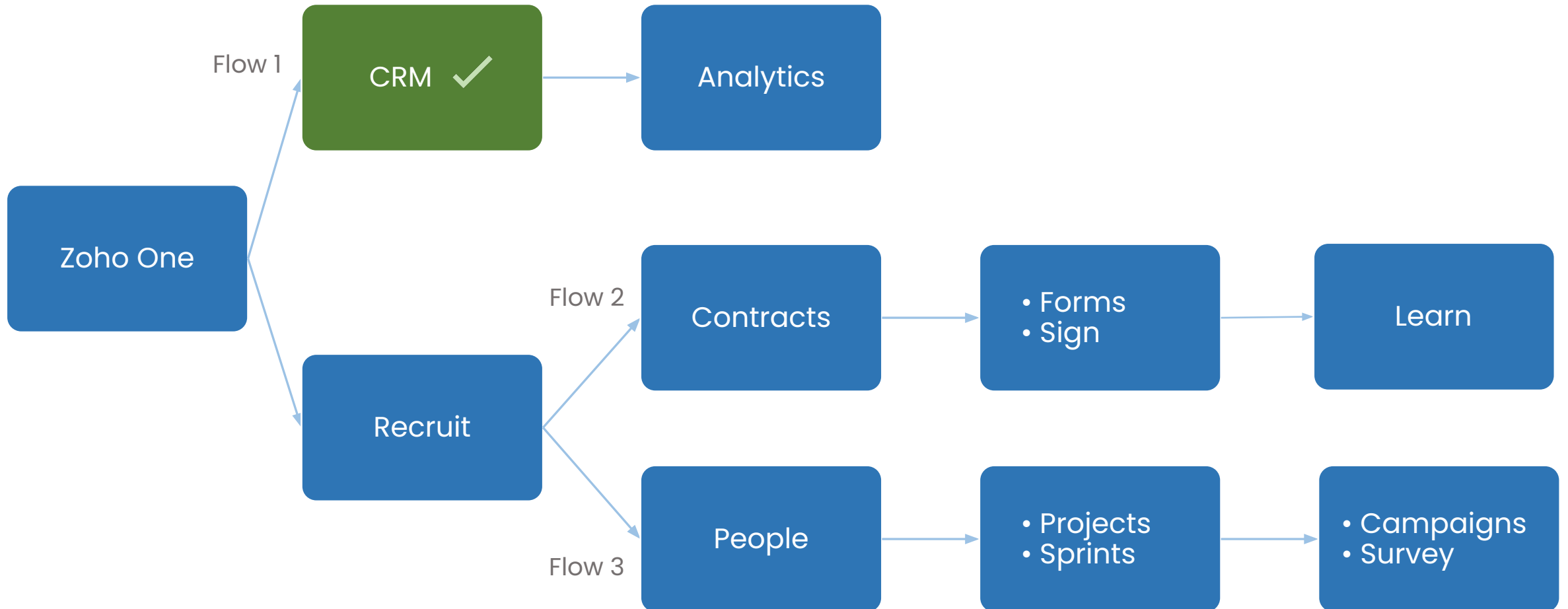
Recommendations

Zoho One Ruling: Let's Do It

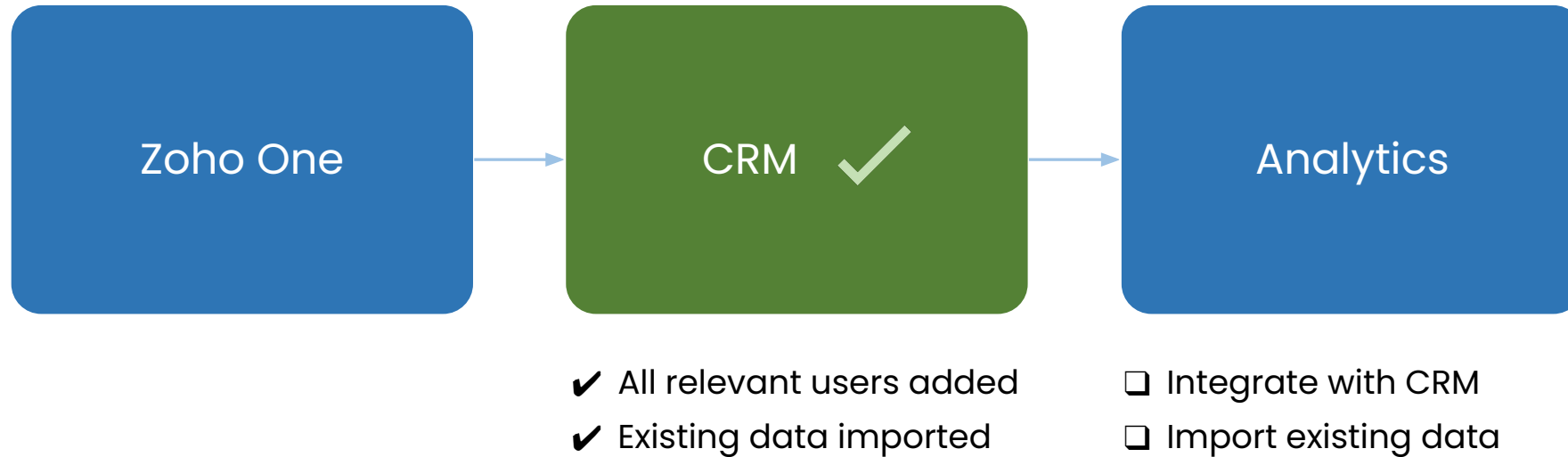
- Zoho One will work well with Pleco processes, workflows, and current needs.
- Apps of particular interest within Zoho One are:
 - Recruit
 - People
 - Learn
 - Expense
 - Contracts
 - Sign
 - Projects
 - Projects
 - CRM
 - Analytics



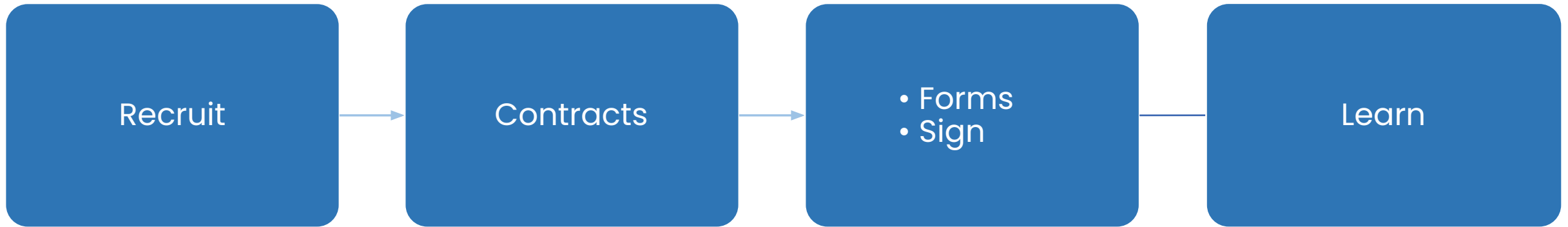
Proposed Rollout



Proposed Rollout: Flow 1



Proposed Rollout: Flow 2



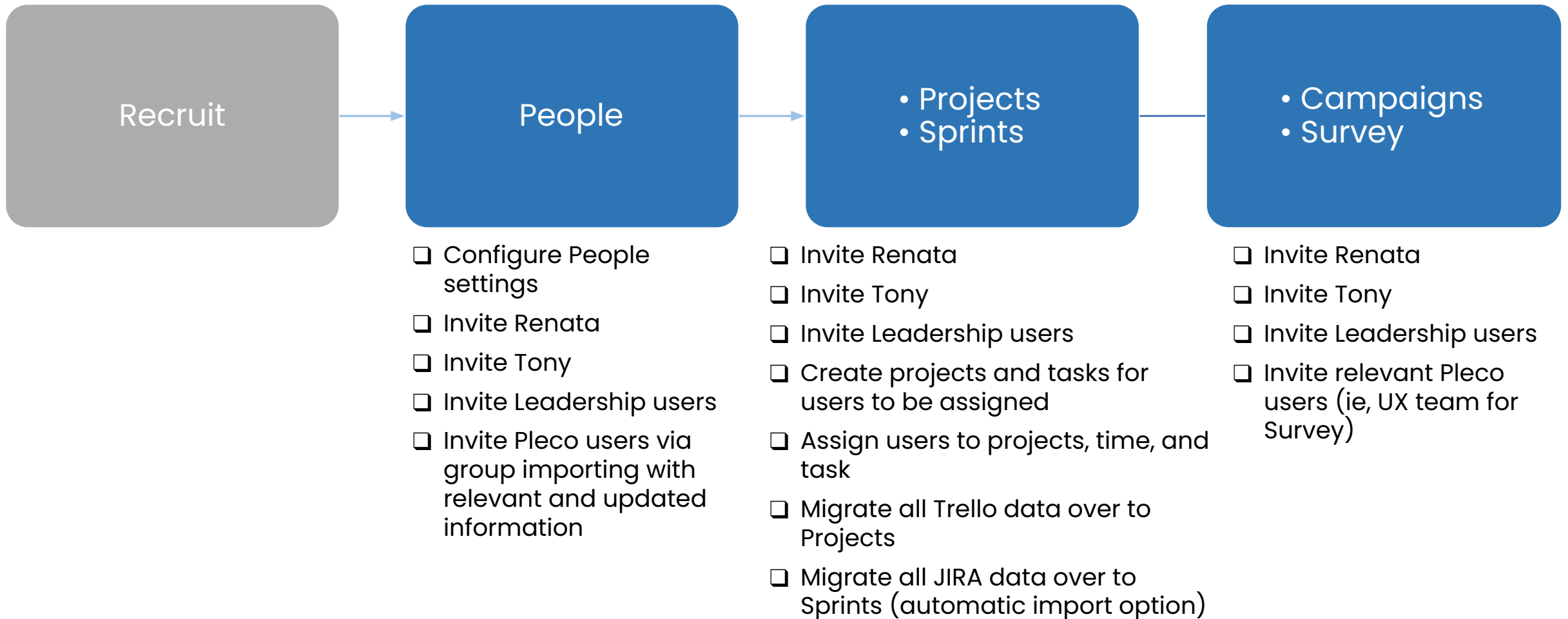
- Configure settings
- Invite Renata
- Invite Tony
- Sync with LinkedIn, Upwork, etc.

- Invite Renata
- Invite Tony
- Invite leadership

- Invite Renata
- Invite Tony
- Create or import existing forms and templates (contracts, offer letters, etc.)
- Integrate with new and existing forms and contracts

- Invite Renata
- Invite Tony
- Invite Leadership users
- Create new learning experience(s) for onboarding new employees
- Import onboarding materials from Confluence

Proposed Rollout: Flow 3



Proposed Rollout Steps

1. Configure settings for each app
 - Migrate needed data from other apps to Zoho
2. Import and sort new users in groups
 - Executive, UX, HR, etc.
3. Determine and assign specific app access to new users and groups
 - Basic access would include People, Projects/Sprints, and other relevant productivity apps.
4. Basic training on Zoho One, People, and Projects/Sprints
 - Especially time tracking
5. More specific training on other apps as needed

Conclusion

1. Zoho is best for replacing current Human Resources and Sales tools.
 - Can replace Confluence, Trainual, Lattice, Harvest, DocuSign, and PTO requests through Teams.
2. Zoho Project Management apps are similar to our current tools.
 - Can replace Trello, JIRA, and Harvest.
 - Can integrate with Zoho Sales and HR tools.
3. Zoho Marketing apps are multipurpose with their personalization and integrations.
 - Can replace DocuSign and improve internal and external company communications.
4. Zoho Productivity and Communication apps cannot compete with Office Suite and Teams.
5. Let's migrate to Zoho One!

Thank you