

# Greenbotz Case Study



## 1. Client Overview

**Greenbotz Platform Private Limited**, led by a team of technology innovators, is a fast-growing digital solutions provider based in India. With over 100 employees, Greenbotz specializes in robotics, AI/ML, AR/VR, IoT, and custom software development. The company partners with enterprises, SMEs, and startups to deliver cutting-edge digital transformation projects. Known for their focus on emerging tech and agile development practices, Greenbotz has built a strong reputation in industries such as real estate, education, and smart city solutions.

Before implementing Zoho Projects, Sprints, and Desk, Greenbotz faced challenges in managing multiple client projects, fragmented internal collaboration, and unstructured customer support workflows. Project updates were scattered across emails and chats, leading to missed deadlines and inefficient resource allocation. Without a centralized support system, client queries were delayed and tracking service requests was cumbersome. These gaps affected their project turnaround times, customer satisfaction, and team productivity, making it difficult to scale operations smoothly.

## 2. Problem Statement

### Business Problems Faced

#### Project Management Inefficiencies:

Project tracking was decentralized, with different teams using separate tools and spreadsheets. This led to missed task deadlines, lack of visibility on project statuses, and difficulties in coordinating between cross-functional teams across robotics, AI, and IoT projects.

#### Agile Process Challenges:

Without a dedicated sprint management tool, managing product backlogs, sprint planning, and iteration reviews became chaotic. Prioritization was inconsistent, affecting project timelines and overall team productivity in their software and tech development cycles.

#### Customer Support Fragmentation:

Client queries and support issues were handled informally through emails and phone calls, with no proper ticketing or SLA monitoring system. This caused delays in issue resolution, inconsistent customer service quality, and lower client satisfaction rates.

### 3. Zoho Products Implemented:

Zoho Projects, Zoho Sprints, and Zoho Desk were implemented to streamline project management, agile development, and customer support operations.

#### Customizations and Workflows

##### Custom Task Templates:

Predefined task lists and project templates were created for common solution categories like AI/ML, AR/VR, and IoT projects, ensuring faster project kickoffs and standardized workflows.

##### Sprint Automation Workflows:

Custom sprint boards with auto-notifications for sprint planning, review meetings, and task assignments were set up to improve agile execution and team collaboration.

##### Ticket Categorization and Auto-Assignment Rules:

Incoming support tickets were automatically categorized by project type and assigned to relevant support teams in Zoho Desk, ensuring faster response and resolution times.

##### Escalation Workflows:

Multi-level escalation workflows were configured for client tickets that exceeded SLA timelines, ensuring no critical issues were left unresolved.

##### Custom Dashboards for Leadership:

Real-time dashboards were developed to provide insights into project statuses, sprint progress, ticket volumes, and customer satisfaction scores, enabling proactive decision-making and better resource allocation.

### 4. Implementation Process

#### Planning and Deployment:

The implementation for Greenbotz began with an in-depth discovery phase where project management practices, agile development cycles, and customer support workflows were closely analyzed. A tailored deployment plan was crafted focusing on the integration of Zoho Projects, Zoho Sprints, and Zoho Desk. The rollout was executed in phases — starting with project and task management configurations in Zoho Projects, followed by sprint planning boards in Zoho Sprints, and finally setting up automated support ticket workflows in Zoho Desk. Regular training sessions and feedback loops were conducted to ensure seamless adoption across all teams.

## **Challenges Faced and Resolutions:**

### **Project Data Consolidation:**

Migrating project plans, task lists, and sprint backlogs from multiple spreadsheets and offline documents into Zoho Projects and Zoho Sprints required meticulous validation. Multiple test imports and structured mapping were conducted to ensure data integrity and clean setup across all projects.

### **Agile Process Familiarity:**

Since the teams were new to structured agile methodologies and sprint-based tracking, customized training sessions were held. Hands-on workshops, quick-start guides, and role-based manuals were provided to ensure smoother adaptation to Zoho Sprints and Zoho Projects.

### **Support Ticket Structuring:**

Setting up a comprehensive ticketing system in Zoho Desk to align with varied client support processes was complex. Close collaboration with the Greenbotz service teams helped design custom categories, SLAs, and escalation paths, ensuring the support structure matched real-world workflows.

## **Timeline and Key Milestones:**

Week 1–2: Business process analysis, agile practice assessment, and finalization of solution design and deployment roadmap.

Week 3–4: Zoho Projects setup with project templates, task automation workflows, and milestone tracking structures.

Week 5: Zoho Sprints implementation, including backlog configuration, sprint boards setup, and sprint planning workflows.

Week 6: Zoho Desk deployment with ticket categorization, SLA setup, auto-assignment rules, and escalation workflows.

Week 7: User training sessions for project teams, support teams, and leadership dashboards; system testing and feedback adjustments.

Week 8: Full system go-live with end-to-end process validation across project management, sprint execution, and customer support.



## 5. Key Features & Customizations

### **Automation, Reports, and Features:**

#### **Project Automation:**

Automated task assignment and milestone alerts were set up in Zoho Projects to ensure teams stayed on track with client delivery timelines.

#### **Sprint Management Workflows:**

Sprint planning templates, backlog grooming automation, and sprint review reminders were configured in Zoho Sprints to streamline agile project execution.

#### **Ticket Routing and Escalation:**

Support tickets raised through Zoho Desk were automatically categorized and routed to relevant teams based on project type, with multi-level escalation workflows for high-priority issues.

#### **Custom Client Dashboards:**

Real-time dashboards were developed to track project progress, sprint completion rates, ticket resolution times, and team workload distribution.

#### **Knowledge Base Setup:**

An internal knowledge base was created within Zoho Desk to enable quicker client support responses and reduce resolution turnaround times.

#### **Performance Reporting:**

Custom reports were built in Zoho Projects and Zoho Desk to monitor project health, sprint velocity, ticket volume trends, and SLA compliance.

**Tailored Workflows, and Dashboards:****Customized Project Pipelines:**

Separate project pipelines were developed for different solution areas like AI/ML, IoT, AR/VR, and Robotics, each reflecting distinct stages from project inquiry to delivery and support handover.

**Approval Workflows:**

Multi-stage approval flows were implemented for critical project changes and high-value client support escalations, ensuring structured reviews before final decision-making.

**Custom Dashboards:**

- **Project Status Dashboard:** Visual tracking of project phases — planning, development, testing, and deployment — across all clients.
- **Sprint Performance Dashboard:** Real-time insights into sprint velocity, completed vs pending tasks, and team workload distribution.
- **Support Ticket Dashboard:** Monitoring ticket volume, resolution rates, SLA breaches, and customer satisfaction trends.

## 6. Business Impact & Results

**Tangible Improvements:****Enhanced Project Delivery Efficiency:**

Task automation and streamlined project workflows led to a 30% reduction in project turnaround time, enabling Greenbotz to take on more client projects simultaneously.

**Improved Agile Execution:**

With Zoho Sprints, sprint planning and tracking efficiency improved by 40%, resulting in faster product iteration cycles and better quality outcomes.

**Superior Customer Support:**

The implementation of Zoho Desk reduced average support ticket resolution time by 35%, significantly boosting client satisfaction and retention.

**Real-time Business Visibility:**

Custom dashboards provided leadership with instant insights into project health, sprint progress, and client support performance, enabling faster, data-driven decision-making.

## 7. Lessons Learned & Best Practices

### Insights:

#### **Detailed process mapping ensures effective tool customization:**

Spending time to clearly map project workflows, sprint structures, and support processes helped align Zoho Projects, Sprints, and Desk perfectly with Greenbotz's operational needs.

#### **Early engagement and feedback loops drive successful adoption:**

Involving project teams and support staff during system design and pilot phases helped address challenges proactively and boosted user confidence.

#### **Staggered deployment promotes smoother transition:**

Rolling out Projects, Sprints, and Desk in phased stages allowed the Greenbotz team to adapt comfortably, fine-tune configurations, and achieve quicker result.

### **Recommendations for Similar Businesses Considering Zoho Solutions:**

#### **Prioritize core operational tools first:**

Start with project and support management modules (like Zoho Projects, Sprints, and Desk) before expanding into advanced analytics or client engagement platforms.

#### **Customize workflows to match project and sprint needs:**

Even minor adjustments in task flows, sprint templates, and ticket routing can greatly boost team efficiency and project success rates.

#### **Plan comprehensive training and change management:**

Early training, detailed user guides, and ongoing support are crucial to ensuring strong system adoption and maximizing ROI from Zoho investments.

## 8. Future Scope & Scalability

- Zoho Analytics for building advanced project, sprint, and customer support performance dashboards to support strategic decision-making and future forecasting.
- Zoho WorkDrive to implement a centralized document management system for project files, technical documentation, and client deliverables.
- Zoho Assist for providing remote support to clients and internal teams, enhancing service responsiveness.
- Zoho Contracts to streamline and automate contract management with clients, vendors, and partners.
- Zoho Creator for developing custom internal apps to manage specialized workflows as Greenbotz scales into newer technology domains.