

## XPHENO PRIVATE LIMITED

### EXECUTIVE SUMMARY

Xpheno is a specialist staffing company, headquartered in Bangalore, and is ranked in India's top 20 largest staffing Firms in India by SIA in a 2025 report. Founded in 2017, by Kamal Karanth and Anil Ethanur, Xpheno is led by a strong team, and is preparing for its listing in 2027.

### INTRODUCTION

Xpheno is anchored around a framework that focuses on Skills, Speed & Scale. They leverage the potential of people, scalable processes, and the latest technology tools to swiftly identify talent, curate refined and engaged talent pools, and facilitate hiring for its clients in setting up Global Capability Centres (GCC), Technology, Engineering R&D and other sectors. They have also set up an executive search division to cater to increasing demand for senior leadership talent.

### THE BUSINESS LANDSCAPE

The Indian staffing and recruitment market is valued at approximately **\$20 billion** (USD) and is projected to reach **\$48.53 billion** by 2030. The Indian staffing industry has experienced an enormous growth since the beginning of the decade

### THE CHALLENGE

In its start-up journey the company had developed an inhouse CRM, but as the organization scaled and client facing teams expanded, they felt the need leverage on a professional CRM, so they could focus on the core activities of expanding and building a strong customer base and strengthen the recruitment delivery ecosystem.

### FINDING A SOLUTION: ZOHO CRM IMPLEMENTATION

The project scope for Zoho CRM (Professional Edition) included:

- **Lead Management:** Capturing leads from diverse sources and managing follow-up activities.
- **Account & Contact Management:** Maintaining up-to-date customer and contact information, including parent-child mapping for accounts.
- **Deal Management:** Tracking business transactions through various stages, with a focus on potential/deal progression.
- **Activity Tracking:** Logging and monitoring meetings, tasks, calls, and email conversations.
- **Custom Modules:** Development of "Internal Meeting" and "Send MOM" modules for comprehensive meeting note capture, and a "Business Unit" module to map BUs and their heads.
- **Automation:** Configuration of reminder settings and automation for agreement renewal processes within the Deals Module.

- **Hierarchy & Access:** Implementation of custom roles and profiles to reflect organizational hierarchy.
- **Reporting & Dashboards:** Creation of standard reports and dashboards (Sales User, Manager, Admin) for actionable insights.
- **Training & Support:** Comprehensive User Acceptance Testing (UAT), walkthroughs, and training activities.

## CO-SOLUTIONING AND COLLABORATION

It is important to highlight the role of the client as they spent significant time understanding the tool and the standard limitations, and jointly brainstormed the solutioning. They participated extensively in validating and curating the process blueprints. The custom modules of Internal Meeting and Send MoM, automation ideas emerged based on the internal problem statements the customer was committed to solving. This is also a strong case study where the client challenged the existing product limitations and provided crucial insights on the workarounds. The customer also calibrated their internal processes that to fully capitalise on the solutioning.

## IMPLEMENTATION & RESULTS

The Zoho CRM implementation brought significant enhancements across key modules:

- **Leads Module:** Streamlined inquiry capture from various sources (website, manual, bulk import, email) and nurturing processes (outbound calls, meetings, notes).
- **Accounts Module:** Centralized repository for active and inactive customer information.
- **Contacts Module:** Dedicated module for comprehensive contact details.
- **Deals Module:** Enhanced management of business transactions, including automated agreement renewal processes via cloning or a dedicated renewal button.
- **Activities Module:** Provided a complete overview of sales activities (tasks, calls, meetings) within prospect records.
- **Custom Modules:**
  - **Internal Meeting Module:** Captured detailed meeting notes.
  - **Send MOM Module:** Facilitated distribution of Minutes of Meeting.
  - **Business Unit Module:** Mapped all business units and their respective heads.
  - **Email Notifications:** Configured trigger-point-based email notifications.
- **Roles & Profiles:** Established default roles (Admin, Standard) for access control.
- **Approval Process:** Implemented a streamlined approval workflow.
- **Reporting & Dashboards:** Generated insightful reports and dashboards for sales, marketing, and management, offering a clear view of business performance.
- **Integrations:** Enabled seamless email communication through IMAP integration.

## KEY BENEFITS & FEEDBACK

The Zoho CRM implementation has yielded significant benefits:

- Improved **customer management** and **database management**.
- Achieved **complete process automation** and **better internal communication**.
- Enhanced **employee relations** through streamlined workflows.
- Enabled effective **alerts, workflow, and product management**.
- Provided essential **approvals and dashboards for management**.
- Ensured **mobile access** to applications for all users.

The comprehensive training provided has ensured complete satisfaction, and we will continue with periodic reviews and training to guarantee full adaptability and usage of the system.