

## OFFICE PARTNERS 360 TRANSFORMS HCM WITH ZOHU TO INTRODUCE EFFICIENCY, SCALE WITH EASE, AND SUPPORT THE EMPLOYEE EXPERIENCE

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### What You Need to Know

When a company grows, especially when that expansion means new geographies, one of the biggest challenges is ensuring that its business processes, including talent management, not only keep pace but can act as a critical enabler in the expansion. COVID and the impact it had on organizations highlighted similar concerns and problems. While digital transformation presents a solution to many of these challenges and enables many companies to weather the significant issues and roadblocks the pandemic presents, it is only part of the answer. The other part involves the company's system or software to manage hypergrowth's HR component. Results come not only in the form of greater efficiencies and attendant time savings, but also, a greater ability to practice empathy. What's more, not only is there a [balance between these two](#), but they also can go hand in hand — i.e., newfound efficiencies support people managers' ability to show empathy at scale.

To find large volumes of talent fast, companies will look to deploy an applicant tracking system (ATS), a solution for hiring new employees, another for onboarding, and one that can manage global payroll. However, what can happen is that given the complexity of each segment, the organization may choose to silo each area, sometimes because no one wants to propose a single tech stack. It can be perceived as being the easier, less risky option. However, this approach can mean you end up with disparate, messy, siloed information — a fragmented solution with multiple integrations that offer few operational efficiencies and impeding holistic empathy.

Imagine then opting for a single enterprise platform that can replace these disjointed systems and where the integration between various domains is strong to facilitate smooth operations and the sharing of critical data. Follow new hires from the moment they apply on your website, right through a job offer, onboarding, and subsequent remuneration review. Consider the data opportunities this presents and how having a single unified source of workforce data can produce cost savings and, as a tightly correlated outcome, elevate the employee experience.

### About Office Partners 360

"It really helps to coordinate recruiting practices with business growth," says Ben Roberts, president at OfficePartners360 (OP360), a business process outsourcing (BPO) company. OP360 offers organizations a plethora of services, including customer support, sales support, technical support, back-office support, content

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### AT A GLANCE

#### Solution

Zoho Corporation

#### Research Participant

Office Partners 360

#### Synopsis

An avid user of Zoho at his previous employer, Ben Roberts wanted to deploy the solution again when he joined Office Partners 360 (OP360) as president in May 2019. This report provides a glimpse into his team's successful, broad use of Zoho at OP360, a business process outsourcer (BPO). Comprising an array of Zoho applications for employee collaboration, business intelligence, sales, marketing, and human capital management (HCM), the deployment has introduced significant newfound efficiencies. Especially in HCM, these and greater visibility into key processes have been instrumental in accommodating and aiding OP360's rapid global expansion since the onset of the worldwide pandemic.

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moderation, artificial intelligence, operations, and creative services. COVID accelerated many companies' digital transformation, and OP360 played a crucial role in facilitating this transition for many businesses that lacked the technology and operational functionality to switch to working from a location other than the office. As remote working has grown in popularity, OP360 has seen phenomenal growth as they scale and expand globally to meet the rising demands of this new paradigm. Currently, OP360 has offices in the US, India, Philippines, and Colombia, plus a small number of independent contractors across Europe. The company supports countries in multiple languages: French, Italian, German, Polish, Mandarin, Japanese, Korean, and Vietnamese.

## The Situation

"To be successful, though, in this new hybrid work platform, you need powerful systems that are scalable and flexible," says Roberts. Historically, OP360 used paper-based systems for HR, finance, and transactions. They ran on the Google Suite platform, using Google Docs, Google Sheets, and Google Drive. As a result, they were experiencing version control issues and corrupted files. Critically, conducting data analysis was difficult. The cobbled-together ecosystem also hindered their ability to streamline processes or access an accurate overview of the company's compensation plans. Gathering all the pertinent data when the company wanted to redo the management's compensation structure and build long-term incentive plans was a challenge. It took such a long time to get the data that it slowed their introduction of a new compensation structure and long-term incentive schemes.

## Why Zoho?

When Roberts joined OP360, one of his first actions was to reboot customer relationship management. Having utilized Zoho in another company, he was very familiar with the platform and adamant that OP360 wait to deploy a single technology stack across the enterprise to build a cohesive and complementary workflow, all under the aegis of Zoho. OP360 implemented Zoho Recruit in 2019, and then, in 2020, Zoho People. Since then, the employer has implemented several additional Zoho applications, including payroll.

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Among the key reasons OP360 chose Zoho are because of the solutions provider's applications' diversity and that they integrate easily with each other. "One of the most significant and critical aspects is that instead of trying to combine several third-party applications, Zoho has already done it

## About Zoho Corporation

With more than 55 applications in nearly every major business category for the enterprise, Zoho Corporation maintains U.S. headquarters in Austin, Texas, and international headquarters in Chennai, India. Zoho is privately held and employs more than 12,000 in staff.

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for us,” says Roberts. “And, unlike other platforms that have grown through acquisition, Zoho has built all these products out internally and organically. There’s a native module functionality and integration that exists that is unrivaled. And that’s where the real power of Zoho lies because I don’t have to have a massive IT team or development team doing cartwheels and backflips to get everything integrated through APIs.”

On the ground, this means that as OP360 hires and onboards somebody through Zoho Recruit, it’s a push of a button, and that record seamlessly flows into Zoho People. Apart from making the HR and recruitment team’s job easier, it eliminates a lot of double data entry. The workflow is uninterrupted as the offer is pushed out to the new hire, who receives and returns the employee contract and any amendment through Zoho Sign.

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With a background as an analyst, Roberts has considerable experience in business intelligence and finance roles. He’s very comfortable with large volumes of data. “It allows me to get in, get my hands dirty and be pretty dangerous when I need to answer a question or verify something independently.”

## Streamlining Recruiting and Optimizing HR Operations

Zoho encompasses both sales and HR, and Zoho Sales IQ powers lead forms. So, from each initial interaction, whether by a prospect or a candidate, the information is collected and goes directly into the Zoho ecosystem. Robert explains how it works for OP360:

“With a prospect, Zoho creates a lead, and all the documents are signed and uploaded in the CRM, kicking off Zoho Projects, where we then manage and map out the New Client Onboarding implementation process. Then our management team raises a recruitment request through Zoho People that pushes to Zoho Recruit, and our recruiters jump on it. They post these jobs directly on our website, third-party websites, and paid ads, and everything flows into Zoho Recruit.” OP360 follows Zoho Recruit’s steps, and once an employee is hired, the offer goes out through Zoho Sign.

Once the proposals have been signed, then they move, again seamlessly, into Zoho People. Here OP360 captures their timecard tracking, and the employee can access an organizational chart and other relevant information. OP360 pushes out announcements through Zoho People. They also have Zoho LMS (learning management system) built into Zoho people, so as employees go through new hire orientation, they complete the training modules specific to each client built out in Zoho LMS. OP360 can also monitor

## Accommodating OP360’s Growth

Demand for business process outsourcing (BPO) has increased. Why? More and more, employers are seeing BPO services as a viable bulwark against pandemic-precipitated changing dynamics in the workplace. Because of this, unsurprisingly, OP360 has experienced related large-scale global growth since early 2020. Notably, inefficiencies predating the deployment of Zoho at OP360 would have slowed this expansion. “We were fortunate to have introduced Zoho prior to the pandemic,” says Ben Roberts, president of OP360. “When we experienced massive, rapid growth as the pandemic-related lockdowns began to take hold, we were ready. Without Zoho, the backend office would not have been able to accommodate this development.”

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and track performance in Zoho People. And then, as individuals are promoted and progress their careers with the company, all those movements are captured within Zoho People.

**“That’s the beauty of Zoho,” says Ben Roberts, president at OfficePartners360 (OP360). “We can implement clean and easy-to-build, repeatable, scalable, predictable processes at a massive scale, globally in different countries,” says Roberts. “Furthermore, it is straightforward for our BI team to use Zoho Analytics. They can quickly tap into the backend data and get questions answered promptly because all the information is in one place and structured similarly.”**

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## Success

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- **Greater agility:** It’s enabled OP360 to grow and scale in a remote, distributed, hybrid work environment. They are now entirely paperless and have everything in the cloud, which has considerably impacted their organization. Roberts notes, “We were fortunate to have introduced Zoho before the pandemic. When we experienced massive, rapid growth as the pandemic-related lockdowns began to take hold, we were ready. Without Zoho, the backend office would not have been able to accommodate this development.”
- **Significant time savings:** OP360 is enjoying time savings of an approximately 60 percent to 70 percent reduction in hours because of the automation capabilities in Zoho People. According to Roberto Castro, assistant manager at OP360 (who also spoke with 3Sixty Insights), OP360 utilizes a process called the percent of movement (PMF) to track and evaluate performance. Before Zoho, the PMF around recruitment practices was significant as there were many stages involved. Now about 90 percent is automated, and the only human intervention is getting executive approval. Zoho sends the documentation signed by the manager, finance, payroll officer, and then the employee. Once all those are assigned, it captures within that specific record for the PMF. Then it is also added to the 201 files for that particular employee.
- **Tighter controls:** With Zoho, data is secure. The field-level permissions prevent people from deleting documents from the system, and you can run real-time reports, highlight missing documents, and record changes to the payment listing. Any action



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**Ben Roberts**

President  
Office Partners 360

of any kind, whether an employee moving from one department to another, from one role to another, a merit increase, a demotion, whatever it may be, is captured. Nothing is updated on the employee's record without the executive approval process.

- **Faster hiring process:** Hiring used to be a more manual process, conducted through multiple emails. Moving to Zoho, OP360 can now easily hire 300 plus people a month — which has become the norm and need over the course of the pandemic and, now, as the world begins to move on. Internally there are advantages too. Typically, there are around 400 movements a month. Now, Roberts has greater oversight and can quickly review all the changes. Such

robust checks and controls ensure that processes are followed correctly, ultimately enabling OP360 to meet its financial targets. "In the BPO business, the speed of implementation is the key that will allow us to capture more headcount ramps faster," says Roberts. "And, ultimately, outpace the competition. And we could recruit and onboard faster than all of our competitors."

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- **Reduction in cost-per-hire:** Leveraging Zoho Recruit and Zoho People, OP360 can get onboarding requests, which typically took one week to do, reduced to one day for executive approval. OP360 also eliminated the need for compensation committees, and Roberts only needs to spend about one hour a week to understand everything happening across the company.

## Aligning the Employer Experience with the External Brand

For Roberts, the key to a quality employee experience is for it to be an efficient, digital experience. Before deploying Zoho, "the employee experience was one hundred percent paper-based," he says. "That's not the best employee experience in this day and age." OP360 has a significant presence in the Philippines, a country where almost "everything is paper based. That's just the way of life" for any business. As the Zoho deployment enabled OP360 to digitize more and more, Roberts believes the employer's staff there and elsewhere, across the organization, began to feel more pride in working at the company.

With Zoho in place, employees enter into a fully modern digital environment from the moment they apply for a job with OP360. "They're not applying via email anymore or just directly on a job board. Everything is going right back to our job portal. That's the first step in the employee experience, and it's a very positive one at a really nice portal that's completely branded as OP360." From there, new hires sign the employment contract via Zoho Sign and onboard via Zoho people, where they're able to log in and see their teammates, and see birthday announcements, 10-year anniversaries, corporate communications, and more.

## Greater Efficiencies Enable Empathy at Scale

In an example of newfound efficiencies enabling the organization to practice empathy at scale, Roberts describes the process to wish employees a happy birthday. "I would try as best as I could to write people custom birthday notes," he says. With the company's rapid growth, however, "there are now several birthdays a day, and I can't always keep up with that." Fortunately, Roberts was able to add a measure of automation to birthday announcements through Zoho. "It was really neat, and now I get emails back every day from our staff thanking us for taking the time to write this email and saying they're proud to be a part of the OP360 family." One employee of 15 years wrote Roberts back to say he'd never received an email from senior leadership to thank him for his birthday or tenure. "That's just a great example of how technological automation can create an even more personal experience."

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“Folks describe it as being kind of like Facebook, and Facebook is very popular still, in the Philippines. When they see that completely end to end, everything is digital, this makes employees feel like they work for a modern, innovative company.” And they do. OP360 offers not only the usual, expected services when it comes to BPO services, but also deep capabilities in artificial intelligence, data and analytics, for example, and bills itself as a “a ‘new economy’ BPO that is nimbler and delivers better value than large, big-box BPOs.” As 3Sixty Insights has observed, the most successful, most competitive organizations tend to ensure that their employees’ experience matches that of customers.

In this context specifically, the addition of Zoho has helped OP360 align the quality of the digital experience for customers and employees, thus eliminating the cognitive dissonance that can otherwise fester among employees, negatively affect their level and quality of engagement, and lead to attrition and other organizational challenges. In a testament to the idea, OP360 enjoyed an exceptionally low 3 percent staff attrition rate in 2021, when it reported several key metrics indicating highly positive employee sentiment. Among these, 94 percent said they were satisfied with their jobs. Tellingly, 94 percent of the company’s clients report being satisfied, too. Additionally, 86 percent of employees there said they would reapply to the same role again at OP360 if given the chance. These numbers continue to hold in 2022, and, in another indication of the caliber of employee experience at OP360, “we’re promoting over 200 people a year on average,” says Roberts.

Prior to his joining the firm, in 2019, OP360 did not have an annual employee engagement survey in place to gauge staff sentiment, so the longitudinal data to compare today’s state to the pre-Zoho state is not there. Common sense says there has been a major improvement, however.

## Looking to the Future

One of the biggest challenges for any global organization is ensuring that employees are paid accurately and on time, regardless of location. OP360 leverages Zoho Time & Attendance to record and track billable hours. Once the data is entered, it is reviewed and approved. The company’s finance teams then extract the information and enter it into a third-party solution that completes the final mile and processes payments. Ultimately, Roberts hopes that Zoho will offer this service, and Castro and his four developers have worked with the platform to enhance and customize it to fit OP360’s specific needs better. And they fervently hope this investment will not go to waste and they will be able to push the product as far as possible.

In the meantime, OP360 continues to grow. Digital transformation enabled them to hyper-scale during COVID. And, since 2019, the company has quadrupled in size. Currently, they are onboarding two or so clients a month. And some of these clients need hundreds of people very quickly, which, because of Zoho, OP360 can now deliver. Last year the company launched in Colombia and was able to fold all the processes and data from sales and employees directly into Zoho very smoothly. As leadership looks to new geographies, such as Africa and Europe, OP360 expects it to be equally seamless to weave new customers and new employees into the Zoho platform. Such efficient and streamlined processes across the different regions the company works in allow OP360 to have one global operating model and one way of doing things regardless of location.

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