

Automating Creative Workflows with Zoho for Greater Visibility, Control, and Scale

Customer Profile

Industry: Creative Services & Digital Production

Business Overview: A dedicated creative and production unit supporting a large educational enterprise with multiple schools and colleges across India. Its 15-member team manages graphic design, studio production, post-production, outdoor events, printing, and digital marketing while handling diverse creative requests from institutions across the organization.

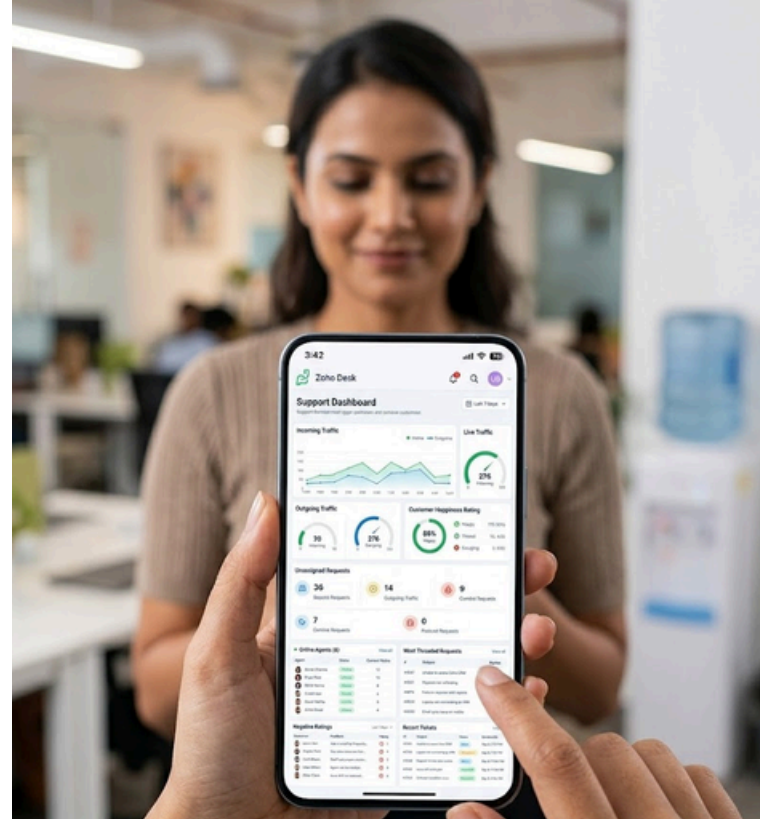


The Problem

The creative team relied on Excel spreadsheets, emails, and WhatsApp messages to manage requests from multiple educational institutions. This fragmented approach made it difficult to capture complete requirements and often resulted in repeated communication, delays, and missing project information.

Managing diverse, multi-stage projects without a centralized system created limited visibility into job status, ownership, workloads, and deadlines. Teams handling design, production, events, printing, and digital activities had to depend on manual updates to track progress and coordinate work.

Approvals were another challenge, as design reviews, revisions, and final sign-offs were handled manually. Without a structured approval process, stakeholders had limited visibility into ongoing requests, while the creative team spent considerable time following up and maintaining status records.



The Solution

A customized operational system was implemented using Zoho Desk to centralize creative requests and establish a structured workflow. Custom intake forms captured project-specific information and validation requirements, ensuring teams received complete briefs before work entered the production queue.

Each request was automatically converted into a tracked ticket and routed to the appropriate department owner. Defined workflow stages provided visibility into progress, responsibilities, and delivery timelines, while dashboards enabled management to monitor active projects and team capacity.

A dedicated client portal enabled institutional stakeholders to submit briefs, review creative drafts, request revisions, and provide approvals from one centralized platform. Mobile accessibility also supported teams working across studios, offices, and outdoor events.



Conclusion

The Zoho implementation transformed a fragmented request-management process into a structured, centralized operational system. Standardized intake reduced gaps in project requirements, while automated ticket creation and workflows improved accountability and visibility across the creative pipeline.

With centralized approvals and real-time status tracking, management gained greater control over workloads, project progress, and delivery timelines. The solution also converted operational knowledge into a customized digital workflow that can evolve with business requirements.

The new framework provides a scalable foundation for supporting increasing creative demands across multiple institutions while reducing administrative effort. Future expansion can further connect scheduling, projects, resources, sales, and finance through a broader Zoho ecosystem.

Zoho Products

Zoho ERP	Zoho CRM	Zoho Books	Zoho Inventory
Zoho People	Zoho Projects	Zoho Analytics	Zoho Desk
Zoho Creator	Zoho Campaigns	Zoho Marketing Automation	Zoho Expense
Zoho Payroll	Zoho One	Zoho WorkDrive	Zoho Mail