

# Crowe Erastus HR Transformation: Zoho People & Zoho Recruit Implementation Plans

## Introduction

Crowe Erastus, a respected professional services firm, is embarking on a strategic upgrade of its human capital systems to support growth, compliance, and operational excellence. To achieve this, the firm will implement two integrated Zoho platforms—**Zoho People** for HR management and **Zoho Recruit** for talent acquisition. Zoho People will serve as the backbone of HR operations, streamlining employee records, leave, attendance, performance, and onboarding. Zoho Recruit will modernize the hiring process, enabling recruiters and managers to collaborate efficiently, reduce time-to-hire, and enhance the candidate experience. This document outlines two detailed, standalone project plans to ensure each platform is deployed with precision, aligned to Crowe Erastus’s internal workflows and strategic goals.

## Project Plan 1: Zoho People Implementation

### Objective

Deploy Zoho People to centralize HR operations, automate employee lifecycle processes, and improve workforce visibility across Crowe Erastus.

### Scope

- **Modules:** Employee database, Leave management, Attendance, Performance, Onboarding, HR workflows
- **Users:** HR team, employees, line managers
- **Integrations:** Payroll (if applicable), Zoho Analytics, Zoho Cliq

## Phased Implementation Timeline

Phase	Duration	Key Activities
<b>Phase 1: Discovery &amp; Planning</b>	Week 1	Kickoff with HR team; Define HR policies and workflows; Map employee lifecycle processes; Identify compliance and reporting needs
<b>Phase 2: Configuration &amp; Setup</b>	Weeks 2–3	Build employee database structure; Configure leave types, attendance rules, shifts; Set up performance appraisal cycles; Automate onboarding and exit workflows
<b>Phase 3: Data Migration &amp; Testing</b>	Week 4	Import employee records; Validate leave balances and attendance logs; Test workflows with pilot group
<b>Phase 4: Training &amp; UAT</b>	Week 5	Train HR admins, managers, and employees; Provide reference guides and walkthroughs; Conduct User Acceptance Testing
<b>Phase 5: Go-Live &amp; Support</b>	Week 6	Launch platform firm-wide; Monitor adoption and resolve issues; Weekly HR check-ins; Post-launch optimization

### Reporting & Governance

- Headcount, attrition, and leave dashboards
- Performance analytics and appraisal tracking
- Audit-ready compliance reports

### Expected Outcomes

- Centralized HR data and workflows
- Automated leave and attendance tracking
- Transparent performance management
- Improved employee experience and HR efficiency

## Project Plan 2: Zoho Recruit Implementation

### Objective

Implement Zoho Recruit to streamline recruitment, candidate tracking, and hiring workflows, ensuring faster and more structured talent acquisition.

### Scope

- **Modules:** Job requisitions, Candidate database, Resume parsing, Interview scheduling, Offer management
- **Users:** Recruiters, hiring managers, interview panelists
- **Integrations:** Job boards (LinkedIn, BrighterMonday), Zoho People (for onboarding), Email/Calendar sync

### Phased Implementation Timeline

Phase	Duration	Key Activities
Phase 1: Discovery & Planning	Week 1	Kickoff with recruitment team; Define hiring workflows and approval chains; Identify sourcing channels and job boards; Map candidate journey
Phase 2: Configuration & Setup	Weeks 2–3	Customize candidate pipeline stages; Configure job templates and requisition forms; Enable resume parsing and scoring; Set up interview scheduling and notifications
Phase 3: Data Migration & Testing	Week 4	Import candidate database; Test job posting integrations; Validate interview workflows
Phase 4: Training & UAT	Week 5	Train recruiters and hiring managers; Provide dashboards and cheat sheets; Conduct UAT with sample job postings
Phase 5: Go-Live & Support	Week 6	Launch live job postings; Monitor recruiter adoption; Weekly hiring pipeline reviews; Optimize based on feedback

### Reporting & Governance

- Time-to-hire and cost-per-hire metrics
- Candidate source effectiveness reports

- Hiring funnel dashboards
- Compliance tracking (EEO, GDPR if applicable)

 **Expected Outcomes**

- Faster, more structured recruitment process
- Centralized candidate database
- Improved recruiter–manager collaboration
- Enhanced candidate experience

### Conclusion

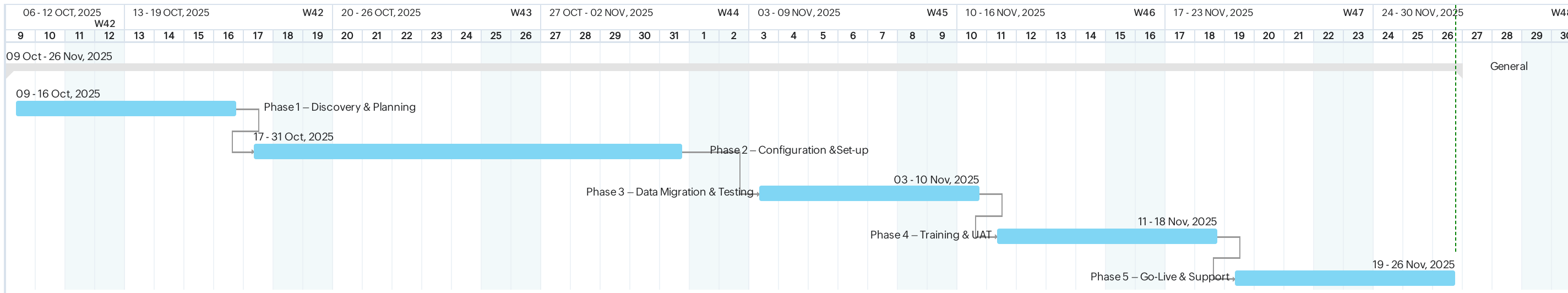
The implementation of Zoho People and Zoho Recruit will empower Crowe Erastus to manage its workforce and hiring processes with greater precision, transparency, and agility. Zoho People will streamline HR operations and improve employee engagement, while Zoho Recruit will accelerate talent acquisition and strengthen the firm’s ability to attract top-tier professionals.

Together, these platforms will form a unified HR ecosystem that supports strategic growth, operational efficiency, and a culture of excellence. With tailored configurations, hands-on training, and ongoing support, Crowe Erastus will be well-positioned to scale its human capital capabilities and deliver exceptional value to both employees and clients.



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Group By: Tasklists    View: All Open    Exported On: 10-02-2025 06:31 PM



## Legends

Tasklists		Task		Subtask	
Task with zero duration		Baseline		Baseline with Slippage	
Critical path		Task Slippage		Roll-up Tasks	
Roll-up Subtasks		Closed Task on time		Closed Task with delay	
Closed Task before start					

\*Task bar colors can be customized.