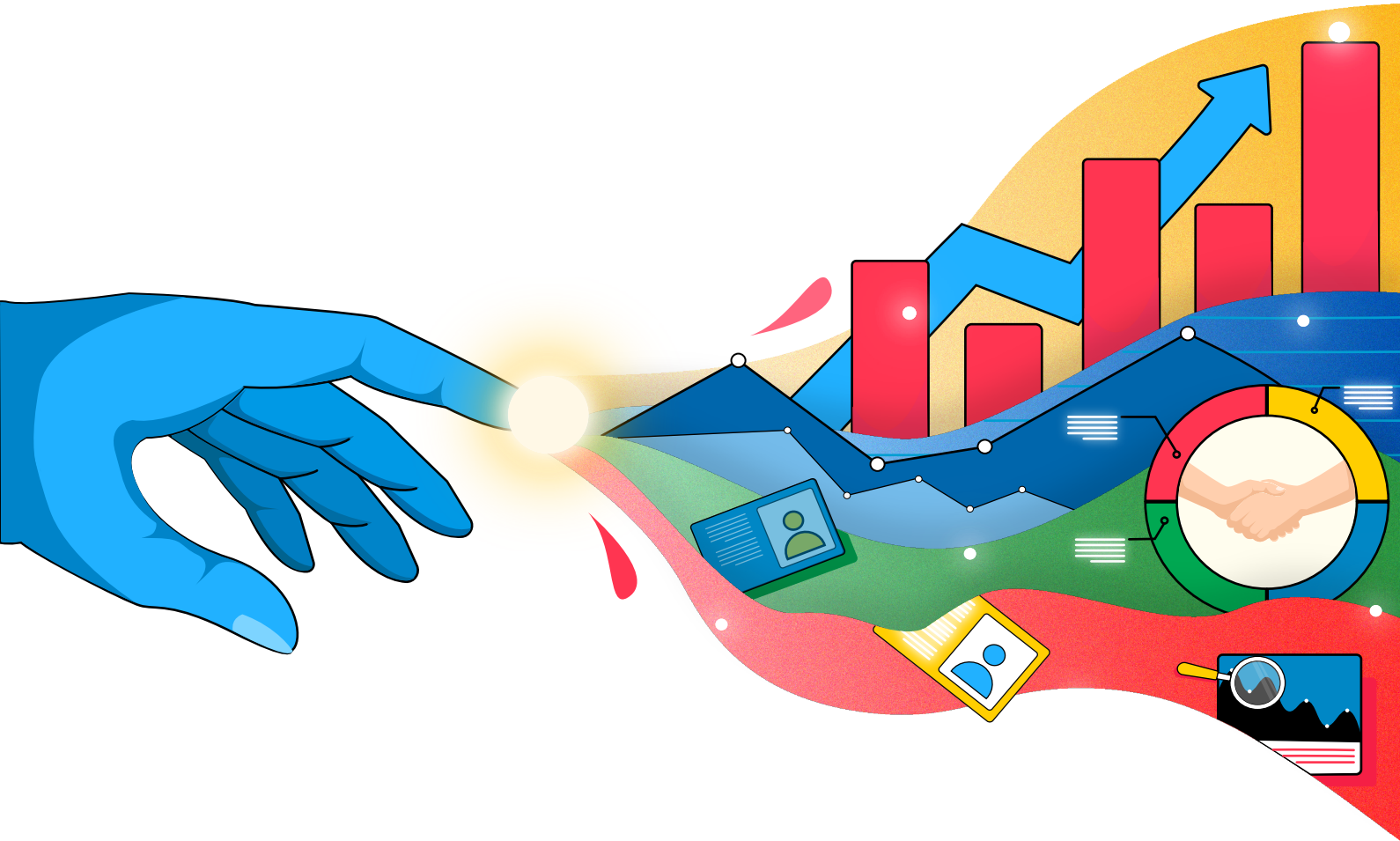


Inventya

Innovation Meets Integration: Inventya Finds Its Growth Groove With Zoho One





The Company

Helping ambitious organisations
to achieve exceptional outcomes

Inventya Ltd was founded in 2010 with a vision to help newly-fledged businesses thrive. As an innovation and growth partner, it offers tailored advice and support around grants and investments, winning tenders and commercialisation. Its expertise also spans competitor analysis, go-to-market strategy, intellectual property, R&D tax credits, international growth plans, and more. Inventya also supports public sector organisations, including government agencies, universities, and local councils, and is a key partner in Innovate UK's business growth programme.

Inventya's founder and CEO, Aldo De Leonibus, practices what he preaches. Under his directorship, the company has thrice been named one of Europe's '1000 Fastest Growing Companies' by the Financial Times and Statista. "We're currently growing at 35% year-on-year," Aldo reports. This success has been fuelled by many factors, but a key driver was Inventya's adoption of Zoho software in 2019.

We caught up with Aldo and his team to uncover how, since implementing Zoho, the business has seen its headcount increase 500% - from 15 employees to more than 90, and has fundraised over £720 million for its clients, enabled by Zoho's integrated and efficient workstreams.

The Challenge

Enable growth with an integrated software stack








It was a logistical nightmare to manage all of these **disjointed solutions.**

Aldo De Leonibus,
Founder and CEO



In its formative years, Inventya relied on a range of software for its operations. Platforms were onboarded in a piecemeal approach in response to specific needs or projects.

Inventya's legacy software stack:

-  Vtiger CRM - for customer relationship management.
-  People HR - for people management.
-  SurveyMonkey - for capturing client survey responses.
-  Dovico - for project management.
-  Excel Spreadsheets - for everything else!

But as the company's growth started to accelerate, what once empowered its team began to hinder it. "What we noticed during this phase is that we had to grow all of our systems and processes because we had increased the number of requirements across the whole spectrum - from HR, to finance, to the relationships with our clients," explains Aldo. With a maze of applications working in silos, Inventya were unable to analyse data and trends as a whole, and it was difficult to get a pulse on the health of the business. The capabilities of some platforms overlapped, causing duplication. And what's more, each product was running on different pricing plans, billing cycles, and renewal dates. Aldo knew there had to be a better way.

In 2019, Aldo set out - alongside Managing Director Viney Chauhan - to bring harmony, clarity, and efficiency to Inventya's software stack. The duo also wanted to reduce software spend and implement solutions that could improve the stakeholder experience. After evaluating and then relegating solutions from Salesforce, Microsoft Dynamics, and HubSpot, the Zoho One bundle of apps took pole position. "The key decision for us to go with Zoho was that we wanted one software stack where everything flowed seamlessly, so it was quite an easy choice", recalls Viney.

With Zoho One's 45+ integrated products, unified data sets, and budget-friendly price point, Aldo and Viney were sold. They embarked on two extensive Zoho projects to both **overhaul Inventya's end-to-end customer experience** and to **build an enviable employee lifecycle experience**.

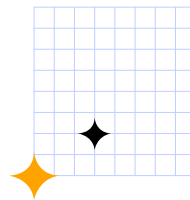
The Customer Experience Solution

Delivering informed and proactive support at every touchpoint



Now we have a seamless interface with our clients that takes them through the end-to-end journey.

Aldo De Leonibus,
Founder and CEO

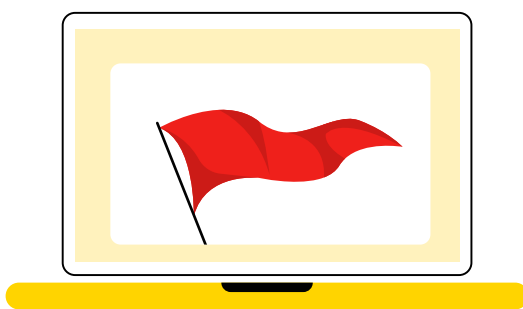


The central hub of Inventya's customer service efforts is **Zoho CRM**. It nurtures new leads, orchestrates client communications, and kick-starts its growth projects. As such, Inventya has utilised a number of customer-centric CRM features to help it deliver best-in-class advice, expertise, and support.

At the start of the customer journey, Zoho CRM is fed by a **Zoho Form** embedded on the company website. This enquiry form captures key information about potential new clients and their requirements, and upon submission, imports it automatically into the Leads module. From here, Invenya deploy a lead scoring workflow based on the prospects' historical financial data to route them to the most appropriate colleague from the business development team, and also to prioritise them.

The lead scoring workflow is underpinned by a critical integration with Red Flag Alert, which sits behind all of Invenya's CRM data. The Red Flag Alert extension provides an API connection between Zoho CRM and Companies House, a third-party register of all UK companies. The extension pulls data from the register into the Leads module to calculate scoring outcomes, while simultaneously feeding data into the Accounts and Contacts modules. The information transferred includes the lead or client's registered address and trading address, its credit risk, total net assets, number of employees, historic filing figures, and profit and loss balance sheets. It also links the LinkedIn profiles of company directors. For Invenya, rich data is essential to assess a start-up's readiness for growth, the potential for its experts to offer support, and the subsequent impact of any support it offers - so the extension has been a game-changer.

The Red Flag Alert integration also unlocks huge time-savings, with Aldo disclosing that "before this, it was taking half a day to research more information about a prospect and insert it into the CRM. Now we can do it in a matter of seconds." What's more, the data bridge is dynamic, ensuring that the information is always accurate and up-to-date. "Once that link was established, all the future data sent by Companies House is automatically updated on the CRM", Aldo adds. Empowered by knowledge, Invenya's team are always ready to offer the right support, at the right time.



A second CRM integration that has proven invaluable for Inventya is Outlook. This connection ensures that all email conversations with a client are logged against the respective CRM record. This helps to provide a seamless service in the event that an employee is out of the office, enabling their colleagues to pick up client discussions right where they left off. "It happened in the past where we contacted someone and we weren't aware of all the discussions that came before....It was a nightmare. But now that's all resolved," says Aldo. The integration also makes it quick and easy to add new contacts or leads. "Directly from our inbox, we can see if any mail we receive is from someone already in our CRM or not," Aldo explains. "If they're not... we can add them in just a couple of steps."

Zoho-to-Zoho integrations are also at play in Inventya's customer journey process. For instance, once a client is ready to move forward with one of Inventya's growth services, the team can immediately issue a contract using **Zoho Sign**. A "Send with Zoho Sign" button is embedded directly within the CRM Opportunity record, which generates a detailed client contract based on the project. The contract is automatically emailed to the client to collect their e-signature before the completed document is received back inside the CRM record. This process triggers the creation of a project inside **Zoho Projects**, which is auto-assigned to the most appropriate project manager at Inventya based on the service. Simultaneously, a record is also created in **Zoho Books** to invoice the client for the hours spent on the project, determined by the timesheets inside Zoho Projects. "It's a whole seamless project that is completely automated by workflows," beams Aldo.

Looking to the future, Aldo plans to enhance the customer journey with the addition of an online portal linked to Zoho Projects. This would enable Inventya's clients to see a real-time snapshot of the progress of their projects, plus download reports, contracts and invoices. "We're confident that Zoho is fully aligned with our plans and will allow us to continue growing and developing," says Aldo.

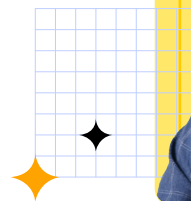
The Employee Experience Solution

Completing the Golden Circle

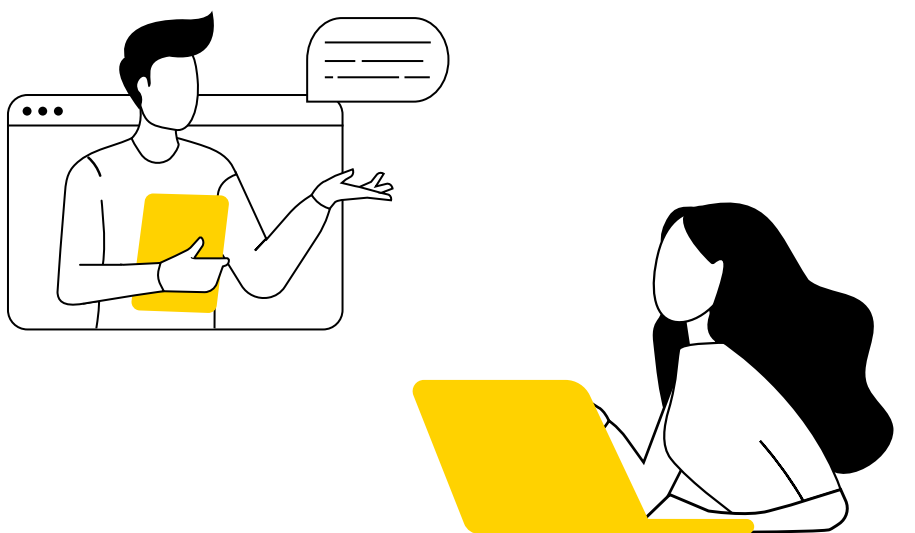


We want to give employees an amazing experience, and the Zoho One suite of apps, especially those focused on human resources, has played a massive role in this.

Viney Chauhan,
Managing Director



Recognising that Inventya's pre-Zoho tech stack created a fragmented employee experience, Viney focused on using Zoho to strengthen what he calls "the golden circle". The golden circle encompasses every stage of the employee lifecycle, starting with recruitment, to onboarding, training, access to information, engagement, and then ultimately to exit. Viney knew that by aligning Zoho One's HR and people development tools with each segment of the loop, he could create a stand-out employment journey that would boost retention, talent acquisition, performance, and colleague satisfaction.



To attract the right future employees to the business, Inventya deployed **Zoho Recruit**, a comprehensive applicant tracking system. In the past, the organisation had relied on external recruitment agencies to source promising candidates, but with Zoho Recruit in the mix, Viney was able to bring the process in-house, gaining more control and saving costs. Today, he greatly enjoys the ease of use and consistency that Recruit offers, and how it amplifies the reach of job postings. "By creating our job advert on Zoho Recruit, we can broadcast it to at least 30+ platforms in a single click," he explains. The platform stores details of every applicant in a single space, lets Inventya's hiring managers assign scores, and creates shortlists of candidates to invite for an interview. It also generates offer letters to those who are successful.

Once a position has been filled, the responsible line manager completes a new starter form, built with **Zoho Forms**. This captures all the necessary details to enrol the new colleague into the business and enables the HR department to issue a contract via **Zoho Sign**. "Previously, this whole cycle was three to four weeks for the end-to-end process. Now we have seen a 30% reduction in time in terms of back and forth between our departments and HR, plus the communication going out to the candidates," smiles Viney. "And, I think there used to be 20 to 30 emails between HR and the line managers to make sure everything was smooth before the new employee starts. We've massively reduced this to just five to seven emails," he continues.

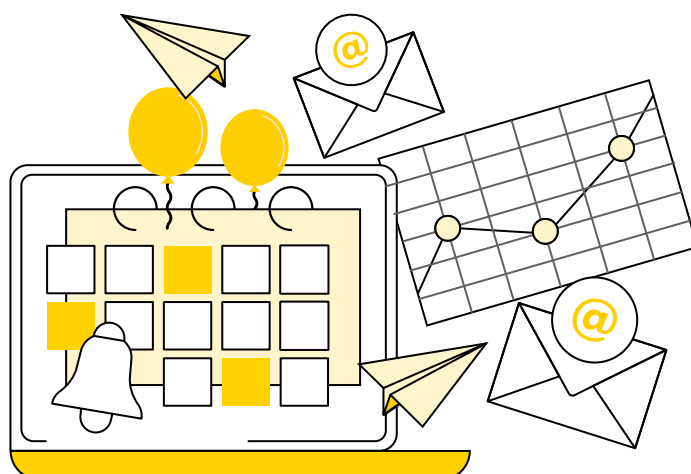
Once a new hire accepts a contract in Zoho Sign, their details are pushed seamlessly from Zoho Recruit into **Zoho People**. A new profile is automatically created for them, which grants access to Inventya's onboarding modules, covering essentials like holiday allowances, company policies, timesheets, and organisational charts. "The new staff members can very clearly see what training modules they need to go through," says Viney. He's noticed that by sharing resources with new team members before their first day on the job, they report feeling more welcome and have a better impression of the company.

Another Zoho People functionality Inventya enjoys is its skills matrix. Offering a complex repertoire of business services means that each member of its team possesses specialised subject knowledge. Using the skills matrix, colleagues can easily see which colleagues are proficient in certain areas and then reach out to them. "If I'm working on a client focused on life sciences, and I want to know who in the business is a life science expert... I can do a search on the company skills matrix... and get a much quicker and direct response," details Viney.

Zoho People is also used to collate Inventya's employee timesheets. "There are predefined projects, and our employees allocate their working hours to them. It gives good visibility of what people are working on, and it's also pushed into our payroll system," Viney elaborates.

Once fully onboarded, colleagues use **Zoho Learn** to complete mandatory training courses, brush up on existing skills, and develop new ones. Inventya have documented scores of topics and how-to guides, from how to raise expenses or complete timesheets, to understanding R&D tax credits and consultancy services. Learn's interactive, bite-sized modules help its staff navigate day-to-day challenges and stay informed in the industry.

The next challenge in Viney's golden circle was employee engagement. He rolled out **Zoho Connect** to provide a space for the company community to thrive. "We created our internal intranet using Zoho Connect, which is a really powerful app. It's like our Facebook, where we can post information, announcements, a company calendar and events. For increasing awareness of what's happening in the business, it's making a massive difference," he explains.



Zoho Expense was the final tool that Viney deployed to level up the employee experience. Before using Zoho, colleagues who travelled for business faced a laborious process to claim expenses, and Inventya's accounts department fared no better for reconciliation. Employees would send photographs of each expense receipt to the finance team via email, manually specifying the project and client it related to. "It was sustainable for a time, but now we have more team members constantly travelling, so sending pictures directly to finance would be chaos," explains Viney. "We started to use Zoho Expense. It's so simple and everything is predefined, so the only thing staff need to do is...upload a picture, and it automatically gets assigned against the project name and client." Zoho Expense greatly streamlines the expense submission, flags duplicate receipts, allows for compliance checks, and provides detailed monthly reports on spend across different parts of the business. "The use of this one simple app has made a massive, massive difference in terms of time and cost," Viney enthuses.

Reflecting on the impact of Zoho on Inventya's workforce, Viney says: "Since we started using Zoho to manage the employee lifecycle, we have experienced significant improvements in efficiency, time savings, and cost savings. And one of the biggest benefits we have seen is that we were able to map our processes end-to-end." The company's achievements in this space were recognised at the Zoholics UK 2025 customer awards, when Inventya scooped the "HR Heroes" trophy.



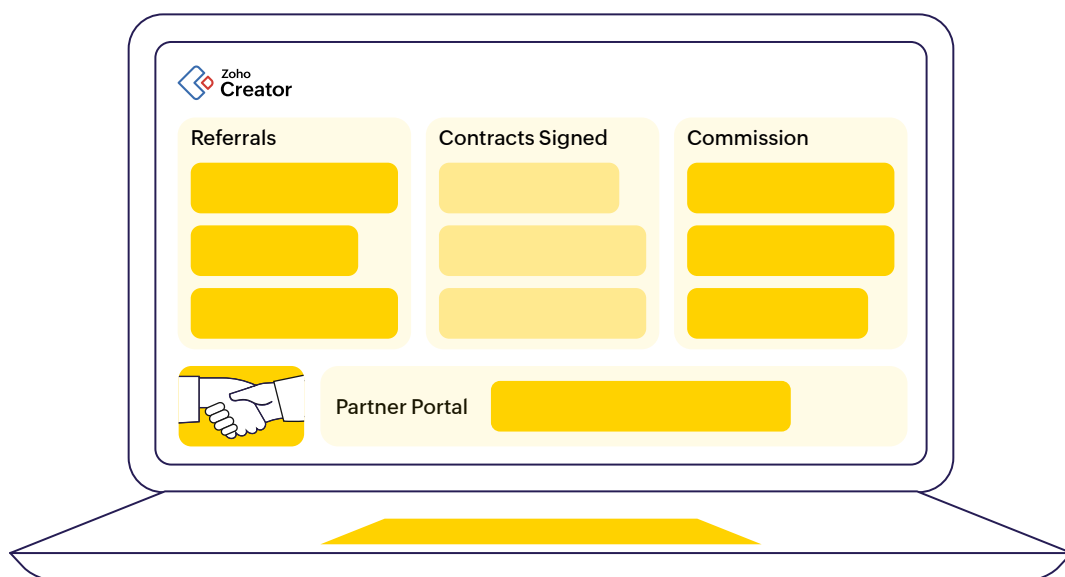
Other apps in Invenyta's stack:

Zoho Creator:

Invenyta receives lots of enquiries and referrals from its partners, some of which are eligible for commission. Historically, its team had to update each partner about the status of their referrals via email, and spent hours preparing monthly reports about the conversion rates and commission due. All of that changed when Aldo discovered Zoho Creator's Low-code potential.

Accessed from Invenyta's website, its partners now use a white-labelled partner portal hosted on Creator, a solution that allows them to self-service their needs. "Through the portal, partners can send leads to us and, more importantly, see a dashboard of all their referrals and the status of the discussions - whether it's someone we progressed with, or whether any contracts have been signed. They can also track their commission if applicable, just within one very simple dashboard."

The application is synced with Zoho CRM, so that Invenyta's business development team only need to add notes to CRM records before they are seamlessly updated inside the partner portal. "Before the partner portal, it was taking us a lot of time to manage the relationships. Now we don't have to do anything extra to keep them informed," Aldo smiles.



Zoho Analytics:

Analytics has revolutionised management reporting for Inventya in a way that was simply impossible with its legacy tech stack.

The platform collates data from every single Zoho application in use, plus Companies House, to provide a complete picture of the businesses' and its client's health. Through its dashboards and reports, Analytics spotlights key insights about Inventya's marketing performance, conversion rates, volume of enquiries, its most popular services, and more. It also enables key metrics to be compared year by year, quarter by quarter, and month by month.

Crucially, Zoho Analytics allows Inventya to understand and measure its very *raison d'être*. "For all of our clients, we can see the net assets, financials, and number of employees over time, and we can see how we can make a positive impact on their business with the various services we provide. We can see how the financials evolve post-support," explains Aldo.

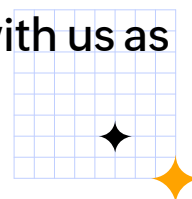


Zoho Bookings:

Inventya uses Zoho Bookings as an additional customer service tool. Embedded on its website, customers and prospects can book a virtual meeting directly with one of Inventya's experts at a convenient time. This fuss-free platform "stops all of the to-ing and fro-ing of emails", shares Viney. Inventya has also integrated Zoho Bookings with Outlook, meaning that clients can always see the up-to-date availability of every consultant, and that booked meetings drop seamlessly into the expert's calendar.



We chose Zoho because of its modular flexibility, deep integration across functions, and superior value. It's tools offered everything we needed - not just as stand-alone apps, but as an interconnected ecosystem that can scale with us as we grow.



Aldo De Leonibus,
Founder and CEO



About Zoho One



Developed as the ultimate "operating system for business", the Zoho One bundle is a collection of 45+ integrated applications that cater to every diverse need of a modern business. From Sales to Marketing, Customer Support, HR, Operations, Finance, and Legal, Zoho One's powerful suite of tools can be relied upon by every department to improve performance, enhance collaboration, and streamline processes. An unrivalled yet affordable solution, Zoho One's cloud-based apps bring extraordinary value to any organisation.

Please find out more via our website: <https://www.zoho.com/one/>



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