




# Aboitiz Equity Ventures

The company's hunt for a low-code solution,  
and why they chose Zoho Creator



# Summary



**With \$8.1 billion in assets and 3600 employees, Aboitiz Equity Ventures is one of the largest conglomerates in Asia.**

The Aboitiz Group's commitment to sharing with the less fortunate has been instilled and passed on through generations of its corporate history. One of its philanthropic initiatives, CSR 2.0, involves over 200 projects that are more sustainable for its beneficiaries, and at the same time aligned with its businesses.

This document discusses the challenges faced by the organization in handling those projects, and how Zoho Creator helped them automate the processes.

# What were they looking for?

As the Aboitiz Group diversified into many businesses, their commitment to sharing grew accordingly. However, they didn't have a **proper system in place to track all their CSR activities**. As they kept advancing their projects and internal processes, papers and spreadsheets became cumbersome to manage. The key challenges they faced were:

- ✓ Each project was unique and required different features to work.
- ✓ For every added feature implementation, **the entire organization was reliant on the IT department**, which couldn't perform at the rate of the organization's **dynamic needs**.

With an increasing number of projects, Aboitiz management decided to find a more efficient and effective way of managing them. To serve its diverse beneficiary base, Aboitiz started looking for a low-code digital platform that would uniquely suit the sectors they operate in—consumer goods, utilities, financials, and industrials.

After extensive research, they decided to implement Zoho Creator as the key platform to realize their digital ambition.

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We consulted many industry experts and looked at many platforms, such as Bpm'online, Kissflow, Appian, and Pega. Zoho Creator came out with very high marks in all of our decision criteria.

**Jojo Guingao,**

Chief Digital Officer, AEV.

# The Zoho Creator solution

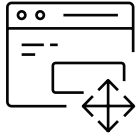
Zoho Creator enabled AEV to roll out a full-fledged web and mobile CSR application in two months, which is used by all the business heads, finance executives, and program heads at AEV. This end-to-end solution has more than 1000 dynamic workflows that take care of the entire project management process without needing any manual supervision.

## Designed by process— managed by project



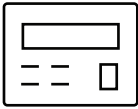
### Budget planning

This module enables program heads to create budgets for projects. The ability to alter processes on the go was a huge win for AEV's dynamic challenges.



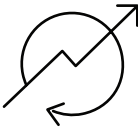
## Approval workflows

A professional approval process for the finance executives to approve budgets which also includes a workflow to request CFO approval if the budget is above a certain amount.



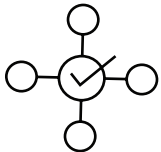
## Dashboard

Each project has a separate dashboard, giving complete visibility and detailed insights for executives into ongoing activities, spending and tasks all from a single place.



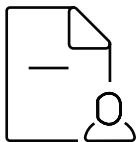
## Goal tracking

Project managers can also set milestones to track progress over a period, and get mobile notifications when a goal is met.



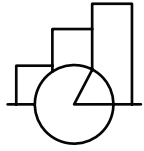
## Integrations

The application also integrates with their existing accounting application, Oracle E-Business Suite, to manage fund allocation and track spending across different verticals.



## Digital invoices

Printable quotes and invoices in different currencies for employees and volunteers at the outset of the project, based on their requirements.



## **Eclectic reports**

Reports derived from a wide range of sources like different locations, divisions, projects, and other dimensions that they'd like to compare.



## **Schedulers and reminders**

Enable managers to schedule tasks that get auto-assigned to team members later. Event reminders to remind volunteers about upcoming events via SMS.



## **Notifications**

Emails to keep every team member focused on the status of their tasks, while also keeping executives up to date on the overall project status and timeline.



## **Cloud storage and mobility**

All the data is secured and stored on Zoho's reliable servers, enabling users to access data from anywhere, at anytime.

# The results

**1000+** transactions automated

**40+** apps deployed at scale

**\$670k** annual savings

**50** diverse business units centralized



# The digital workforce

The employees of AEV started by using a template to track their projects, with the intent of modifying it to meet their requirements. As there were so many tasks that could be performed without creating any code at all, they started using Zoho Creator for automating each of their team's processes.

**This was the turning point, as AEV employees realized the possibilities of Zoho Creator and built apps themselves for all their internal processing needs.**

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I was so delighted when I saw members from the accounting team, from admin, from HR—who are not programmers—develop web and mobile applications with minimal help from IT.

**Jojo Guingao,**

Chief Digital Officer, AEV.

# The ripple effect

**With the adoption of Zoho Creator, our company turned into a digital army, and accelerated towards our digital ambition.**

The applications they developed include an online parking system, inventory, pricing approval, car insurance, customer engagement survey, customer feedback, and project management apps.

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To date, we've deployed 46 applications with mobile and web capabilities using Zoho Creator, and when comparing it with other platforms we realized that we've saved \$670k.

**Jojo Guingao,**

Chief Digital Officer, AEV.



[www.zoho.com/creator](http://www.zoho.com/creator)

**We'd love to talk!**  
**Reach out to us**

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