

# Zoho CRM








by Head of Growth

Patient CRM

## Details

Review Date	08/01/2023
Purchase Date	Q3'21
Implementation Time	12 months
Product Still in Use	Yes
Purchase Amount	\$540 per seat
Intent to Renew	95%
Review Source	Elion

## Product Rating

Product Overall	 4.5
Use Case Fit	 5.0
Ease of Use	 4.0
API	 N/A
Integrations	 N/A
Support	 N/A
Value	 4.5

## About the Reviewer

Purchasing Team

Implementation Team

Product Oversight

## Reviewer Organization

Specialty Practice

Behavioral Health

## Reviewer Tech Stack

CentralReach

## Other Products Considered

N/A

## Summary

- **Product Usage:** The company uses Zoho to manage various workflows related to clients and employees such as record management, documentation management, and therapy scheduling.
- **Strengths:** The review highlights Zoho's range of functionalities, easy automation setup, useful analytics, and straightforward workflow management.
- **Weaknesses:** The reviewer was concerned about potential limitations and glitches in workflow automation, and uncertainties about Zoho's ability to support their growth.
- **Overall Judgment:** The reviewer feels that Zoho offers great value for its price, and strikes a balance between lightweight task management solutions and costly, heavy-duty platforms.

## Review

### **Today, we're here to talk about Zoho and how it's being used at your company. Before we dive in, could you give us a brief overview of your company and your role there?**

Our company is a behavioral health organization. Our main focus is providing therapy services for children with autism. We operate in around 15 different states. Our primary delivery models involve offering therapy to children in their homes; we also have about 15 centers that we run, which are for children who can't receive services at home. Each center typically accommodates anywhere from 25 to 50 children at a time. We're a fee-for-service organization, and we accept Medicaid and most major commercial insurances.

As the Head of Growth, I was initially responsible for launching our services in a particular new market. As things progressed, I transitioned into a larger role focusing on overall growth and strategy. This includes launching all new markets and optimizing our client delivery model.

### **When did you purchase Zoho, and how long have you been using it in production?**

We bought Zoho between 18 and 24 months ago. It took some time before we went fully live with it, which was about a year ago.

### **How do you use Zoho? What does it do for you?**

We looked into Zoho because our company heavily relied on Excel spreadsheets for various processes and workflows across the organization. We used it for everything from record management to documentation management and workflow management. Our recruiting department, quality assurance, scheduling, intake – we had spreadsheets scattered all over the place. While Excel is great as a source of truth, it has limitations in communicating information between different workbooks and sheets.

So, we recognized the need for a single platform that could serve as the source of truth throughout the entire customer and employee journey. We wanted to manage everything from the beginning of the journey, be it a patient or an employee, all the way through their onboarding and beyond. This meant handling all workflows related to clients and employees. Our EHR practice management software, CentralReach, only covers three needs – clinical work, scheduling, and billing. There's a lot more that goes into our operations, and that's where Zoho comes.

We explored several options like Smartsheet, Salesforce, Monday, ClickUp, and other low-code or no-code environments to migrate all our Excel-based workflows and data into one unified platform. I wanted to find the best of both worlds, combining Excel's flexibility with a platform that allowed cross-functionality. Zoho stood out as it offered the ability to view things in an Excel format when needed, but everything was connected to a client profile, which made managing various workflows much more streamlined.

Once we decided Zoho was the right fit, we worked with third-party developers to customize and build out the specific workflows and processes we needed for our organization. And that's how we integrated Zoho into our operations.

### **Could you walk through one of these workflows in some depth?**

Let's start at the beginning of the patient journey. Our relationship with patients starts when they reach out to us, and there are various ways they do that – through digital marketing efforts, on-the-ground marketing, etc. Now, it's

crucial to capture and track that data to see how they come to us. In the past, we used Excel to jot down how they found us, but that manual process wasn't cutting it. We needed something automated and more robust. So, we set up integration between our website forms, chat function, and phone service with Zoho. Now, any lead that comes in through the website form, the chat, or a phone call is automatically recorded in Zoho. This way, we can track the lead's inception point, where it's coming from, and all the information they provide in those interactions.

From there, our intake coordinator takes over. They'll qualify these leads to see if they're relevant. If they are, we'll convert them into a pipeline and initiate the intake process. If not, we simply mark them as not relevant and move on. The intake process involves collecting various documents from the potential patients or clients. They can send in their documents and complete the intake packet, which includes filling out all the necessary forms and signing the required documentation. All of this is done right within Zoho. Zoho has a suite of products, one of which is Zoho Sign, which functions like DocuSign, something we used to use alongside our Excel spreadsheets. Now, with just a click of a button in Zoho, we can send out the intake packet, manage the process, track its progress, and get all the documents stored neatly within the patient's profile.

From there, we keep track of where they stand in the process. Are they ready for services? Do we have their services scheduled? Have we assigned them a clinician? We handle all of this within Zoho, along with other workflows that come into play once we start servicing them. For instance, all the services we provide require prior authorization, so we built out workflows in Zoho to manage all of that. When an authorization is submitted, we track all the information and it triggers other workflows. Our quality assurance team is alerted when there's a new authorization, so they can review the documentation and clinical work accordingly, all within Zoho.

### **What are some of Zoho's standout features for you?**

Zoho has great out-of-the-box automations, which are very easy to set up. Even without the need for developers, I can hop in and set up alerts for our billing team whenever a new authorization is submitted or received. I can very easily do that, whether I want to send an email, an alert within the platform, or establish a secondary workflow.

A big chunk of our workflows revolve around employee management. We handle all our employees through Zoho, not as an ATS (applicant tracking system) but for existing employees. Once a start date is entered, Zoho sends a message to our insurance team to take care of benefits. The internal teams are alerted about the new employee, who they'll be working with, which market, which state, etc., so they're all prepared for the new team member. We also have automated alerts for licensure expiration and even send out "Happy Birthday" emails using simple automations that grab the birthday date and shoot out a template we've created. It's perfect for those straightforward workflows you need at different stages of your organization's lifecycle, without having to rely on code or third-party developers.

While Zoho makes it easy to handle many tasks, we also have more complex and sophisticated workflows that require some coding, but it's totally worth it.

Finally, one of the other great things about Zoho is their analytics. They have this built-in BI tool that's similar to Power BI or Tableau, and it sits on top of the entire platform. We can customize and create fantastic analytics with it. It helps us track data on leads, conversions, intake pipeline, and more. It's a dashboard where we gain valuable insights.

### **It'd be interesting to chat through some of the work that you rely on the developer for. How do you determine where you need a developer?**

While Zoho aims to be user-friendly, even for folks with a non-technical background, having someone who understands Zoho inside-out is crucial for an organization with various workflows and needs. Zoho offers a full suite of

products (they have an ATS, a file management system, etc.), and we only scratch the surface by using just their CRM. So, having someone who knows the capabilities and can build workflows quickly is important.

When we needed to improve our workflows, we engaged our third-party developer to go through discovery and mapping out different phases for the new workflows. For more complex automations, custom code, or building new modules, we lean on our developers. I try to handle some things internally, but for glitches, complex automations, and new workflows, I involve the developers to make sure everything runs smoothly. They help us build new workflows and modules that are essential for our unique needs. We have regular meetings, and they're always ready to assist whenever we need them. Zoho is not a platform you can set up once and forget about, especially for an organization with diverse requirements. I think there's value to having third party support and I will say that it could be Zoho themselves. I've never used Zoho's internal customer service, because our developer knows exactly what they've built for us.

**Got it. What are some examples of things that you can do with custom code that you can't necessarily do with the platform itself?**

There are certain cases where we need specific alerts or automations to be sent out to particular people based on certain conditions or rules. And sometimes, these rules require a bit of custom coding, especially if they're not just standard operations.

**Do you have a perspective on the API or the extensibility of the platform itself?**

I've been told that Zoho has an open API and is easy to work with. I've always wanted to experiment with it, but for many of our workflows, we can handle them directly within Zoho. They have a lot of off-the-shelf solutions that eliminate the need for external integrations. For instance, Zoho Sign replaces the need for DocuSign, and their file management system covers that aspect as well. Even for lead generation from our website, we don't need Zapier because Zoho CRM directly integrates with the website.

However, there are certain functionalities, especially in healthcare, where we need external APIs. For example, eligibility checking to verify insurance or benefit eligibility isn't natively available in Zoho. While I've considered building that feature, I haven't found the right solution or had the time to delve into it. Salesforce, for instance, has a feature like that and integrates with vendors to achieve it. At the same time, building that out has a cost associated with it. Right now, we can handle certain tasks manually or through other platforms, like downloading a spreadsheet from Zoho and performing a batch check for eligibility. So, while it's an opportunity, we need to weigh the ROI and whether the added automation justifies the investment at this point.

**That makes sense. You mentioned some of the integrations that Zoho has, and it seems like they focus a lot on internal functionality due to the wide variety of products they offer within their suite. I'm curious to know if they have out-of-the-box integrations with external tools or if it's mainly internal-only.**

From my perspective and the way we've been using it, it's mostly their own tools, covering a full suite of products. They are really good at providing cross-functionality between these tools. You can either use them independently or have them seamlessly integrated. For instance, Zoho Sign directly integrates with our CRM, allowing us to send and receive documents right from there. However, you can also use Zoho Sign as a standalone product if needed.

**And in your experience, do you find the quality of the integration between the different Zoho products to be high?**

Yes, staying within the Zoho suite of products, their cross-functionality is really strong. It's evident that they were designed to complement each other and work as a unified set. While it may not be as robust as Microsoft 365, there is definitely a solid relationship between the different Zoho products.

### **Is there anything with Zoho where you feel like it is not doing a good job for your needs?**

There are some limitations. As our company scales and grows larger, I get a little nervous about whether Zoho can handle all our needs. We have a lot of different workflows and automations, and I have noticed some glitches or failures in the automations, which can be concerning. And sometimes, I wonder if it is strong enough to hold everything in the data analytics module. I wonder if moving to a more powerful BI tool would provide better analytics or if we could customize the data retrieval for more real-time insights.

Zoho is a great entry product for any business. It might not be as powerful as Salesforce, but the cost difference is significant. Building Zoho costs less than for Salesforce, and the actual seat price is not nearly as expensive either.

### **Shifting gears a bit, how was your experience with the sales process when you were considering Zoho?**

It's been a while, but when I was first introduced to Zoho, I heard about it from others who were already using it. I did a couple of demos to see its capabilities. After that, I proactively sought out third-party developers to get a better understanding of what they had built with Zoho and how it could meet our needs. It was more of an exploratory phase to see if Zoho could address our requirements and assist us with our workflows.

### **Did you explore other products as well to find the best fit for your needs?**

Yes, I did consider and evaluate other products. While Salesforce was too expensive and cumbersome for our requirements, I looked into alternatives such as ClickUp, Monday, Smartsheet, and Notion. Each of these platforms excels in specific areas like project management, task management, or customer relation management. Monday is really good at project management. Asana is really good at task management. However, we needed a combination of all these features, which is why Zoho seemed like the best fit for our needs.

### **Salesforce was way more in terms of price, but how did Zoho compare to the other more task management-oriented CRMs you were considering?**

Zoho is definitely more expensive than some of the other task management-oriented CRMs. Building out our customized solution on Zoho cost us around \$10K, and we also pay a monthly fee for ongoing support and maintenance. Additionally, the seats for Zoho are pricier compared to some other platforms like Monday, which offers seats at around \$45 per month. Despite the higher cost, Zoho still offers much more functionality and features, making it a better fit for our needs compared to the other options. It's not as expensive as Salesforce.

### **Let's talk about the onboarding and implementation process. So once you decided to go with Zoho, it took about six to twelve months to get everything set up in production. You had to find your own engineers for the project. How did you feel about the overall process? Was it efficient and a good use of time?**

From my perspective, there are two parts to that. First, the customer service from Zoho was lacking in terms of finding a third-party developer. I didn't receive much assistance, but that might be because I took the initiative to find a developer myself. I saw right away that for us to really be able to build something out, we'd need a third-party developer. They didn't provide any insight into that. Once I started looking for a third-party developer, it took me some

time. I interviewed five to seven, started with one, and then switched to another. Once I did find the right developer, I put the entire onboarding and setup process in their hands. They knew the platform, the type of account we would need, etc. better than me, so I shared our needs with them and asked them to get us there.

The second part is around building out the platform. That required close involvement as there were many nuances to consider, especially for a large organization like ours with various workflows. The actual implementation was challenging, especially with migrating existing data and going live. Like with any project, the last 10% of the work was harder than the first 90%. This whole process was not without its difficulties, but we managed to overcome them and get things running smoothly.

**I see. How do you find the customer support and account management now that you're live and in production with Zoho?**

To be honest, I rely entirely on our third-party developer for support, which could be a mistake on our end, but we do it because of a lack of time and bandwidth to understand what Zoho's support capabilities are. I never really interact with Zoho's internal support team. The third-party support costs money, but I think I'm getting a better level of support and I'd imagine quicker support as well.

**What do you like most about Zoho?**

I like that Zoho has a lot of functionalities that give us the ability to build various workflows for different challenges within our organization. Whether it's client management, employee tracking, or other day-to-day processes, I can simply define the workflow and implement it in Zoho. Businesses scale and they need to be able to scale with their tech stack. You should not be evaluating new softwares to do something every three or six months. It's important to have milestones (revenue, employee size, etc.) where you ask that question, but you should be able to get the most out of a software before you move to the next one. For example, we could build out our credentialing workflow in Zoho, but there are limitations. Because of those, we decided to bring in another piece of software.

**What do you dislike most about Zoho?**

I wouldn't say it's a dislike, but more of a concern. I always worry about potential limitations and glitches in the workflow automations. It's a constant responsibility to ensure the platform works optimally and serves as the source of truth for our business. I need to be vigilant in case any critical automations fail, like alerts for onboarding new employees, which could lead to costly mistakes and headaches.

**What is the likelihood of you continuing to use the product, say in 24 months?**

I see a pretty strong likelihood. I'd want to get a little more sophisticated with it, designating someone internally to manage the entire product. I'd like to have someone that oversees our tech stack and can continue implementing and building on it.

**Do you have any advice for someone in selecting this type of product right now?**

My advice is to do your research into what's out there. I think Zoho falls in a really unique sweet spot. On one hand, you have all these siloed products and tools with different functions. On the other hand, you have heavier platforms that require a lot more custom work. But Zoho really falls in the middle and can provide a lot of functionality and different solutions for businesses of any type.