



# Zoho CRM Helps Mobile Health Company Turn Weeks of Work into Minutes

**“We knew we needed to change the way we were tracking our sales pipeline and reporting data.”**

## COMPANY PROFILE



INDUSTRY  
Hospital & Health Care



TYPE  
B2B



SIZE  
1001-5000 employees

## COMPANY CRM CRITERIA



Customization



Integration with  
Zoho Reports



Flexibility

In early 2016, **Allegiance Mobile Health** came to the realization that they needed a full-featured CRM to track their sales and business pipeline. Customer Support Manager, Valerie Holden, remembers the process of testing several CRM platforms after receiving a recommendation to try Zoho CRM. She quickly found that it stood apart from the rest as the best solution.

“It was important to us to have something that would be accessible to all of our staff members,” Holden said. “Zoho, as far as usability and the capability, wiped out every other competitor in the running.”

On a daily basis, Allegiance Mobile Health manages a customer database that includes thousands of facilities—from hospitals to nursing homes. The Texas-based company provides both emergency and non-emergency transportation solutions to millions of residents scattered across several regions.

“At the end of the day, our decision to go with Zoho came down to what would be the easiest CRM to use that could support our growth and our staff,” she said .

## Background:

Prior to integrating its operation with Zoho, Allegiance Mobile Health relied on a complicated reporting function embedded within its dispatch system to track how various facilities utilized transportation services.

But there was one major caveat to monitoring the entire customer base through this function, . “The tracking system was not user-friendly at all unless you were an expert analyst,” Holden said. “Very few people within the organization could maneuver through the system or even use the reporting functions.”

Thousands of medical facility contracts, combined with a laborious reporting system, meant that Allegiance funneled excessive administrative hours into its daily operations. Everything, from reporting to lead generation, was costing the company an increasing amount of money and time.

“I sometimes spent two weeks building reports for a previous quarter. Managing our client contracts was another time-consuming game,” she said. “We were expanding to new regions rather quickly, and something had to give.”

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## **Making the Change and Seeing Rapid Results:**

A combination of company culture and available training resources factored into their decision to implement Zoho in early 2016. With employees from all walks of life and varied experience levels, Allegiance Mobile Health recognized the benefit of an accessible platform—one that its staff could expertly use with minimal training and expertise.

Since implementation, Zoho has had a considerable impact on day-to-day operations. Reports that used to take several weeks to generate are finished in 10 minutes or less. Allegiance Mobile Health also tracks its contracts and generates leads much more efficiently.

“At the click of a button, I can send all of my sales and business development reps to facilities with expired contracts, whereas before I’d have to make 25 phone calls,” Holden said.

Allegiance Mobile Health plans to shift more departments to Zoho apps. Holden anticipates almost half their staff (about 500-600 people), from administrative to dispatch to support, will eventually interface regularly with Zoho.

“Once we can get everybody in the system and trained in all the functionalities, I think it will be a whole new world for us. In man hours alone, Zoho will be a vital point in our growth in 2017.

## **What Would you say to Other Customers about Zoho?**

“I can’t even express fully the increase in efficiency we’ve experienced in the past eight months. I don’t have another word other than awesome. I’d definitely recommend Zoho.”



Zoho CRM is a cloud-based software for managing your customer relationship in a better way. It helps streamline your organization-wide sales, marketing, customer support, and inventory management functions in a single system. We are light on your pocket and the features and integrations we give you are unmatched.

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