



## Case Study

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# How Agappe plans their unique journey cycles, optimizes account management, and improves productivity with Zoho CRM

Industry type  
**Medical Devices**

Number of Employees  
**501-1000**

Type of business  
**Partnership**

## Features that helped us

**Automation | Custom module | Customization | Mobile App  
Zoho Desk Integration | Telephony Integration**

# Summary



## Business Challenges

- Need for a single system to handle all business processes
- Lack of contextual information for field agents
- Lack of reporting



## Results

- 360 degree view of the customer, offering personalised services
- Contextual information available to field sales agents
- Transparent reporting



## Most Useful Feature

- Customized mobile application for field sales agents



## Important Business Metric

- 80% increase in productivity and increased operational efficiency

## THE COMPANY

**W**ith a vision to establish globally as a premier in in-vitro diagnostics, [Agappe Diagnostics](#) is the fastest growing company in the IVD (in-vitro diagnostic) industry in India with 30,000 customers across the country. They have a presence in 65+ countries with more than 700 employees, 300 field sales agents, and 150 field service agents.

Agappe manufactures in-vitro diagnostic equipment in the analytical and pre-analytical segments and their offerings include clinical chemistry, immunochemistry, haematology, molecular diagnostics, pre-analytics, serology, coagulation, SyRe (system reagents), urinalysis, and blood grouping. They have a world-class facility for reagent manufacturing in Cochin, India with a capacity of 120,000 kits per shift per month. With a state-of-the-art modern manufacturing facility spread over 120,000 square feet, Agappe is the largest IVD manufacturing facility in India. The equipment facility, situated in Cochin, has a total area of 30,000 square feet with a capacity of 1,250 pieces of equipment per shift per month.

Agappe was honoured with the award for  
**“Indigenous Development of Technology and Commercialisation”**  
from the Honourable President of India **Shri. Ramnath Kovind** in 2018  
and at present is growing at a CAGR of 22% for the last 5 years.



## THE CHALLENGE

Agappe's mission is to provide their customers with up-to-date, innovative, and high-quality services backed by promptness. To do this, they needed an account management system that could support their sales and service agents. The technology they were previously using presented challenges in achieving their mission.



**We lacked a single system that could handle both our sales and services processes. Data was distributed across multiple systems that made it impossible to get insight on the business.**



**Thomas John**  
Managing Director

This led to Agappe's need for a solution provider that could support their internal planning and processes end to end. They had both domestic (India) and international processes that needed geo-specific support.

The process followed by Agappe is unique to the diagnostics industry. Every month, their sales executives have to prepare an approved journey planner for the following month. This planner includes the following details for every working day of the month: target area, number of prospects, tour plan, customer name, and purpose of visit. Before Zoho, a lot of this planning was done on spreadsheets and data was not centralized in a single place.

Agappe's post-sales service also needed a single system that could handle all tickets that came in for different purposes: service, installation, and preventive maintenance. With information in multiple places and a system that was not scalable to their needs, Agappe started to see a decline in productivity.

**"We wanted a solution provider that offered a system that was not only flexible to our needs, but also scalable. We were looking to provide our customers the best experience and for this, we needed a technology partner that could understand the nuances of our domain and our internal processes, as well."**

**Thomas John**  
Managing Director

## THE SOLUTION

# How Agappe uses Zoho to achieve their digital business transformation

## Kick-starting the journey with Zoho CRM

After a thorough exploration of Agappe's unique processes, [Zoho CRM](#) was implemented as the first step in the plan and remains at the heart of the transformation. Zoho CRM became Agappe's centralized application that would serve all their sales and service needs.

## A single system

A custom module was designed to capture their sales process automation. This included customer and product information along with the lead-to-order process details. Zoho CRM also served as the single point for running their field operations capturing orders and leads and converting those leads into potential business orders.

For customer service, Agappe's call centre now uses Zoho CRM for all tickets. [Zoho Desk](#), the customer service software from Zoho, serves as the back-end and the Zoho Desk and Zoho CRM integration ensures that all service-related processes can be handled from within Zoho CRM. The automation also triggers an SMS on service ticket creation and completion from within the CRM system.

This gives the team at Agappe a complete view of the customer with relevant information, effectively taking out the guesswork.



**Prasad Paulose**  
General Manager  
IT & Total Lab Automation

**Zoho CRM offers a robust ecosystem that allows us to customize it to our needs. The 360-degree view of the customer helps us to offer services that are highly personalized to every customer, taking us closer to our vision of being the best partner in the diagnostics field.**



## Fast-tracked integration approval for contextual information

Agappe uses Xtend Call Center Solutions as their call management system. For successful service, Zoho CRM had to be integrated with Xtend so that their call centre agents have complete contextual information to handle service requests.

The Zoho team got this integration approval specifically for Agappe and onboarded Xtend technologies as an integration partner.

## Introducing the Zoho CRM mobile app for every field agent

For Agappe's sales process to run well, the iPad and mobile CRM app is a must-have for every field sales agent. The team at Zoho CRM ensured that the complete app was available on the iPad. This was easy because of the widget-based developer capability that allowed quick customization of CRM, specific to Agappe's processes. Sales agents are now able to go through their day-to-day work with contextual and relevant information at their fingertips.

**"The [Zoho EBS](#) team helped us achieve complete digital transformation. The mobile app is customized to our needs with an automation of processes. This is helping our field sales agents to be more productive. "**

**Prasad Paulose**

General Manager - IT & Total Lab Automation

During the implementation phase, widget-based support was in the beta phase, and the Zoho CRM team was able to successfully roll out mobile support for Agappe's processes.

## Seamless integrations for the complete picture

The ecosystem of Zoho brings together everything about a customer, from the first touchpoint to future interactions, in one place. Agappe employs seamless integrations between Zoho products so that all information is available inside Zoho CRM.

They use the [Zoho Survey](#)-Zoho CRM integration to obtain customer feedback. Agappe also uses [Zoho Analytics](#) to get complete reporting and analytics on their sales and service processes. They also use [Zoho Expense](#) to manage employee travel.

Employee attendance data is managed using the [Zoho People](#)-Zoho CRM integration and recruitment is handled with [Zoho Recruit](#). They also use [Zoho Cliq](#) to manage their internal communication and notifications.

It is not just Zoho-product integrations, Agappe continues to use Microsoft Dynamics Navision as their ERP software to manage all their financial billings. Data flows from the ERP system to Zoho CRM to be easily available for agents to process.

## Transparent reporting

All this transformation also required reporting that was missing from Agappe's previous implementation. With Zoho Analytics, they now have dashboards to see every individual agent's progress. The senior management has complete transparency with custom reporting.

## Daily check-in report automation with Zoho Expense

Daily reporting of field agents' journeys is automated with Zoho Expense. This calculates allowances automatically, without having to work on dispersed data.

## Taking advantage of the Zoho One bundle of applications

Agappe started using Zoho CRM for lead and account management and slowly expanded to many other apps in [Zoho One](#), the inter-connected platform making up the operating system for business. This allows them to connect with their customers digitally on scale, while offering the internal team a seamless experience.

In addition to all the above, Agappe also runs their business support functions including conference and hall booking, visitor tracking, and vehicle tracking with [Zoho Creator](#).

## Zoho Enterprise Business Solutions (EBS)

Zoho's EBS team worked with Agappe to get a complete understanding of their business and processes. They then suggested the appropriate applications and features. Once approved by the Agappe team, Zoho was completely implemented for them.



## The bottom line: Driving digital transformation with record-breaking results

Zoho CRM's highly customizable system along with the mobile app, integrations, and automation allowed Agappe to create operational efficiency and increased productivity up by 80%.

**“ Zoho CRM offers us technology that allows us to be more proactive and insight-driven, with all information in a single place. With our complete business under control, our productivity is up by 80% in the last year that we have been using Zoho. ”**

**Thomas John**  
Managing Director