



**Compass  
Health Agency  
increases deal  
success by 45%  
using Zoho CRM.**





# The company

The teams at [Compass Health Agency](#) understand that navigating the world of insurance can be overwhelming and confusing. That's why they've created a one-stop shop for all insurance needs, providing policies tailored to clients' specific needs and budgets. They work closely with leading insurance providers to bring clients the best options available, ensuring that they have the coverage they need to protect themselves and their loved ones. Based in Orlando, Compass Health have been in business for only three years but have already seen impressive demand for their services.



## The challenge

Prior to adopting Zoho CRM, Compass Health's leadership team was spending countless hours on phone calls with sales reps and prospects "drowning in data", trying to understand what was and was not working. Ripley F, Vice President of Compass Health—who holds a PhD in organizational psychology—recognized the need for a tool that was more efficient than Google Sheets. Switching from routinely using Google Sheets and pivot tables was difficult but necessary, says Ripley. Back then, there was no way to organize the data efficiently or optimize the sales pipeline. If they hadn't looked for a better way to manage the information, growth would've been a distant dream.



# The solution

A friend from a medicare agency recommended Zoho while Ripley was researching options. Out of the many contenders—including Salesforce, HubSpot, and Monday.com—only Zoho met Ripley's high standards. The others dropped from the race due to drawbacks like unreasonable pricing, inadequate features, or lack of customization.

Zoho CRM's wealth of online resources, like guides and tutorials—the “Zoho University” as she calls it—was what ultimately drove her decision. Ripley believes that answers to all or most queries about how Zoho CRM works can be found online. Apart from the help she received from Zoho Support, she personally invested an abundance of time and energy into studying CRM to make the most of its offerings.

Keep reading for Ripley's brilliant bonus tips for new Zoho users.

## Actionable alerts

As a recently onboarded Zoho customer, Ripley fondly remembers the initial phase and is grateful for the help from Zoho's onboarding team. "Giridharan from the premium onboarding team was a huge help," she says. "I chatted with them every single day." In just three weeks, Ripley was able to get the CRM up and running for her team. Ripley's passion for learning, research and improvement helped her coach her teammates and optimize their CRM usage.

Adoption drives behavioral change at Compass Health now. "We use Zoho CRM all day, everyday. It has become our prime communication tool," Ripley says. "Really, everyone is using it." Zoho helps Compass Health's teams stay on top of their pipeline and ensure that every stage and action built into the sales process takes place for every deal moving through the funnel. It's easy to stay focused on marquee deals, and they prioritize others according to their value.

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And teams are not just using Zoho CRM in isolation. The cross-department collaboration—sharing prospect and customer insights across teams—is what has made Zoho part of every Compass Health team member’s daily routine.

**Ripley F**

Vice President, Compass Health Agency



They now have a focused to-do list that helps them track the customer’s journey and hold their hands throughout the process. Thanks to their clarity and intuitiveness, CRM’s reports help the team make vital decisions. It’s easy to see which opportunities are trending in the wrong direction and what actions they need to take to fix them.

Reports on conversion rates and deals won are a simple way to see how well leads and opportunities are flowing through the funnel and where things are getting stuck. Ripley's team use the visibility these reports provide to re-engineer their sales stages as needed by removing barriers that cause opportunities to stall and die out.

## Customized features equal increased productivity

A few of the major customizations in Zoho CRM that have had a massive impact on the profitability of Compass Health are as follows:

- ✓ Custom [fields](#) for medical history, physical injuries, and health goals help organize data more efficiently.
- ✓ Customized views and [filters](#) enable the teams to group records for unique work scenarios.
- ✓ The team uses Blueprints to qualify leads coming into CRM through Zoho Forms.
- ✓ Zoho Flow's workflows are used to trigger an automatic welcome email when a record is pushed into CRM, thereby setting follow-up actions in motion.
- ✓ Mass email campaigns using Zoho Campaigns enable Compass Health to target different categories of subscribers, like leads, customers, and those interested in specific products.
- ✓ By connecting the Deals module in CRM to Zoho Sign, it's now effortless to send agreements and templates to customers to be signed.

# Building customer engagement to boost sales

As the team adopted Zoho CRM, they easily identified aspects of their business they could improve and re-engineered their sales stages. For instance, while scheduling sales calls with customers and requesting required documents from them, the Compass Health team realized that their younger demographic is more responsive to texts, so they built their messaging strategy accordingly. They started seeing two times more responses than before.

Customer retention was a common issue the company faced when using their old tools, because they didn't have a consistent way to stay in touch with customers. For instance, just by integrating the Kixie telephony plugin with Zoho CRM, the teams revolutionized the way they connect with customers and store their information.

Scanning QR codes was another impactful change they made to their business process. "Building a QR integration with Zoho CRM was the best thing we did," Ripley says, "because now the customer just uses their phone to scan the QR code and uploads all the documentation without having to talk to us at all." Compass Health have seen a 100% increase in the number of responses they receive.

## Seamless flow of customer data inside the Zoho ecosystem

Compass Health also uses Zoho's comprehensive suite of business solutions: Zoho One. "We use [Cliq](#) all the time," Ripley says.

"It ensures that there's seamless instant communication within the Zoho ecosystem. We also use Zoho [Assist](#), because we do have numerous remote agents, and Zoho [Workdrive](#) to manage all our documents internally."

Apart from using Zoho Sign, they also use [Zoho Flow](#) to integrate their apps tightly, like their telephony integration, Kixie, which they use on a daily basis for customer interactions. They turn to [Zoho Campaigns](#) for planning and building their email marketing campaigns, and can automate personalized, targeted marketing emails through automation, which helps increase engagement and drive sales.

## From hit or miss to operational insights

Now that they've optimized their pipeline, Compass Health have started using Zoho CRM's analytics and tracking capabilities to drive growth. They have a dedicated screen in their sales room to display key metrics, and their CRM [dashboard](#) is on display for all to see. They recognize that it's hard to make meaningful adjustments unless you keep an eye on the big picture.

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Instead of having those ugly Google pivot tables—which is what we used in the years prior to adopting Zoho—I now have these beautiful visual graphs, analytics, and goal trackers. That's a big win for us!

**Ripley F**

Vice President, Compass Health Agency



# Immediate impact: No more finger's crossed



As a company that makes data-driven business decisions, Compass Health is taking advantage of the Zoho platform to improve data quality, conversion rates, and rep behavior throughout the funnel. In the brief time since they implemented Zoho, there have been numerous notable improvements and operational changes.

"From a 40% success rate in getting documents from clients," Ripley says, "we started seeing an 85% success rate—in just a week."

Compass Health's sales team have started closing upwards of 200 deals a day—a huge boost and the quickest turnaround they could imagine for a new tool. Furthermore, the team members who were hesitant to switch from Google Sheets in the beginning are now twice as productive as before.

Zoho provides Compass Health with valuable insights into customer behavior and preferences, which enables them to tailor their approach and meet the needs of their target market more effectively.



## Looking forward

Thanks to Zoho's various features, the company has been able to add more agents and acquire more customers, resulting in increased sales and conversion rates. They're planning to set higher goals for deals won and expand to more locations.

But this is just the tip of the iceberg of how Compass Health Agency plans to leverage the power of Zoho. As a consultant, Ripley has already helped two other businesses subscribe to Zoho One, use the premium support add-on, and join onboarding sessions to aid their business goals. She doesn't want to keep the benefits of Zoho all to herself; she's happy to see other businesses succeed as well.



# Ripley's bonus tips for new users

- ✓ Sign up for the [premium support](#) option and take advantage of onboarding sessions during onboarding to see faster results.
- ✓ Make full use of the onboarding sessions after you book them. Use the calendar booking link to schedule them and don't miss them for anything.
- ✓ Come prepared for your meetings with Zoho's onboarding agents with the right questions and convey them clearly.

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Zoho CRM's user-friendly interface certainly simplifies the initial setup, yet to truly unlock its full potential, I highly recommend signing up for the premium support option. With the additional assistance and expertise provided, navigating and utilizing the software becomes a seamless and efficient experience. Trust me, the investment in premium support is well worth it and has significantly elevated my overall satisfaction with Zoho CRM.

**Ripley F**

Vice President, Compass Health Agency

