



Scaling Canada-Based Healthcare Company with Zoho One



Zoho One

CLIENT PROFILE

Our client is on a mission to reshape **healthcare in Canada**. With a smart, tech-first platform, they bridge the gap between doctors and patients, making communication seamless while cutting down on administrative headaches.

Their services don't just connect people—they **empower healthcare professionals** with the tools they need to deliver better, faster, and more coordinated care.



Business Type
B2C



Region
Canada



Industry
Healthcare

CURRENT LANDSCAPE

They were manually handling core operations—lead management, appointment bookings, subscription tracking, and payment collection.



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PROJECT BACKGROUND

Despite having an innovative platform, our client was facing difficulties with their **manual backend**. **Lead generation, appointment booking, and subscription management** were all handled separately and manually. This not only slowed down their operations but also made it hard to track patient history and manage growing data efficiently.

The system they were using was **cluttered and inefficient**. They used **Calendly to receive leads, managed bookings separately**, and did not integrate payments or subscriptions. With business expanding across Canada, it became clear they needed a connected digital ecosystem to support their growth.



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Technologies We Used



Zoho CRM



Zoho Forms



Zoho Booking



Zoho Subscription



Zoho Desk



**Zoho Marketing
Automation**



Zoho Billing



Zoho Books



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■ ■ ■ KEY CHALLENGES

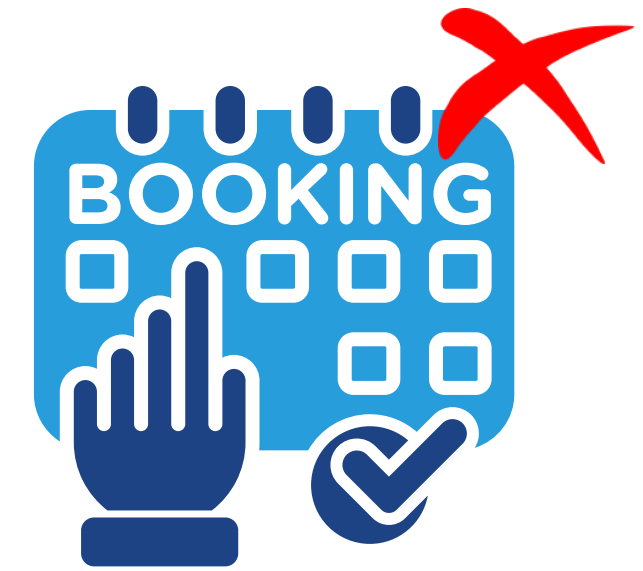
01 Multiple Lead Creation

Leads were manually tracked and entered into the system, which increased the chances of human error and delays.



02 Fragmented Booking System

Using Calendly for lead collection wasn't scalable, nor was it integrated with the rest of their systems.



03 Subscription Management Issue

They didn't have a reliable, centralized system to manage customer subscriptions.



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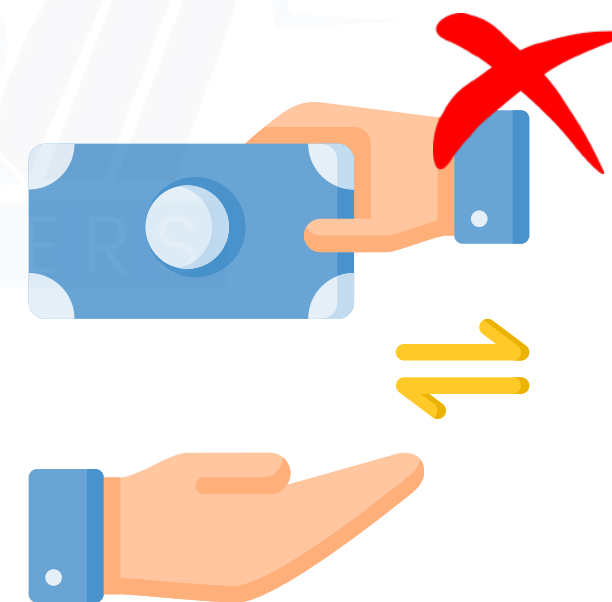


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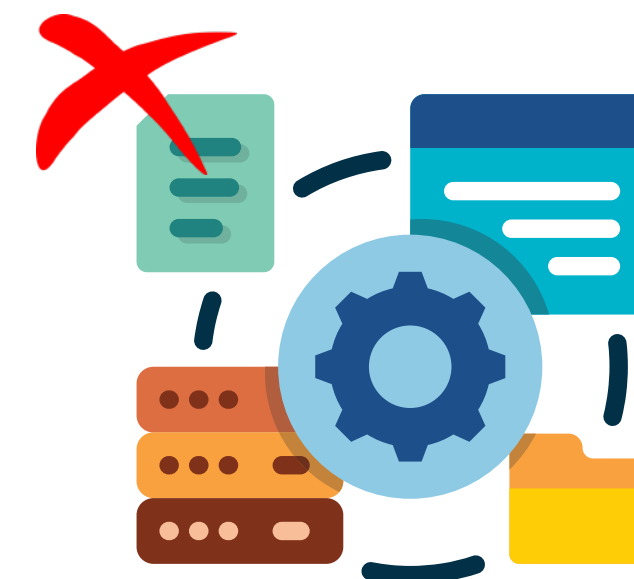
04 Payment Processing Gaps

Payments were handled separately, without any automation or integration with billing tools.



05 Inefficient Data Handling

Lead data, customer communication, and transactions were all being managed separately, leading to confusion and wasted time.



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OUR SOLUTIONS

01 Zoho Forms for Lead Collection

Zoho Forms replaced Calendly for lead collection, allowing for better customization and integration with their CRM.



02 Zoho CRM for Lead and Customer Management

Zoho CRM was introduced for automated lead capture, nurturing, and centralized tracking.



03 Zoho Booking for Appointment Scheduling

Zoho Booking enabled a seamless and branded appointment scheduling experience.



04 Zoho Subscription for Recurring Plan Management

Zoho Subscription was used to manage recurring plans with ease, bringing transparency and automation into their billing cycles.



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05 Stripe Integration for Payments

Stripe was integrated as the primary payment gateway, ensuring secure and smooth transactions.



06 Zoho Books & Zoho Billing for Financial Operations

To handle financial data, transactions, and bills, Zoho Books and Zoho Billing were implemented.



07 Zoho Desk for Customer Support

A structured ticketing system introduced by Zoho Desk enhanced communication and response times for customer service.



08 Zoho Marketing Automation for Engagement

Zoho Marketing Automation helped automate follow-ups, email campaigns, and customer engagement.



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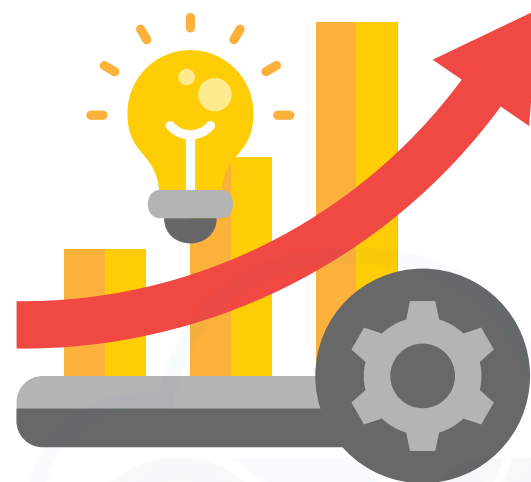


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RESULTS

01 Faster Lead Capture

Automating lead forms and integrating them into Zoho CRM drastically reduced manual work and errors.



02 Better Subscription Management

Using Zoho Subscription eliminated confusion around plan tracking and renewals.



03 Seamless Bookings

Patients could now self-schedule appointments with real-time availability, reducing no-shows.



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04 Integrated Payment Gateway

Stripe made the payment system secure, simple, and integrated with their billing system.



05 Centralized Data

All customers' touchpoints—from lead to payment—are now tracked in one place.

06 Better Team Collaboration

With all tools under one roof, our client could collaborate better, and focus more on patient care.



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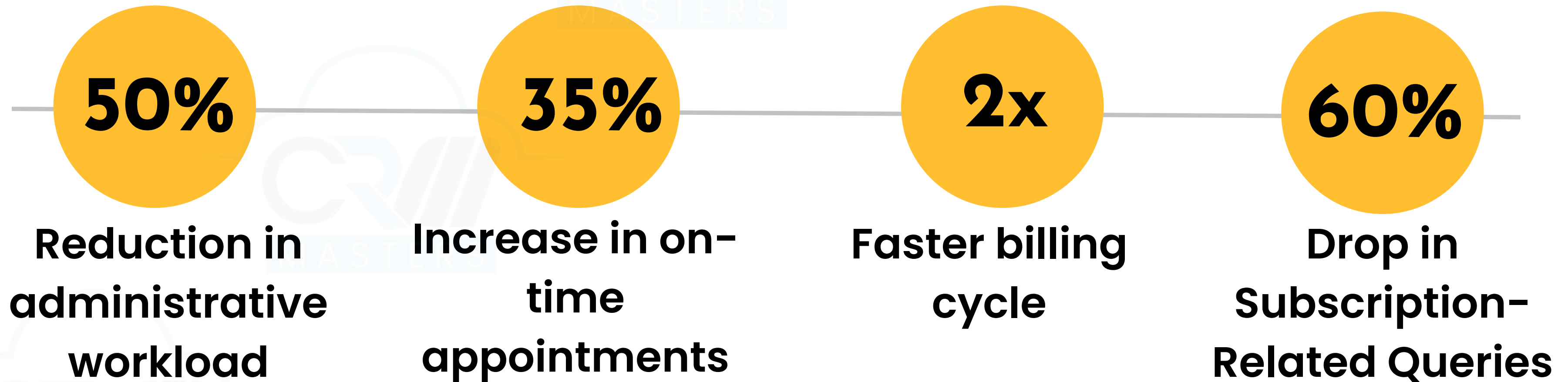
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Performance Improvements:

Our strategic implementation helped the client in building a powerful, unified system—automated, easy to scale, and patient-friendly.



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About CRM Masters Infotech



At CRM Masters, we help businesses eliminate unmanaged workflows and disconnected tools. We don't just implement Zoho—we tailor it to fit your business like a glove with our team of **100+ Zoho Developers**.

With a proven track record of **2050+ successful projects** worldwide and our **9+ years** of experience, we turn your operations into a smart, scalable ecosystem that grows with you. Whether you're a growing startup or an established business ready for digital transformation, we build systems that work for you, not the other way around.

Book your free consultation call now!



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CONTACT US

LET'S TALK & FIND YOUR SOLUTION



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