



Case Study:

Transforming Laboratory Operations at Bio-Test with Zoho One

By DirectReach, [Zoho Partner](#)

Background

[Bio-Test](#), headquartered in Ottawa, has led the local medical laboratory industry for over two decades. At the heart of its mission is a relentless commitment to patient care and the pursuit of medical excellence. Bio-Test specializes in providing comprehensive diagnostic services, ensuring that patients and healthcare providers have timely and easy access to crucial health data.

The six patient centres are equipped with the latest in medical technology, enabling them to offer a wide range of testing services that meet the highest standards of accuracy and reliability. Bio-Test is dedicated to innovation and continuously seeks to improve the patient experience by adopting advanced technologies that streamline processes and enhance service delivery.

“ We understand the importance of accessible healthcare and are passionate about empowering patients with the tools they need to take charge of their health. This commitment is reflected in our efforts to provide seamless access to health data and improve patient interactions through digital solutions. We strive to meet and exceed the expectations of those we serve, ensuring every patient receives the highest level of care and support. ” - Kyle Tettman, Head of Operations.

[DirectReach](#) partnered with Bio-Test to overhaul its operational and customer engagement systems. This collaboration aimed to enhance Bio-Test's B2B sales, inventory management, appointment scheduling, website optimization, and patient wait time tracking.

Zoho CRM for B2B Sales

Goal: Enhance Bio-Test's B2B sales process to leverage the Doctor referral channel effectively and increase business closures.

Approach:

DirectReach started by thoroughly researching Bio-Test's existing sales process. By conducting interviews with the sales team and analyzing the referral patterns, we identified gaps and areas for improvement.

Bio-Test previously relied on manual tracking and spreadsheets, which resulted in missed opportunities and poor visibility into the referral channel. New partnerships often fell through the cracks due to ineffective tracking.

Zoho CRM was customized to streamline prospect management, automate follow-ups, and categorize referrals for better tracking. DirectReach also provided training sessions for Bio-Test's business development team to ensure they could fully leverage the new features.

Results:

- **Improved Business Management:** Implementing Zoho CRM gave Bio-Test a centralized system to manage doctor referrals efficiently.
- **Increased Sales Efficiency:** Automated workflows reduced manual tasks, giving the business development team more time to focus on having actual discussions with prospective clinics and medical institutions to generate more pipeline.
- **Enhanced Reporting:** Detailed reports on referral performance enabled data-driven strategies, fostering targeted marketing and outreach.

Zoho Inventory for Operational Efficiency

Goal: Optimize inventory management to enhance day-to-day operations with automated workflows.

Approach:

DirectReach conducted a thorough assessment of Bio-Test's inventory management needs. Manual inventory management led to frequent stockouts, delays in reordering, and financial discrepancies due to inconsistent data synchronization.

By implementing Zoho Inventory, we established automated workflows for low stock alerts, purchase order generation, and syncing with QuickBooks for financial management. We also set up reorder points to maintain optimal inventory levels and integrated supplier data to streamline reordering.

Results:

- **Automated Stock Alerts:** With automated low stock reminders, Bio-Test maintains optimal inventory levels, reducing stockouts by 25%.
- **Seamless Accounting Integration:** The QuickBooks sync ensured that inventory data and financial records were always aligned, improving accuracy in budgeting and forecasting.
- **Time Savings:** Automated purchase order creation significantly reduced administrative time, allowing staff to focus on core operations.

"The automation and real-time tracking enabled by Zoho Inventory have eliminated our stockouts and manual errors. It's not just about keeping shelves full; it's about smart, efficient operations that save us time and money daily." - Kyle Tettman, Head of Operations.

Zoho Bookings for Appointment Management

Goal: Enable online appointment booking to expand business offerings, including private in-home visits.

Approach:

Before Zoho Bookings, Bio-Test relied on phone-based scheduling, leading to errors, double bookings, and limited hours of availability.

DirectReach configured Zoho Bookings to reflect Bio-Test's unique scheduling needs, including in-home visit appointments and payment processing. The booking interface was integrated into the website, providing patients with a seamless booking experience. Staff training was also provided to ensure effective use of the new system.

Results:

- **Expanded Services:** Online booking enabled Bio-Test to offer a broader range of appointment types, including private in-home visits, increasing bookings by 40%.
- **Enhanced Customer Experience:** Patients can now book appointments 24/7 through an intuitive interface, improving customer satisfaction and reducing booking-related errors.
- **Payment Integration:** Integrated payment processing made it easier for patients to pay for services during booking, dramatically increasing the conversion rate and reducing the cancellation rate for in-home visits.

"Zoho Bookings has been instrumental in launching our new service for in-home patient visits, which has quickly become a significant revenue stream. This tool facilitates easy scheduling of appointments and integrates seamless online payment processing. It has opened up new opportunities for us to serve our patients better, ensuring they receive professional care in the comfort of their homes. The convenience and efficiency brought by Zoho Bookings have greatly enhanced our service delivery and patient satisfaction." - Kyle Tettman, Head of Operations.

Zoho PageSense for Website Optimization

Goal: Enhance the performance and user experience of Bio-Test's website.

Approach:

Bio-Test's website did not effectively engage visitors, resulting in high bounce rates and low conversions.

DirectReach implemented Zoho PageSense to enable the marketing team to track visitor behaviour, analyze user interactions, and conduct A/B testing for different website elements. We helped set up goals to measure conversions and identified improvement areas.

Results:

- **Data-Driven Insights:** Heatmaps and visitor recordings identified the main points of friction for users, allowing the marketing team to make strategic adjustments.
- **Improved Conversion Rates:** A/B testing helped refine call-to-action placements and webpage layouts, resulting in a 20% improvement in conversion rates.
- **Optimized User Experience:** The marketing team could now tailor the website's structure based on user preferences, making it more intuitive.

"Thanks to Zoho PageSense, we've transformed our website into a dynamic, engaging platform. The ability to conduct A/B tests and see real-time analytics has allowed us to continuously refine our user experience, leading to better engagement and higher conversions." - Kyle Knott, Marketing and Sales Operations Manager

Custom Zoho Creator Application for Patient Wait Time Management

Goal: Develop a custom application to track patient wait times across multiple collection centers.

Approach:

Inconsistent wait times and a lack of real-time updates affected patient experience and satisfaction with the provided services, as they could not plan their visits effectively. On top of this, laboratories are strictly regulated on this topic and must provide very detailed reporting to the Ontario Health Organization for compliance.

In order to resolve both issues, the DirectReach team used Zoho Creator's low-code platform to design a comprehensive patient wait time tracking application. The app was integrated into Bio-Test's systems to provide real-time wait time updates. Staff at each of the seven specimen collection centers input patient information on arrival, and the system does the rest for them while patients observe the movement of a live queue on the screen conveniently located in the waiting area.

Results:

- **Reduced Wait Times:** Real-time tracking allowed clinics to distribute patient flow more evenly, reducing wait times by 35% across all collection centers within just six months
- **Enhanced Patient Communication:** Patients receive timely updates about wait times, significantly improving their satisfaction and reducing complaints.
- **Operational Efficiency:** Staff uses the application to monitor and manage patient flow, improving coordination between different centers.

"The custom application built with Zoho Creator has not only drastically reduced patient wait times but has also transformed our reporting process. Previously, we spent countless hours each month on mandatory government reporting, which is now fully automated. This significant advancement has enhanced patient satisfaction and streamlined our operations across all centers, allowing us to focus more on patient care and less on paperwork." - Kyle Tettman, Head of Operations.

In conclusion, the DirectReach team successfully transformed Bio-Test's sales, inventory, and customer engagement processes through a comprehensive and customized implementation of the Zoho One Platform. The laboratory now enjoys increased efficiency, better customer satisfaction, and new growth opportunities.