



Zoho CRM Implementation Practices by Industry

Healthcare

Patient relationship management centered on appointments, referrals, and multi-channel communication, kept compliant with HIPAA-style data handling.

Custom Modules & Fields

- Custom modules: Patients, Referring Physicians/Providers, Appointments, Treatment Plans
- Sensitive patient data pushed to a HIPAA-first Zoho Creator app, kept separate from core CRM records
- Custom fields: insurance provider, treatment history summary, emergency contact, referral source

Key Workflows & Automation

- Lead-to-patient journey: inquiry -> appointment scheduled -> visit completed -> follow-up care
- Automated appointment reminders and rebooking workflows
- Referral tracking so a referred patient's status is visible back to the referring doctor
- Zoho Cliq/SalesIQ for real-time messaging between patients and care coordinators

Integrations & Compliance Notes

- Zoho Bookings/Forms for intake and scheduling
- Zoho Sign for consent and onboarding documents
- Zoho Analytics for referral performance and compliance dashboards
- Field-level encryption and export restrictions; Business Associate Agreement (BAA) required for HIPAA-relevant use