



CASE STUDY



How RJG replaced
fragmented
**“institutionalized
knowledge ops”** with
an integrated Zoho
engine for **revenue,**
service, and
executive visibility

Industry

Energy & Utilities

Region

Southern US

Objectives

Streamline service delivery | Increase operational liquidity
Optimize field operations | Digitize manual sales processes

Key Apps



Zoho
CRM



Zoho
Desk



Zoho
Analytics

COMPANY OVERVIEW

RJG is a global training, consulting, and technology company specializing in plastic injection molding, serving manufacturers that produce safety- and quality-critical parts for regulated industries such as medical devices, automotive, and transportation. For more than 30 years, RJG has helped molders and OEMs improve process stability, product quality, and operational performance through advanced process-control technology, expert consulting, and industry-leading training. Headquartered in the United States, RJG operates across North America, Europe, and Asia, supporting manufacturers of life-critical and safety-sensitive components where consistency, traceability, and compliance are essential.

KEY CHALLENGES

RJG operates in highly regulated, safety-critical industries where precision, traceability, and timely resolution are essential, but its internal systems lagged behind the complexity of the business. As the company expanded globally across medical, automotive, and transportation manufacturing, workflows fragmented across disconnected tools, spreadsheets, and email. Sales cycles stretched over long periods without a single system to maintain continuity, while support teams relied on manual tracking and undocumented institutional knowledge to manage complex issues. Limited real-time visibility hindered progress tracking, cross-team handoffs, and performance insight. As expectations and regulatory scrutiny increased, these constraints heightened operational risk, slowed execution, and limited RJG's ability to scale—driving the need for a unified operational foundation.

"From the first email to the purchase order, the **full story of the customer finally lives in one place.**"

Jason Yoffy
Director of Engineering

KEY RESULTS

Zoho enables measurable gains in efficiency, visibility, and business resilience across RJG's operations.

- **251% annual ROI** with a **net annual benefit of \$716,995**, driven by platform consolidation, automation, and productivity gains.
- **50%+ improvement** in operational efficiency since implementation, with continued gains through ongoing optimization.
- **Reporting time reduced** from 6–8 hours to real time, eliminating manual data collection and weekly report preparation.
- Quote and order processing time **reduced from hours to minutes**, replacing a legacy CRM that required up to 8 hours for document generation.
- End-to-end customer resolution tracking, enabling **visibility from ticket creation** through engineering escalation and closure.
- First-touch resolution, ticket aging, and resolution-time KPIs now **actively tracked and benchmarked** across support teams.
- **90% of sales activity logged** via mobile CRM, increasing productivity for remote and traveling teams.
- **Improved cross-team collaboration** through integrated Desk, CRM, Analytics, and Jira workflows, reducing handoff friction.
- **Higher data accuracy and task completion rates**, eliminating missed follow-ups previously caused by spreadsheet-based tracking.
- Cloud-based access enables **uninterrupted operations**, supporting a **fully remote workforce** during critical business periods.

Business Conditions

ABOUT RJG

RJG is a global training, consulting, and technology company serving the plastic injection molding industry, supporting manufacturers of safety- and quality-critical components in regulated sectors such as medical devices, automotive, and transportation. Founded in 1985 and headquartered in the United States, RJG works with molders and OEMs worldwide, combining advanced process-control technology, expert consulting, and industry-leading training to improve process stability, product quality, and operational performance in environments where consistency and compliance are essential.

Unlike firms that focus on a single point solution, RJG operates as a full-solution provider across the customer lifecycle. The company combines hardware, software, training, and consulting to help customers design, optimize, and sustain complex manufacturing processes over time. This integrated model delivers deep value to customers but also requires close coordination across sales, support, engineering, training, and service teams—along with clear visibility into long-running engagements, technical issues, and customer outcomes across a global footprint.

THE CHALLENGE

An aging tech stack hindering collaboration and growth

RJG was held together by a web of disconnected technologies that were cobbled together to handle everything from email and training registrations to quoting, support, and reporting. The result was a messy tech stack that caused drag in speed, clarity, and collaboration.

Business Conditions

“The time it took to remember we had a task, and not let that task fall off had been **a major challenge.**”

Jason Yoffy
Director of Engineering

At the center of the problem sat SalesLogix, an aging, server-based CRM. It wasn't merely unpopular; it actively slowed the Sales team down. Quoting workflows that required generating a PDF for a customer could take several hours; reporting took so long that it felt like a separate job; and remote work was always challenging because the local, server-based system wasn't truly web-native.

Support had its own version of the same story. Because the SalesLogix ticketing platform couldn't meet their needs, teams resorted to spreadsheets and email. Because work happened in Google Docs and Google Sheets, Support teams had some basic visibility (how busy they were, how many tickets they were seeing), but generating those insights was time-consuming, asynchronous, and produced inconsistent results.

RJG didn't just need a new CRM; they needed a cohesive operating system—a connected suite that could unify customer data, standardize execution, and surface real-time business health.

DISCOVERY & DUE DILIGENCE

The 6-month assessment of Zoho and Salesforce

While RJG's search began as a CRM replacement effort, the team realized something important during discovery: the CRM wasn't the only broken link. Finance was collecting monthly spreadsheets. Support was working out of Google Sheets. Reporting required manual assembly. And as they looked at the market, they saw that CRMs weren't just CRMs anymore, but extensible platforms also capable of powering help desks, marketing teams, and analytics.

So RJG widened the lens. The evaluation shifted from product to ecosystem, and to identifying which platform offered the most value across departments and the cleanest integrations. During their six-month comparison between Zoho and Salesforce (in collaboration with Implementation Partners from both), RJG conducted discovery sessions, mapped their workflows against

Business Conditions

the platform's capabilities, and calculated the actual TCO to achieve an integrated system across all departments.

The decision to go with Zoho came down to two business realities. First, the Zoho platform offered a set of applications that RJG could deploy across sales, support, analytics, collaboration, and custom workflows without constantly paying "integration tolls." In RJG's experience, adding or connecting capabilities in Salesforce often introduced incremental costs that could create significant expense. Second, ensuring the best user experience really mattered. Adoption was a make-or-break requirement, and Zoho's easy-to-use, highly customizable UI seemed more navigable for everyday work.

What had started as a search for a "CRM replacement" had become an initiative establishing a sustainable foundation for operations with Zoho CRM, Zoho Desk, and Zoho Analytics at the core.

Solution Breakdown



Clean modules, automation, and field-ready workflows

RJG wanted a system that could do three things at once: consolidate a clean database of customer information, standardize how sales and service move work forward, and connect seamlessly to the rest of the business.

RJG's US Sales team operates in three regions—west, middle, and east—each with multiple levels of sales executives engaging different customer types. Zoho CRM was customized to support this structure to ensure leads and ownership could flow naturally, without the need for manual handoffs.

This matters because RJG's deal velocity is inherently variable. Some opportunities progress quickly, while others stretch to a year or more. In both cases, the sales team needs the same thing: continuity, accountability, and a place where customer engagement can be tracked over long timelines without losing context.

Zoho CRM's modular setup—Leads, Accounts, Contacts, and Deals—became the backbone of that continuity. Sales teams don't just store data; they log every meaningful touchpoint so that the organization can see the full arc of an engagement, even if multiple people contribute over time.

50%+ improvement in operational efficiency since implementation, with continued gains through ongoing optimization.

Comprehensive lead management

Most RJG leads originate on the website through forms that feed directly into Zoho CRM. Trade show leads still come in manually,



Solution Breakdown

but once entered they follow the same governed path.

Leads arrive with minimal information by design—enough to begin outreach and assign ownership accurately. Assignment is driven largely by location, ensuring the right sales pod owns the relationship from the start. The moment a lead is created and routed, the rep receives notification, reviews the record, and initiates the first contact directly from within Zoho CRM.

Because email is a required field on the web form, early engagement often begins with an introduction message that's launched from the lead record itself. Phone calls proceed when the information is available, but the system doesn't depend on a phone number to move forward.

When the rep has the basics and the lead is qualified, they convert the lead into an Account and Contact while simultaneously initiating a Deal. That conversion step is a turning point: it's where RJG moves from "inquiry" to "actively working an opportunity," and where the CRM begins to function as a living workspace rather than a static database.

Deal stages mapped to real sales processes

RJG's Deals module is configured with stage-probability mapping, so the pipeline reflects how work actually progresses. As a deal advances, RJG updates stages to match milestones: early discovery, budgetary quoting, deeper planning, formal quoting, and the final push to purchase order.

The deal is only considered "closed" when RJG receives the purchase order. That creates a clear operational hand-off while avoiding the ambiguity that plagues many CRMs, where "closed" can mean anything from verbal approval to signed paperwork.

Data hygiene as a workflow, not an afterthought

One of the most practical differences RJG built into their CRM is how aggressively they prevent data decay. They established workflow rules that keep records synchronized across modules.



Solution Breakdown

When a contact is created, it pulls key details from the account. When account information changes—such as an address update—the system keeps related contacts current, reducing duplication and manual cleanup.

This sounds small until you scale it across years of accounts, multiple departments, and constant customer changes. For RJG, clean data isn't a reporting preference; it's what makes cross-team collaboration possible.

Quote and order processing
time reduced from hours to minutes.

Custom modules that reflect RJG's business model: training, products, repairs, and learning systems

RJG is a "full solution provider" with technical and multifaceted offerings. They don't sell a simple product with a simple fulfillment path; they deliver consulting, training, and technology, often in combinations, and the customer relationship often continues long after the purchase order.

That complexity is also reflected in RJG's custom modules.

One custom module manages training course registrations for built-in products, integrating with LearnUpon (their LMS) so that course registration data is automatically imported into Zoho CRM. Without that integration, registrations would require manual entry or manual imports.

They also built modules to track serialized and non-serialized products, along with modules for product logs and repairs. This is what turns Zoho CRM into the key engine of their "customer lifecycle" infrastructure. Now, reps can see what products the customer owns, what service history exists, and what support activity is happening right now.



Solution Breakdown

"Zoho CRM is a tool that we completely lean on. It brings **more collaboration, more efficiencies, and more transparency** into the business."

Jason Yoffy
Director of Engineering

Bridging quotes, orders, and deals with low-code

Quoting was one of the most painful processes under SalesLogix. In the legacy world, generating customer quote documents could take hours. Instead of replacing that pain with a generic quoting add-on, RJG built a bespoke quoting and sales order application in Zoho Creator and integrated it tightly into Zoho CRM's Deal Module. The status of the quote and sales-order are then pushed back into the Deal, ensuring that visibility stays high. In practice, that means any team member can open the CRM deal and immediately understand where quoting stands and the (true) opportunity stage without having to search through spreadsheets, PDF folders, or internal emails.

A Mobile CRM for FSM

RJG's sales team doesn't sell entirely behind desks. They travel to customer facilities, including manufacturing plants, where access to customer history and active opportunities can't depend on a VPN, a server, or a teammate in the back office.

Zoho CRM's mobile app became a daily tool for this reason. RJG reps pull up account records on-site, review open deals and active quotes, check for related support tickets, and log activities in real time so the CRM remains current. For some representatives, upwards of 90% of activity tracking happens through the mobile app.

90% of sales activity logged via mobile CRM, increasing productivity for remote and traveling teams.

That matters both for convenience and for adoption. A CRM that doesn't meet people where they work doesn't get used; RJG's Zoho CRM adoption rate has reached 80%, which they attribute (in part) to usability and the way the system aligns with daily habits.



Solution Breakdown

CRM SOLUTION IMPACT

Centralized visibility across the revenue lifecycle

Zoho CRM centralizes customer data and sales activity into a single system of record, replacing fragmented workflows and preserving continuity across long, complex engagements. From initial inquiry through purchase order, every interaction is documented, searchable, and visible to teams working across sales, support, and service.

This shared visibility strengthens execution and accountability. Region-based lead routing and deal stages mapped to real sales milestones ensure ownership is clear, handoffs are consistent, and opportunities progress without losing context—even as deal timelines vary widely.

Rather than forcing rigid process change, Zoho CRM provides a flexible operational foundation. Automation, data governance, and custom modules support RJG's full customer lifecycle, while mobile access and integrated quoting improve responsiveness, adoption, and day-to-day efficiency across the organization.



Measurable resolutions, automated follow-ups, and engineering transparency

As Zoho CRM became the single source of truth for revenue and customer records, Zoho Desk became the key system for customer resolutions. After RJG implemented Zoho Desk, multiple departments—around eight in total—began using Desk extensively, including technical support, eLearning, training operations, and maintenance. That detail matters because RJG didn't simply deploy a ticketing tool for support, but a service platform that touched customer experience across the company.



Solution Breakdown

“What’s really cool about Zoho is that every week or month, we see how much you’re improving your products... **it’s exciting to work with something new and innovative.**”

Jason Yoffy
Director of Engineering

Before Zoho: No search, no connections, no account-level insight

RJG’s pre-Desk environment wasn’t just manual, it was limiting. The SalesLogix help desk platform made it hard to search for tickets, see connections between issues, or track the volume of tickets associated with each account or customer. Because the system failed to support the way people worked, teams reverted to Google Docs and Sheets to document what they were doing, who they were doing it for, and who owned the task.

This created operational risk. The hardest part of support isn’t responding to a single email; it’s ensuring the follow-up happens reliably, that history is searchable, and that handoffs don’t lose context. RJG felt that risk acutely.

First-touch resolution, ticket aging, and resolution-time **KPIs now actively tracked and benchmarked across support teams.**

Desk + CRM: Visibility that changes behavior across teams

One of the most impactful decisions was to integrate Desk with CRM so that when a user clicks into an account, they can view the account’s entire summary—support tickets, needs, and other vital information—directly in context.

Trigger-based actions automatically raise new tickets when the company sends an invoice, receives a sales order, or sells a product that requires technical support attention. The system can prompt installation follow-ups, training coordination, or required touchpoints without relying on someone to remember.

This keeps customer experience a cross-functional, proactive discipline: Sales can see open issues tied to their accounts; Support can see commercial context; Leadership can see



Solution Breakdown

patterns. The company stops acting like three separate departments interacting with the same customer in three separate worlds.

Intake workflows that form a single operational queue

By integrating Zoho Desk with their webforms, every customer query on the website automatically becomes a ticket. Those new tickets land in an unassigned queue, which becomes a practical “next task” feed for the Support team. The next available agent pulls from that queue, engages the customer, and documents the entire interaction in one place.

The same applies to email. When a customer emails support, the message is stored as a ticket, and agents respond from inside Zoho Desk, preserving a clean history of interaction without requiring multiple logins or scattered email threads.

End-to-end customer resolution tracking, enabling visibility from ticket creation through engineering escalation and closure.

And while that design may sound straightforward, it's truly foundational; it's how RJG ensures that no matter how a customer reaches out, the issue enters the same operational pipeline with the same visibility and accountability.

Ticketing that drives internal collaboration

RJG's support work is deeply technical, and it often extends beyond the support team into engineering and development. That reality makes “uniform resolution time” impossible. The goal isn't to force all issues into the same timeline—it's to track progress, remove ambiguity, and improve the resolution journey step by



Solution Breakdown

step.

Inside Desk, RJG identifies ticket types to distinguish general questions, recommendations, systems training, or repairs. They also categorize by product focus (eg. data acquisition systems or sensors) so that routing, reporting, and knowledge-building grow easier over time.

Zoho Desk acts as our central system for customer communication, documentation, and escalation. Tickets capture email conversations, internal comments, repair workflows, and engineering handoffs, providing full visibility from issue creation to resolution. Integrated metrics and Jira connectivity allow us to measure resolution time and continuously improve customer outcomes.

Repair workflows and product logs

RJG's repair department is one of the most intensive users of Zoho Desk. By leaving updates about the work they've done in Desk's product logs, anyone with access can see the repair history for every product sold.

In RJG's broader operating model, the repair department also maintains product logs connected to customer-owned products in the CRM environment. Desk becomes the workflow surface, while CRM becomes the broader customer and asset context, keeping service activity connected to the customer's full lifecycle.

Higher data accuracy and task completion rates, eliminating missed follow-ups previously caused by spreadsheet-based tracking.

Engineering integration with Atlassian

RJG integrated Zoho Desk with Jira and Confluence to ensure engineering has visibility into the tickets that need their assistance. This prevents the "ticket toss" (where support throws



Solution Breakdown

issues over the wall and loses sight of progress) by creating shared accountability; teams can see each ticket's status at any moment, and any employee responding to the customer has the same context and the same story.

RJG also created dashboards that identify tickets connected to Jira and track non-conformities visible across the company. This keeps engineering-linked work measurable, transparent, and discussable in operational rhythms rather than hidden inside inboxes.

NPS as Quality Assurance

RJG uses automated communications throughout the ticket lifecycle, giving customers regular updates about the ticket's stage. Once a ticket closes, Support uses Zoho Desk to send a survey and calculate a Net Promoter Score.

This offers RJG both a feedback mechanism and a quantitative way of operationalizing customer experience without resorting to anecdotal data. When resolution performance, engineering handoffs, and customer sentiment are all connected, Support becomes a measurable part of quality management.

DESK SOLUTION IMPACT

Zoho Desk provides full visibility into RJG's support operations by centralizing all customer communication within a single ticket. This structure replaces fragmented email-based workflows and ensures that every customer interaction is consistently documented, searchable, and easy to reference.

The improved transparency has strengthened confidence in the support function across the organization. Teams such as sales have visibility into customer issues when needed, while support teams resolve cases more efficiently through centralized workflows. This shared visibility reduces hand-off friction, minimizes the risk of issues being missed, and supports steady



Solution Breakdown

"With the visibility Zoho has provided us into our ticketing system and the customers in it, we've been able to **eliminate 75% of our manual paperwork**, freeing our teams to focus on far more productive work."

Jason Yoffy
Director of Engineering

improvements in team effectiveness and morale.

Rather than a wholesale process change, Zoho Desk represented a practical modernization. Its cloud-based accessibility has improved responsiveness, data consistency, and operational efficiency while supporting more disciplined time and workload management.

RJG also views Zoho Desk as a platform for continued evolution. Their roadmap includes expanding into a customer-facing portal that will allow customers to view open tickets, access service-related documents such as calibration certificates, and manage support interactions more directly—extending existing workflows without disrupting established processes.



Real-time dashboards for visibility into Sales, Service, and QA

Zoho Analytics is where RJG turned operational data into executive clarity. Before Analytics, reporting was a weekly or monthly production effort. Teams manually collected data across the company, built charts and graphs in Excel, exported PDFs, and then emailed them to the organization. In practical terms, Sales and Support could lose an entire workday to creating a single reporting cycle.

This changed the nature of reporting from “tedious task” into “always-on capability.” After integrating Analytics with Desk and CRM, RJG automated data collection and pushed insights into dashboards that update in real time.

Company 360: A living view, not a retrospective report

RJG built a Company 360 dashboard that functions as an executive window into organizational health. It consolidates total



Solution Breakdown

sales, total quote amounts, open pre-quote deals, and total tickets submitted from a Desk standpoint. It becomes a single place where leadership can orient without waiting for regional teams to compile spreadsheets.

Because RJG operates globally, this “always current” view also solves a painful international reporting problem: previously, the organization was often dependent on remote teams to export data from local systems, translate it, and send it to the corporate office. Now, the stream flows automatically.

Improved cross-team collaboration through integrated Desk, CRM, Analytics, and Jira workflows, reducing handoff friction.

Sales dashboards with actionable insights

Analytics dashboards track sales activity across the US team, highlighting calls, events, and pipeline dynamics. RJG also has dashboards by region and by salesperson, so performance is visible at the individual and team level. Rather than using CRM data only for record-keeping, RJG uses it as an engagement dataset about the activities (and people) that lead to deals progressing and where opportunities are stalling.

Because RJG’s sales cycle length can vary widely, these dashboards give the organization a way to normalize performance measurement. Rather than forcing every deal into the same timeline, they can measure engagement, touchpoints, and stage progression with clear visibility.

Custom quoting dashboards gives leadership deep insights into quotes by revenue category (consulting, training, and technology), the composition of customer demand, and how that changes over time. This is particularly useful for capacity planning, forecasting, and aligning staffing across the departments that serve different offer types.



Solution Breakdown

Measuring "resolution time as a journey"

RJG built dashboards that look specifically at ticket duration across handoffs: the time from ticket creation to engineering escalation, from engineering to closure, and from return to customer service closure. This is paired with severity-based tracking, enabling RJG to segment performance in a way that respects the reality of technical work.

This work directly connects to customer experience and quality. RJG has positioned "customer resolution time" as a quality metric, measuring the stages from when a customer opens a ticket through engineering resolution and final closure. In other words, resolution becomes a managed system, not a heroic effort.

ANALYTICS SOLUTION IMPACT

Analytics as an operating habit

Zoho Analytics has transformed operational data into a shared, real-time view of business performance across sales, service, and quality. By replacing manual spreadsheet-based reporting with live dashboards, RJG eliminated hours of recurring report preparation while ensuring that performance insights are always current, consistent, and accessible.

This shift has changed how decisions are made. Leadership relies extensively on Analytics dashboards to set goals, track progress, and understand performance week to week. Because Analytics draws directly from integrated operational systems—including CRM, Desk, and Jira—the data reflects actual work in motion rather than retrospective rollups, increasing trust and confidence in the numbers.

Rather than serving as a periodic reporting tool, Zoho Analytics functions as an operating layer for the organization. Dashboards make activity measurable, resolution time visible, and cross-functional performance transparent, enabling teams to identify bottlenecks, course-correct faster, and manage outcomes with greater discipline as the business scales.



CSS Conclusion

“Because it’s integrated, **the operational efficiencies are huge**. We are able to do more work with Zoho.”

Jason Yoffy
Director of Engineering

KPI HIGHLIGHTS

RJG’s story isn’t “we implemented three products.” It’s “we built a connected business.”

CRM connects lead-to-cash workflows and maintains the customer system of record. Desk manages the customer resolution lifecycle and connects support to engineering. Analytics transforms both systems’ data into a shared view of reality for leaders and teams.

By automating 75% of once manual paperwork with Zoho, RJG has freed their people to focus on productive work. Reporting cycles that once consumed six to eight hours have become automated and real time, driving efficiency improvements of more than 50% since implementation. RJG achieved over 50% gains in efficiency, eliminated dozens of hours per month of manual reporting, improved customer resolution tracking across multiple stages, increased internal accountability, and realized a \$716,995 net annual benefit with a 251% ROI.

