Allergy Standards

Zoho CRM is a breath of fresh air for allergy testing specialists

The Company

We help people breathe healthier indoor air.

Allergy Standards Ltd (ASL) was established in 2000 by Dr John McKeon, an A&E doctor and the Principal of the Indoor Air Innovation and Research (iAIR) Institute. He was troubled by the high volume of patients requiring treatment for preventable allergic reactions and asthma attacks. "It was very difficult for people to identify products that help them remove trigger factors in the indoor environment," John recalls. ASL was to be the breath of fresh air that his patients needed. "We developed a consumer product certification testing programme to validate products that could be a better choice for people with asthma and allergies," he explains.

ASL has now tested, inspected, and certified the "allergy-friendly" claims of more than 50 million products across the globe, from soft toys to paint, bedding, cleaning products, and more. Goods from some of the world's biggest brands carry its trusted mark, including Disney, Procter & Gamble, 3M, Dyson, LG, and Samsung. From an entrepreneurial vision to a life-changing enterprise, ASL's work has enabled asthma and allergy sufferers around the world to build trigger-free indoor environments.

We visited ASL's HQ and research facility in Dublin to discover how Zoho software has played a significant part in its growth, and why Zoho CRM, in particular, left its allergen-averse team walking on air.

The Challenge

Achieve scalability, reproducibility, and consistency to unlock growth

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We were the classic start-up.
We used a lot of disparate systems and basic Excel.

Dr John McKeon
CEO and Founder

In its early years, ASL's operations relied on a maze of spreadsheets, which made it hard to locate data and caused a lot of duplication. As CEO, John knew that scaling up the business from a start-up to a respected international TIC (Testing, Inspection, and Certification) organisation would require a more technical way of working. "There comes a time where you have to scale and get discipline, reproducibility, and consistency in your processes," John explains.

John's software search introduced him to Zoho and he was impressed by the breadth of different connected platforms it offered, which would give ASL the scope to grow. Together with Dave Morrisey, ASL's Chief Innovation Officer, John steadily rolled out Zoho across all of ASL's departments and functions - but its entry point was the CRM platform. Growing with the business over more than 15 years, Zoho CRM has now become the mainstay of its sales processes, marketing activities, and employee engagement strategy.

The Solution

Zoho CRM scales up sales, marketing, and employee engagement

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We put everything into the CRM now.

Dave Morrissey
Chief Innovation Officer

ASL's CRM requirements were many and diverse. On a basic level, its sales team wanted to capture new website enquiries, log client conversations, track deals, and access real-time insights whilst travelling via a mobile app. But over time, they extended its remit to automate the sending of technical questionnaires, map out multiple service pipelines, organise marketing collaterals, and view testing rate cards.

Then, after seeing the power of Zoho CRM for sales, Emma Coonan, ASL's Head of Learning and Development, sought to carve out a dedicated CRM space for goal setting and planning. For Dave Morrisey, ASL's Chief Innovation Officer, Zoho CRM had to become the businesses' single point of truth. He wanted to weave together clients with certificates, contacts with communications, and testing applications with services. By plugging in ASL's wider Zoho software, including its Creator databases, Forms, Survey and Books, Dave aimed to deliver the seamless data visibility needed for growth and success.

ASL's full CRM wish list:

- Link client data with related certified products, testing applications, and renewal dates from Zoho Creator.

- Capture website enquiries via Zoho Forms and push them into the CRM.

- Attribute Zoho Survey responses to their respective CRM contacts.

- House multiple pipelines to track the sales of different services.

- Pull live pricing information from Zoho Books.

- Provide a mobile app for fast data recall during international travel.

- Dedicated custom modules for marketing assets and activities.

- Log employee development plans and link them to company-wide goals and KPIs.

Meeting every requirement and more, here's how Zoho CRM finally did away with ASL's tangle of disconnected, duplicated spreadsheets...
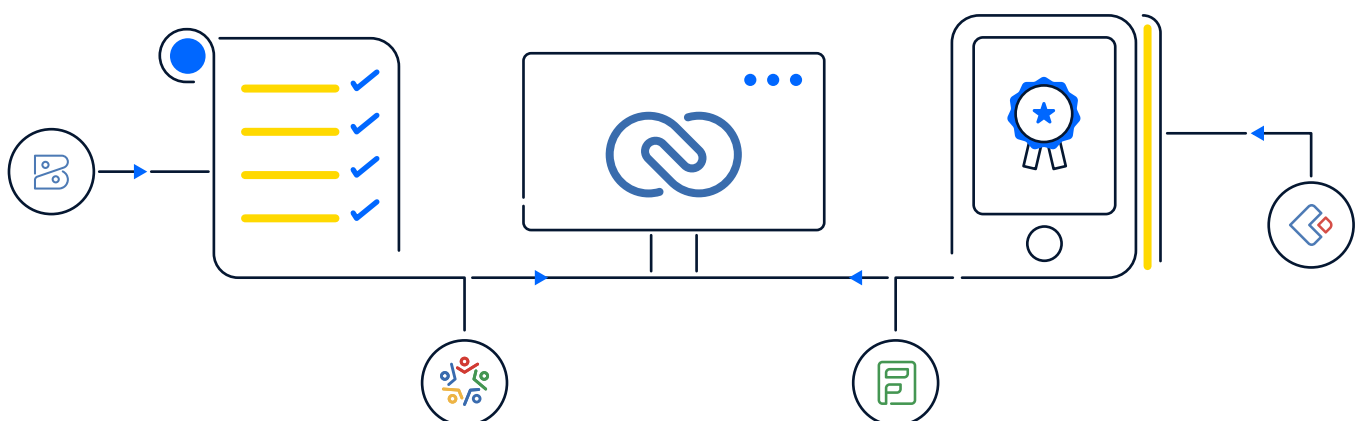
Zoho CRM for sales

From first contact through to certification, Zoho CRM enables every stage of ASL's sales cycle to run seamlessly. Renaming the standard "Leads" module to "Contacts" ("We call them contacts because it's a person," explains Dave), the CRM captures inbound web enquiries from an embedded Zoho Form on ASL's website. Upon submission, these enquiries are written straight into the Contacts module of the CRM, with an instant notification sent to a shared sales inbox. From here, an automated "thank you" email is sent to the enquirer, urging them to provide more technical details via a link to a Zoho Survey, the results of which are stored against their CRM record. "It's quite detailed in what we ask them, and a lot of the information that they fill in is very useful to the team," explains Dave. This data discovery process inside Zoho helps assign the contact to the most appropriate sales colleague based on sector specialisms.

Progressing from enquiry to sale, ASL caters to its clients' varied needs through a range of different services. "We've got test and technical services, licensing services, business services, and educational courses. The journey that each one of these prospects goes on is different," says Dave. To reflect this, ASL built separate pipelines inside the CRM, with each service utilising different cycle stages, layouts, and customised data fields.
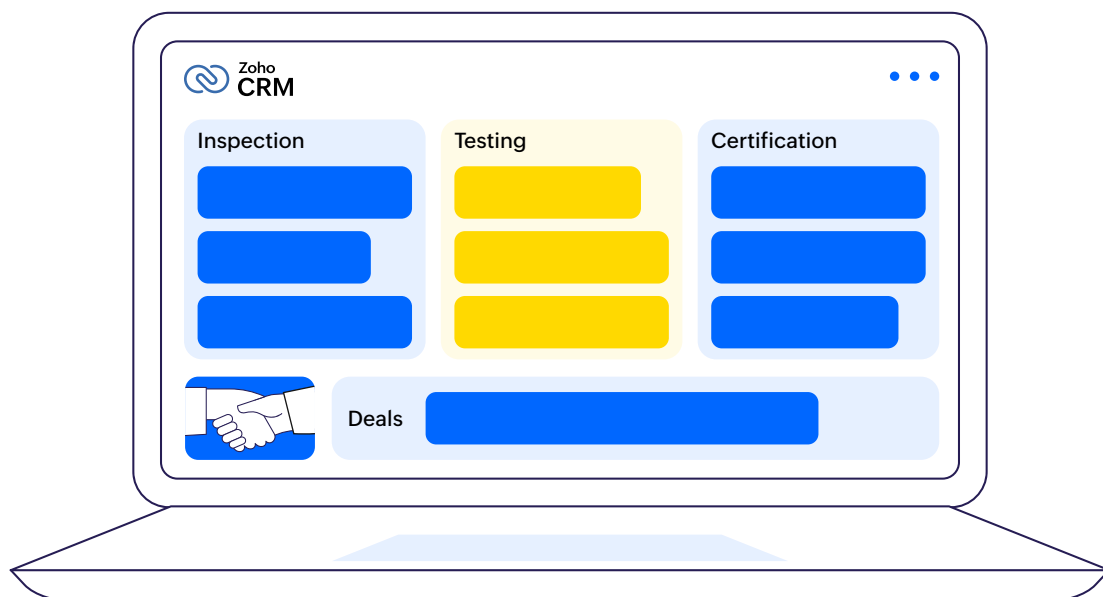
Colours feature heavily in its pipelines too, helping ASL identify stagnant deals during its weekly sales meetings. "When a prospect is at a certain stage, that's a colour. The tags are different colours as well; it's very visual, and it's easy to see what's happening. If there's a lot of green, things are going well. If there's a lot of red, we've got issues!" laughs Dave.

Whatever the service or the stage, Zoho CRM is now the only space that ASL's sales team needs to consult. It brings together the particulars of each client in one place, as well as a timeline of its interactions with ASL and any upcoming tasks. "Everything is embedded, and it's very easy to set up workflows to make sure that we're not missing anything," explains Dave. What's more, the CRM's seamless interoperability with Zoho Creator means that detailed technical data is accessible without the sales representative having to navigate outside of the CRM. Its standards database and client portals can be consulted right from within the CRM for an up-to-date snapshot of the products each client has approved. "What we're able to see now is a product that's eligible to be certified, and legally that it's enabled to use the mark, in one application," enthuses Dave. Certificate renewal dates are also visible to the sales team and the client success manager, illuminating sales opportunities and ensuring the delivery of a seamless service to ASL's customers.

Real-time pricing data also cascades harmoniously into Zoho CRM from Zoho Books, becoming another useful tool at the sales team's disposal. "If the team is looking for a rate card on the latest test prices, they're able to see it. If we have reduced the price of a testing service in Zoho Books, it's a story that they can go out to their prospects with," says Dave.

ASL is very evangelistic and vocal about the need for TIC work for allergy and asthma-targeted products, with John and the team attending and speaking at many international events, round-tables and conferences. It also has a global customer base. For these reasons, the Zoho CRM mobile app has become an invaluable resource. "We travel quite a lot. Most of our clients are in the US," Dave reveals. "So when we go to a trade show… we just call up the app and we're able to see the latest notes that somebody here in Dublin has made about that company. It enables that starting point so that we're not going in blank," he adds.

Zoho CRM for marketing activities

ASL refers to events and campaigns as DGIs (Demand Generation Initiatives) and has created a custom Zoho CRM module of the same name to log them and monitor the enquiries they spark. Using the CRM to log marketing-qualified leads against events helps them determine ROI and plan for future marketing activities. "If prospects are created from a DGI, they're linked there… so we're able to very simply say we should do that event again next year, or don't do it," Dave clarifies.
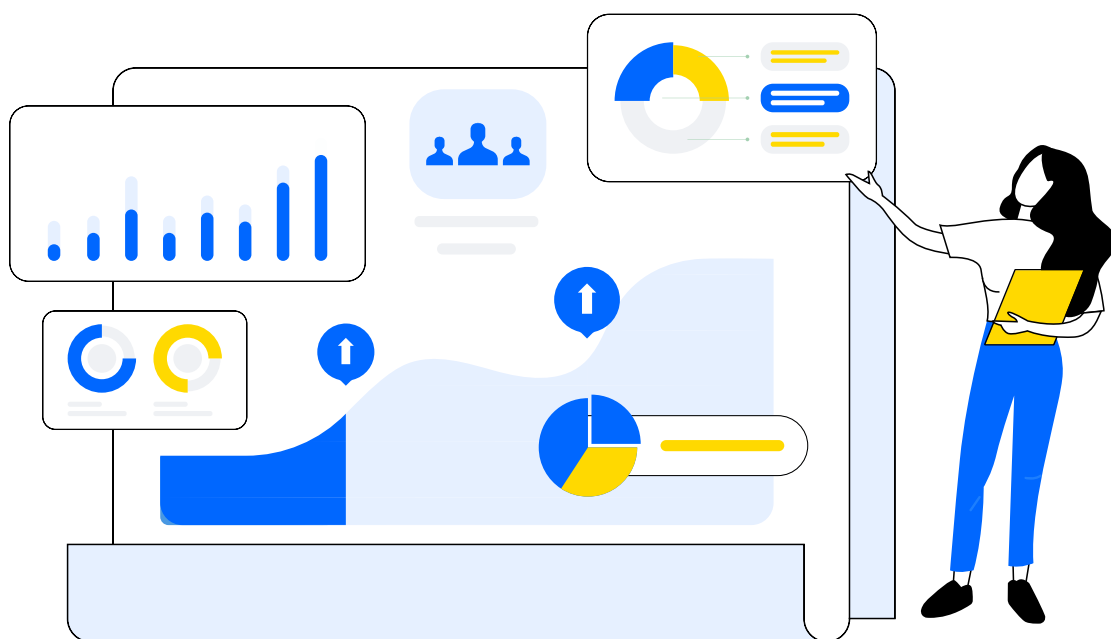
If a DGI activity leads to the creation of a marketing asset, perhaps a video of John's keynote speech, or coverage of ASL's booth in a trade magazine, these are documented and uploaded in another custom CRM module called DGAs (Demand Generation Assets). The two bespoke modules cross-reference each other, forming a rich bank of structured marketing resources that ASL's sales team can use to evidence expertise to their prospects. Tags and drop-down fields are utilised to ensure all DGI campaigns and their DGA files are easily searchable by relevant product or sector keywords. "There's a lot of assets that we have, but they weren't in one place where we could find them before. They weren't grouped by category, or industry, or client," recalls Dave. "It was really simple to create custom modules where we could have all those fields enabled," he adds.

Zoho CRM for employee engagement

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Through Zoho CRM,
we engage the team in
quarterly and annual planning.

Emma Coonan
Head of Learning and Development

It's not just ASL's sales and marketing departments that benefit from Zoho CRM's custom modules. Emma, Head of Learning and Development, has leveraged several of them in her formation of a sophisticated employee engagement programme.

Central to this programme is a quarterly and annual planning exercise coined the "one thing plan". This involves each employee crafting a personal development strategy as well as adding deliverables to a company-wide plan for growth. "Like a lot of organisations creating our plan, we would have done it on a Word document, circulated it through email, and saved it on the server. Sometimes these were put in a drawer till someone remembered to take them back out. It's very hard to manage version control that way and keep it top of mind for everybody," Emma explains.
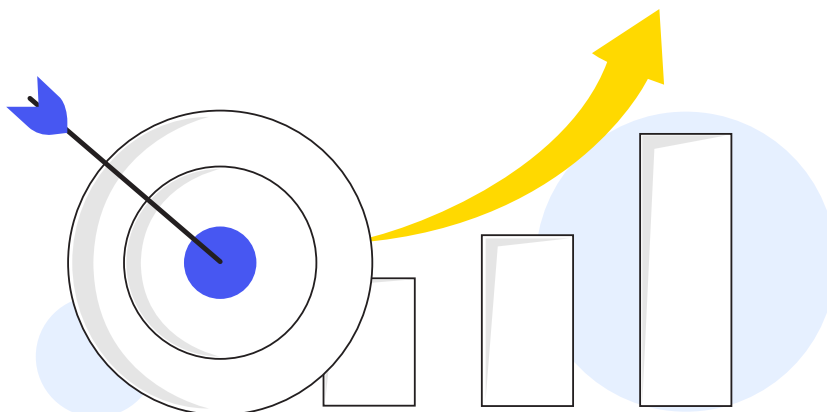
Emma resolved to make ASL's planning process more interactive, engaging, and visible using Zoho CRM. She built a network of interlinked modules, from a shared "ASL Goals" module to a series of "My Goals" modules unique to each user. Goals logged on the latter feed into the former via lookup fields, giving each user an indication of how their progress also helps to move the needle of wider company goals. "Because everyone's "one thing plan" is connected to the overall goals of the business, we're always keeping our team connected to our purpose," Emma says. "Everybody needs to feel a sense of achievement, that they're contributing," she adds.

Emma also lauds the CRM's interactive dashboards, comprised of widgets that help keep the team engaged in their goals, such as barometers and target meters that use bright, clear colours. As a novel way to manage quarterly and annual planning, new starters regularly tell Emma that Zoho CRM is a game-changer for their personal progress. "It's been a really consistent way to onboard people… it's a great coaching tool," she beams.

Allergy Standards' Zoho CRM benefits at a glance:

- A single source of truth, including client details, communications, certified products, and live pricing.
- Access to information on the fly using the mobile app.
- Multiple sales pipelines tailored to each service.
- Highly visual dashboards, pipelines and reporting features.
- Structured marketing resources and event ROI tracking.
- Increased visibility of company and employee goals.
- Improved onboarding process for new employees.

Those benefits are not to be sniffed at!

About Zoho CRM
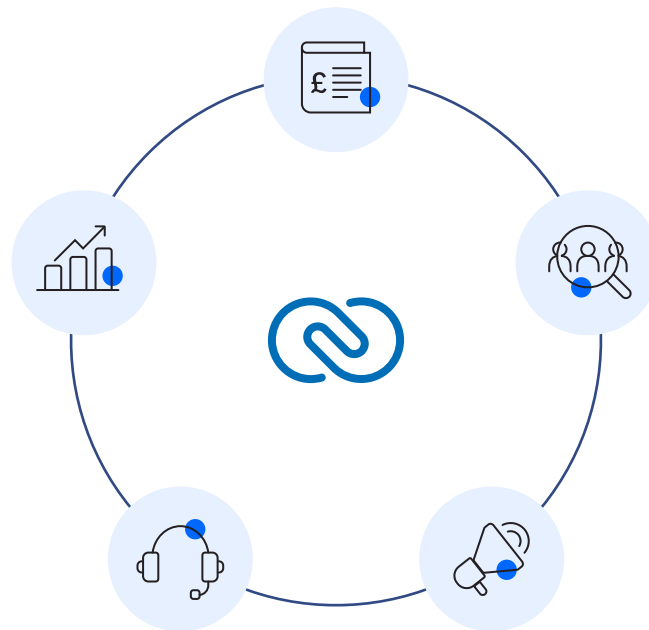
Zoho CRM is a cloud-based customer relationship management software that helps businesses deliver fantastic customer experiences and drive growth. The platform manages every aspect of sales, marketing, and support. Offering omnichannel presence, segmentation, predictive intelligence, analytics, customisation, integration, and more, Zoho CRM empowers more than 250,000 global customers.

Please find out more via our website: https://www.zoho.com/CRM

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