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**GrowBeyond Tech**  
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**H** Hinkapin Health

# Hinkapin Health Case Study

## A global customer

Streamlining referral management,  
scheduling, and billing workflows



Scheduling



Referrals



Billing



Analytics

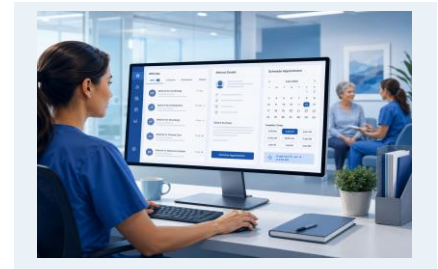


Implemented by  
**GrowBeyond Tech Pvt. Ltd.**

## 1. Hinkapin Health case study

### Streamlining Referral Management and Care Coordination with Zoho

*Zoho CRM | Zoho Books | Zoho Bookings | Zoho Flow | Zoho Mail*



## 2. Overview

Hinkapin Health used a multi-application Zoho solution to create a connected referral-management process. The implementation focused on:

- Standardizing referral intake from physicians, third-party administrators, Coral, fax and other channels.
- Connecting patient, referrer, appointment, opportunity and financial records.
- Automating notifications, booking updates, notes and referral communications.
- Improving operational and financial visibility across the referral lifecycle.

## 3. Executive Summary

Hinkapin Health is a US-based healthcare organization focused on improving care coordination. Its referral workflow requires timely collaboration between referring providers, patients, specialists, scheduling staff and finance teams.

GrowBeyond Tech implemented a connected solution using Zoho CRM, Zoho Books, Zoho Bookings, Zoho Flow and Zoho Mail. The six-week engagement covered process discovery, configuration, integration, automation, testing, training and deployment, followed by four months of post-deployment support.

## 4. Problem Statement and Key Challenges

- 1. Manual referral intake:** Referral details received through multiple channels had to be re-entered, increasing the risk of incomplete or inconsistent records.
- 2. Disconnected operational records:** Patient information, referring entities, appointments, opportunities, communications and billing details were not consistently linked.
- 3. Inconsistent data entry:** Free-text values for referral source, appointment type and service information reduced reporting accuracy and increased duplicate handling.
- 4. Appointment coordination gaps:** Booking information, calendars, confirmations and CRM opportunity status were not synchronized through one controlled process.
- 5. Limited management visibility:** Leadership needed clearer insight into referral sources, appointment activity, service delivery, invoicing and actions requiring attention.

## 5. Evaluation of the Problem

GrowBeyond Tech conducted stakeholder workshops and due diligence to document the As-Is referral process. The review covered intake channels, patient and referrer information, appointment types, opportunity stages, communication triggers, invoicing, reporting, and referrals received through Coral, an external referral channel, and fax.

The assessment showed that Hinkapin could meet most requirements through Zoho-native capabilities. The design therefore prioritized tailored layouts, standardized picklists, related lists, workflows, calendar synchronization, CRM-to-Books integration and Zoho Flow, while avoiding unnecessary custom development and webhooks. Where Coral or fax referrals could not be integrated directly, GrowBeyond Tech retained controlled manual capture and used Zoho Flow to preserve referral context consistently.

## 6. Proposed Solution(s)

### 1. Zoho CRM referral management

- Redesigned Leads, Contacts and Opportunities layouts around referral source, patient details, appointment type, referring entity and opportunity context.
- Introduced standardized picklists and linked records through related lists for consistent data and easier navigation.
- Configured workflows to create or link records, notify assigned users, generate follow-up activities and trigger stage-based communication.

### 2. Zoho Bookings appointment coordination

- Captured referral source and appointment type during booking.
- Automated appointment confirmations and synchronized staff calendars.
- Reflected booking activity in the corresponding CRM referral or opportunity record.

### 3. Zoho Books financial tracking

- Linked Zoho Books customers with CRM contacts and opportunities.
- Categorized referral-related services and captured referral source on financial records.
- Enabled reporting on referral income, service performance and invoice activity.

### 4. Zoho Flow and Zoho Mail automation

- Used Zoho Flow to create consistent CRM notes and preserve referral context from supported intake channels.
- Standardized referral-request, confirmation and follow-up communication through Zoho Mail templates and a dedicated referral mailbox.
- Maintained controlled manual capture as a fallback where direct marketplace integration was not available.

## 7. Implementation

The implementation was delivered in six phases:

- Phase 1: Requirements gathering and As-Is process documentation.
- Phase 2: CRM layouts, picklists, related lists and workflow configuration.
- Phase 3: CRM and Zoho Books integration, service categorization and referral-source tracking.
- Phase 4: Zoho Bookings setup, appointment types, confirmations and calendar synchronization.
- Phase 5: Zoho Flow and Zoho Mail automation for referral capture and communication.

- Phase 6: UAT, training, production deployment and handover.

## 8. Result

- 1. Connected referral journey:** Referral intake, appointment activity, communication, opportunity progress and financial follow-through are managed through linked Zoho applications.
- 2. Improved data consistency:** Standardized fields and picklists provide clearer referral-source, appointment-type and service information.
- 3. Reduced repetitive administration:** Automated notifications, appointment confirmations, calendar updates, note creation and referral messages reduce duplicate handling.
- 4. Better financial traceability:** The CRM-to-Books connection provides a clearer path from referral and service activity to invoice creation and referral-source reporting.
- 5. Stronger operational visibility:** Leadership can monitor referral activity, appointment progress, source performance, financial contribution and exceptions requiring follow-up.
- 6. Supported adoption:** Four months of post-deployment support provided a defined period for stabilization, issue resolution and reporting validation.

### Client Testimonial

*“GrowBeyond Tech helped us structure the referral process across Zoho CRM, Bookings, Books, Flow and Mail, creating better visibility and coordination from referral intake through appointment and financial follow-up.”*

— Customer Representative, Hinkapin Health

### Operational outcome tracking

The implementation also established the data foundation required for consistent before-and-after measurement:

| Outcome measure                                 | Before implementation                                                                      | After implementation                                                                           |
|-------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| <b>Referral intake to scheduled appointment</b> | Previously coordinated across separate referral channels and calendars.                    | CRM and Bookings now provide linked records and timestamps for cycle-time tracking.            |
| <b>Manual reconciliation effort</b>             | Staff cross-checked referral, appointment, communication and billing information manually. | Linked records, synchronized booking updates and automated notes provide one operational view. |
| <b>Referral-related invoice turnaround</b>      | The handoff from appointment or service completion to invoicing was manual.                | CRM and Books now provide a traceable path from service activity to invoice creation.          |

Hinkapin Health now has a more structured and connected referral-management foundation, supported by consistent data capture, coordinated appointments, financial traceability and clear operational ownership.

**GrowBeyond Tech Pvt. Ltd.**

Contact: +91 9663739175 | Email: [harshagp@growbeyondtech.com](mailto:harshagp@growbeyondtech.com) | [www.growbeyondtech.com](http://www.growbeyondtech.com)