



Zoho CRM Migration and Customization for Simi Psychological Group

Zoho CRM Migration and Customization - Scaling a Multi-Location Therapy Practice with Zoho CRM, Automation, and Integrated SMS

Customer Overview

- **Company Name:** Simi Psychological Group
- **Industry:** Healthcare / Therapy & Counseling
- **Location:** Simi Valley, California (with additional locations in Thousand Oaks and Porter Ranch)
- **Company Size:** Not specified
- **Website:** Not provided

Simi Psychological Group is a multi-location therapy and counseling practice offering services including individual therapy, couples counseling, group therapy, child and teen therapy, trauma therapy, neuropsychological assessments, and online therapy.

Business Challenges (Problem Statement)

The customer had been operating on TheraSaaS, a vertical CRM platform designed for therapy practices. While it initially met their needs, it could not keep pace with the operational demands of a growing, multi-location organization.

Key challenges included:

- Limited scalability of their existing CRM platform
- Lack of flexibility for customization and automation
- Inefficient communication workflows
- Disconnected systems for telephony and messaging



- Increasing administrative burden on staff

The organization required a modern, unified platform capable of handling CRM, communications, and automation in a scalable way.

Objectives / Requirements

- Migrate from TheraSaaS to a scalable CRM platform
 - Centralize operations within a single system
 - Automate client communications and internal workflows
 - Implement telephony and SMS integration
 - Improve data consistency and visibility across records
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Solution Implemented

Zoho Products Used:

- Zoho CRM
- Zoho Flow

Key Features / Customizations:

- Custom CRM modules, fields, and architecture
- Custom SMS module to track inbound and outbound messaging
- Automated workflows for client communication and data synchronization
- Full data migration and restructuring

Implementation Approach:

Discovery:

- Analyzed business workflows across multiple locations
- Identified gaps in TheraSaaS and defined system requirements



Configuration:

- Built Zoho CRM structure aligned to therapy practice operations
- Created custom modules and fields, including SMS tracking

Data Migration:

- Extracted, cleaned, and migrated records from TheraSaaS
- Restructured data to align with Zoho CRM module architecture

Automation Setup:

- Configured workflows within Zoho CRM and Zoho Flow
 - Enabled communication automation and backend data sync
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Third-Party Integrations

RingCentral Integration

- **Purpose:** Enable telephony and SMS directly within Zoho CRM
- **Implementation Details:**
 - Provisioned RingCentral account
 - Assisted with porting existing phone numbers
 - Integrated RingCentral with Zoho CRM via Zoho Flow
 - Configured automated logging of inbound and outbound SMS messages

Key Integration Capabilities:

- SMS messages automatically logged to CRM
 - RingCentral used as delivery channel for automated messages
 - Full communication history centralized within Zoho CRM
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Project Execution Details

- **Timeline:** August 15, 2025 – December 30, 2025



- **Team size / roles:** Not specified

Key Deliverables:

- CRM data migration from TheraSaaS
- RingCentral provisioning and number porting
- Custom SMS module implementation
- Workflow automation deployment

Core Workstreams:

1. CRM migration
 2. CRM customization and automation
 3. Telephony and SMS integration
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Results / Outcomes

Quantitative Improvements:

- Not explicitly measured, but operational efficiencies achieved

Operational Improvements:

- All records successfully migrated to Zoho CRM
 - RingCentral fully operational with existing numbers
 - Automated workflows deployed and functioning
 - SMS history fully tracked within CRM
 - Client communications automated (birthdays, reminders, notifications)
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Business Impact

- **Operational Efficiency:**
Automation of client communications significantly reduced manual workload, allowing staff to focus on higher-value activities
- **Improved Client Experience:**



Consistent, timely, and personalized communication improved engagement throughout the client journey

- **Data Reliability:**
Automated synchronization between records eliminated inconsistencies and improved data accuracy
 - **Unified Communications:**
Centralized SMS logging provides full visibility into all client interactions
 - **Scalability:**
Zoho CRM provides a flexible foundation for future growth, automation, and integrations
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Key Takeaways / Highlights

- Successful migration from TheraSaaS to Zoho CRM
 - End-to-end communication automation implemented
 - Seamless RingCentral integration for telephony and SMS
 - Custom CRM architecture tailored to healthcare workflows
 - Scalable system designed for continued growth
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Partner Information

Looking to modernize your CRM and streamline communications?

- **Partner Name:** Twelve Three LLC
 - **Zoho Partner Tier:** Advanced Zoho Partner (formerly Premium Partner)
 - **Website:** <https://www.twelvethree.com>
 - **Email:** support@twelvethree.com
 - **Phone:** 716-837-5727
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