

Case Study



HGEM Delivering better hospitality experiences with **Zoho One**



zoho.com



The Company

HGEM is the hospitality industry's secret weapon. It empowers leading restaurants, cafes, and pubs, including Pret a Manger, Pizza Express, Lounges, Jamie's Italian, Flight Club, Wingstop, Dishoom, and Wagamama, to deliver exceptional guest experiences. Established in 2003 and headquartered in Bath, UK, HGEM provides illuminating, actionable insights through guest feedback sites, online reviews, mystery audits, product ratings, and more. "We shine a light on what they do and provide the tools to improve it," explains Steven Pike, HGEM's Managing Director.

At the core of HGEM's offering are its three proprietary software solutions. 'The Hub' is its central portal, where its hospitality clients view all of their data and performance dashboards. Here, clients can also initiate actions and inform decisions about how to best refine their guest management. 'Halo' is HGEM's AI agent, which is woven into 'The Hub' to help users identify and interpret patterns in their data, uncover anomalies, and respond to their customers. Its third application, 'Mystery Dining', is where its community of mystery diners can browse and book available audit visits, submit reports, and claim reimbursements.

We took time out with Steven to discuss another software platform that has been central to the business for the last decade: Zoho. "I'm inside Zoho most days, using its applications to make our business more efficient, more informed, and more effective," he begins.

The Challenge

Enable greater client success with a structured, well-integrated CRM system



Back in 2017, we were using a collection of different tools for different things.

Steven Pike,
Managing Director, HGEM



As HGEM is a software business at its heart, Steven recognises the importance of intuitive, integrated systems. He understands that siloed data, duplicated processes, and disconnected platforms hinder growth, collaboration, and ultimately, client success. In early 2017, Steven saw that tool sprawl had crept into HGEM's operations. He recalls a plethora of software systems being in place - all sitting at the same table, but none of them talking to one another.

HGEM's pre-Zoho stack:

- Multiple in-house administration and reporting platforms.
- Capsule CRM for customer management.
- KashFlow for finance processes.
- A shared mailbox for customer support.

This fractured stack resulted in inefficiency, duplication, and manual effort. "Before Zoho, we had one version of the client in our CRM, and another version of the client in our accounting system," Steven remembers. To bring uniformity, he sought to replace Capsule CRM with an alternative CRM that could seamlessly connect data from multiple areas of the business in one central database.

Steven evaluated a number of CRMs on the market, including Salesforce, which he felt was "too expensive for what we would get out of it." However, upon finding Zoho CRM, complete with a competitive price point, he was instantly excited. "It was the configurability potential of Zoho that swayed me to it," he nods. In October of 2017, he signed up to Zoho CRM - a game-changing decision that would kick-start a company-wide software journey, and enable gains felt by both HGEM's colleagues and clients alike.

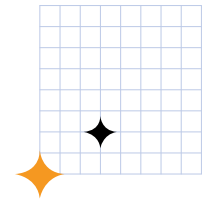
The Solution

From CRM to support, marketing, finance, and more, Zoho One builds a customer-centric ecosystem

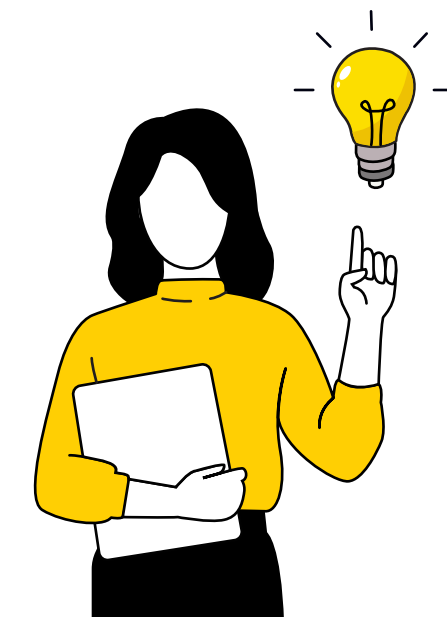


The importance of software businesses like ours is to be embedded in customers' workflows - this is very much part of **the decision to have Zoho One.**

Steven Pike,
Managing Director, HGEM



In early 2018, Steven attended a meet-up for Zoho users, organised by Bill Quinn of 1 Cloud Consultants, an official Zoho partner. Striking up a rapport, Steven then booked a deep dive product workshop with Bill, where they explored several Zoho solutions that could bring further harmony to HGEM's operations. Steven subsequently rolled out Books and Desk to sit alongside CRM. "We had separate applications for quite a while, with CRM, Desk and Books being the main ones," Steven recounts. "Then we moved onto CRM Plus in 2019, looking to take advantage of the included marketing applications in that bundle."



In 2025, eager to unlock the benefits of several further Zoho products and future-proof HGEM's growth, Steven adopted the Zoho One suite of 45+ business applications. Today, 50 employees use the platform, enjoying its connected workflows and data uniformity across core products including CRM, Desk, SalesIQ, Campaigns, Books, and most recently, MCP. HGEM's management has realised even further advantages, such as intuitive user management and slimmed-down subscription costs. "Zoho One makes onboarding particularly easy, slick, and efficient. You have everything in one place, and you can just tick the applications each person needs. Other key advantages are that you've got just one directory of users and a simplified billing process," says Steven.

The impact of Zoho's rollout has been felt across the business and by HGEM's customers. Steven reports that productivity has increased by around 50%, giving his teams more time to focus on delivering exceptional customer service and support. "Zoho solved the problems we needed it to, so it was easy to see adoption across the business. People have seen that Zoho adds value," he reflects.



Central to HGEM's daily activities is Zoho CRM. "CRM is at the heart of our processes, and everything connects back into it," Steven shares. "Everything starts with our customer records." The CRM's leads, contacts, and account records now form the company's single source of truth, which is tightly integrated with its three proprietary systems to prevent any discrepancy in client data.

The CRM orchestrates almost every activity to ensure client communication is timely, documented, and well-informed. "It's about driving actions, and making sure people are focused on the right things. We do this by creating tasks, triggering notifications, and building dashboards. These sorts of things drive the right behaviours and actions across the company and make people accountable," says Steven. Even when a colleague is away from the business, the centralised visibility offered by the CRM allows a teammate to easily pick up the conversation, enabling the smooth continuation of service to its clients.

HGEM has heavily customised the CRM environment to adapt to its sector-specific needs, especially through the creation of custom modules. For instance, the 'Success Plans' module houses each client success manager's quarterly plans to help their clients improve and grow. It covers the initiatives they're working on and the ways they intend to keep the client engaged with those projects. "The module creates discipline. They're having to think about what they are going to do for their client this quarter, but also how to hold the client accountable for the things they too are going to do to be successful," Steven explains.

A second custom module, 'Commission Pools', is used by the HGEM team to track the commission earned against their sales. "Here we track all the changes that people make, so we can follow things like bookings, attrition, and other key metrics," says Steven. Elsewhere, HGEM have adapted the standard 'Sales Orders' module to hold its contracts and agreements, which are connected directly to Zoho Books.

The extensive customisation potential of CRM enables it to keep pace with HGEM's evolving business requirements. "Whenever we have a business challenge, we'll come to CRM and think right, how can we solve it or record it, track it, or report on it in CRM? I am someone who likes to play, tweak and optimise, and CRM has considerable flexibility to be able to shape things around our business," Steven adds.

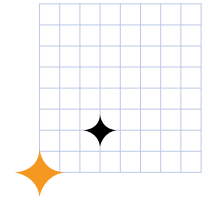
Zoho CRM is also used for reporting purposes, providing a snapshot of the company's performance. Steven built a custom dashboard to visualise how the value of accounts has changed in the current month versus the previous one, giving a holistic overview of progress over time.



We've halved the time it takes to resolve enquiries since implementing Zoho Desk.

Steven Pike,

Managing Director, HGEM



Zoho Desk is used to manage both external and internal support requests. For customer tickets, HGEM has established two departments, 'Client Support' and 'Mystery Diner Support', both handling thousands of tickets every month. For internal audiences, the firm has established an 'IT Support' department to assist with technical queries and a 'Privacy' department to answer data questions.

Moving from shared inboxes to Zoho Desk has transformed the way HGEM manages support, improving organisation, SLA compliance, and visibility into performance. Steven reports that the average first response time for client tickets has fallen by around 50% since Desk was introduced. Zia, Zoho's embedded AI agent, is now drafting many first responses, helping colleagues to action tickets faster than ever before. Plus, Desk's knowledge base articles and FAQs are also helping to generate accurate replies at speed.

The platform's reporting capabilities also give HGEM clear visibility into support performance. If response times begin to slip below the company's standards, the team can quickly identify the issue and take corrective action. "Having the visibility of key metrics in our monthly reports allows us to recognise when things fall outside our guardrails and consider the actions we can take to improve them. If we still used an inbox, we would be blind to these things, we wouldn't be able to measure them," says Steven.

Meanwhile, Desk is seamlessly integrated with Zoho CRM to ensure that all client tickets are recorded on the related record, providing the sales and account teams with a window into each support interaction. It's also connected to Zoho SalesIQ, which provides a chatbot on the organisation's website. Here, Desk FAQs are automatically surfaced as responses to inbound queries, helping visitors to self-service their needs. This integration has delivered impressive time-saving results. Steven beams: "About 30% of our tickets at the moment are handled autonomously in SalesIQ, and those are resolved on the spot. It's using our Desk knowledge bases and answer templates to achieve this."



Campaigns

HGEM uses Zoho Campaigns to stay connected to its network of hospitality professionals. Identifying three distinct audiences - enrolled clients, prospective clients, and mystery diners - the team segments its mailing list accordingly to send tailored communications. Mystery diners receive exciting newsletters, and prospects are nurtured through targeted lead generation campaigns. Existing clients are sent update mailers, announcing new features in the software or important notices, "to make them aware and drive deeper engagement," explains Steven.

Campaigns' direct sync with Zoho CRM makes the sending and segmentation processes exceptionally smooth. Mailing lists are pulled directly from the CRM's leads and contact modules, automatically separating subscribers by their status as a client or soon-to-be client. "Yes, segmentation is super easy," Steven smiles.

Also easy is the design and build experience. "The user interface is good, we can make our emails look however we want them to look. It's easy to drop Canva graphics into them, which look nice and feel on-brand to our contacts." Campaign reporting is simple too, with Steven adding: "When we run a campaign, we can easily see how it's performed, and quickly spot drop-outs to help us identify what might be causing them."



Books

One of the first Zoho tools that HGEM ever implemented was Zoho Books, and it remains a go-to application for the organisation today. "It's managed our finances and invoicing for years, and it's an important part of our suite. It sits at the heart of all of our invoicing and accounting processes," explains Steven.

Tightly integrated with Zoho CRM, HGEM's team can simply push won sales orders for invoicing and see their status right from the CRM record. From there, HGEM's finance team can track money in and out of the business and submit detailed, accurate reports to HGEM's parent group. "We report into a much larger collection of businesses. Ultimately, our financial performance gets reported on the Toronto stock exchange," Steven continues.

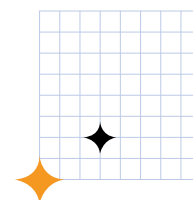
Going forward, HGEM plans to integrate Books with its proprietary software, and also upgrade its billing process so that clients can see their invoices and statements and manage them independently.





I created an AI agent that produced an attrition analysis for me. The result was really useful.

Steven Pike,
Managing Director, HGEM



The latest addition to HGEM's stack is Zoho MCP, a product built around the Model Context Protocol, designed to interface AI agents with business software. 1 Cloud Consultants arranged early access to MCP for AI enthusiast Steven, who confesses he's always "excited" by new features and products.

Connecting his preferred LLM platform - Claude Cowork - Steven built an AI agent in just minutes, and tasked it with building an attrition analysis. "It has been fantastic. Much more effective than trying to build blueprints and workflows, or wrestling with code. The result was really useful, and the whole process was very quick. There's huge potential there to make things more connected and slicker."

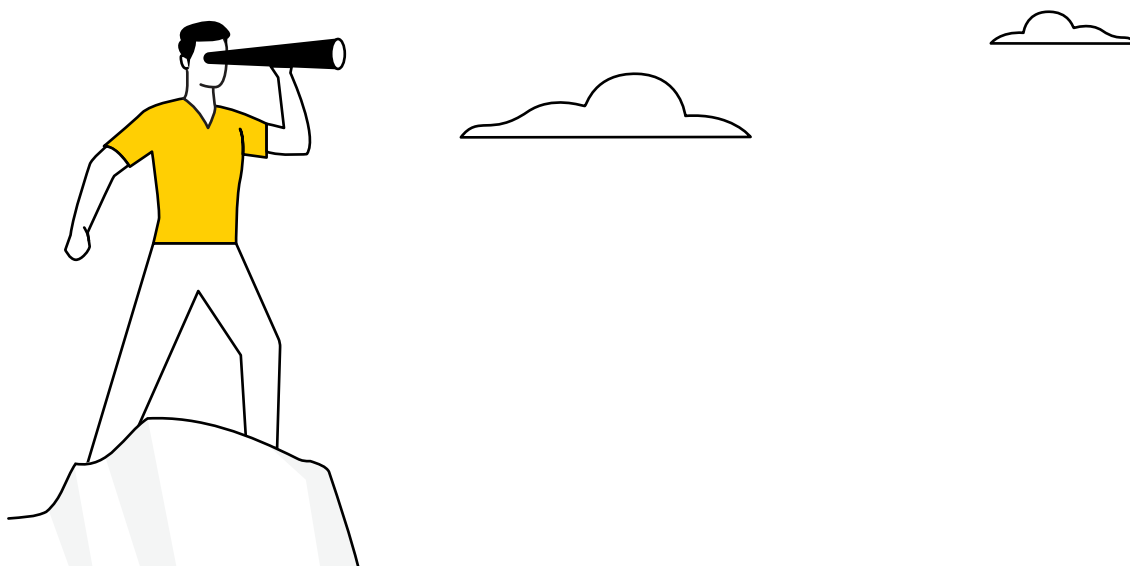
Looking to the future

Steven is always looking for ways to make HGEM run more effectively and improve the client experience. He regularly reviews the business's processes to identify opportunities to reduce administration, eliminate duplication, and improve the flow of information. With 45+ Zoho One products available at his fingertips, the answers to these operational challenges are usually just a few clicks away.

When it comes to ongoing advice and support, Steven says he will always turn to Bill at 1 Cloud Consultants. "It's really useful to have someone closely connected with Zoho that I can reach out to for advice or different perspectives on what we can do. It's been a great connection to have all these years, helping us stay on top of what's new in the products we use. The plan is to keep evolving and innovating together."

Steven's current to-do list:

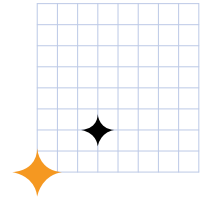
- Build a customer portal to surface more data to external stakeholders.
- Explore Zoho's new unified portal to connect more elements from each application.
- Launch AI-generated responses in SalesIQ.
- Expose client billing agreements in a self-service portal.





I would definitely recommend Zoho, and indeed I have done so! We're part of a collection of businesses, and they all have different CRMs. Lately I've been showing them all how I use Zoho.

Steven Pike,
Managing Director, HGEM



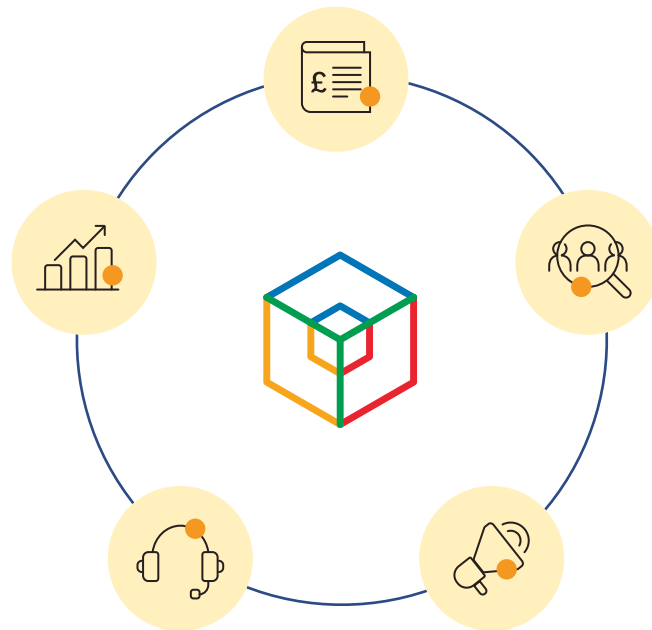
About 1 Cloud Consultants



With over a decade of experience, 1 Cloud Consultants is dedicated to providing top-notch services in reselling, training, consultancy, implementation, and ongoing support for Zoho products. Its long-standing partnership with Zoho, which began in July 2012, ensures that its team bring unparalleled expertise and commitment to its clients across the UK and beyond.

To learn more about 1 Cloud Consultants, visit: www.1cloudconsultants.com/

About Zoho One



Developed as the ultimate "operating system for business", the Zoho One bundle is a collection of 45+ integrated applications that cater to every diverse need of a modern business. From Sales to Marketing, Customer Support, HR, Operations, Finance, and Legal, Zoho One's powerful suite of tools can be relied upon by every department to improve performance, enhance collaboration, and streamline processes. An unrivalled yet affordable solution, Zoho One's cloud-based apps bring extraordinary value to any organisation.

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



zoho.com



HGEM website:
www.hgem.com

Email us:
Sales@zohocorp.com

Contact us:
+44 (0)203 564 7890