

Beyond CRM: How RJG Built the Operating System for Its Entire Business

Plastic Injection Molding Training & Technology · Traverse City, Michigan · ~130 Employees

For more than 30 years, RJG has helped plastics manufacturers in medical, automotive, and transportation industries improve process stability through hardware, software, training, and consulting delivered as one full-solution model. By 2018, though, the systems running that business internally had not kept pace with it: an aging, server-based CRM slowed sales teams down, support ran on spreadsheets, and project work was scattered across five or more disconnected tools. What began as a search to replace a single legacy CRM, guided by Zoho Advanced Partner Aspen94, grew over the following years into a company-wide rollout of more than twenty Zoho applications, reshaping how RJG sells, supports, reports, and collaborates.

THE CHALLENGE

An aging, server-based CRM and a patchwork of disconnected tools left sales, support, and project teams without a shared source of truth.

THE SOLUTION

A discovery-first rollout of Zoho One, built department by department and expanded steadily over several years of close partnership with Aspen94.

THE RESULT

A company that runs its own connected platform, with teams spending less time on paperwork and more time on customers, quality, and growth.

251%

ANNUAL ROI

\$716,995

NET ANNUAL BENEFIT

50%+

EFFICIENCY IMPROVEMENT

80%

ZOHO CRM ADOPTION

75%

PAPERWORK AUTOMATED

24

ZOHO APPS IN DAILY USE



Zoho One

KEY APPS USED



Zoho CRM



Zoho Desk



Zoho Analytics



Zoho Creator

ABOUT RJG, INC.

RJG is a global training, consulting, and technology company specializing in plastic injection molding. Its customers are manufacturers producing safety and quality-critical parts for regulated industries including medical devices, automotive, and transportation. Founded in 1985 and headquartered in Traverse City, Michigan, RJG has spent more than 30 years helping molders and OEMs improve process stability, product quality, and operational performance through advanced process-control technology, expert consulting, and industry-leading training across North America, Europe, and Asia. Most firms in this space sell a single point solution. RJG combines hardware, software, training, and consulting into one full-solution model, which demands close coordination across sales, support, engineering, training, and service teams.

ZOHO IMPLEMENTATION PARTNER: ASPEN94

Aspen94 is a Zoho Advanced Partner based in Michigan, the same state as RJG's headquarters, a proximity that shaped much of how the partnership played out. Founded in 1994 as AspenTech Consulting Group, the company later rebranded to AspenTech CRM and eventually to Aspen94, in honor of its 30th anniversary. It got its start implementing on-premises Act! CRM systems, installed software running on Windows machines and local servers, which gave Aspen94 deep familiarity with legacy, server-based platforms like SalesLogix, precisely the kind of system RJG needed to leave behind. President Marshall Knapp has led Aspen94 as a Zoho partner for roughly 14 years.

The Challenge

RJG operates in highly regulated, safety-critical industries where precision, traceability, and timely resolution matter enormously. Its internal systems, though, had fallen 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 on for months without a single system to maintain continuity. Support teams leaned on manual tracking and undocumented institutional knowledge just to manage complex issues.

What RJG Moved Off Of

At the center of the problem sat SalesLogix, an aging, server-based CRM hosted at RJG's Traverse City headquarters. It actively slowed teams down: remote and international offices had to sync with the host database before doing much of anything, a process that was especially painful for RJG's teams outside the US. Generating a single sales quote could take up to two hours while the system produced the PDF. The platform also offered little structure to guide good data entry, with no conditionally required fields and no dependable picklists. Support told a similar story: because the SalesLogix ticketing platform couldn't meet their needs, teams resorted to spreadsheets and email, which gave them some basic visibility but made generating real insight slow and inconsistent.

The problems went well beyond the CRM. Project management was scattered across five or more disconnected tools depending on the department, a patchwork that included Smartsheet, Asana, plain Excel, and in some cases nothing formal at all. RJG needed a cohesive operating system that could unify customer data, standardize execution, and surface real-time business health company-wide.

“SalesLogix was set up so you had the host database sitting on a server at RJG's headquarters, and then these remote syncs that would sometimes work and sometimes wouldn't. Especially for the international users, it was a real drag.”

MARSHALL KNAPP, PRESIDENT, ASPEN94

The Solution

Starting in 2018, RJG narrowed its search to two platforms, Zoho and Salesforce, and evaluated each alongside its respective implementation partner over roughly four months. It was a deliberate, parallel process: RJG's team dug into both platforms' capabilities while simultaneously vetting the partners who would carry out the work, considering three Zoho partner candidates before choosing Aspen94.

“We had internally narrowed it down to Zoho or Salesforce, and then we went and chose Zoho and Salesforce partners... at the same time we were vetting our partners with the platforms as well.”

JASON “YOFFY” YOFFY, USER EXPERIENCE MANAGER, RJG

Cost tipped the scales early. Salesforce required RJG to purchase a growing list of separate add-ons, a marketing suite here, a help desk module there, that pushed the total cost well past Zoho's. Zoho's visible investment in the communities where it operates, particularly in India, also resonated with RJG's own community outreach efforts. Ultimately the decision came down to affordability, adoption feasibility, and RJG's ability to manage the system itself.

“It's not about saying your product is great and spending a lot of money to scream from the rooftops about it. It's more about: when the rubber meets the road, does this product really work?”

MARSHALL KNAPP, PRESIDENT, ASPEN94

Marshall Knapp was on-site in Traverse City two to three days every other week throughout the engagement, running biweekly sprints in person. Aspen94's own Michigan base made that level of hands-on commitment easier, and it mattered in a pre-pandemic world where remote work wasn't yet the norm. Shared values reinforced the fit: Zoho's approach to GDPR, achieved through an ISO-standardized process, landed just as RJG was completing its own ISO certification, giving RJG confidence to stand up its own GDPR program without friction.

What had started as a search for a “CRM replacement” had become something bigger: an initiative to establish a sustainable operational foundation, with Zoho CRM, Zoho Desk, and Zoho Analytics at the core, and Aspen94 as the partner to build it.

Implementation: Discovery Before Requirements

Aspen94 didn't ask RJG to hand over a list of requirements. Instead, the team took a different approach from the start, sitting down with every department to understand, firsthand, how the business actually worked before mapping any of it to Zoho.

“What we wanted to understand was how do they work today. We wanted to see it firsthand, ideally, so that we could really do that level of intake... I think that's what led to the eventual success of the solution.”

MARSHALL KNAPP, PRESIDENT, ASPEN94

That discovery process ran through a series of empathy sessions across every RJG department, surfacing the gaps in the old system and the priorities for the new one. RJG built a cross-departmental internal team in response, nicknamed “The Zoholics” after the Zoholics user conference the team attended in 2019, with one representative from every part of the business. The group met weekly to prioritize needs and bugs, then worked the backlog with Aspen94's team, all of it tracked in Zoho Sprints.

The overall timeline ran roughly four months of evaluating Zoho against Salesforce, while vetting each platform's implementation partner in parallel, followed by about seven to eight months implementing the first wave of apps, CRM and Desk, which launched the following April. From there, RJG and Aspen94 kept building and refining together for roughly two more years before RJG was fully self-sufficient, putting the full close-collaboration arc at about three years. Among the first custom builds was a quoting application on Zoho Creator, engineered to handle RJG's multi-currency, multi-language quoting needs and replace a SalesLogix process that had taken up to two hours to generate a single quote.

2 hrs → instant

QUOTE GENERATION TIME

~7–8 mo

FIRST-WAVE ROLLOUT (CRM + DESK)

~3 yrs

TOTAL CLOSE-COLLABORATION ARC

Two More Years of Building Together

Launch day wasn't the finish line. For roughly two more years, RJG and Aspen94 kept refining, expanding, and integrating the system, tackling items that had been deliberately deprioritized during the initial rollout. Those projects included feeding class and training registrations into the CRM, connecting serialized-product tracking to support tickets, and building out Analytics dashboards once real production data existed. RJG's ERP integration with Sage 100 was part of that longer arc; it took three years in total to eliminate double data entry between systems.

As the priority list shrank, RJG made a deliberate shift, investing in its own internal Enterprise IT capability, including hiring an in-house Deluge developer. The partnership hadn't soured; it had simply done its job. RJG now runs a larger internal IT team that supports its full Zoho footprint without external partners, calling in Aspen94 only occasionally for support tickets.

Adoption: Gradual, Uneven, and Expected

Change of this scale wasn't instant, and RJG doesn't pretend it was. Zoho Desk was adopted quickly by RJG's support team. Sales adoption moved slower because documentation can feel like it competes with time spent selling, and

COVID-era downsizing only sharpened that tension. Some international offices were still coming fully on board years into the rollout. A trained cohort of internal Zoholics champions carried adoption forward department by department, and Zoho CRM adoption has since reached 80%.

The payoff shows up in time, not just dashboards. Sales reporting that used to take reps roughly six hours a month to compile by hand is now automatic and real-time, hours redirected back to selling and managing customer relationships.

CRM in Practice

Zoho CRM was customized to reflect how RJG actually sells. Its US sales team operates across three regions, west, middle, and east, each with multiple levels of sales executives engaging different customer types, and leads route automatically by location so the right sales pod owns each relationship from the start. Deal stages map to real sales milestones: early discovery, budgetary quoting, deeper planning, formal quoting, and the final push to purchase order. A deal only counts as “closed” once RJG receives the purchase order, which removes an ambiguity common to many CRMs.

RJG also built custom modules that reflect its full-solution business model. One integrates with LearnUpon, its LMS, so training course registrations flow automatically into Zoho CRM. Others track serialized and non-serialized products, product logs, and repairs, turning Zoho CRM into the engine of RJG's full customer-lifecycle infrastructure. RJG's sales team spends much of its time at customer manufacturing plants rather than behind a desk, so the Zoho CRM mobile app became a daily tool: reps pull up account records on-site, review deals and quotes, and log activity in real time. Ninety percent of sales activity is now logged via mobile.

Desk in Practice

Zoho Desk became RJG's central system for customer resolution, used extensively across roughly eight departments including technical support, eLearning, training operations, and maintenance. Integrating Desk with CRM meant anyone opening an account record could see its entire support history in context. Trigger-based rules automatically raise tickets when RJG sends an invoice, receives a sales order, or sells a product that needs technical follow-up. A Jira and Confluence integration gives engineering visibility into escalated tickets, preventing the “ticket toss” where issues get handed off and lose momentum. Post-resolution NPS surveys turn customer sentiment into a tracked, quantitative signal, too. RJG's roadmap includes a customer-facing portal for viewing open tickets and service documents like calibration certificates.

Analytics in Practice

Before Zoho Analytics, reporting was a weekly or monthly production effort. Teams manually collected data, built charts in Excel, and emailed PDFs across the company, often losing an entire workday per cycle. RJG's Company 360 dashboard now gives leadership a living view of total sales, quote amounts, open deals, and support tickets, without waiting on regional teams to compile spreadsheets. That's a particular win for an internationally distributed company that used to depend on remote offices to export and translate local data by hand. RJG also built dashboards that track “resolution time as a journey,” measuring ticket duration from creation through engineering escalation to final closure.

The Results

The numbers tell a consistent story. Aspen94's implementation and the ongoing platform build-out produced a 251% annual ROI for RJG, translating to a net annual benefit of \$716,995. That return didn't come from one fix; it accumulated across the business: automation eliminated up to two hours of manual work per sales quote, reclaimed roughly six hours of reporting time per sales rep every month, and now handles 75% of paperwork that once required manual entry.

251%

ANNUAL ROI

50%+

EFFICIENCY GAIN

90–95%

DAILY EMPLOYEE ADOPTION

Overall operational efficiency has improved by more than 50% since the initial rollout, and RJG continues to find further gains through ongoing optimization rather than a one-time jump. Adoption tells a similar arc. Zoho CRM usage climbed from a slow, cautious start to 80% today, and an estimated 90 to 95% of RJG's roughly 130 employees now touch some part of the Zoho suite in daily work.

“The leaders believe in it, the leaders use it. That makes a huge difference.”

JASON “YOFFY” YOFFY, USER EXPERIENCE MANAGER, RJG

This partnership also paid a less visible dividend: self-sufficiency. Rather than staying dependent on outside consultants, RJG used its multi-year build-out with Aspen94 to stand up its own internal Enterprise IT team, including an in-house Deluge developer, and now runs its full 24-app Zoho footprint independently, calling on Aspen94 only occasionally for support. Paired with the elimination of RJG's physical file servers in favor of Zoho WorkDrive, the platform consolidation cut not just manual labor, but the ongoing infrastructure and vendor overhead RJG used to carry.

Where Things Stand Today

Eight years in, RJG runs 24 Zoho applications, with an estimated 90 to 95 percent of its roughly 130 employees using some part of the Zoho suite daily. WorkDrive has effectively replaced RJG's physical file servers. Writer, Sheet, Show, and Cliq now carry the bulk of day-to-day collaboration. 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 turns both systems' data into a shared view of reality for leaders and teams. Governance has matured alongside adoption: the informal “Zoholics” team has given way to a formal Enterprise IT intake and approval process for new tools and requests.

Conclusion

What started as a search to replace an aging CRM ended up giving RJG something bigger. Today, the company has a platform it runs itself, on its own terms, with Aspen94 still a call away when it's needed. That's what a 251% ROI and near-universal daily adoption look like in practice: not a system swap, but a business rebuilt around it.

“Before Zoho, the sales guys were spending six hours a month on a report, but now it's real-time and automatic. They can take that six hours and go sell more, or help manage a customer's relationship, or do some other sales activity that's more important.”

JASON “YOFFY” YOFFY, USER EXPERIENCE MANAGER, RJG