

The client and prospect base is the asset of most businesses.

Using Zoho CRM to manage and track their client and prospect lists

COMPANY PROFILE



INDUSTRY
Training & Coaching



TYPE
B2C & B2B



SIZE
1001-5000 employees

COMPANY CRM CRITERIA



Customization



Opportunity Management



Email Integration

ActionCOACH, Team Sage is a franchise member of a worldwide business coaching franchise with close to 1,000 offices worldwide. It helps business owners fix how they process time, team, and money.

Challenges:

The business' biggest challenge was tracking and managing correspondences with all clients. "The client and prospect base is the asset of most businesses. If you don't have that documented somewhere that's a huge asset that's not accounted for in the business," Jody Johnson, CEO of ActionCOACH, Team Sage said.

Solution:

Johnson learned about Zoho from the CEO of ActionCOACH of the Americas, and now recommends Zoho to all of her clients. The company went through two other content management programs before Zoho. Both systems failed because they either didn't work with Outlook or weren't customizable.

With Zoho CRM, ActionCOACH can manage everyone and everything all in one place: from prospects to current clients across all different kinds of correspondences (e.g., newsletter, emails). Johnson's team facilitates communications by utilizing more than two dozen email templates. Here, she can track progress, see bottlenecks, and identify how certain business will affect their revenues.

Results:

Johnson started with Zoho three years ago. If she could do it all over again, she would have hired a Zoho consultant to tell her and her team everything Zoho could do. For example, just last year they began utilizing the "Potentials" feature which allows you to indicate what a sale would be worth to see which potentials would have the greatest revenue impact on the business.

"Most business owners don't have a way of tracking a customer list or prospect list. They don't have an integrated or holistic way of reaching out to them," said Johnson who sees this on a daily basis.

“A contact management system of any kind is really important.”

“You need to protect that contact and communications information like you would a bank account,”
Johnson said.



Zoho CRM is a cloud-based software for managing your customer relationship in a better way. It helps streamline your organization-wide sales, marketing, customer support, and inventory management functions in a single system. We are light on your pocket and the features and integrations we give you are unmatched.

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