

# Anderson Sales Advantage

I needed a CRM  
that would be easy  
to set up

Coaching and training sales  
teams is easy with Zoho CRM

## COMPANY PROFILE



INDUSTRY  
Financial Services



TYPE  
B2B



SIZE  
51-200 employees

## COMPANY CRM CRITERIA



Customization



Pricing

**Anderson Sales Advantage** is a sales coaching and training company serving sole entrepreneurs, independents, and small business owners that don't have dedicated sales teams. Based in Columbus, Ohio, the three-person company helps its clients develop the sales processes and systems they need to be successful. "We work with people that have to sell, but selling isn't what they do," said owner Teddy Anderson. "They're not professional sales people. Our goal is to take the dread out of selling."

## Challenges:

When it comes to CRM systems, Anderson Sales Advantage is both a user and an advocate. Anderson has used CRM software—including Salesforce.com—for years. However, most of his clients had no CRM experience. In fact, when Anderson focused his business on sales coaching and training, he found that most of his clients had no sales pipeline or lead management whatsoever. In other words, these clients weren't just new to CRM software. They were new to CRM as a fundamental business process to support pre and post sales activities.

"I needed a CRM system that would be easy to set up and easy to train my clients to use," Anderson said. "It had to be easy for them to understand."

"Zoho CRM hits all those points and the price is great for an independent or a solo entrepreneur. I had been using Salesforce previously, and I found that Zoho CRM is very comparable. And the price is a lot better. The icing on the cake being the integration between Google Apps & Zoho CRM."

## Solution:

As both a user and promoter, Anderson appreciates the flexibility of Zoho CRM. The companies and individuals that turn to Anderson Sales Consulting all have different terminologies and ways to track their customers and prospects. The customization features in Zoho CRM make it easy for Anderson to one tune the service to meet the unique demands of each of his clients. And the ability to work with his clients in real time ensures that Anderson provides them with the best possible training and coaching.

"With Zoho CRM, my clients can invite me and let me log in to their CRM accounts to help manage and train them on how to use the CRM," Anderson said. "So we're there from the beginning, helping

our clients to set up Zoho CRM, and then we're actually using Zoho CRM with them as they're going through training to make sure they're developing the system."

Other features Anderson Sales Consulting uses internally and sets up for his clients include leads, contacts, accounts, potentials and campaigns. Anderson also uses many of the reports and dashboards.

## Results:

Among other places, Zoho CRM has positively impacted the bottom line for Anderson Sales Advantage. "Even the free edition of Zoho CRM offers outstanding flexibility and capabilities. I've worked with Salesforce and with ACT. I've tried some others, too, and there's nothing out there that would make me switch from Zoho."



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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