

ecomark solar

I would definitely  
recommend Zoho

## EcoMark Solar Migrates from Salesforce to Zoho

### COMPANY PROFILE



INDUSTRY  
Renewable Energy



TYPE  
B2C



SIZE  
50-200 employees

### COMPANY CRM CRITERIA



Integration with  
Zoho Reports



Workflow  
Automation

“The cost is just too high,” were the words that echoed a year ago from **EcoMark Solar** when it began growing and adding users to its CRM system. At the time, they were using Salesforce, but as is frequently the case, the return-on-cost (ROC) of the system made Salesforce increasingly impractical when EcoMark began adding more users.

Having been in business for two years and now experiencing rapid growth, EcoMark was at a technology crossroads. It was time to determine which CRM to use for the foreseeable future – bite the bullet and hope Salesforce eventually paid off, or try another solution.

EcoMark Solar is based in Denver, Colorado and dedicated to accelerating the adoption of solar energy on a grassroots level. Specifically, EcoMark is a marketing, lead generation, and channel sales firm that specializes in public outreach and persuasion on behalf of the renewable energy industry. Simply put, it specializes in selling residential solar capabilities.

Ian Melchior is the Vice President of IT whose job it is to set up all of the systems, make sure workflows are in place, check the integrity of data, and generate reports so he can analyze trends and determine where to dedicate resources. As such, he is deeply involved in EcoMark’s CRM and was crucial in the CRM decision making process.

## Challenges:

The catalyst for EcoMark making the decision to switch CRM services was when their business model changed:

“Initially, we were just using the Salesforce CRM as a glorified database. Our business was simply lead generation whom we would market to other companies. What made us really start needing a complete yet affordable CRM was when we started selling our own product to our own leads.”

With Salesforce, they had a single user account. The new business model however brought the need for multiple users. “We were expanding and had sales reps, customer service, managers, etc. and really needed a full featured CRM that could accommodate at least 20 users without costing us an arm and a leg. Although Eco-Mark was not disappointed in the functionality of Salesforce, the attached price tag was too high. When searching for another solution, EcoMark looked for something with equal functionality, at lower price point. Additionally, Melchior was looking for a CRM with an intuitive

and easy-to-understand interface. This was paramount considering Melchior also had to train over 20 staff members to use the CRM.

With several members of EcoMark's team having prior experience with Zoho, that became the logical choice to try. Fortunately for EcoMark, the search process stopped with Zoho CRM.

## Solution:

EcoMark was able to get off to a fast start with Zoho CRM, primarily because of the simple and intuitive user interface. "Overall the learning, training, and transition process has been pretty smooth." Throughout the integration process, Melchior also took advantage of Zoho's live chat support to make the transition easier. "One of the things that has been really helpful in getting running with Zoho CRM is the live chat support – those guys are great!" Soon after implementing Zoho CRM, Melchior decided to try Zoho Reports as well. "Although Zoho CRM has a great reporting tool, I wanted to use something with some more robust features, so we decided to integrate with Zoho Reports."

## Results:

"We've been using Zoho for about a year now and so far so good! With reports we can now identify metrics telling us information about health of a certain department, quality of our leads, and employee performance. We can also identify trends which help us with forecasting."

Workflow rules however have proven to be the most valuable tool for EcoMark within Zoho CRM. "Workflow rules and alerts have also been critical for us. In fact, we couldn't do without those features."

In addition to Zoho CRM, Melchior has also found a lot of value in Zoho Reports: "Zoho Reports has been extremely critical to our business and the integration with CRM is invaluable. Going forward, I'm excited to start using the forecasting feature and possibility integrating with Zoho Campaigns. Zoho has very good online support. It's pretty customizable and intuitive. For a company that is starting out and wants a full featured CRM without the astronomical prices of Salesforce, I would definitely recommend 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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