



Infiltrator Water Sees Immediate Returns Switching from Sugar to Zoho CRM

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COMPANY PROFILE



INDUSTRY
Environmental Services



TYPE
Privately Held



SIZE
51-200 employees

In December 2015, Infiltrator Water was about to go live with a CRM platform for the first time, migrating away from the spreadsheets and other archaic methods that the sales team had been using to track their pipeline. On a whim, they selected Sugar CRM, but before fully implementing realized it wasn't going to work for them.

Infiltrator Water, based in Connecticut, has operated a successful business for over 30 years. They manufacture and distribute wastewater management solutions like septic tanks. Infiltrator's Market Research Analyst, Josephine Hermanson, who had previous experience with CRMs, had been tasked with the implementation. "With Sugar, the mobile app wasn't user friendly at all, and ultimately our sales guys just hated it. As they would be in the CRM every single day, we needed something that they liked and found useful."

So Infiltrator returned to their list of other potential CRM solutions to find a solution.

Background

For years, Infiltrator's longtime sales reps had maintained sales and customer information manually. But because these individual-specific processes were not universally accessible, they made internal communication and hiring new team members challenging. Additionally, many of these longterm sales representatives had never used a CRM.

"The primary reason we wanted and needed to implement a CRM was so that we could unite more as an organization," says Hermanson. "We were not tracking opportunities as a company prior to December 2015."

Infiltrator wanted to standardize its customer data. But having sales reps with varying degrees of experience in CRM technology, the company recognized their CRM had to first and foremost be user-friendly. It also had to be customizable in-house. Lastly, with sales reps scattered across the country, the CRM had to possess a solid mobile app with a maps feature.

An Optimal Solution: Zoho CRM

Hermanson had previously seen Zoho as a potential solution but had yet to try the CRM. When Infiltrator returned to Zoho CRM, it didn't take them long to notice the platform could be customized to fit their business much better than Sugar CRM could. It also met all of their selection criteria including ease of use.

“Unlike some of the other solutions, Zoho had everything we needed. And it was already a complete system, rather than something still in developmental stages.”

Infiltrator made the switch to Zoho CRM in early 2016 and hasn't looked back. They currently have 45 active users (this includes outside sales representatives and a small, in-house customer service team) all of whom love using the program.

Hermanson reports several tangible benefits they've noticed already, “We've been able to measure opportunities. Zoho helps put a number on everything and helps significantly with future planning.”

“I definitely see us using Zoho for years down the road,” she says. “When we've added several new employees in the past year, the on-boarding process has proven to be much simpler. That alone saves us time and money.”

What would you say to other customers about using Zoho?

“Zoho is a complete ecosystem of tools and apps that can pretty much run the entire backend of a business. Of course, I definitely recommend Zoho CRM.”

Tools that helped us grow:

 Mobile App

 Customization

 User-friendly



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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