



Atlanta Working Capital Saves Hours Every Day Returning to Zoho CRM

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COMPANY PROFILE



INDUSTRY
Financial Solutions



SIZE
2-10 employees

Three years ago, Scott Brown left his position as a senior executive in the factoring industry to launch his own business, Atlanta Working Capital. The company is now a leader in the alternative lending industry, providing invoice factoring, cash flow-related advice, and more to other small and medium sized businesses.

“We provide a quick boost to immediate cash flow and assist companies at various stages of their development,” Brown said. “Our clients receive cash now instead of later so they can continue doing business.”

Throughout Brown’s career, he has relied on CRM to help manage his business. This experience with CRM began with a brief stint trying Zoho CRM.

“I’m a unique Zoho customer,” he emphasized. “I initially tried Zoho about three years ago after starting Atlanta Working Capital, but I didn’t feel like the fit was quite right. I wound up using Microsoft Dynamics then switched over to Pipeliner, but neither really fit my custom CRM needs.

It was at that point, three years after initially trying Zoho, that Brown made an unexpected discovery.

“I decided to take a peak at Zoho CRM again just to see what had changed. I was surprised to find that since I’d been gone, so many things had improved. Not just by a little bit either, but by miles! I decided to try it on for size again, and haven’t looked back,” he said.

The Problem

Atlanta Working Capital’s operation depends on a database of over 26,000 contacts, all of whom Brown has personally met. His primary need for a CRM was to manage these contacts in an efficient, productive, and cost efficient way.

“I needed a system that was easy to use but could manage this high volume effortlessly,” Brown said.

Brown started his business somewhat ahead of the game having several years of CRM experience while serving as a senior executive in the factoring industry. Although he initially tried Zoho CRM after starting Atlanta Working Capital three years ago, he wanted to test the market and explore other options to find the best CRM for his business. Despite Brown “living” within Microsoft Outlook on a daily basis, he found Microsoft Dynamics CRM wasn’t the right fit for him.

“Dynamics was just way too complex and seemed like overkill. Every operation took several steps to accomplish anything, and it just wasn’t efficient enough for me,” Brown said.

Next he moved on to Pipeliner, and while satisfied with the interface, he found the price exorbitantly expensive for his business. Ultimately Brown was seeking a product that could sync his massive database of contact categories and custom fields while remaining cost effective, relative to the size of his enterprise.

Fed up with options that didn't suit exactly what he needed, Brown revisited Zoho CRM. Based on his initial impressions, he decided to transition his business back to it four months ago.

"I loved what I saw on the website," he said. "It seemed like a lot of work had gone in to Zoho CRM since my last experience, so I decided to try it out again."

After signing up, Brown was ecstatic to find that his suspicions about Zoho CRM were validated.

"The changes that have been made since I last used Zoho three years ago are prevalent both visually and in the functionality of the CRM," he said. "It has really come alive, and I love it."

The Transition

"First off, Zoho CRM was incredibly easy to get up and running," Brown said. "From an underlying database standpoint, Zoho CRM is fast. Searches and clicks on the screen as well as interacting with the interface are crisp and efficient."

He estimates that Zoho CRM saves him anywhere from 8-10 hours per week and opens his schedule so that he can focus his energy on other projects.

Additionally, Brown finds the Zoho CRM mobile application particularly useful.

"I can be anywhere with the Zoho Mobile app and remain just as productive as when I am in the office. I love that I don't have to open my laptop or find a WiFi signal to do business. Zoho gives you enough that you can customize everything, but without any unnecessary features. Everything is useful."

Brown indicated that he's looking forward to the next 2-3 months as he starts to implement a suite of other Zoho products including Zoho Campaigns and Zoho SalesIQ.

What Would You Say to Other Customers about Zoho?

"In my opinion, most CRM users will find that Zoho fits their needs well. It is amazing what it can do for your business and I couldn't be more satisfied with Zoho and what it is doing for my business."



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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