



The Road That Made All the Difference: How Bernard Health Saved \$1M Switching from Salesforce to Zoho

“Our bottom line has increased by over \$100K per year from the cost savings alone after using Zoho.”

COMPANY PROFILE



Bernard Health has a complex and varied sales and services network. The company not only licenses HR software to brokers and employers nationwide, but it also operates four retail stores in the southeastern United States where non-commissioned advisers help individuals and families determine healthcare solutions.

For nine years Bernard Health used Salesforce to manage this entire operation, including all sales and services processes from its business clients to its consumer clients. But in March 2015, things began to shift.

Bernard Health Founder, Alex Tolbert, says, “We’d been growing at a 30% pace per year, and Salesforce started dramatically raising our per-user fee. This caused us to say to ourselves, ‘There are so many other CRM options available, why don’t we have a look at them?’”

The Challenge - Migrating Away from Salesforce

During Bernard Health’s search for a new, robust CRM, they came across Zoho’s “Zwitch” program - a program created specifically to help companies migrate over to Zoho, while saving costs.

Says Tolbert, “Salesforce does a nice job of making people think all other CRMs lack functionality. We checked out Zoho and found that not only did it have all of the functionality Salesforce has, but the interface was much more thoughtful and well-designed. Our only challenge would really be changing platforms.”

Nevertheless, the organization chose to shift without the help from an outside consultant. In fact, Tolbert oversaw the entire migration to Zoho CRM himself. He says that it only took four days to manage the data migration and about a week for the company to fully transition.

The Benefits

From a cost-saving standpoint, Bernard Health’s bottom line has improved significantly since switching to Zoho a year and a half ago.

“We save over 70% per year since switching. When I tell people that we changed CRMs, they’re shocked,” says Tolbert. “They think that Salesforce is the only platform on the market that can accommodate the complexity of our business. And that’s just not true.

Bernard Health also uses a suite of Zoho products including, Campaigns, Support, Sales IQ, and Zoho Connect. “We LOVE Zoho Connect. It’s a fixture of our culture now. It’s our internal

Twitter feed. It's clear to us that Zoho really paid attention to all of the details that deliver a great user experience.”

Tolbert sees Bernard Health adding even more Zoho products in the future. Right now they have roughly 90 user licenses. Tolbert notes that employees are happier with the Zoho interface because the product works so well.”

In the end, he says that shifting his company to a suite of Zoho products was “well worth it.”

What Would You Say to Other Customers About Zoho?

”Our bottom line has increased by over \$100K per year from the cost savings alone. That’s not including the increased revenue due to our improved customer experience. The 10-year savings for a company with 100 employees is a million bucks.”

“The thing we admire most about Zoho is that they are really trying to build one cohesive product where everything works well—and works together. Their customer support is amazing, and I’m just really confident that Zoho’s roadmap is going to continually add more and more value I would absolutely recommend Zoho.”

Tools that helped us grow:

 Integration with Zoho apps

 Zoho’s Zwitch programme

 Easy-to-use Interface



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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