



I'm really glad that
we made the switch

Find reliability and ease-of-use
when switching to Zoho CRM

COMPANY PROFILE



INDUSTRY
Insurance



TYPE
B2B



SIZE
1-10 employees

COMPANY CRM CRITERIA



Customization



Zoho Creator



Workflow Automation

The **Lead Exchange**, powered by Insurance Express, is one of the largest homeowner's insurance writers in Florida, working with agents across the state. As director of agency sales Garrett Mitchell explained, "We help agents place insurance business when they might not otherwise be able to. Our network includes over 200 partner agents who refer us business on a daily basis, and up to 40 companies across the state."

When a customer enters an agent's office to inquire about home owner's insurance, The Lead Exchange serves as a third party avenue to assist those independent agents in achieving winning outcomes. "We beat the rates, we capture the business, and we split the commission with the partner that referred us," Mitchell said. "That's the backbone of our business."

Several months ago, The Lead Exchange realized it was paying the price for working with a slow CRM with poor-quality updates. Because its CRM was outdated and unreliable, information was falling through the cracks, customers were not being followed up with, and customer service was suffering. Mitchell knew it was time for a change.

Challenges:

Prior to the change, The Lead Exchange was using a smaller boutique system called AgencyIQ to manage its clients. Mitchell, a two-and-a-half year veteran of CRM systems, knew he needed a change when an unexpected event happened:

"Basically, AgencyIQ did an update to their system and the whole thing crashed. It was unusable for three weeks. We didn't have access to the data that was in the CRM, and as a result couldn't receive business from the 75-80 agents who were tied to that software."

"For all intents and purposes," he continued, "our offices were pretty much down until we created a go-around for agents to get business to us. In that time span we lost a lot of money. This was just not something that we could afford to have happen again, so we moved full-speed ahead to find a new platform that would be easy to implement, full-featured, and guaranteed not to 'put us out' for any period of time."

“You can find an abundance of B2B content and insider opinions on the internet about what you should be looking for in the right CRM. It’s clear there’s no lack of information available, but knowing what you want and what your business needs are is even more vital. When The Lead Exchange started scouring the internet for a new CRM, they had a pretty clear idea of what they needed from their new CRM platform.”

Quick implementation, an easy-to-use interface, and most importantly, reliable customer service was a must for The Lead Exchange given the experience they had with their previous CRM.

“We did not want to make an investment in software that was just going to risk collapsing our business and potentially cost us even more money—that was not an option and reliability was paramount.” However, the search for a new CRM proved to be more difficult than Mitchell first expected. Inquiries for information from several companies largely went unanswered. “We made attempts to contact at least two other CRM providers we found, but were unable to get through to speak to an actual sales associate. That definitely turned us off.”

Solution:

Mitchell describes his experience discovering Zoho as very different from that of dealing with other CRM providers he found. “CRMs should facilitate growth and provide sales data that is actionable and clear. A CRM also needs to be scalable over time and remain easy-to-use so your business can continue to serve its customer base. That is what initially excited me about Zoho because it seemed to embody exactly those values.”

“When we called Zoho, we were able to start speaking to a sales representative right away,” said Mitchell. “All of our basic knock-out questions in terms of capability, what we needed for the system, etc. were answered in short order.” Mitchell downloaded the trial version of Zoho CRM and began experimenting with it. “I had a positive experience with Zoho and its capabilities right from the beginning.” Mitchell, having familiarity with CRM software, began customizing the software soon after signing up. “Zoho was very user-friendly and exactly what we needed from a CRM.”

Results:

The Lead Exchange's transition to Zoho was ultimately straightforward and problem-free. "My team and I really like the software," said Mitchell. "Right off the bat I've seen a lot of benefits in terms of productivity. Zoho makes communication with our partner agents so much easier and I'm really glad we made the switch. It's proving to be the right decision for us and I would absolutely recommend Zoho to anyone looking for a full-featured, reliable, and intuitive CRM.



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.

Contact Us:

US: +1.877.834.4428 | +1.615.671.9025

UK: +44.20.35647890
(local call charges applicable)

Australia: +61.2.8066.2898
(local call charges applicable)

India: +91.44.7181.7070

Email: sales@zohocorp.com

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