



We needed a CRM that would really mold around our processes.

From no CRM to Zoho CRM power users.

COMPANY PROFILE



INDUSTRY
Info. Technology and
Services



TYPE
B2B



SIZE
1-20 employees

COMPANY CRM CRITERIA



Customization



Pricing



Reports and Dashboards

Three years ago, **Tonari Inc.** knew it needed a CRM upgrade after using a few different systems including Goldmine and ACT for several years. In fact, after growing beyond the feature offering of those CRMs, Tonari was left operating without a CRM all together.

“Goldmine and ACT never really were good enough,” he said. “They had flaws in terms of reliability, and of course there was the problem of not having access to our CRM everywhere. About three or four years ago we were in a little bit of a slump and it was time for us to redefine ourselves – we changed a lot of things internally and none of the other CRMs were cutting it so we were left without one. I knew that it was time to implement a CRM that was truly effective for us. We had evolved from spreadsheets to Goldmine CRM, and finally to ACT CRM, but we knew we needed to move to a native cloud-based CRM.”

Tonari Inc. is a computing consulting company founded in 1991. Tonari focuses on delivering a wide range of complete computing solutions including software development, network design and integration, internet services, web development, business solutions, and security and threat management.

Co-founder John Kelly is intimately involved in all operations at Tonari and places a premium on adapting new services to retain a high level of efficiency and relevance. As Kelly puts it, “You need to sort of reinvent yourself every seven years or so. Otherwise you’re destined to go out of business!”

Challenges:

A major issue Tonari faced was transitioning from using ACT to operating without a CRM system for several months. “ACT essentially became non-functional to us and we were stuck without a CRM. We were using Outlook to kind of just keep things together,” said Kelly.

Kelly knew that he needed to quickly find a full-featured CRM solution because Tonari could not “keep things together” without a CRM for much longer.

“One of the most important things is to have a CRM that is customizable and efficient, especially for a service oriented company like us. To not have a CRM was crazy. We had very specific needs and the challenge was to find a CRM that fulfilled those needs in a timely fashion.”

Kelly was extremely thorough in his search and evaluation of potential CRM systems. “I took about six months to evaluate CRMs from Salesforce to Zoho and everything inbetween. Essentially anything that looked remotely like a CRM, I evaluated for Tonari.”

The first product Kelly looked at was Sales-force, but he was underwhelmed. “A lot of people talk about how good Salesforce is but I didn’t see that at all. As a matter of fact, they were overpriced and had less functionality than Zoho.”

When Kelly found Zoho, he was already excited about one particular feature before even using the CRM. “When I saw that I could start with a free account for three users that did not have a time limit, it peaked my interest. I felt like everyone else had a one or two week trial period whereas with Zoho, I could play with it at my leisure.”

Kelly’s main selection criteria for a CRM was it had to be easy-to-implement and highly customizable. With Zoho, Kelly said, “It was so easy to navigate and use that I was excited from the beginning.” Given that our business is very unique and requires a high degree of customization, we needed a CRM that would really mold around what we do, and trigger tasks based on certain actions and inputs in the CRM. Zoho immediately jumped out at me as a tool that would make this possible.”

There was one more aspect that really convinced Kelly to run with Zoho CRM.“Above all, it was the hugely, outrageously reasonable pricing that made us want to jump into Zoho. Salesforce wanted a year paid in advance with twice the amount of money per user locked in. As a small company, that was a ridiculous amount of money for a CRM we weren’t even sure about. I really felt like Salesforce had less features at twice the price!”

Results:

Kelly was pleased with Zoho from the start and found implementation quite easy.“It was a piece of cake getting up and running. One of the things we were looking for was a CRM that has an intuitive interface.

We couldn’t afford to have a huge learning curve for a CRM. Zoho was on the top of the list when it came to ease of use. Adding fields and calculations was easy and straightforward.”

In just a few days, Kelly felt comfortable with Zoho CRM, and within a couple of months, Tonari was fully integrated with the CRM. Tonari has been using Zoho CRM for three consecutive years with no desire to change. “There are a lot of plugins, features, capability, and flexibility and I really don’t think any other CRM would be able to manage Tonari’s needs like Zoho does. We really push CRM to its limits, and as such, we take advantage of the most advanced Zoho CRM features that other customers probably would never dream of using.”

As long time users, Tonari has also taken advantage of Zoho CRM updates and releases. “Zoho keeps adding features. When Zoho came out with the iPhone app, that was hugely helpful. Every time I think of something I need, it seems like Zoho adds it soon thereafter.”

“I recommend Zoho to my clients all the time. It’s a no-brainer for small business. It’s easy to set-up, and there’s no contracts or commitments. Moreover, I like a company that’s confident. Zoho, unlike other CRMs, offers a free version with no expiration date and allows you to try any version without a contract or commitment. What that says to me is that Zoho is so confident in their product, they don’t need to limit the amount of time you can try it for or lock someone into a long term contract,” said Kelly. “I already liked Zoho from day one, but over the years I’ve realized truly how valuable and versatile it is and recommend it to everyone.”



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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