



We have used Zoho for about six years, and it continues to play a vital role in our organization.

Zoho Helps Change the Culture at Revision Energy

COMPANY PROFILE



INDUSTRY
Renewables &
Environment



TYPE
B2B



SIZE
51-200 employees

COMPANY CRM CRITERIA



Pricing



Reports and Dashboards

Background:

It was late 2009 when **Revision Energy** initially sought a platform to help manage its sales and solar panel installation projects. “At that time we were in a more nascent stage of growth, having just opened our second office,” said Greenhalgh.

Not long after, Greenhalgh realized that in order to truly experience rapid growth, he would need a reporting methodology to manage the company’s entire sales pipeline. Spreadsheets just weren’t cutting it anymore, as incorrectly editing and deleting information was a common occurrence interfering with their sales processes and tracking.

But as Digital Marketing Manager, Greenhalgh couldn’t afford to have any mistakes in the data he was gathering, especially since he’s responsible for asking the big questions.

“Although a big part of my job is to demonstrate how web searches and web traffic can lead to leads, the better question is what happens to those leads? How do leads become opportunities? And how can we track the progress of opportunities?” he said.

Scaling the Business with Zoho CRM:

Greenhalgh cites Zoho CRM’s scalability and flexibility as two of the major reasons that have not only allowed Revision Energy to overcome one of its biggest challenges, to grow sustainably, but to also “embrace a data-driven culture.”

To keep that culture alive, Greenhalgh has also started using Zoho Reports, which he loves because its integration with Zoho CRM allows the company to “spend more time analyzing the data and implementing strategy, rather than building tables and spending hours formatting,” time-wasters he had to struggle with before when the company was using spreadsheets.

“We can accurately track the entirety of a customer’s journey and manage our solar installation projects from start to finish,” Greenhalgh said.

And, best of all, he says, “Zoho CRM provides the tools to create the methodology and culture to accomplish our goals. I think we can attribute our growth to tracking our sales pipeline in Zoho.”

What Would you say to Other Customers about Zoho CRM?

“The whole premise with software as a service is that it gets better over time,” Greenhalgh said. “And we’ve experienced exactly that with Zoho. I see us growing quite a bit more with Zoho’s help.”



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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