

Case Study



Go Geothermal

# Renewable energy experts heat up their operations with Zoho CRM



[zoho.com](https://zoho.com)



# The Company

Go Geothermal was established in 2006 when visionary entrepreneurs Tim Williams and Sean Sowden, both Executive Directors, set out to supply the UK's homes and businesses with renewable energy heating systems. After 15 years of innovation and enviable success, ("We've been very good at leading not following, and we are constantly being imitated by our competition," says Tim), the firm caught the attention of a leading Swedish manufacturer, CTC AB Group, known for its environmentally friendly cooling and heating products. In 2021, CTC AB acquired Go Geothermal, making Tim and Sean the exclusive UK distributors of its high-quality ground and air source heat pumps.

Continuing to go from strength to strength in 2024, Go Geothermal doubled the size of its head office and warehouse in the North East of England and opened a 2,600 sq ft showroom in Retford, Nottinghamshire. It also launched its "Go Green Academy," a nationally-accredited heat pump installation training programme for engineers to support the UK-wide transition from fossil fuel heating to renewable energy.

With the outlook hotting up for this cutting-edge firm, we caught up with Tim to uncover how Zoho software has supercharged its sales, revolutionised its reporting, and expedited its expense management!

# The Challenge

Gain a "helicopter view" of the business's performance



We were living in  
the dark ages  
**in terms of  
sales tech and  
CRM**

**Tim Williams**  
Executive Director



In 2023, Tim and Sean were joined by a new Commercial Director, Darran Burrage, whose strong background in sales automation and technology made him the ideal candidate to take the business to the next level of efficiency. "One of the things that was very instrumental for Darran was changing our CRM," says Tim.

At the time, Go Geothermal was running a well-known brand of CRM unsuccessfully. Feeling that the platform was unwieldy and cumbersome, its sales team neglected to use it in favour of keeping their own records in emails and spreadsheets. "Across the business, the feeling was that the existing CRM was awful," explains Tim. "People got disenfranchised with it quickly, and I wasn't pushing them to use it enough either. But the reality was that it wasn't good enough to inspire confidence in me to push it to them." With siloed data languishing in scattered files, it was impossible for the sales team to manage each other's accounts when a colleague was absent, hindering the delivery of great customer service. It was also difficult for Tim and Sean to get a real-time, consolidated outlook on the health of the business.

Furthermore, the lack of an active CRM system left Tim unable to monitor the daily activity of the sales team and the leads they were generating. The company's four full-time salespeople spend their days on the road, visiting existing clients and continuously prospecting for new business. As a minimum, each member of the team is expected to complete between 2-3 appointments per day with new and existing customers. Without an up-to-date CRM to consult, Tim found he was unable to easily keep members of the team accountable without checking their calendars manually. Plus, with plans to potentially employ more sales staff in 2024, Tim needed to justify new hires to his business partners by documenting the lead generation demands and output, information that was sadly out of reach.

Poor visibility of information was also an upstream problem for Tim. Since CTC AB acquired the firm in 2021, Tim was asked to provide accurate high-level performance reports to the Swedish owners on a monthly basis. CTC AB wanted to see Go Geothermal's full pipeline, from leads to quotes to won deals, as well as the channels and the employees that were driving the most and least growth. But Go Geothermal's abandoned CRM pipeline was obsolete and could not return the reports this required. Tim resorted to manually pulling together figures from disparate spreadsheets and documents each month, a laborious and sometimes error-prone task.



Another key goal for Tim and Darran in implementing a workable CRM was to improve customer service. Go Geothermal has partnerships with a network of approved heating installers across the UK, to whom it passes its clients on completion of a sale. However, when customers were calling the office to discuss their installation, agents were unable to see which partner was assigned to the job, resulting in confusion. "One of the things that was hard for us before, because we offer technical support for our products, was to dovetail the technical and sales sides of the business. They were very disjointed," explains Tim. He hoped that by connecting the pre- and post-sale journey inside a new CRM system, there would also be a positive knock-on effect on customer service.

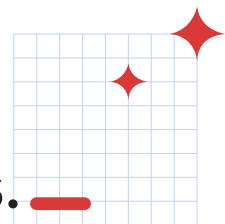
Ultimately, Darran resolved to deliver the "helicopter" view of the business that Tim had always wanted but had so far eluded him, lost in a tangle of neglected software platforms.

## The Solution

Zoho CRM delivers visibility, accountability, streamlined customer service, and consistent reporting



**It gives me a window**  
into the workings of my business.



**Tim Williams**  
Executive Director

From the outset, Darran sought to bring about a shift in Go Geothermal's internal culture by demonstrating the rewards that a well-loved CRM system could deliver, as well as the transparency it could facilitate across its teams and leadership. Drawing on his extensive CRM experience from previous roles, Darran was quick to recommend Zoho CRM as the answer to Go Geothermal's woes.

Championing its extensive capabilities, Darran demonstrated how easy and intuitive Zoho CRM was to use and maintain, and Tim was sold. "When Zoho came into the mix, we quickly realised it could do all the things we needed," recalls Tim. "Where Zoho changed the game was that we had a willingness to use it, and we believed it was worth it for the benefits."

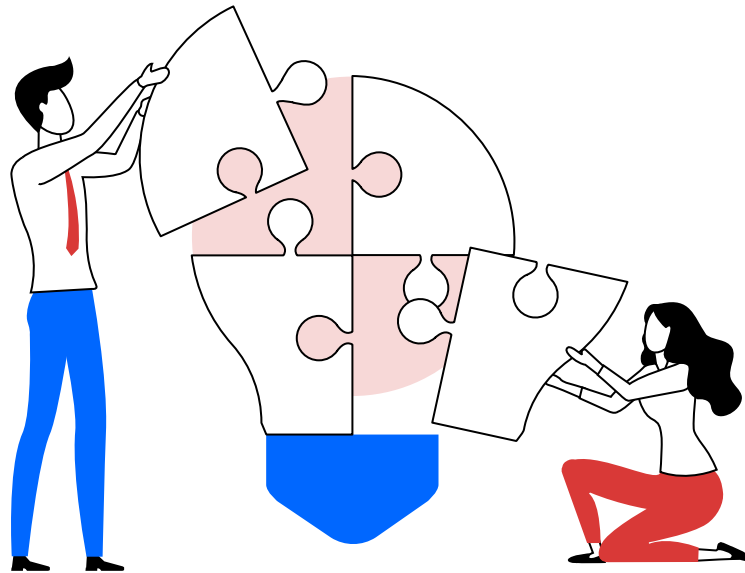
Buoyed by his board-level buy-in, Darran enlisted the expertise of Ascent Business Solutions Ltd, a Zoho Premium partner, to proceed with the CRM rollout. Together, they migrated all of the firm's fractured data sources into the platform, integrated its existing Sage accounting system, and built all the dashboards, pipelines, and reports that Go Geothermal and CTC AB needed. The effects of Zoho were instantly revolutionary. "Imagine a human being lying in a hospital. Having Zoho is like suddenly getting visibility of all their vital signs, and we didn't have that before," beams Tim.

## Accountability

With real-time visibility of the sales team's activity now at his fingertips, Tim can identify his star CRM contributors and those who may need more support. "Now I can see the key people we have, who's on track, who's off point, and where people could improve," he explains. With accountability and transparency the new order of the day, he adds; "There are no excuses. It's all there in black and white, what is and isn't happening." Tim can also check peaks and troughs in productivity against annual leave, or the volume of new prospects against previous months and sales quarters. Zoho CRM gives him the insights required to accurately decide if more salespeople are indeed needed to bolster the team's efficacy.

## Visibility

For Go Geothermal's individual sales colleagues, the CRM has been an invaluable tool during their busy days on the road. Its mobile app allows them to pull up customer details from anywhere, capture notes, log calls, and add new deals and leads on the go. The app is "very convenient", says Tim. "They're embracing it because the information is all just there in front of the team when they're with a customer. " Tim uses the mobile app too, staying abreast of the team's efforts to bring new leads into the sales funnel each day. "I permanently have the prospects module open on my phone," he reveals.



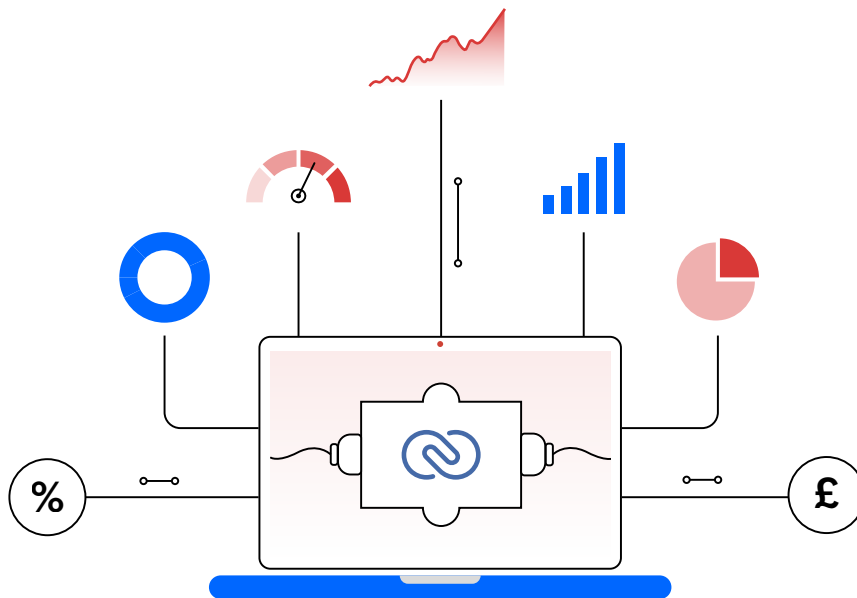
Alongside Commercient, a data sync specialist, Ascent Business Solutions connected Go Geothermal's existing Sage accounts package with the Opportunities module of the CRM. This allows its team to see the quotes that have been generated for each customer, as well as a grand total of open quotes in its pipeline, a figure that's calculated automatically. "When we quote a customer, you can see it in the system. All of that is working lovely," explains Tim. The quotes are also linked to their related individual customer records as well as the Opportunities module so that the team don't have to search through a raft of open quotes when interacting with their contacts. "It's good to see the right quotes when we're in face-to-face meetings with our clients," Tim quips.

## Customer service

Zoho CRM now lets each team member see and track every stage of the sales journey, from enquiry to quotation, won deal, and finally, the installer handover. No longer are the team blind to the post-sales activity and aftercare experiences of their customers. This upgrade is already having a halo effect on customer Trustpilot reviews, which are now glowing. "It all leads to a better service, and I can see it improving," says Tim. With Go Geothermal's commercial, training, and technical teams now aligned inside the CRM, they can pass on much richer levels of detail to each customer, regardless of who picks up the enquiry.

# Reporting

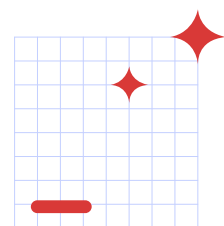
"All of our reporting is now Zoho-lead," says Tim. Using detailed CRM dashboards, Go Geothermal's management can see at a glance how the business is performing against its KPIs and targets. And although its Swedish owners are not internal users of the CRM, they too can see these statistics via a series of reports that are shared through automated emails. "It's all integrated, so they can see every prospect, quote, and opportunity that we've got. It's very transparent and it's global across the CTC AB corporation," adds Tim. With Zoho CRM on board, reporting is no longer a manual process to be dreaded each month, and Tim and Sean can rest easy knowing that all of their figures are consistent and accurate across the group.



## Zoho Expense



**Doing my expenses now takes me seven minutes,** and they used to take me four hours a month.



**Tim Williams,** Executive Director



Another application that Go Geothermal's management and sales team have fully embraced is Zoho Expense, now used by 23 of its employees. Before Zoho, logging and submitting individual monthly expenses was a time-consuming process that involved retaining paper receipts and filling out forms. "We were using a really antiquated Excel spreadsheet. It was very manual, and expenses were a massive bugbear in the business," reveals Tim.



With Zoho Expense, colleagues can now auto-scan receipts on the fly and then attribute them to specific trips or monthly reports that automatically tally up their total spend for reimbursement. Once each employee's receipts are submitted, built-in approval workflows allow Go Geothermal's finance team to check each person's spending against budgets. "This keeps our spending sensible, quite rightly," says Tim. The finance department can also easily cross-reference these expense reports with any balances on the company's corporate credit accounts.

Digitising Go Geothermal's expenses has helped to illuminate trends in spending and highlight any anomalies. As such, Tim has renewed confidence in the accuracy of the whole process. "I was hidden from what we spent on Expenses before, but now I can see everything. It's also advantageous during auditing time, much quicker and easier," he adds.

Tim especially lauds Zoho Expense's ease-of-use, simplicity, and intuitiveness, leading him to conclude that "the time saved across the business doing expenses translates to several weeks per year. Expense sounded too good to be true, but it's actually as good as it promised to be."

# Go Geothermal, Zoho & Ascent - A strategy for success

Reflecting on the impact of Zoho as a whole, Tim feels that the Go Geothermal of today has been much advanced from the business of old. "Zoho brought us into the twenty-first century from being quite a traditional business."

Tim, Sean, and Darran are looking forward to reaching new heights of success with Zoho in tow, spearheaded by their strong relationship with Ascent Business Solutions, who keep up the momentum for its ongoing development. "Having an ongoing dialogue with Ascent is good because they tell us about new ways we can grow with Zoho. We've had nothing but a great experience with them. Equally, I can't imagine our business now without Zoho. It's very scalable, and I love how new apps can be bolted onto it. We will definitely be doing more with Zoho going forward."

Hands up who's got that warm, fuzzy feeling?

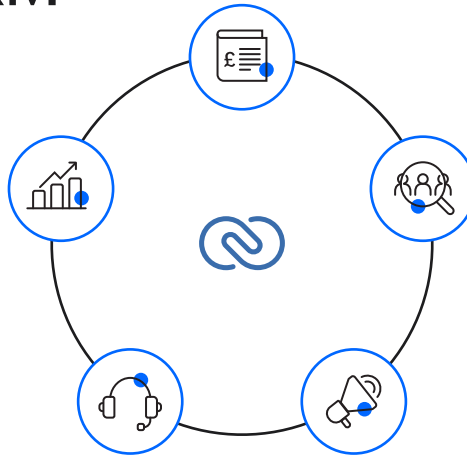
## About Ascent Business Solutions



Ascent Business Solutions is a Zoho Premium partner based in the UK. Its experienced team of developers and solution consultants have helped businesses of all sizes from SMEs to FTSE corporations scale and thrive. Ascent's expertise covers software for every business function, including Sales, Operations, Marketing, Finance, Stock and Inventory Systems, and much, much more.

To learn more about Ascent, visit: <https://ascentbusiness.co.uk/>

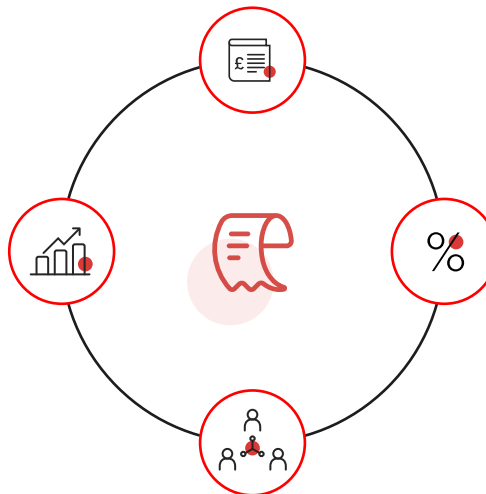
# About Zoho CRM



Zoho CRM is a cloud-based customer relationship management software that helps businesses deliver fantastic customer experiences and drive growth. The platform manages every aspect of sales, marketing, and support. Offering omnichannel presence, segmentation, predictive intelligence, analytics, customisation, integration, and more, Zoho CRM empowers more than 250,000 global customers.

**Please find out more via our website: <https://www.zoho.com/CRM>**

# About Zoho Expense



Zoho Expense delivers simplified travel booking, faster expense reporting, and effective cost control to growing businesses. Automating the end-to-end expense process from receipt to reimbursement, Zoho Expense eliminates manual errors and saves countless hours, all with built-in spend control. Plus, Expense helps businesses manage travel bookings, issue flight alerts and streamline visa requests, totally aligned with company policies.

**Please find out more via our website: <https://www.zoho.com/Expense>**



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