

Case Study

SUSTAINABLE ENERGY | NORWEGIAN CATAPULT CENTRE

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# Sustainable Energy:

## Scaling Green Technology Testing with Zoho CRM



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

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ENERGY**

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THE COMPANY

# Sustainable Energy

Sustainable Energy is a Norwegian pioneer in large-scale energy testing. Their facilities support advanced technologies—everything from offshore wind farms and carbon-capture systems to the world’s first floating ammonia-to-hydrogen cracker. Unlike typical R&D institutes that test in kilowatts, Sustainable Energy works at the megawatt level—a thousand times bigger. As competitors begin to replicate their model across Europe, especially in Germany, the company is determined to stay ahead. “I see that (the competition) as a nice thing,” says Tore Kallevåg, CCO of Sustainable Energy. “Because by the time our work has been copied, we will have reached the next level.”

Tore gave us an inside look at how Sustainable Energy uses Zoho CRM—from marketing and sales all the way to strategic decision-making with internal and external stakeholders.



## OVERALL IMPRESSION

# Simple, Versatile, Reliable

When Tore joined in 2020, he inherited Zoho CRM and became its main administrator. He compares it to his experience with SAP and Salesforce: “It is very easy to use and much more flexible than I was expecting.” Although he is familiar with databases and CRM systems, he doesn’t call himself an expert or programmer. Because of that, simplicity matters.

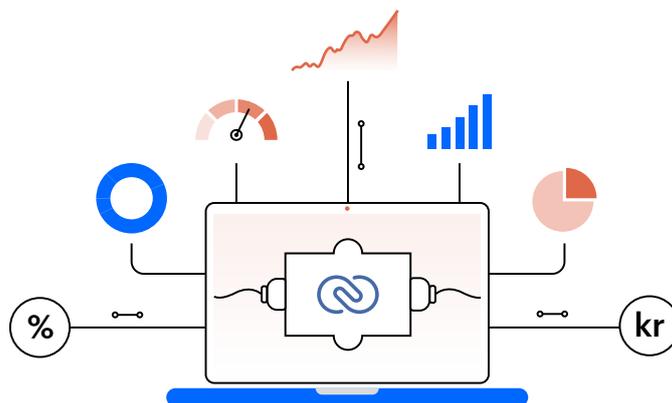
“It’s basically me who is adding new tables, fields, and so on. If I want to steer the rest of the sales team to perform certain actions, or to add important information, then I just put it in and make it mandatory and then it’s fixed. That makes it extremely easy to standardize things.”

Another key benefit of Zoho CRM is its reliability. With highly customizable systems, you often see mistakes when things are removed or changed—but not here.



When you take something out, it doesn’t destroy all your data, either. So far, it has not failed me once; it’s just very, very stable. It’s kind of amazing.

- **Tore Kallevåg**, CCO at Sustainable Energy



**With an accessible, flexible and reliable system, Sustainable Energy can:**

- ⚡ Manage project pipelines in stages
- ⚡ Make data-driven decisions and build AI tools
- ⚡ Report efficiently to both internal and external stakeholders



## MANAGING THE PROJECT PIPELINE

# The Flow

**Inside Zoho CRM, Sustainable Energy has built a structured pipeline. The project journey is clearly defined:**

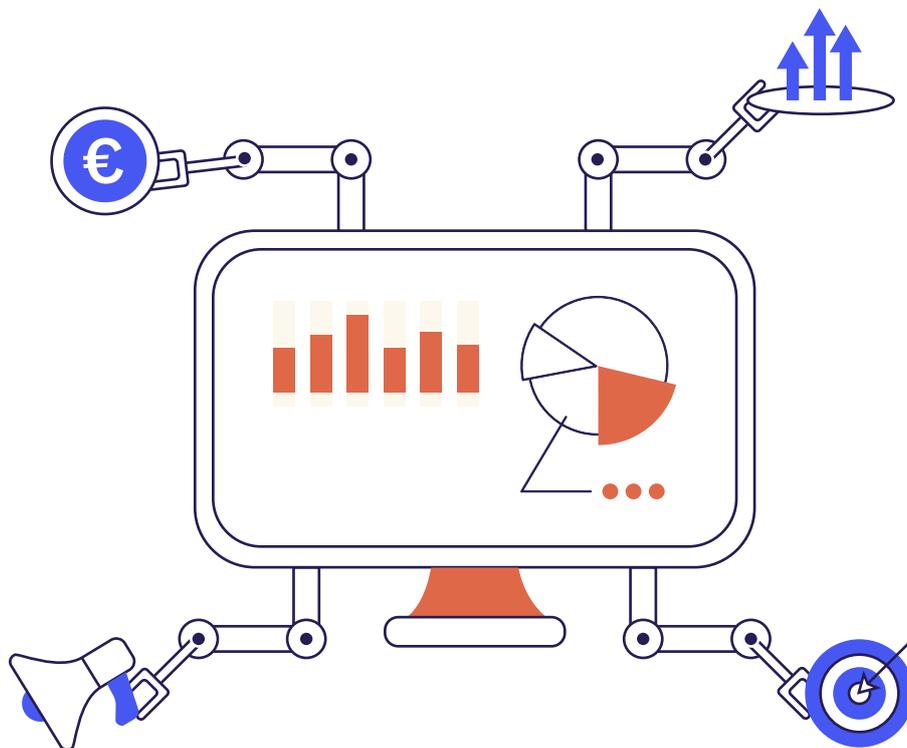
- ⚡ Campaign tracking (marketing)
- ⚡ Lead management across stages
- ⚡ Quote generation and sending
- ⚡ Ongoing project management

# Marketing Campaign Tracking

The top of the funnel is field marketing. For every event or marketing activity, Sustainable Energy creates a campaign in Zoho CRM to capture the resulting contacts and leads. This ensures each lead's origin is recorded and tracked as it moves down the funnel—letting them measure the revenue associated with each marketing effort.

At a strategic level, this is especially useful because they attend many conferences and exhibitions. "Because we are in an industry where we are visiting a lot of conferences and exhibitions, we're trying to measure the outcome of these so that we can plan the best for next year," says Tore. With all marketing activities centralized and structured, the company can prioritize both time and cost more effectively.

They run both regular and annual reviews. For the annual review, all leads, deals, revenue and individual actions are compiled into one strategic campaign, generating a full-year report. Based on this, marketing decisions for the coming year are made.



# Lead Management

Next comes the lead stage. Since projects range from single-component tests to full systems, categorisation and processing are vital. To capture required information, Sustainable Energy uses a staged approach.

This categorisation not only identifies the project requirements but examines feasibility and commercial viability. By rating leads based on the chance of them becoming a project—from 10% to 90%—they can efficiently assess and advance the most likely deals.



## Quote Generation

Tore notes, “What is very important at the end of the project-sales phase is sending out a quotation.” Usually this step precedes converting a lead into a deal, so it’s key for conversion. Zoho CRM handles the quote process: once a project nears deal stage, the sales team enters project details into the system, where calculations happen automatically. A PDF quote is then shared with the prospect.

That said, there's still room for improvement. Because their commercial operations are their priority, they haven't yet developed a fully structured product database with categorizations, pricing and product codes. Currently they work with dummy codes. But the system is ready: they plan to move to standardized codes and pricing to reduce manual work. As Tore adds, "I want to start developing a structure and make some rules for these kinds of things." Despite his estimate of roughly 10,000 dummy product codes, the quoting module is still functioning well. "We are fooling it at the moment," he says with a smile.

## Iterative Project Management

Beyond sales, Zoho CRM supports project management too. With multiple projects running concurrently—and timelines stretching over many months or years—keeping all notes and interactions in one place is critical.

Tore encourages his teams to log their activity: "When you have had a Teams meeting, write a summary of that meeting; or when you run into a complication, put the email in the attachment so that we keep this data." The richer the data, the better the insights for commercial decisions.



## LEVERAGING THE DATA

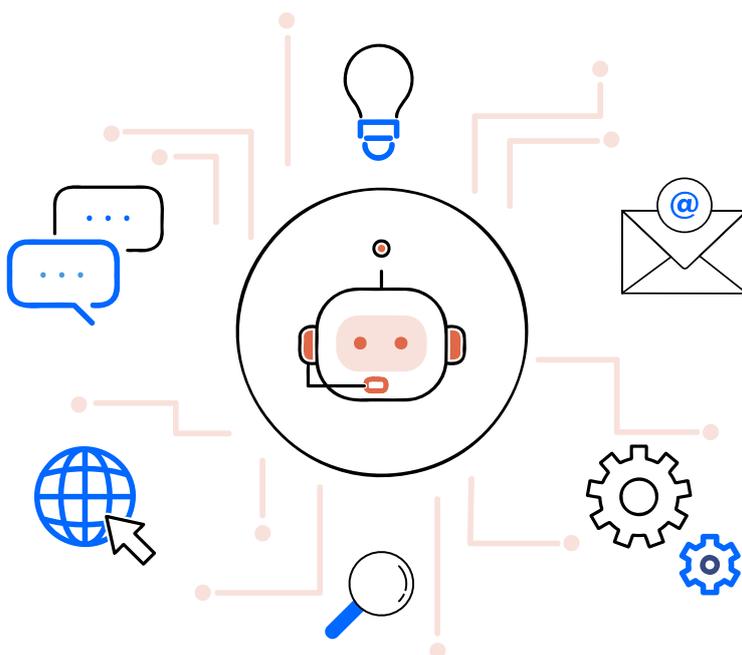
# The Foundation

Because Zoho CRM is their central business system, it serves multiple roles:



It's very much a CRM, but also a planning and reporting tool for strategic actions. Not so much for each individual project, but at a more overall strategic level.

Gathering large amounts of accurate data is key for their digital next step: building AI bots. Tore states, "We are spending a lot of time on developing AI tools, and actually using the data we have put into Zoho and the other sources we have—whether that is email or the internet as a whole." Their aim is to merge data from multiple sources—including CRM—in a structured way, to assist strategic planning. And as with all AI projects, the richer the data, the better the output. Tore emphasizes, "It's extremely important that we put in valuable data for every customer."



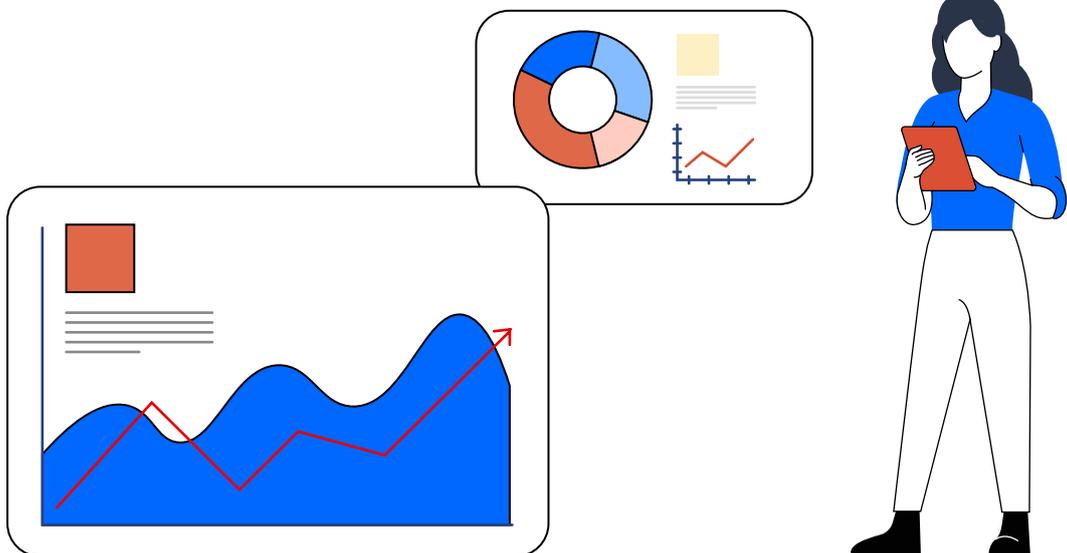
# Reporting

While the AI initiative is still early, reporting is already well advanced. As CCO, Tore continuously monitors their pipeline and activities to optimize performance. “It’s extremely important to visualize goals, and to try to do this in an efficient way,” he says. Zoho CRM helps by providing templates and reusable reports. “Before everything I do, I try to find a reusable report, or take the data from the system and analyze it there (in Zoho CRM) instead of having a lot of other systems.”

## Sustainable Energy uses Zoho’s reporting features to:

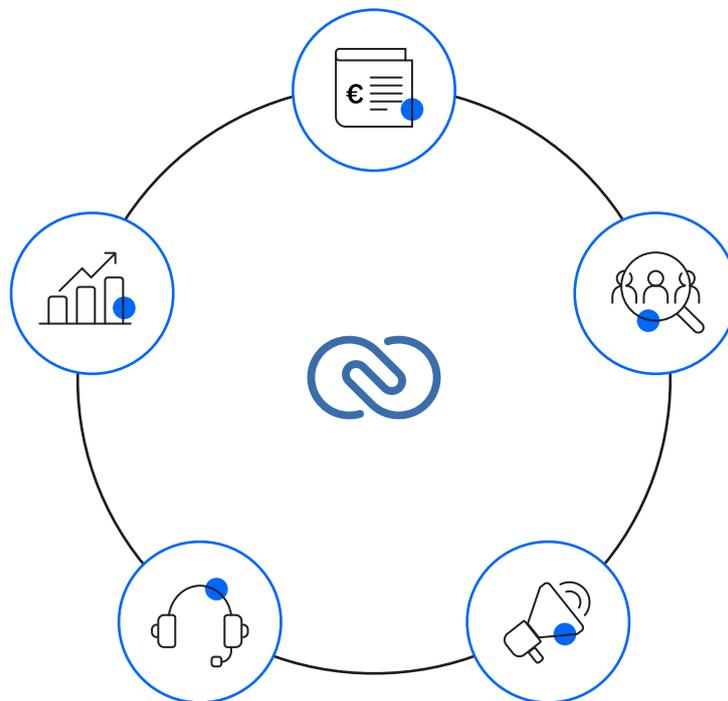
- ⚡ Support high-level strategic decisions
- ⚡ Visualize team and business goals
- ⚡ Provide oversight to internal and external stakeholders

In meetings with the board, Tore uses both raw numbers and visualizations from Zoho CRM to demonstrate the company’s pipeline—from potential value to project stage and progress. Because the company receives Norwegian government funding, additional reporting formats are required. While they use Zoho CRM data, Tore notes the government system lacks integration, “I have great tables, great databases; I have exactly what they ask for,” he says, though he adds, “anyhow, it’s easy to form tables and reports and put them into an Excel sheet.”



## BUSINESS IMPACT OF ZOHO CRM

# Results



The outcome of Sustainable Energy’s work with Zoho CRM is a system that gives them control over their commercial operations and pipeline. “That our main KPI system about revenues, leads, conversion rates, our performance on select KPIs, comes directly from Zoho is important. Then we can just adjust the calculations instead of having to collect all kinds of information from elsewhere. This way, we know where the data comes from, so if we put in the right parameters, then we are in control.”

Moreover, they’ve seen smoother sales processes. With information centralized in CRM, the teams can share insights, track pipeline and monitor performance. While Tore finds it hard to quantify the exact impact of Zoho CRM, the fact that the system allows measurement of everything else is result enough: “These kinds of efficiencies we clearly see. Maybe we don’t measure them, but we measure a lot of other things.”



zoho.com



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