

We spoke to Reece Hatton from Ritz Plumbing & Electrical about his use of the simPRO to Zoho CRM integration and how it has helped their company.

Q: What were your processes before using the simPRO to Zoho CRM integration?

A: Prior to our integration between simPRO and Zoho, we were making do with simPRO's native capabilities and then using a multitude of manual processes and workarounds if this data was required outside of simPRO. This included a lot of spreadsheet editing, and uploading to various marketing platforms. Without a dedicated CRM, we only had very rudimentary customer tracking and communication.

Q: What made you want to change?

A: While expanding our marketing capabilities, it was quickly realised a new full-fledged CRM was vital to the business as we grew. As the rest of the business was built around simPRO, we started a needs analysis of our technology stack that would have full integration with simPRO at its heart.

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Reece Hatton - Marketing Manager at Ritz



Q: How did you find SyncEzy?

A: As simPRO was already embedded within the business, we were searching for integrations specifically for simPRO. While researching and evaluating a few solutions, I frequently came across mentions of SyncEzy being a premium simPRO partner, and decided to reach out to Garth at SyncEzy to discuss our options. We were blown away by how completely thorough and well-thought-out the SyncEzy solution was and decided to partner with them to implement Zoho CRM Plus across our business.

Q: What have been the big wins whilst you have been using the integration?

A: Our biggest win has been having a way to analyse and generate insights from our marketing activity to new and existing customers in the CRM, and easily blend this with our actual jobs and quotes drawn from simPRO which had been synced to the CRM via the integration. This had an immediate impact on how we were spending our marketing budget to improve our ROI, as we could now see exactly what channels were driving value and how much revenue was being generated.

Q: Lastly, if you were describing the integration and its value when chatting to a friend, how would you describe it?

A: The integration fulfilled everything we expected from it, and so much more. Penelope and the team understand both simPRO and Zoho very thoroughly and were more than happy in sharing this knowledge, and were an absolute pleasure to work with in getting everything up and running.

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