



## CUSTOMER CASE STUDY

# A bigger business A broader CRM platform

# 50+

Zoho One users across multiple locations  
Previously 10 users in ACT!

### THE CHALLENGE

NWE needed automation and advanced reporting to support its home improvement business across California and Hawaii.

### THE MOVE

Active Sales Technology helped move the company to Zoho CRM and Zoho One, expanding its tools for sales, service and business insight.

## Zoho One across the business

### CRM

Relationships

### WorkDrive

Documents

### Sign

E-signatures

### Desk

Service requests

### Analytics

Dashboards

### Built to Grow: Moving Beyond ACT! with Zoho One

**Industry:** Home improvement

**Technology:** Zoho CRM, WorkDrive, Sign, Desk, and Analytics

**Consulting partner:** Active Sales Technology

**The challenge:** A growing business needed more from its CRM

Northwest Exteriors helps homeowners upgrade their windows, doors, siding, and patio covers, serving markets across California and Hawaii. Supporting that business requires coordination across customer relationships, sales activity, documents, and service.



The company had reached a turning point with 10 users in ACT! software. Its requirements had expanded beyond contact management. Northwest Exteriors needed automation to support its processes and advanced analytics and business intelligence reporting not available with ACT to give management a clearer view of the business.

The next step was to move to a platform that could support those needs—and extend beyond just CRM.

### **The move: Put Zoho CRM at the center**

Working with Active Sales Technology, Northwest Exteriors moved from ACT! to Zoho CRM within the Zoho One suite. They now have 50+ users in multiple locations.

The move opened the door to configurable workflows, flexible and detailed reporting, and a broader set of business tools. Instead of treating CRM as a standalone contact database, Northwest Exteriors moved to the cloud and adopted Zoho One as the foundation for a more connected operation using many apps within the Zoho One suite.

### **Beyond CRM: Bring more of the business into Zoho One**

Northwest Exteriors now uses additional Zoho One applications alongside CRM:

- **Zoho WorkDrive:** Shared file storage and document collaboration.
- **Zoho Sign:** Electronic signatures for documents requiring approval.
- **Zoho Desk:** Tools for organizing and tracking customer service requests.
- **Zoho Analytics:** Advanced reporting and dashboards for exploring business performance.

Together, these applications give the company more ways to manage information, support customers, and turn data into useful insight.

### **The outcome: A platform for the next stage**

Northwest Exteriors moved beyond the limitations that had prompted its departure from ACT! and adopted a platform tailored to its need for automation and advanced reporting.

Its adoption of multiple Zoho One applications extends the value of that decision across document management, signatures, customer service, and analytics.

**A growing business needs systems that keep pace. Northwest Exteriors chose Zoho One to support what comes next.**

**Active Sales Technology** CRM consulting, migrations, programming, and training  
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