



I would not be able to
manage my business
without Zoho CRM

RIA firm makes the switch from Salesforce to Zoho CRM

COMPANY PROFILE



INDUSTRY
Financial Services



TYPE
B2B



SIZE
51-200 employees

COMPANY CRM CRITERIA



Customization



Email
Integration



Pricing

ALTUS Wealth Solutions is a registered investment advisory (RIA) firm specializing in financial planning for business owners and entrepreneurs, alternative investment strategies, and college funding solutions. Based in San Luis Obispo, California, ALTUS is run by John Buerger, a CERTIFIED FINANCIAL PLANNER™ professional, wealth coach, and fiduciary advisor. This makes ALTUS a one-stop shop for people who need a financial strategy, coaching to execute the plan, and an advisor who is ethically and legally obligated to serve the client's best interests. Logitek's headquarters is in Barcelona, with satellite offices in Bilbao, Madrid, and Bucharest.

Challenges:

In addition to approximately 60 active clients, ALTUS has hundreds of relationships with prospective clients, financial services peers, and other contacts Buerger has met over his last eight years in business. Buerger operates ALTUS as a sole proprietorship; therefore, Buerger is solely responsible for maintaining these relationships and paying the bills; including the cost of the CRM software he uses to stay on top of his relationship network. As a result, ALTUS needed a full-featured CRM that was both easy to use and easy on the pocketbook.

"I was with Salesforce before I moved to Zoho CRM, and I found Salesforce to be outrageously expensive for what it was providing," Buerger said. "For me, nothing in Salesforce was any more powerful than what I can do with Zoho CRM. But Zoho CRM costs just a fraction of Salesforce – \$15 per month vs. \$100 per month. I'm saving over \$1,000 per year per user."

Solution:

ALTUS switched from Salesforce to Zoho CRM in 2008 when Buerger determined that the Zoho solution had matured to the point of being a competitive, and ultimately, the preferred CRM option. As a web-based service, Zoho CRM lets Buerger work from his home office, from his office in downtown San Luis Obispo, and on the road via the Zoho CRM for BlackBerry app. The tipping point for making the switch to Zoho CRM was the Gmail integration, which ALTUS uses as its email server.

Another key feature was the customization options that let Buerger personalize Zoho CRM to meet his own unique needs and preferences. "Customization is key to Zoho CRM working for me," Buerger said. "For instance, I've renamed 'Accounts' as 'Households' and renamed 'Contacts' as 'Individuals.'

I renamed another category as ‘Planning Documents’ and I completely revamped it to generate financial plans for my clients. I can actually write a financial plan with all the moving parts and pieces and adjust it any way I want from within Zoho CRM. Now, I can create a very client specific plan based on the framework I constructed with Zoho.”

ALTUS also uses invoices, reporting, and bulk mail. Buerger notes that Zoho CRM lets him create custom reports or printouts with almost any piece of data that he wants. “I could never do that in Salesforce without paying an additional fee per month for some kind of special reporting software.”

Results:

“I would not be able to manage my business without Zoho CRM. It’s an expansive system that I can tweak pretty hard on my own without third-party help,” Buerger said. “And Zoho CRM is extremely fast and responsive. When I type a search, the results flash up on the screen in a useable format very quickly. I’m not left staring at an hourglass.”



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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