

SalesTiger

The company

SalesTiger is a sales and marketing lead generation firm that helps organizations grow their revenue by implementing structured sales processes and marketing automation with a primary focus on B2B clients, especially larger franchise accounts.

Founded by Howard Meltzer in Jacksonville, Florida back in 2002, SalesTiger provides clients with warm leads and detailed contact lists, customized marketing content like email campaigns and landing pages with client approval, and offers CRM capabilities featuring contact management, lead scoring, and mobile access. The company also delivers sales training, process consulting, and operates a separate community for sales professionals to learn, network, and advance their careers.

Meltzer, who previously worked for major office products companies such as Xerox, Ricoh, and Canon, started SalesTiger to provide consulting services to independent office product dealers, helping them grow and prepare for a successful sale. Over time, SalesTiger transitioned from in-person consulting to remote and webinar-based services, which enabled greater reach and scalability.

The challenge

SalesTiger's sales approach centers on shifting away from pushy tactics towards a value-based, customer-centric approach. Their key principles include building trust through integrity and transparency, prioritizing customer needs and timelines, and offering prospect exclusivity by not overlapping clients by industry or even region. To facilitate these goals and values, Meltzer needed a system that would provide visibility across each organization while being flexible enough for the variety of businesses he was working with.

Initially, he carried out his operations using spreadsheets, direct mail, limited email, and sales training focused on cold calling and appointment setting. His clients were all located across the country, so he spent a majority of the year traveling. But as his business grew, he realized he could serve more clients and improve his scalability and

reach by switching from in-person consulting to remote and webinar-based services, particularly in the office products industry. This, in turn, prompted him to find solutions that could help him manage his client base and operations remotely.

Meltzer experimented with several CRM and marketing tools to scale his operations. He first tried InfusionSoft (now known as Keap), which offered limited CRM capabilities and poor email delivery rates. He paired this with Leadpages to manage his landing pages, but ultimately, he found that integrating these tools proved inefficient. He then moved to ActiveCampaign, which brought landing page capabilities with basic CRM features and relied on SendGrid, resulting in similar email deliverability issues. Meltzer continued to experiment and look for a more robust solution.

"After trying to put all those pieces together, I needed a solution that was bigger, better and all in one." - Howard Meltzer, Owner

Meltzer evaluated Salesforce, HubSpot, and Pipedrive, before eventually choosing [Zoho](#). Starting with [Zoho One](#), he appreciated the comprehensive and scalable features, hierarchy, and privacy controls. He also found Zoho's honesty about the strengths and weaknesses in their products a refreshing change of pace, when compared to other competitors.

"Zoho's approach is to launch early, gather user feedback, and improve over time. This transparency convinced me to go with Zoho, and my use of the platform has grown since then." - Howard Meltzer, Owner

"Your support is fantastic. I think it's by far the best out there in the world where you compete, the best of the best." - Howard Meltzer, Owner.

The solution

"Zoho provided a single source of truth, helped with legalities, and enabled outbound marketing, all of which contributed to selling more franchises and supporting existing ones. Competition within the organization is intense, confidentiality, security, and

hierarchy were critical." - Howard Meltzer, Owner

Zoho at SalesTiger

Meltzer uses Zoho both at SalesTiger, and as an administrator for his clients to optimize their operations and workflows. This makes his particular use cases and requirements unique, since most of his clients are his users.

He initially started by looking for CRM and email marketing solutions. The available integration between [Zoho CRM](#) and [Zoho Campaigns](#) within [Zoho One](#) led him to more products within the suite. From [Zoho Sign](#) to help him manage his non-disclosure agreements (NDAs), to [Zoho SalesIQ](#) and [Zoho Social](#) for marketing, to [Zoho Landing Pages](#) for website management, which eliminated the cost of his previous solution, Leadpages, Meltzer's Zoho usage grew alongside his clients' requirements. For data management, all of his data and files are centralized within [Zoho Analytics](#) for reporting and [Zoho WorkDrive](#) for file management.

SalesTiger places a high priority on customer experience, which made it especially important that they find a solution that supported a personalized approach.

"My sales approach fits perfectly with platforms like Zoho, emphasizing ongoing, soft engagement rather than aggressive sales tactics, especially since 99.9% of our businesses are B2B." - Howard Meltzer, Owner

SalesTiger works with clients to make sure that new systems work with existing processes, meaning most clients begin by using the CRM tool they already had. But when given access to Zoho One to access other apps, many companies often switch to Zoho CRM.

Meltzer manages the customer journey from lead generation, to sales, to ongoing billing and management on Zoho One.

He uses Zoho CRM as his primary sales solution and Zoho Sign for handling NDAs. When a potential buyer requests an NDA through any of his client's sites, the system automatically generates a contract, sends it to the buyer to request a signature, after which they receive confidential sales information. Zoho CRM then adds a record of the buyer's information, where it also keeps track of how much time recipients spend

reading the documents and other related statistics.

Security with Zoho

Meltzer observed when working with large franchises that franchisees often express concerns about franchisor accessing, misusing, or even messing with their data. Data isolation and hierarchy are essential for franchise clients to ensure that each franchisee's information is kept confidential.

In the case of one franchising client, internal competition was so intense that brokers viewed their own colleagues as primary competitors. This made data privacy between users critical. To support this, Meltzer helped configure detailed hierarchies, roles, and privileges in order to restrict access.

"In the business brokering world, an agent in an office will say 'my competition is the person sitting right next to me.' The ability to maintain hierarchy and essentially, confidentiality, between users was paramount and Zoho does a wonderful job with that."
- Howard Meltzer, Owner

Zoho for Clients

Howard's first major [Zoho Desk](#) deployment was for a client in the business brokerage industry with 300 users and about 40-50 franchises, with most using spreadsheets or Outlook instead of a CRM. The goal was to add value for franchisees, ensure legal compliance (especially with document storage and agreements), and improve marketing and sales all of which he accomplished with Zoho Desk. The client had previously relied on emails and phone calls to address support issues, creating a backlog of issues with no accountability by department. Support issues were slipping through the cracks. Meltzer said "There was a lot of 'I never saw the email,' and even when an issue was resolved the user was not made aware that it had been resolved.

By using Zoho Desk to create departments and assign support teams, the client can see the issues, prioritize them, and respond on a timely basis with complete accountability."

Another client, a cartridge supplier, has a limited budget. Meltzer decided on using [Begin by Zoho CRM](#) with Zoho Campaigns, instead of the full Zoho One suite.

As his client's needs evolved, he added more Zoho apps to his collection. Some wanted [Zoho Sign](#), others [were interested in Zoho SalesIQ](#), and many wanted [Zoho Analytics](#) and [Zoho WorkDrive](#). He expanded his offerings accordingly.

Benefits and ROI

Switching to Zoho One, Meltzer was able to improve his gross margins due to the reduction in major expenses. He calculates that his gross margins are now around 80–85%, as opposed to the approximately 60% he tracked when using Infusionsoft and ActiveCampaign.

“With my only substantial expenses now being my labor, employee labor, and Zoho, I've built a business that generates \$600,000–\$700,000 in annual revenue with extremely high gross margins.” - Howard Meltzer, Owner

Zoho has helped Meltzer support larger clients and more complex organizations at SalesTiger, such as franchises and buying groups, which was not feasible before. Although he has fewer clients now, each client brings in higher revenue and their businesses operate with greater efficiency than before.

“I chose Zoho One for its integrated campaigns and comprehensive suite of tools, and it has proven to be one of the best decisions for my business. Without Zoho One, I would still be working with smaller clients instead of the larger accounts I now serve. Remarkably, I can support over 300 users with just two core staff members.” - Howard Meltzer, Owner

Another benefit Meltzer observed with one client was that implementing lead scoring and automating processes through Zoho integrations and API setups significantly boosted conversion rates and reduced task completion times.

“The biggest benefit they have experienced with Zoho is that they've all gotten lead

scoring, which improved conversion rates exponentially. The integration with their proprietary operating system took some of the simplest tasks that would normally take hours to complete and brought them down to 10 minutes by automating the processes.”

- Howard Meltzer, Owner

Looking forward

SalesTiger recently started using [Zoho Voice](#) and they are considering expanding the use of [Zoho Projects](#) and Zoho Analytics. And while they currently use AI to some extent, they would like to maximize its potential.

Additionally, Meltzer maintains contact with Zoho’s enterprise support team in order to explore other applications and discover how they can enhance both his own processes at SalesTiger, as well as his clients’.