

Case Study



Energise

Building a unified business management platform with Zoho One



zoho.com



The Company

Sustainable thinking, profitable outcomes

Energise is a leading UK-based sustainability consultancy. Founded in 2008 by Simon and Tamsin Alsbury, the firm helps companies realise their net-zero goals, navigate government regulations, remain compliant, and become more energy-efficient and socially conscious. But this eco-friendly enterprise does more than talk a good talk. Energise is deeply committed to its core values of sustainability, accessibility, and a regenerative economy, and it has the awards and accreditations to prove it. Its B Corp status, three TELCA (The Energy Live Consultancy Awards) gongs, and multiple Great Place to Work Certifications are testament to an organisation that lives and breathes its mission statement.

Working with clients like Iceland, The National Union of Students, and Bidfood, Energise has advised on more than 7.5% of the UK's carbon footprint, delivered more than 700 compliance programmes, boasts a 100% audit pass rate, and has saved its clients more than £58,000,000 to date.

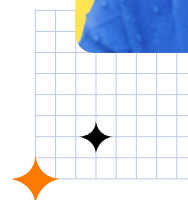
We caught up with Catherine Parkinson, Energise's Head of Business Systems, to understand how this 32-strong team of change-makers use Zoho's tools to power projects, revitalise reporting, track technical tickets, communicate with clients, and more.

The Challenge

Find a customisable, connected system that stands the test of time



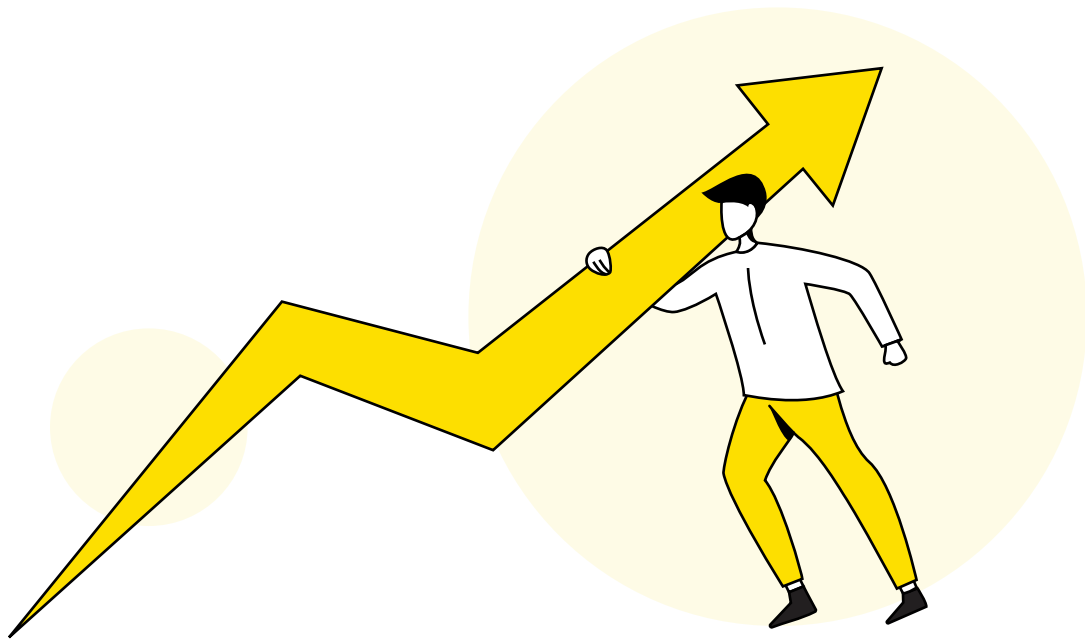
We've gone through three or four system cycles, including time sheet systems and project management systems. We've even tried building several systems of our own, and we always outgrew them almost immediately.



Catherine Parkinson

Head of Business Systems, Energise.

Catherine is Energise's in-house software guru, at once a systems architect and a builder. Au fait with APIs, automations, data flows, and Deluge code, she's a self-coined "Phone-a-Friend!" for Energise's internal team. Her mission is to understand the big-picture view of the software her colleagues use every day, connect gaps, streamline processes, and break down silos. "I make sure our teams have the tools needed to do their jobs as fast and efficiently as possible, and as supported as possible," Catherine explains.



Throughout her 13-year tenure, Catherine has seen many software implementations come and go. "For a small business, we've used a lot of systems. We've had to learn to dial down our enthusiasm and use only what we need," she reflects. This hunger for continuous improvement has seen multiple evolutions of Energise's software stack, with no setups quite ticking all the boxes or offering much staying power. Its nuanced business needs also meant that many systems didn't deliver enough customisation potential. "We never use a system straight off the peg!" Catherine laughs. This interminable software loop came to a head when COVID struck. "Before, we all worked in the office with an on-premise server. We suddenly had to go remote. That's when our Co-CEO and Co-Founder, Simon, decided to rebuild everything again because he'd found Zoho."

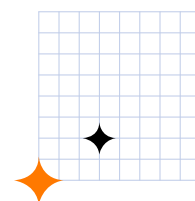
Catherine spent lockdown discovering Zoho's extensive capabilities, migrating data, crafting workflows, and shaping the software to match the business. This time, her efforts would pay dividends for the long haul.

The Solution

Zoho One creates a versatile internal platform with room to grow

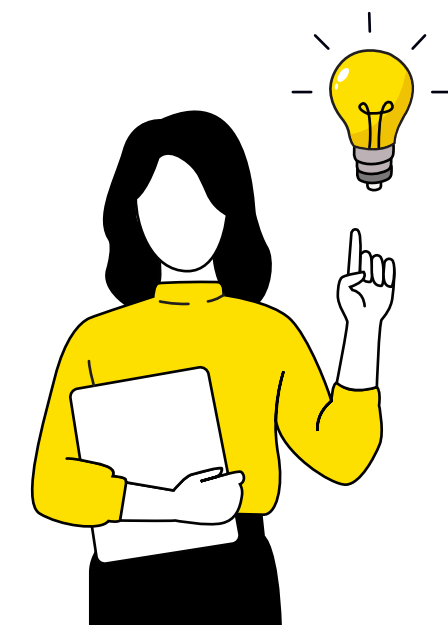


We now have around 25 Zoho apps that we're using on a regular basis, many of them totally integral to how our company operates. Zoho is an incredible unified platform.



Catherine Parkinson

Head of Business Systems, Energise.



Energise's Zoho journey started with Zoho Creator, a low-code custom app builder. It used the platform to develop a structured 'Net Zero Hub', which collected clients' carbon data centrally for reporting purposes. Soon, millions of rows of data flowed easily and securely

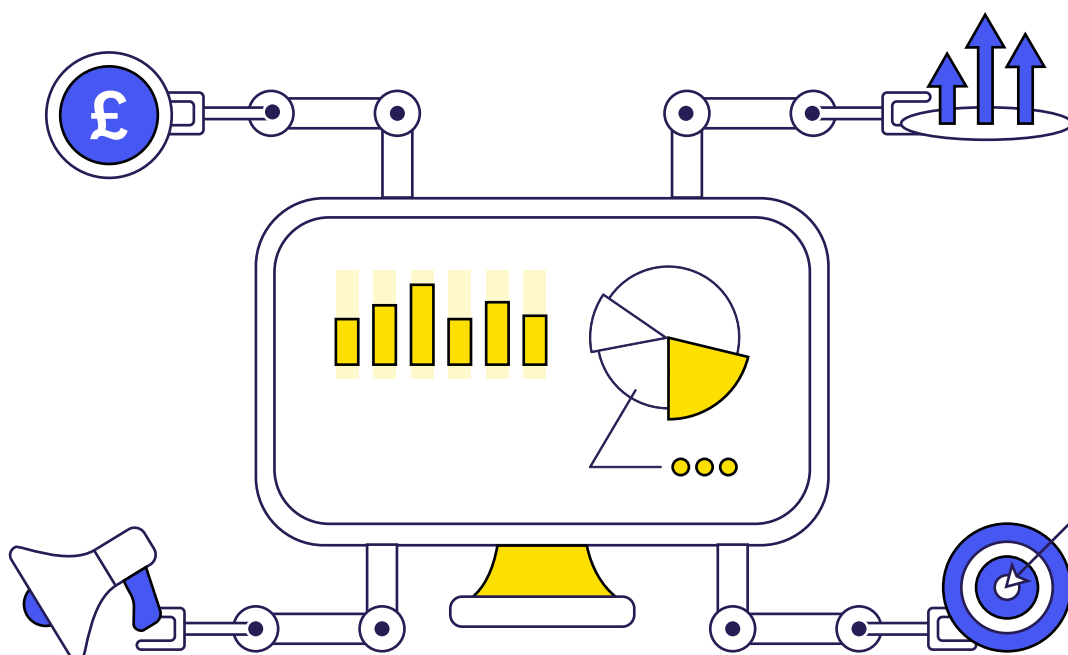
into the application, convincing Catherine of Zoho's wider potential. "Creator fully opened the door to Zoho and a lot of future projects within it," she recalls. "We gradually started adding more and more into the infrastructure."

From there, moving to Zoho One was a no-brainer. Access to a suite of 45+ natively integrated business applications gave Energise the opportunity to streamline operations, connect teams, and build for the future. It was also a convincing price proposition. "We have to make sure that what we're using is cost-effective, and we keep a close eye on all of our systems to make sure we're not duplicating things. Wherever possible, whenever we have a new requirement, I see if Zoho has a suitable app first. We don't want to pay twice, and Zoho One stops us from doing so," adds Catherine.

Now, for the first time, Energise was able to realise a company-wide operating system, with Zoho as its base.

CRM

After Creator, Energise implemented Zoho CRM, which she describes as "our single source of truth for customers and prospects". The commercial team use the platform to record and store their accounts and contacts, sales opportunities, and pricing information. It's also where they view current and past projects and invoices.



Elsewhere, Zoho Bookings is embedded into the company's website, giving potential clients a simple way to schedule meetings with its commercial team. Visitors can select a date and time that works for them through the appointment widget, removing the need for endless email back-and-forth. "Having dedicated pages for our employees, and different workspaces for all the different use cases is really handy," Catherine shares. All booked appointments sync directly with Zoho CRM's Leads module, allowing the commercial and marketing teams to track new customer meetings effectively.



Projects

Linked to Zoho CRM is Zoho Projects, which is used extensively to manage both internal and external projects.

For all new client work, Energise employs a series of external codes which are directly related to the 'won' opportunity in the CRM. Projects clearly defines all the individual tasks and milestones, assigns an appropriate consultant, and helps to manage all the necessary resources effectively.



By connecting Projects with Zoho Analytics, Energise has been able to understand exactly where those resources are expended at a glance, and whether a project is within budget. "Previously, the project managers were downloading all the project data, importing it into Excel, and spending valuable time trying to visualise it. Now it takes just minutes. Being able to see an up-to-date state of play and get the key figures without downloading raw data and putting it through templates...it just works," she smiles.

Energise also relies on Zoho Projects to manage internal development work, track tasks, and allocate time across projects. Beyond day-to-day project management, the wider business uses the platform to develop and evaluate new services before taking them to market. By tracking time, activity, and resources in detail, teams gain a clearer view of how services are performing and their projected profitability. "Our team build services which go through project management. At the end, they assess what each service looks like and how profitable it's going to be. This enables continual improvement because we have this very fine level of detail offered by Projects," explains Catherine.



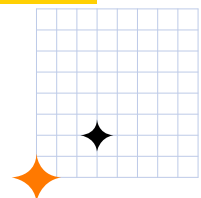
Desk



I've tried so many ways to track my work, and Desk is the only one that's stuck. It's invaluable.

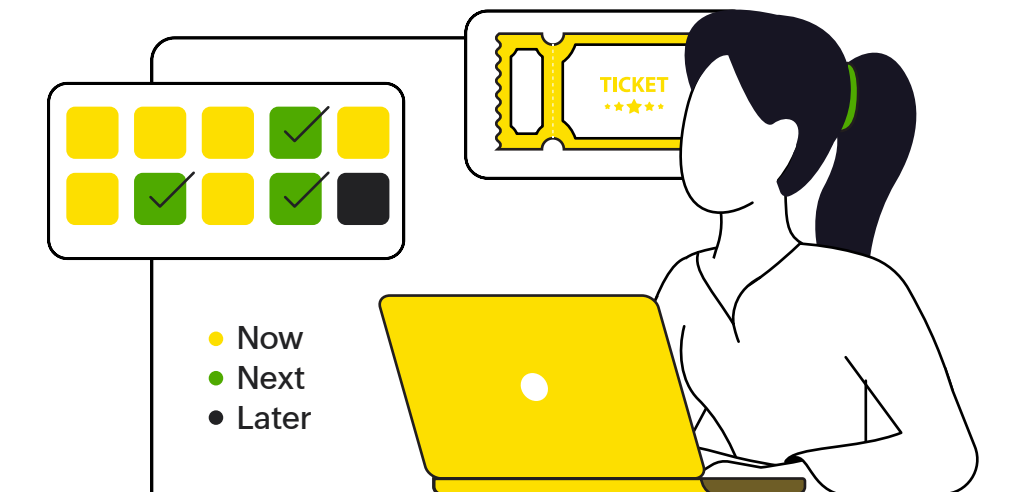
Catherine Parkinson,

Head of Business Systems, Energise.



Alongside Projects, Zoho Desk powers up Catherine's productivity. The ticketing platform has become her 'internal helpdesk' that manages her workload, prioritises her time, and keeps her projects running on track.

Historically, Catherine's colleagues would send her requests via email or instant message, but these could easily be missed. "They used to just drop into the ether. Now the team raise Desk tickets for me instead." Catherine uses a 'now, next, later' approach to her ticket queue, using tags and reminders to efficiently manage priority levels. Furthermore, Desk keeps all conversations and updates related to a task in a single thread, making it easy for Catherine to quickly understand its history and current status.

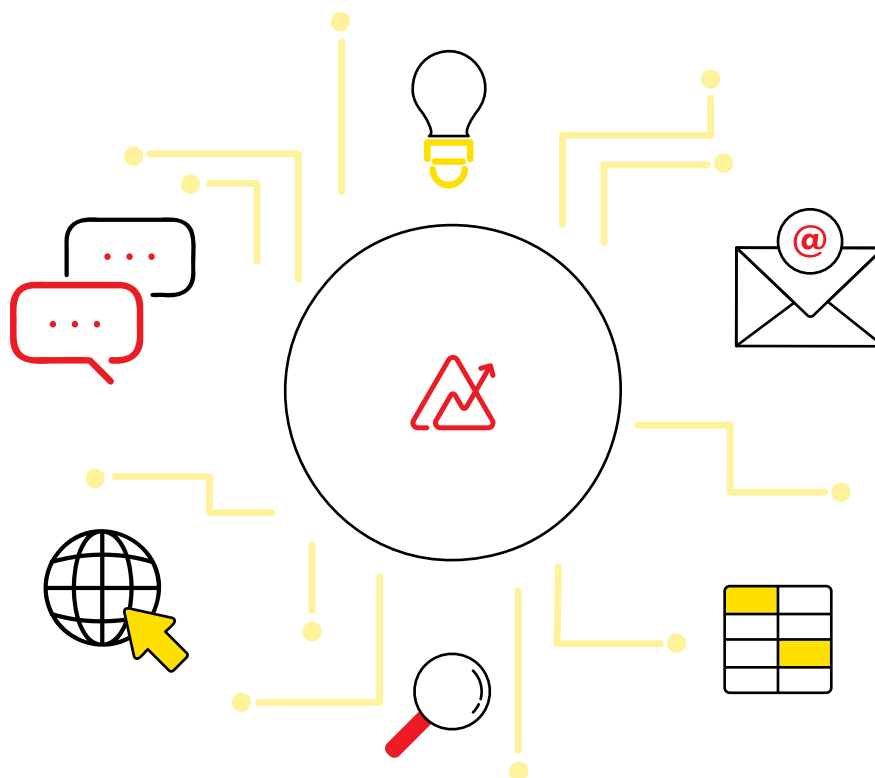


"Being able to send messages out to my internal customers to keep them updated, plus track their replies against the ticket - it means I'm not using three different systems to remember where things are," Catherine explains.

By the nature of her role, Catherine's impact is very much behind the scenes. "A lot of the things I work on are invisible, under-the-hood things," she acknowledges. But although it's not customer-facing, her role is critical to Energise's success and growth. To this end, Catherine has plugged Desk into Analytics to provide an overview of her workload. "Because Desk integrates with Analytics, I have created a heat map showing where all my tickets are up to, and embedded it in our intranet. It reflects my entire workload from Desk and my colleagues can see what I'm busy working on and what's in my pipeline. It gives more visibility to the whole business."

Analytics

As another core application in Energise's software stack, Zoho Analytics is used to "tie everything together". Previously, business reporting had been a laborious, manual process. "Teams conversations here, siloed emails there, Excel files elsewhere - it wasn't unified," recalls Catherine. "One person had to collate everything together and then update a spreadsheet or a PowerPoint for our exec team to view."



Today, Analytics is plumbed into every application, with automatic refreshes maintaining a current window into the business's performance. It collates data from the sales, marketing, finance, and delivery teams, and represents it in intuitive, interactive dashboards, widgets, and reports. More than just a snapshot in time, Analytics also allows for comparisons to be drawn across times, teams, and tasks. "Being able to report on things is wonderful, to demonstrate what it is we're doing and how things are changing over time," explains Catherine. Insights that had frustratingly remained beyond the reach of static spreadsheets are now available within just a few clicks.

Access to business intelligence has been made even easier for Energise's senior leadership through the deployment of Analytics' portals. "We utilise the portals, which contain dashboards on each department's metrics and risks, plus company KPIs. It's all available through one URL. That means our executive team can access accurate, up-to-date data directly in meetings, which makes a real difference," smiles Catherine.

Empowered by Analytics' insights, managers can make fast, accurate business decisions that drive real results. "I've had feedback that having such a high-level view of data accessible in one place is a real win," shares Catherine, adding that the more she builds inside Analytics, the more frequently she receives report requests. She's currently building illuminating reports tailored to the needs of each department head.



**We've completed our Cyber Essentials accreditation,
and Zoho Vault was a huge part of achieving that.**

Catherine Parkinson,

Head of Business Systems, Energise.

As the Head of Business Systems, one of Catherine's key responsibilities is maintaining Energise's data integrity and security. As such, she has rolled out Zoho Vault across the business, a secure password management application.

Vault safely stores all of the company's Zoho sign in credentials, as well as passwords for external platforms. These can be shared with specific colleagues or even with entire teams. "Sharing passwords with a group is useful. If someone joins or leaves, all I have to do is update the team members in Vault, and the passwords are all updated together. It's safe, it's secure, and it can be shared easily between team members. It's got all the auditing behind it, too."

Catherine has also set up Multi Factor Authentication (MFA) through Zoho Vault, adding an additional layer of security and compliance for the Cyber Essentials accreditation. "It's remarkably good," she says. "Being able to have multi-factor authentication within the Vault app itself means that automatically, people who use Vault can access the codes. In the past, MFA would be reliant on a single user's device, but now its always accessible in a secure environment."



Flow



Flow has **more capacity and use cases** than Zapier.

Catherine Parkinson,

Head of Business Systems, Energise.

The final core app in Catherine's Zoho toolkit is Flow. It enables her to build seamless connections between platforms, trigger contextual workflows and automatic actions, and update fields across the ecosystem.



"It's incredible in the way it talks to all of the Zoho systems and external ones," Catherine says. "Now we're looking to integrate it with our own developed software to generate unique IDs for our customers. Using webhooks through Flow will mean that Zoho CRM is tightly linked to our self-built client platform." So impressed is Catherine with the tool that she's now made Zapier redundant across the business.

Continuing the Zoho journey

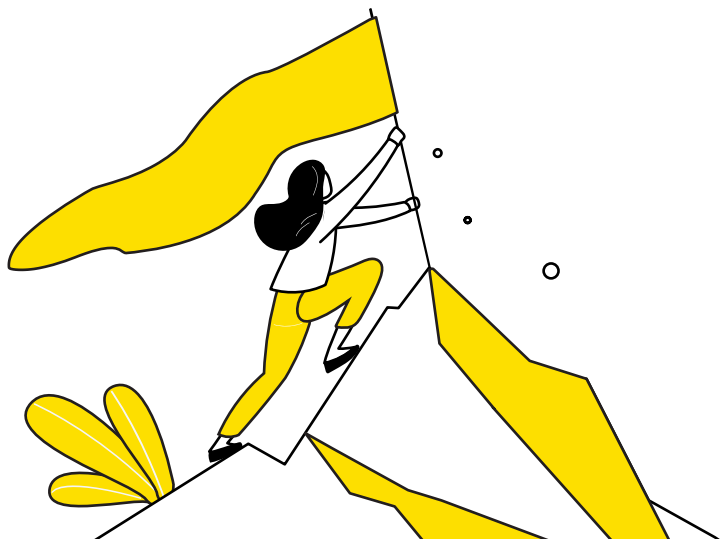


We can see that improvements are coming out all the time.

I am always checking the roadmaps to see what's coming next!

Catherine Parkinson,
Head of Business Systems, Energise.

Catherine is excited about Zoho's future potential at Energise, but takes a measured approach to its rollout. New solutions are explored, developed to MVP stage, introduced with training, and then refined over time. "I like to really push what the systems can do," Catherine says. "My plan is now to start maturing our systems." She especially lauds the common coding language used across Zoho, Deluge, for the way it enables deep customisation. "Deluge is very easy to pick up. It allows us to really personalise the systems to make them our own, and uplift what we can offer," she says.



Looking ahead, Catherine and her colleagues have exciting plans, including taking advantage of Zoho's embedded AI capabilities across the suite. "We're looking at how to intelligently use Zoho's AI assistant 'Zia', as well as Zoho MCP, in ways that will benefit our clients and processes. I love how much Zoho is continually improving," she adds.

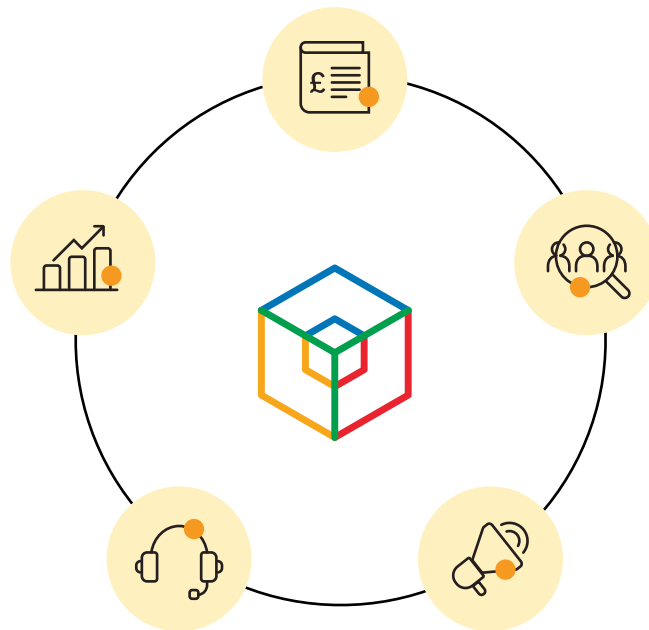
Ultimately, the Zoho One bundle of apps has called time on a fatiguing cycle of software implementation, owing to its baked-in scalability and malleable nature. "I would absolutely recommend Zoho, having a unified platform makes things so much easier than trying to manage the cost of a suite of different systems," beams Catherine.



The possibilities Zoho One offers have helped us
build really complex systems that work really well.

Catherine Parkinson,
Head of Business Systems, Energise.

About Zoho One



Developed as the ultimate "operating system for business", the Zoho One bundle is a collection of 45+ integrated applications that cater to every diverse need of a modern business. From Sales to Marketing, Customer Support, HR, Operations, Finance, and Legal, Zoho One's powerful suite of tools can be relied upon by every department to improve performance, enhance collaboration, and streamline processes. An unrivalled yet affordable solution, Zoho One's cloud-based apps bring extraordinary value to any organisation.

Please find out more via our website: www.zoho.com/one/



zoho.com



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