



REVS (Refuel Electronic Vehicle Solutions) – Case Study: Powering EV Infrastructure Sales and Management with Zoho

Executive Summary

REVS (Refuel Electronic Vehicle Solutions) specializes in providing comprehensive EV charging solutions, turning charging stations from a cost center into a new source of revenue for property owners. As a growing business in a rapidly expanding industry, REVS needed a unified digital platform to manage their complex sales pipeline, track grants and property reimbursements, and centralize customer data and marketing efforts.

The company was challenged by an existing **Zoho CRM** instance that lacked the necessary structure for their unique business rules—specifically around tracking profitability, price changes, and integrating external data. This created silos between sales, marketing, and operations.

REVS partnered with Cornerstone Solutions to restructure their **Zoho CRM**, integrate **Zoho Campaigns**, **Zoho Forms**, and leverage **Zapier** for external data connections. The implementation focused on creating a single source of truth for all client and deal data, automating marketing outreach, and establishing clear financial tracking.

The Challenge

REVS's initial CRM setup could not support the financial complexity and data requirements of the EV charging industry:

1. **Fragmented Financial Tracking:** The system lacked structures to accurately manage and track **profit, price changes, property reimbursement, and received grants**. These critical financial elements were likely tracked manually outside the CRM, leading to high administrative burden and inaccurate reporting.
2. **Siloed Data and Limited Transparency:** Data relating to client records (attachments, notes, emails) was dispersed across personal desktops and memory, preventing a **360-degree view of the client** and hindering organizational growth.

3. **Inefficient Marketing & Lead Capture:** Marketing efforts (conferences, magazine ads, website leads) could not be effectively tracked and analyzed for ROI. They needed a seamless way to capture leads and enroll them in targeted campaigns.
 4. **Usability and Structure:** The existing **Zoho CRM** structure needed a significant overhaul to improve usability, move from a less-flexible Canvas design to a more standard structure, and add the necessary **automation and security** layers.
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Implementation

Cornerstone Solutions executed a multi-phase project focused on data structure, financial module creation, and automation to create a robust and transparent sales platform.

1. CRM Restructure and Financial Modeling (Zoho CRM)

- **Data Centralization:** The core **Zoho CRM** was restructured to serve as the centralized repository for all records. This included configuring the system to store and display all related items like attachments, notes, and completed activities in one place, providing **high visibility** across the sales and operations teams.
- **Custom Financial Structures:** New fields and potential custom modules were implemented to manage the complexities of the business, specifically tracking:
 - **Profit and Price Change** related to EV charger deals.
 - **Property Reimbursement** reminders and data, especially for recurring payments.
 - **Grants** received or applied for, including important reminder workflows to manage due dates.
- **Invoice and Quote Improvement:** The system was configured to improve the **invoicing process** and optimize the **Estimates** structure for clarity and accuracy, ensuring sales quotes were professional and financially accurate.

2. Marketing and Lead Automation (Zoho Campaigns & Zoho Forms)

- **Seamless Lead Capture: Zoho Forms** were integrated with the REVS website to automatically feed leads directly into the CRM, ensuring no inquiry was missed and sales tracking began immediately.
- **Targeted Communication (Zoho Campaigns): Zoho Campaigns** was implemented and integrated with the CRM. This allowed the marketing team to:

- Create targeted email campaigns, such as the **EV Management Email Campaign**, to address common pain points (e.g., "Is your EV charger costing you money?").
- Use segmentation (e.g., checking for **Unopened** segments) to measure and improve email campaign effectiveness.

3. Data Integration and Reporting (Zapier & Zoho Analytics)

- **External Data Integration (Zapier):** To achieve true centralization, **Zapier** was identified as the tool to connect external vendor data and services (potentially charging network data or financial systems) directly into the CRM. This eliminated manual data entry from third-party sources.
- **Performance Analytics (Zoho Analytics):** **Zoho Analytics** was implemented to provide comprehensive reporting. Dashboards were configured to track:
 - **Marketing effectiveness** (lead conversion from website/campaigns).
 - **Financial performance** (profitability per deal, grant tracking).
 - **Sales pipeline health** for executive and management review.

Results

REVS now leverages a sophisticated Zoho and Zapier ecosystem that provides the structure and automation needed to scale its operations in the rapidly growing EV infrastructure market.

Key Outcome	Impact Metric	Zoho Application(s)
Financial Visibility	Centralized tracking for profit, price changes, and grants , enabling better financial control.	CRM, Analytics
Sales & Data Transparency	360-degree view of all client records (attachments, notes, emails) in a single system.	CRM
Marketing Efficacy	Automated lead capture and segmented email campaigns (like the EV Management Campaign) for improved prospect	Campaigns, Forms

Key Outcome	Impact Metric	Zoho Application(s)
	engagement.	
Operational Efficiency	Automated workflows and Zapier integration reduced manual entry and ensured data accuracy from external vendors.	CRM, Forms, Zapier

By transforming their Zoho CRM into a transparent, financially robust, and automated platform, REVS is well-positioned to maximize its market opportunity and provide exceptional service to property owners seeking reliable EV charging solutions.

About REVS (Refuel Electronic Vehicle Solutions)

REVS helps property owners and businesses implement and manage electric vehicle charging stations, providing expertise to ensure profitability, reliability, and security for their EV infrastructure. www.refuelevs.com

About Cornerstone Solutions

Cornerstone Solutions is a certified Zoho Partner specializing in custom CRM implementation, data migration, and workflow automation to help businesses maximize the potential of the Zoho One ecosystem.