

# GoldenLion Implements Zoho One for EcoTraining

## Introduction

EcoTraining, operating since 1993, is the leading innovator in training safari guides and wildlife experts across Africa.

Renowned for its high standards and credibility, EcoTraining offers a wide range of programs, including accredited career courses, nature programs, gap year and sabbatical options, study abroad opportunities for students, and on-site professional guide training at safari lodges.

Their unique business model, which combines elements of the travel and training industries, made it challenging to find a CRM solution that suited their needs out of the box.

To address these challenges, GoldenLion implemented Zoho One, featuring extensive customizations on Zoho CRM to align with EcoTraining's specific requirements.

## Business Name

ECOTRAINING PTY LTD

## Company Profile

- INDUSTRY SAFARI TRAINING
- TYPE B2B AND B2C
- HQ SOUTH AFRICA
- USERS 6

## Selection Criteria

- ONE SUBSCRIPTION, MULTIPLE APPS
- TIMELY SUPPORT
- PROPER PARTNER SUPPORT
- BUDGET-FRIENDLY
- INTEGRATION WITH WEBSITE
- INDUSTRY KNOWLEDGE

**ECOTraining**  
Guides and Guardians 

# CASE STUDY

## Problem Statement

With EcoTraining's distinctive offerings and expert training programs, their business experienced rapid growth. Soon, inquiries about their training programs began pouring in from across the globe. However, at that time, they were managing most of these inquiries manually.

Once captured, the data was stored in multiple spreadsheets. While this approach allowed them to manage their processes to some extent, generating insightful reports on sales and marketing performance became increasingly challenging.

Recognizing the need for a better solution, they began searching for a CRM system and a partner with expertise and experience in the Travel and Training industry.



## WHY ZOHU ONE?

- Zoho One provided a unified platform, covering everything from CRM, email marketing, and project management to analytics and customer support. This eliminated the need for multiple tools and streamlined their operations.
- Zoho CRM's flexibility allowed EcoTraining to tailor it to its specific needs in the training and travel industry. EcoTraining could easily track inquiries, automate follow-ups, and manage customer relationships efficiently.
- With GoldenLion specializing in the training and travel industry, EcoTraining received expert guidance during implementation, ensuring the system aligned perfectly with their processes.

## Finding GoldenLion

The sales team at EcoTraining began exploring online for a solution to streamline their Sales and Marketing processes.

After numerous demos and discussions, they found it challenging to identify a partner with expertise in both the Travel and Training industries.

That's when they discovered GoldenLion through a Google search. They were impressed to learn that GoldenLion offers two specialized industry solutions—Travel Agency CRM and Training Provider CRM – both built on Zoho CRM.

Intrigued, they scheduled a meeting with GoldenLion. During the meeting, GoldenLion showcased both industry solutions and proposed combining components from each to create a custom solution tailored for EcoTraining, leveraging the capabilities of Zoho One.

# CASE STUDY

## Implementing Zoho One

GoldenLion implemented a customized CRM solution on Zoho CRM to meet EcoTraining's needs. With their business model blending travel and training, the GoldenLion team quickly understood the requirements and tailored the CRM accordingly.

After launching the CRM, GoldenLion customized Zoho Forms to capture training program inquiries directly into the CRM. The addition of Zoho Campaigns provided EcoTraining with an efficient Sales and Marketing automation system, fulfilling their key requirement.

Once the system was in place, GoldenLion focused on training the EcoTraining team to use the system effectively. Despite the challenge of transitioning from spreadsheets, extensive training and support helped the team adapt successfully to the Zoho solution!



## Future Plans

*"Streamlined workflow, automation, and accurate reporting."*

*"If these things are in place, we will be able to focus on acquiring new business and increasing Sales."*

### **ANNEMI ZAIMAN**

Marketing Manager,  
EcoTraining Pty Ltd

## SOLUTION OFFERED

- Implementation of Zoho CRM, tailored to the specific use-case of EcoTraining.
- Implementation of Zoho Forms to capture inquiries for different training programs.
- Implementation of Zoho Forms to capture details of Trainees once they confirm the bookings.
- Integration of Zoho Forms with CRM so that details captured via Forms flow into the right module in CRM automatically.
- Implementation of Zoho Campaigns for lead nurturing.
- User onboarding and training focused on system adaptation.



## **Annemi Zaaiman**

Marketing Manager  
EcoTraining Pty Ltd

### **About Zoho and GoldenLion**

*"I highly recommend Zoho and GoldenLion. The GoldenLion team is exceptionally efficient, helpful, and supportive. Since integrating Zoho from our website to the CRM, it has significantly reduced our workload. The ability to track marketing efforts and generate reports seamlessly has been a game changer. It saves valuable time and enhances efficiency across departments."*

# CASE STUDY



## About Goldenlion

Starting its journey as an Alliance Partner of Zoho Corporation, GoldenLion has become one of the top Zoho consultation companies worldwide.

Since our inception in 2010, we have been helping small and mid-size businesses worldwide automate and structure their entire business processes by offering all-around consultation for the Zoho Suite of Products and customizing them to fit our client's business requirements.

With 900+ customers in 90+ countries, today we are all set to become a trusted growth partner to your business!

[Here's what our customers have to say about our services.](#)

**900+**  
Customers

**30+**  
Team Members

**6**  
Industry Solutions

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