How ZoJacks Built a Leak-Prevention Growth Engine on Zoho One

Water Damage Prevention · United States & Canada · Fewer than 20 Employees

ZoJacks sells water management solutions that detect leaks inside a building and automatically shut off water flow before damage spreads. A team of fewer than 20 people, ZoJacks began with a plan to sell to homeowners and discovered its best opportunity in commercial buildings and apartment complexes, supported by partnerships with insurance companies. Starting on Zoho One, the team reshaped its sales process, built branded insurer purchase experiences, delivered a custom data dashboard that closed a deal, and connected AI to its CRM to get more done without growing headcount.

THE CHALLENGE

A young industry with an unproven market meant ZoJacks had to pivot its sales focus, serve unexpected customer demands, and compete with a very small team.

THE SOLUTION

One flexible platform that could be reshaped as the sales model changed, extended to partners and customers, and paired with AI to multiply what each person can do.

THE RESULT

A successful market shift, strong insurance partnerships, cleaner data, and a team free to focus on relationships while new ideas are limited only by creativity.

<20 TEAM SIZE	**~$100** LOST PER TRANSACTION BEFORE COMMERCE	**2** DEAL STRUCTURES IN CRM
2 BOOKS INSTANCES: US & CANADA	**1** CUSTOM DASHBOARD THAT CLOSED A DEAL	**Minutes** TO CONNECT AI TO CRM

Zoho One

KEY APPS USED

Zoho CRM · Zoho Commerce · Zoho Books · Zoho Analytics

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ABOUT ZOJACKS

ZoJacks sells water management solutions designed to detect leaks within a building and automatically shut off water flow to prevent damage. Their service helps owners of commercial and residential properties reduce the risk of damage and secure preferable terms with their insurers. Water damage prevention through ZoJacks also allows clients' tenants to avoid the cost and hassle caused by major water damage.

ZoJacks installs and maintains on-site hardware and cloud-based software components of each automated leak prevention system. ZoJacks's software detects leaks and cues the hardware to cut water flow to leaking areas. Throughout the process, the software collects data on the situation. The data collected proves the effectiveness of their service, allowing ZoJacks to build strong relationships with their clients and insurance partners. The company manages all of this as a team of fewer than 20 people.

ZoJacks Vice President Taylor Wolsey had used Zoho One in his previous role at GardaWorld. When he saw the opportunity to start a new venture with ZoJacks, he decided to start with Zoho One.

The Challenge

Leak detection is a young industry. Success depends not just on proving that ZoJacks's service is the best option, but that leak detection itself is a worthwhile investment. When the industry is not very established, it can also be challenging to identify the best customer base to target. ZoJacks had what it takes to build a robust service and prove its effectiveness. In order to convince potential clients of that, they needed to be flexible, maintain thorough records, and stay ahead of their market's demands.

Shifting sales focus

When ZoJacks's founding team got started, they thought their main customer base would be homeowners. As it turned out, they were able to succeed by focusing on companies managing commercial buildings and apartment complexes. This pivot required ZoJacks to change their sales process significantly.

The process for residential homeowners required handling a large number of leads, each with just one or two decision-makers and only one building. The deal structure was set up for direct sales and fewer stakeholders. For commercial property clients, ZoJacks had to implement a more complex deal structure, since each account would have multiple decision-makers to talk to and potentially multiple buildings to service. For those with multiple sites, ZoJacks also needed to be prepared to bill them separately, depending on the clients' needs.

Capturing sales where they are most likely to buy

ZoJacks gets some of its customers through partnerships with insurance companies. Insurance partners face lower risk on a policy if the client uses ZoJack's services to prevent damage, and customers can secure a preferable insurance price by implementing ZoJacks's leak prevention service. This arrangement allows the customer to get a good price, the insurer to make safer bets, and ZoJacks to make more sales.

To create the best experience for the customer, ZoJacks needed their ecommerce experience to be professional, quick, and closely associated with the insurance purchasing process. The ZoJacks team wanted to make purchasing a service plan feel like part of the same process as buying insurance, rather than another task to take care of afterward.

To achieve this, ZoJacks needed a way for their insurance partners to direct clients toward ZoJacks' services as seamlessly as possible. Wanting to make this as easy as possible for their business partners, Taylor and his team decided to create an ecommerce process that insurance companies can easily link to.

They tried using HubSpot to build an ecommerce experience for their insurance-recommended clients, but found that crucial data they needed for their taxes wasn't being fed into Avalara, their tax software, correctly. HubSpot had no

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integration available that would solve the problem. The lost information was costing ZoJacks about $100 on every transaction. Frustrated with the challenge of building a custom integration with HubSpot, ZoJacks switched to Zoho Commerce for their ecommerce pages instead.

Customer requirements

In their industry, every deal is unique, and ZoJacks' customers sometimes come to the negotiating table with unexpected requirements. In one such case, a customer wanted to be able to view the data about their service: severity of any leaks detected, automated interventions taken, areas affected, and similar information. ZoJacks had that data, but they had never needed to serve it to a customer before.

They needed to build a custom dashboard in a timely manner in order to secure the deal. They couldn't do so directly within their own analytical tools. For data security and a polished look, they needed a separate place where they could create an easy-to-use display of all the requested data.

Doing big things with a small team

With the extraordinary influx of AI capabilities into the software market, competition sped up across many markets. Generative AI tools offered new ways to get more done without growing the company's headcount, so Taylor got to work finding ways to automate.

The Solution

Using Zoho One as their base, ZoJacks's team was able to build a system that enables their employees to solve problems creatively and get more done.

Sales flexibility

Paring their implementation down to the foundation of Zoho CRM allowed them to gradually customize as their new sales process solidified. To accommodate the more complex process required to sell to commercial property owners, ZoJacks modified CRM to reflect that deal structure.

A crucial part of the change was adjusting their CRM's integration with Books to accommodate multiple payment sources. Now, they can have multiple properties associated with the account of the company that owns them, and have separate invoices automatically generated for each.

Now, they have two different deal structures in their CRM, so they can adapt easily to residential or commercial property leads.

Well-placed ecommerce

Commerce allows the ZoJacks team to build custom branded ecommerce pages for each insurance partner they work with. Each page uses the insurer's branding, so clients clicking through from the insurer's website have a consistent experience. The page lists the ZoJacks service package that the insurer has chosen to recommend.

The pre-built integration between Commerce and Avalara effectively collects transaction data and updates ZoJacks's tax forms, saving them money they would have lost using HubSpot.

Leveraging the full toolbox to serve customers

Data is essential to not just ZoJacks's strategy but their business model itself. ZoJacks collects data from incidents its systems detect, analyzes that data to determine how effective the service is, and calculates the dollar value of the damage that was prevented. ZoJacks secures partnerships with insurance companies in part by proving that their leak prevention service lowers the risk of costly water damage.

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As this monitoring is part of their service, ZoJacks has their own analytical system through AWS where they process data collected by their leak detection systems.

ZoJacks already had access to Zoho Analytics within Zoho One. Analytics allows users to create custom dashboards with data from a wide variety of integrated data sources, and share those internally or externally. ZoJacks used the pre-built integration between Analytics and AWS to create a bridge between their data stream and the dashboard in Analytics.

Custom UI with a strong Zoho backbone

Zoho One came with connectors for a variety of AI tools, so connecting his AI of choice with CRM took Taylor just a few minutes. After trying out a few AI tools, Taylor decided that Anthropic's Claude was the one he preferred for ZoJacks.

With the pre-built MCP connections in Zoho One, Taylor is able to use his AI tool of choice to create custom solutions powered by Zoho One. Taylor built an interface his sales reps can use easily in a variety of contexts, powered by Zoho CRM in the background.

Sales reps now have this custom interface on their phones through the Claude mobile app, and they can use it to snapshot contact info at trade shows. The AI then parses the data and enters it into the correct fields in CRM.

Taylor's email and calendar are connected into this AI-powered tool as well. The AI can identify relevant data in email conversations with leads, and record it in data fields or as relevant notes in that lead's CRM record. It also allows Taylor to analyze email interactions in the context of sales data to discover insights he can use to refine sales training.

Beyond just a sales interface, Taylor has also freed up time in his workday by creating a Business Development AI Agent using the same integrations. This agent conducts email conversations with prospects through Taylor's GMail, automating lead nurture. It records essential information in CRM along the way. When the prospect is ready for a call, the agent finds a good time with the prospect over email and puts it on Taylor's schedule in Google Calendar.

The Benefits

A successful shift

The ability to deconstruct their CRM implementation and re-orient allowed them to shift toward a new portion of the market where they've been successful since. Pivoting toward commercial properties and incorporating insurance companies into their sales process as partners has not only increased sales, but helped the company build credibility in a young industry where some other firms have fallen short.

Custom ecommerce for strong partnerships

ZoJacks has custom-branded ecommerce pages ready to go for each insurance partner that joins them. This step supports positive business relationships by minimizing the work required for the insurance partner to recommend ZoJacks's services. In the process, it also creates a positive experience for both companies' shared customers.

A full toolbox supports creative problem-solvers

Building a custom dashboard for one customer enabled them to close that deal. This is just one example of the adaptability made possible by Zoho One. Having access to Zoho's range of solutions enables the ZoJacks team to activate new functionalities without paying for new software. This flexibility enables ZoJacks to continue going above and beyond for their customers, knowing they have the tools they need to get the job done.

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Clean data and time saved

With the custom AI-powered interface, ZoJacks's sales reps can focus on building rapport with leads, while the AI meticulously logs data in CRM behind the scenes. This saves time, allowing the small team to make the most profitable use of their work days. It has also resulted in cleaner and more complete data than typically resulted from manual data entry. In a data-driven company like ZoJacks, that data is turned into real value, so every bit counts.

Looking to the Future

Unified reporting across regions

ZoJacks has chosen to use separate instances of Zoho One's financial tools for their US and Canada operations. This dual-accounting implementation was created as the best fit solution for their unique business. Currently, they have enabled the native integrations between each of the Books instances and their CRM, so that deals can generate invoices automatically and all transactions are recorded accurately. Next, they're working on unifying reporting across these two regions through Zoho Analytics. Once they have configured Analytics in the way that best reflects their needs, they will be able to analyze data from both regions together, while keeping their books separate, secure, and tax compliant.

Experimentation and Creativity

The MCP connections available in Zoho One empower Taylor and his team to create new AI-based tools to support their unique processes and preferences. ZoJacks is a small team making big deals, so a few automations go a long way.

> “That foundation Zoho has built and that MCP connection has allowed us to leverage AI, and we're now just limited by our own creativity.”
>
> TAYLOR WOLSEY · VP OF STRATEGY AND INNOVATION · ZOJACKS

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