

CASE STUDY

Accounting Firm

From a Spreadsheet to Firm-Wide Pipeline Clarity Across 65+ Seller-Doers

Zoho transformation | adoption, data quality, and firm-wide visibility



An accounting and advisory firm was managing its pipeline in SmartSheet—a workable solution for a few people, but not for 65+ partners who both sell and deliver client work. Adroit led a full Zoho transformation that did more than centralize the pipeline: it got non-traditional salespeople to actually adopt and rely on the system.



The existing pipeline was fragmented across dozens of partners, with no firm-wide forecast. The people responsible for selling were practice leaders—experts in their craft, not in sales tools.



Adroit built a custom Zoho CRM tailored to the seller-doer model, with purpose-built pipeline stages, dashboards and reporting for partners and leadership, role-based visibility by partner and team, and automations for follow-up and handoffs.



The system was engineered for data quality with customized page views, widgets, and scripts that support complete, accurate data entry while reducing administrative burden, speeding entry time, and cutting errors.



It was also integrated directly with the firm's practice management software so the CRM fit how the firm already operates instead of becoming a parallel system.



65+
seller-doers



Firm-wide
pipeline clarity



Adoption
by non-traditional
salespeople



**Delivered firm-wide pipeline and forecast clarity,
with successful adoption across 65+ seller-doers.**



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