

CASE STUDY

From Inbox to Insight in 30 Days

Highlander Press Books & Pegasus Equity Advisors

30-day Growth Ready process | CRM setup, migration, and automation



A publishing company and an equity advisory firm were both running sales from their email inboxes. Through Adroit's 30-day Growth Ready process, each went from scattered, memory-based selling to a fully configured CRM with migrated data, live automations, and a clear view of the pipeline in under a month.



Before the transformation, there was **no shared pipeline, no forecast, and no consistent follow-up** or communication plan—just selling from the mailbox.



The process was **simple and fast**: a brief intake form, a quick kickoff call with Kristen, and within 30 days their systems were configured, data migrated, and automations running.



Most firms quote months for this kind of work. Adroit's productized 30-day approach gets clients **live fast and right** because the system is built around how the business actually sells.



Live in 30 days



From inbox to pipeline visibility



Two clients, one repeatable outcome



Both clients moved from managing sales in the inbox to having a clear picture of their process, forecast, and communication plan—all within a single 30-day window.

★ A repeatable process built for speed without shortcuts. ★



Adroit Insights | CRM Growth