

JFJ Wood Flooring Case Study



How JFJ Wood Flooring Transformed from Manual Spreadsheets to a Unified Digital Ecosystem with Zoho One

Overview

JFJ Wood Flooring, a long established family run business of wood flooring specialists with flooring, joinery and timber sales dating back as far as 1853, successfully transformed from manual spreadsheet-based operations into a unified Zoho One ecosystem. This comprehensive transformation streamlined sample management, automated delivery processes, and integrated their WordPress eCommerce platform with intelligent CRM functionality.

Key Takeaways:



CRM Implementation

Migrated from manual spreadsheets to structured Zoho CRM system with automated workflows



Sample Management

Created dedicated pipeline for sample tracking and management before orders are placed



Intelligent Calculations

Custom functions for items per box and square meterage calculations with margin analysis



Seamless Integration

WordPress eCommerce integration with automated Xero financial synchronization

Executive Summary

Company Profile

- **Company:** [JFJ Wood Flooring](#)
- **Industry:** Wood Flooring & Joinery Specialists
- **Location:** South Molton, Devon, England
- **Employees:** 35+ years manufacturing experience

Implementation Details

- **Products Used:** Zoho One (CRM, Desk, Books, Inventory, Projects, Campaigns, Forms, Analytics, Sites)
- **Partner:** Axithorn (Zoho Advanced Partner)
- **Implementation Timeline:** 6 Months (ongoing optimization)

JFJ Wood Flooring, trading as JF Joinery (SW) Ltd, has been one of the most trusted Devon based joinery suppliers for over 40 years, with an extensive history of supplying some of the highest spec engineered wood flooring available in the UK. They work directly with customers to provide reliable wood flooring solutions that meet specific requirements, keeping prices competitive through high quantity buying power and superior customer service levels.

Trading under the name of JFJ Wood Flooring, they provide wood flooring solutions that beautifully complement their timber windows and doors, with an extensive range of high-quality options adding warmth and elegance to any space.

"For the past few months we've had the pleasure working with James from Axithorn to implement Zoho One into our business, JFJ Wood Flooring. From start to finish, James demonstrated exceptional professionalism, expertise, and dedication to ensuring the implementation was as seamless as possible and tailored to our requirements." — Tom Fanthorpe, Director

Problem Statement and Key Challenges

Prior to their digital transformation, JFJ Wood Flooring operated on manual processes and disconnected systems that created significant operational inefficiencies in their wood flooring business:

The Technology Landscape Before Zoho

Manual Systems:

- Excel spreadsheets for customer data and order management
- Paper-based sample tracking and delivery notes
- Disconnected WordPress eCommerce site with no CRM integration
- Manual calculation processes for square meterage and box requirements
- Separate accounting systems with no automation

Critical Challenges:

1

Sample Management Chaos

- No systematic tracking of samples sent to potential customers
- Manual follow-up processes leading to lost opportunities
- Confusion between sample requests and actual orders
- No visibility into sample conversion rates or effectiveness

2

Manual Calculation Errors

- Time-consuming manual calculations for items per box and total boxes required
- Pricing errors due to manual margin calculations
- Risk of ordering incorrect quantities based on square meterage
- No standardized process for cost price to sales price calculations

3

Disconnected eCommerce Operations

- WordPress site orders required manual data entry into separate systems
- No automated follow-up or customer journey management
- Difficulty tracking customer interactions across online and offline channels
- Manual generation of delivery notes and product specifications

4

Financial Integration Gaps

- Manual data entry between sales systems and Xero accounting
- Time-consuming reconciliation processes
- Limited visibility into financial performance and profitability
- No consolidated analytics or historical data analysis

"Axithorn's in-depth knowledge of Zoho One and its various applications helped us streamline our existing operations as well as provide us new sales and marketing opportunities. They took the time to understand our unique business processes and were always efficient at fixing / improving any issues." — Tom Fanthorpe, Director

Evaluation of the Problem

Recognizing the need for systematic transformation, JFJ Wood Flooring engaged Axithorn, a registered Zoho Advanced Partner, to conduct a comprehensive evaluation of their wood flooring business processes.

Assessment Process

The evaluation revealed several critical insights specific to the wood flooring industry:

- 1 Sample-to-Order Workflow Gaps**
Critical disconnect between sample management and order conversion processes
- 2 Calculation Inefficiencies**
Manual processes for complex square meterage and box calculations prone to errors
- 3 eCommerce Integration Needs**
WordPress site operating in isolation from customer relationship management
- 4 Financial Data Silos**
Xero accounting disconnected from sales and customer data
- 5 Analytics Blind Spots**
No consolidated view of customer journey from sample to delivery

Partner Expertise

Axithorn brought critical expertise to the evaluation phase:

- Mapped wood flooring specific business processes to Zoho capabilities
- Designed custom calculation functions for industry requirements
- Planned WordPress integration strategy
- Developed sample management and dual pipeline strategy
- Created automated Xero integration workflows

📋 The evaluation concluded that Zoho One's comprehensive suite could transform JFJ's manual operations while providing the specialized functionality needed for wood flooring business operations, sample management, and intelligent pricing calculations.

Proposed Solution

Based on the evaluation, JFJ Wood Flooring and Axithorn designed a comprehensive Zoho One implementation strategy focused on sample management, automated calculations, and seamless integrations.

Solution Architecture

Core Zoho One Modules:



Zoho CRM

Structured customer database with dual pipelines for samples and orders



WordPress Integration

Seamless connection between eCommerce site and CRM system



Sample Management

Dedicated workflow for tracking samples sent before orders



Custom Calculations

Automated functions for square meterage, boxes, and margin calculations



Analytics Dashboard

Consolidated view of historical and new CRM data



Xero Integration

Automated financial synchronization and delivery note generation

Integration Strategy:



Data Migration

Structured import of customer data from Excel spreadsheets into CRM



Dual Pipelines

Separate workflows for sample requests and actual orders with conversion tracking



Web Forms & Chat

Customer inquiry capture from website with automated CRM entry



Document Generation

Automated delivery notes and product specification creation

Implementation

Phased Rollout Strategy

JFJ Wood Flooring adopted a systematic approach to ensure successful adoption of their new digital ecosystem:



Phase 1: CRM Setup and Data Migration (Month 1)

- Migrated customer data from Excel spreadsheets to structured CRM system
- Configured custom fields for wood flooring specifications
- Established dual pipeline structure for samples and orders



Phase 2: WordPress Integration (Month 2)

- Connected eCommerce site to CRM for automated lead capture
- Implemented web forms for customer inquiries
- Set up chat functionality for real-time customer support



Phase 3: Sample Management System (Month 3)

- Built dedicated sample tracking workflows
- Created automated follow-up sequences for sample recipients
- Implemented conversion tracking from samples to orders



Phase 4: Custom Calculations (Month 4)

- Developed functions for items per box calculations based on square meterage
- Built intelligent margin calculation system using cost and sales prices
- Automated box quantity requirements for different flooring types



Phase 5: Financial Integration (Month 5)

- Implemented automated Xero synchronization
- Set up delivery note generation workflows
- Created product specification document automation



Phase 6: Analytics & Optimization (Month 6)

- Deployed comprehensive analytics dashboard
- Integrated historical data with new CRM insights
- Established KPI tracking for sample conversion and profitability

Implementation Approach

Partner Collaboration

Working with Axithorn proved essential:

- Guided migration from spreadsheet-based systems
- Built custom calculation functions for wood flooring industry
- Configured WordPress integration workflows
- Provided comprehensive training on new systems

Change Management

- Appointed system administrators with autonomy to customize workflows
- Created role-specific training for sample management and order processing
- Established best practices documentation
- Implemented regular review cycles for optimization opportunities

Technical Configuration

- Customized CRM fields for wood flooring specifications
- Built automated calculation functions for industry requirements
- Created integrated dashboards combining historical and new data
- Configured automated document generation for delivery and specifications

Overcoming Challenges

Complex Calculation Requirements

Wood flooring calculations involving square meterage, items per box, and different product specifications required custom development. **Solution:** Axithorn built bespoke calculation functions integrated directly into the CRM workflow.

Dual Pipeline Complexity

Managing separate but connected workflows for samples and orders created potential confusion. **Solution:** Clear visual indicators and automated conversion workflows ensured seamless progression from samples to orders.

Historical Data Integration

Combining years of Excel-based customer data with new CRM insights presented challenges. **Solution:** Comprehensive data cleaning and analytics dashboard design provided unified historical and current views.

Timeline: 6-month implementation with ongoing optimization and support

Results

The transformation to Zoho One delivered significant improvements across JFJ Wood Flooring's operations, streamlining their entire customer journey from initial inquiry to delivery.

Quantifiable Business Impact

Sample Management Excellence

- Achieved 100% tracking of samples sent to potential customers
- Increased sample-to-order conversion rates through automated follow-up
- Eliminated lost opportunities from manual sample tracking failures

Calculation Accuracy & Speed

- Eliminated calculation errors in square meterage and box requirements
- Reduced quote preparation time from hours to minutes
- Achieved consistent margin calculations based on intelligent pricing algorithms

Seamless Integration Benefits

- WordPress orders automatically flow into CRM with no manual data entry
- Eliminated double-handling between eCommerce and customer management
- Achieved real-time synchronization with Xero financial systems

Operational Efficiency Gains

- Automated delivery note generation saving hours per order
- Consolidated analytics bringing together all customer touchpoints
- Streamlined customer communication through integrated chat and forms

Strategic Achievements



Enhanced Customer Experience

Customers now experience seamless interaction from initial website inquiry through sample request to final delivery, with consistent communication and professional documentation throughout.



Data-Driven Decision Making

Management now has comprehensive analytics showing customer journey performance, sample conversion rates, and profitability metrics across all wood flooring product lines.



Scalable Operations

The new system supports business growth without proportional increases in administrative overhead, with automated workflows handling increased order volumes efficiently.

Qualitative Benefits

Improved Accuracy

- Elimination of manual calculation errors
- Consistent pricing and margin application
- Accurate delivery documentation every time

Enhanced Professionalism

- Professional delivery notes and product specifications
- Consistent customer communication
- Reliable follow-up on sample requests

Staff Satisfaction

- Eliminated time-consuming manual data entry
- Reduced frustration from calculation errors
- Empowered team with modern digital tools

"James has a calm approach to problem-solving and never makes you feel as though you're asking stupid questions or asking 'too much'. We highly recommend James and Axithorn to anyone considering implementing Zoho One or looking for guidance in optimising their business systems. I went around in circles for years before I started this process with Axithorn." — Tom Fanthorpe, Director

Lessons Learned and Best Practices

Based on JFJ Wood Flooring's transformation journey, the team offers valuable insights for wood flooring businesses and similar industries considering digital transformation:

Key Recommendations

1	<p>Partner with Industry-Experienced Experts</p> <p>"His in-depth knowledge of Zoho One and its various applications helped us streamline our existing operations as well as provide us new sales and marketing opportunities."</p>
2	<p>Plan for Industry-Specific Workflows</p> <p>Wood flooring businesses have unique requirements like sample management and complex calculations. Ensure your implementation partner understands these specific needs before beginning.</p>
3	<p>Prioritize Integration Over Replacement</p> <p>Rather than replacing existing WordPress eCommerce sites, focus on integrating them seamlessly with your new CRM system to maintain customer experience continuity.</p>
4	<p>Build Dual Pipelines for Complex Sales Processes</p> <p>Separate sample management from order processing while maintaining clear conversion pathways between them for accurate tracking and follow-up.</p>
5	<p>Automate Calculation-Heavy Processes</p> <p>Invest time in building custom calculation functions for square meterage, box requirements, and margin calculations. This eliminates errors and saves significant time.</p>
6	<p>Embrace Continuous Improvement</p> <p>Schedule regular reviews to optimize workflows and identify new automation opportunities as your team becomes more comfortable with the system.</p>
7	<p>Document Everything</p> <p>Create comprehensive documentation for custom functions and workflows, particularly for industry-specific calculations and processes.</p>

Industry-Specific Advice

For businesses in the wood flooring and construction materials industry:

- Sample management is critical – invest in robust tracking and conversion systems
- Calculation accuracy directly impacts profitability – automate wherever possible
- Customer education through product specifications adds significant value
- Integration with existing eCommerce platforms preserves customer relationships

Looking Ahead

JFJ Wood Flooring's digital transformation journey continues with ongoing optimization and expansion:

Current Focus Areas:

- Expanding analytics to include predictive inventory management
- Enhancing customer self-service capabilities through web portals
- Developing mobile-friendly workflows for field operations
- Optimizing sample conversion rates through advanced analytics

Future Opportunities:

- AI-powered margin optimization based on market conditions
- Advanced customer segmentation for targeted marketing
- Enhanced supplier integration for automated procurement
- Expanded product configurator for complex flooring projects

"Lastly, we intend to continue to lean on James' expertise moving forward and get the most out of our new Zoho One system! Thank you James, your commitment to delivering solutions has added real value to our business." — Tom Fanthorpe, Director

About Axithorn



Axithorn is a Zoho Advanced Partner specializing in digital transformation for businesses across multiple industries, with particular expertise in construction materials, manufacturing, and eCommerce integration.

Services:



Zoho One Implementation

Complete implementation and migration services



Custom Development

Custom module development tailored to your industry needs



Business Consulting

Business process consulting and optimization



Ongoing Support

Continuous support and optimization services

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Partner



Ready to transform your wood flooring business with Zoho?

Contact Axithorn today to discuss how we can help you implement CRM systems, automate calculations, integrate your eCommerce platform, and achieve operational excellence.