

# Newline Auction Software Case Study



How Newline Transformed from Fragmented Systems to a Unified Digital Ecosystem with Zoho One

# Overview

Newline Auction Software, a 40-year leader in livestock auction management software, successfully consolidated multiple disparate systems into a unified Zoho One ecosystem. This transformation eliminated data silos, automated critical reporting processes, and positioned Newline as a digital transformation model within their software group of 100+ software companies.

## Key Takeaways:



### System Consolidation

Consolidated 5+ disparate systems into Zoho One, eliminating department silos



### Time Savings

Reduced manual reporting time from days to hours through automated Analytics workflows



### Seamless Integration

Achieved seamless data flow across Sales, Projects, Support, and Finance operations



### Industry Leadership

Became the Zoho implementation model for 13+ businesses

# Executive Summary

## Company Profile

- **Company:** [Newline Auction Software](#)
- **Industry:** Agricultural Technology / Auction Software
- **Location:** United Kingdom
- **Employees:** 26

## Implementation Details

- **Products Used:** Zoho One (CRM, Desk, Books, Sign, Inventory, Projects, Campaigns, Surveys, Forms, Analytics, Notebook, WorkDrive)
- **Partner:** Axithorn (Zoho Advanced Partner)
- **Implementation Timeline:** 3 Years (ongoing optimization)

For over 40 years, Newline Auction Software has been the trusted choice of leading livestock auction firms across the UK, Ireland, Canada, and New Zealand. Their software streamlines auction operations, eliminates office duplication, and automates administrative tasks to ensure live sales run seamlessly. Newline also offers IT Services, Mobile Apps, Online Auctions, and Payment solutions.

In 2021, Newline was acquired by a software holding group, which manages over 100 independently operated software brands worldwide.

"After our acquisition, we were immediately required to produce vast quantities of accurate, time-critical reporting. Our fragmented systems made this nearly impossible. The pain of bringing our data together led us to focus on automating and streamlining our processes so we could report across the full business, not from individual silos." — Lucie Jones, Business Analyst, Newline

# Problem Statement and Key Challenges

Prior to their digital transformation, Newline operated on a complex patchwork of disconnected systems that created significant operational inefficiencies:

## The Technology Landscape Before Zoho

### Fragmented Systems:

- Bespoke Access Database solutions for core operations
- Multiple third-party CRM systems across different departments
- Separate accounting software
- Disconnected project management tools
- Isolated customer service platforms

### Critical Challenges:

1

#### Data Silos and Manual Consolidation

- Each department implemented and managed their own solutions independently
- Critical business data was painfully brought together through manual spreadsheet compilation
- PowerPoint presentations were created manually from fragmented data sources

2

#### Inability to Meet Reporting Requirements

- Post-acquisition, the purchasing group immediately required comprehensive reporting
- Weekly, monthly, and quarterly reports demanded accurate, consolidated data from all systems
- No effective means of consolidating data across systems to reflect true business performance
- Time-critical reporting deadlines were consistently at risk

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#### Process Inefficiencies

- Significant duplication of effort across departments
- High risk of data entry errors due to manual processes
- Limited visibility into cross-functional operations
- No unified view of customer interactions across sales, support, and finance

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#### Scalability Limitations

- Existing systems couldn't scale to meet growing reporting demands
- No cloud-based collaboration capabilities
- Limited automation possibilities with legacy Access databases

"Not only were our processes limited by inefficiencies and costs, we also had no means of effectively consolidating the data from each system to accurately reflect business performance. The pain of bringing our data together led us to focus on automating and streamlining our processes." — Lucie Jones, Business Analyst, Newline

# Evaluation of the Problem

Recognizing the urgency of their situation, Newline engaged James Welch-Thornton from Axithorn, a registered Zoho Advanced Partner, to conduct a comprehensive evaluation of their technology challenges.

## Assessment Process

The evaluation revealed several critical insights:

- 1 System Redundancy**  
Multiple overlapping systems created unnecessary costs and complexity
- 2 Data Fragmentation**  
Customer information existed in multiple locations without synchronization
- 3 Reporting Gaps**  
No single source of truth for business metrics and KPIs
- 4 Process Inefficiencies**  
Manual handoffs between systems created bottlenecks and errors
- 5 Limited Automation**  
Minimal workflow automation led to repetitive manual tasks

## Partner Expertise

Axithorn brought critical expertise to the evaluation phase:

- Educated Newline team on available Zoho One functionality
- Mapped existing business processes to Zoho capabilities
- Identified opportunities for process simplification and standardization
- Developed a phased migration and implementation strategy
- Provided guidance on custom module development for specialized requirements

❏ The evaluation concluded that Zoho One's comprehensive suite could replace all disparate systems while providing the integration, automation, and reporting capabilities Newline desperately needed.

# Proposed Solution

Based on the evaluation, Newline and Axithorn designed a comprehensive Zoho One implementation strategy focused on unification, automation, and reporting excellence.

## Solution Architecture

### Core Zoho One Modules:



#### Zoho CRM

Central hub for customer relationships and sales pipeline management



#### Zoho Books

Financial management and invoicing



#### Zoho Desk

Unified customer support and ticket management



#### Zoho Projects

Project tracking and resource management



#### Zoho Analytics

Comprehensive reporting and business intelligence



#### Custom Modules

Bespoke solutions for specialized auction industry requirements

### Integration Strategy:



#### Unified Data Model

All customer data flows through Zoho CRM as the single source of truth



#### Automated Workflows

Sales orders automatically trigger projects, support tickets, and invoicing



#### Custom Fields

Extended standard modules to capture industry-specific auction data



#### Analytics Integration

Nightly data exports to provide consolidated reporting

# Implementation

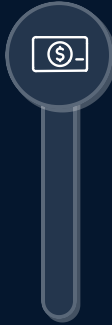
## Phased Rollout Strategy

Newline adopted a measured, department-by-department approach to ensure successful adoption:



### Phase 1: Sales and CRM (Months 1–6)

- Migrated account management from legacy CRM to Zoho CRM
- Implemented sales pipeline tracking and forecasting
- Established CRM as the central customer database



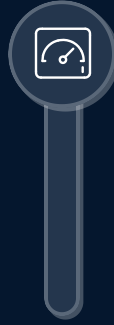
### Phase 2: Order Processing and Finance (Months 6–12)

- Developed custom sales order processing solution
- Integrated Books for maintenance invoicing automation
- Built workflows connecting sales to finance



### Phase 3: Support and Projects (Months 12–18)

- Migrated customer support to Zoho Desk
- Implemented Projects for internal project tracking
- Connected support tickets to customer accounts in CRM



### Phase 4: Analytics and Reporting (Months 18–24)

- Deployed Zoho Analytics with custom dashboards
- Built automated reporting workflows
- Established KPI tracking across all departments



### Phase 5: Continuous Optimization (Months 24+)

- Implemented cross-module automation workflows
- Enhanced custom fields and modules based on user feedback
- Expanded usage to additional Zoho One applications

## Implementation Approach

### Partner Collaboration

Working with Axithorn proved essential to implementation success:

- Guided data migration from legacy systems
- Designed and built custom modules for specialized requirements
- Provided training to department administrators
- Offered ongoing support during adoption phase

### Change Management

- Appointed module owners/administrators with autonomy to extend functionality
- Conducted department-specific training sessions
- Created internal documentation and best practices
- Established regular review cycles to address adoption challenges

### Technical Configuration

- Customized standard modules with industry-specific fields
- Built custom modules for unique auction software requirements
- Created consolidated account views with embedded Analytics links
- Configured automated workflows for common business processes

## Overcoming Challenges

### Subscription Module Limitations

The standard Zoho Subscriptions module couldn't accommodate Newline's complex maintenance invoicing requirements. **Solution:** Axithorn built a custom module combining CRM, Books, and bespoke functionality to meet specific needs.

### Data Flow Complexity

With multiple interconnected systems, tracking transaction states became challenging. **Solution:** Created Analytics reports showing transaction status across sales order and project workflows, accessible directly from CRM account pages.

### Unused Functionality

Standard modules included features irrelevant to Newline's operations, potentially confusing users. **Solution:** Comprehensive training and documentation helped users navigate to relevant features, though the ability to deactivate unused functionality would have been beneficial.

**Timeline:** 3-year phased implementation with continuous optimization

# Results

The transformation to Zoho One delivered measurable improvements across Newline's operations and positioned the company as a digital transformation leader within the group of companies.

## Quantifiable Business Impact

### Operational Efficiency

- Reduced reporting preparation time from days to hours
- Eliminated manual data consolidation across 5+ systems
- Decreased data entry duplication by consolidating to single source of truth

### Data Accuracy and Visibility

- Achieved real-time visibility into business performance across all departments
- Eliminated discrepancies from manual data transfers between systems
- Enabled accurate weekly, monthly, and quarterly reporting for parent group requirements

### Cost Optimization

- Consolidated multiple software subscriptions into Zoho One licensing
- Reduced IT overhead from managing disparate systems
- Eliminated redundant software licenses across departments

### Scalability and Collaboration

- Successfully scaled to support growing reporting demands
- Enabled cloud-based collaboration across all 26 employees
- Positioned for further growth without system limitations



Working with and having the support of James from Axithorn has enabled us to rollout solutions far more quickly than we would have done on our own.



Lucie Jones

## Strategic Achievements



### Model for Software Group

Newline became one of the first businesses within the group of companies to fully implement Zoho One, now serving as a model and knowledge resource for other companies.



### Cross-Company Collaboration

Newline holds regular meetings with 13+ other business unit teams to share ideas and solutions for meeting process and reporting requirements.



### Continuous Improvement Culture

The modular nature of Zoho One enables ongoing optimization, with teams regularly identifying new automation opportunities and workflow enhancements.

## Qualitative Benefits

### Improved Decision Making

- Real-time dashboards provide instant insights into business health
- Consolidated data enables informed strategic decisions
- Cross-functional visibility improves collaboration

### Enhanced Customer Experience

- Unified customer view across sales, support, and finance
- Faster response times with integrated Desk and CRM
- Reduced errors from manual data handling

### Employee Satisfaction

- Eliminated frustrating manual data consolidation tasks
- Empowered department owners to customize their workflows
- Provided modern, cloud-based tools for remote collaboration

"Newline was one of the first businesses within the group to fully implement and embrace the Zoho suite. We now act as a model and knowledge resource for other businesses within the group. We hold regular meetings with 13+ other teams to share our ideas and solutions for meeting both process and reporting requirements." — Lucie Jones, Business Analyst, Newline

# Lessons Learned and Best Practices

Based on Newline's three-year journey, the team offers valuable insights for businesses considering similar transformations:

## Key Recommendations

|   |                                                                                                                                                                                                                                                 |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | <b>Engage Expert Partners Early</b><br><br>"Working with and having the support of James from Axithorn has enabled us to rollout solutions far more quickly than we would have done on our own." — <b>Lucie Jones</b>                           |
| 2 | <b>Document Before Implementation</b><br><br>Carefully document existing workflows and milestones before beginning implementation. This provides clarity on requirements and helps identify opportunities for process improvement.              |
| 3 | <b>Embrace Process Simplification</b><br><br>Don't be afraid to modify and simplify existing processes to map to standard functionality within Zoho products. Forcing old processes onto new technology limits the benefits of transformation.  |
| 4 | <b>Take a Phased Approach</b><br><br>Don't attempt to switch on everything at once. Start with one department or function, prove success, then expand systematically.                                                                           |
| 5 | <b>Empower Department Owners</b><br><br>Nominate module owners/administrators with autonomy to implement their own features and extend usage. This distributes expertise and accelerates adoption.                                              |
| 6 | <b>Prioritize Zoho Solutions</b><br><br>To maximize license value, encourage teams to consider whether Zoho has a solution before evaluating third-party options. Zoho One's breadth often provides capabilities teams don't initially realize. |
| 7 | <b>Invest in Training and Documentation</b><br><br>Comprehensive training and internal documentation are essential for successful adoption, particularly when standard modules include features beyond immediate needs.                         |

## Industry-Specific Advice

For businesses in specialized industries like agricultural technology:

- Custom modules can bridge gaps between standard functionality and unique requirements
- Industry-specific data fields can be added to extend standard modules
- Partner expertise is invaluable for navigating customization options

## Looking Ahead

Newline's digital transformation journey continues with ongoing optimization and expansion of Zoho One capabilities:

| Current Focus Areas:                                                                                                                                                                                                                                                                    | Future Opportunities:                                                                                                                                                                                                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Expanding cross-module automation workflows</li><li>• Enhancing Analytics dashboards for deeper insights</li><li>• Exploring additional Zoho One modules for new use cases</li><li>• Sharing best practices across the software group</li></ul> | <ul style="list-style-type: none"><li>• Deeper integration with central finance transactional systems</li><li>• Advanced AI and machine learning capabilities within Zoho</li><li>• Mobile-first workflows for field teams</li><li>• Enhanced customer self-service portals</li></ul> |

The transformation from fragmented systems to a unified Zoho One ecosystem has not only solved Newline's immediate reporting challenges but positioned the company for continued growth and innovation in the competitive auction software market.

# About Axithorn



**Axithorn** is a Zoho Advanced Partner specializing in digital transformation for businesses across multiple industries.

## Services:



### Zoho One Implementation

Complete implementation and migration services



### Custom Development

Custom module development tailored to your needs



### Business Consulting

Business process consulting and optimization



### Ongoing Support

Continuous support and optimization services

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### Ready to transform your business with Zoho?

Contact Axithorn today to discuss how we can help you eliminate data silos, automate processes, and achieve reporting excellence.