

# Newton Print CRM Implementation Case Study



How Newton Print Transformed from Manual Processes to an Integrated CRM System with Seamless Workflow Automation

# Overview

Newton Print, a professional printing services company, successfully transformed from having no organized CRM and disparate manual processes to a fully integrated Zoho system. This transformation eliminated manual workload, integrated legacy quoting systems via SOAP APIs, and delivered automated workflows that significantly improved business efficiency and sales performance.

## Key Takeaways:



### System Integration

Seamless integration with legacy quoting and printing software through SOAP APIs



### Manual Workload Reduction

Significant reduction in manual processes through automated workflows and daily system synchronization



### Complete Customer Journey

Unified system tracking customers from prospecting through to sale and ongoing management



### Enhanced Sales Performance

Individual sales dashboards and Motivator integration keeping teams engaged and on target

# Executive Summary

## Company Profile

- **Company:** [Newton Print](#)
- **Industry:** Professional Printing Services
- **Location:** United Kingdom
- **Implementation Partner:** Axithorn

## Implementation Details

- **Products Used:** Zoho One, Zoho CRM, Forms, Analytics, Books, Motivator, telephony integration
- **Partner:** Axithorn (Zoho Advanced Partner)
- **Project Start:** 2022
- **Status:** Ongoing evolution and optimization

Newton Print provides comprehensive printing services to businesses across various industries. Prior to their digital transformation, the company operated without an organized CRM system and relied on a historic quoting system that required complex integration work.

The company needed a solution that could seamlessly integrate with their existing printing software while providing modern CRM capabilities to track customers from initial prospecting through to ongoing account management.

"We selected James at Axithorn as our installation partner for Zoho and he's been a delight to work with. It was our first dedicated CRM system and we had a number of customisation requests which most other CRM providers weren't able to work with. However, James has worked hard to produce the results we're looking for. He takes care to understand what we're hoping to achieve so that he can find a way to a solution. I can highly recommend James - his response time is excellent and there's nothing he doesn't know about installing and customising Zoho CRM to fit your business." — Simon Besley, Sales and Marketing Director, Newton Print

# Problem Statement and Key Challenges

Prior to their digital transformation in 2022, Newton Print faced significant operational challenges that hindered their growth and efficiency:

## The Business Landscape Before CRM Implementation

### Existing System Challenges:

- No organized CRM system for customer relationship management
- Historic quoting system requiring complex SOAP API integration
- Manual processes throughout the customer journey
- Disconnected systems with no unified customer view
- Limited visibility into sales performance and pipeline

### Critical Business Challenges:

1

#### Lack of Customer Data Organization

- No centralized system for tracking customer interactions
- Customer information scattered across various manual processes
- Difficulty in managing the complete customer lifecycle from prospect to ongoing client

2

#### Legacy System Integration Complexity

- Historic quoting system required specialized SOAP API integration
- No seamless flow between quoting and customer management
- Manual data transfer between systems creating bottlenecks
- Risk of data inconsistency between quoting and printing workflows

3

#### Manual Process Dependencies

- Heavy reliance on manual processes throughout operations
- Time-consuming administrative tasks reducing productivity
- Limited automation capabilities
- Inconsistent follow-up processes with prospects and customers

4

#### Sales Performance Visibility

- No individual sales dashboards for performance tracking
- Limited visibility into sales targets and progress
- Lack of sales team motivation and engagement tools
- Difficulty in measuring and improving sales effectiveness

The absence of an organized CRM system and the complexity of integrating with our historic quoting system created significant operational challenges. We needed a solution that could bridge these gaps while providing modern customer relationship management capabilities.

# Evaluation of the Problem

Recognizing the need for a comprehensive solution, Newton Print engaged James Welch-Thornton from Axithorn, a registered Zoho Advanced Partner, to evaluate their technology challenges and design an appropriate solution.

## Assessment Process

The evaluation revealed several critical requirements and opportunities:

### 1 CRM Foundation Needed

Complete absence of organized customer relationship management requiring ground-up implementation

### 2 Legacy Integration Requirements

Complex SOAP API integration needed to connect historic quoting system with modern CRM

### 3 Workflow Automation Opportunities

Significant potential for automating manual processes and improving operational efficiency

### 4 Sales Performance Enhancement

Need for individual dashboards and motivation tools to drive sales team performance

### 5 Communication Integration

Requirement for telephony system integration to capture and track all customer interactions

## Partner Expertise

Axithorn brought essential expertise to address Newton Print's unique challenges:

- Deep understanding of Zoho CRM customization capabilities
- Experience with complex API integrations for legacy systems
- Expertise in workflow automation and process optimization
- Knowledge of sales performance tracking and motivation tools
- Understanding of printing industry requirements and workflows

- The evaluation concluded that a phased Zoho implementation focusing on CRM, Forms, and Analytics would provide the foundation needed, with careful attention to SOAP API integration for seamless connectivity with existing quoting systems.

# Proposed Solution

Based on the evaluation, Newton Print and Axithorn designed a comprehensive Zoho implementation strategy focused on CRM foundation, legacy system integration, and workflow automation.

## Solution Architecture

### Core Implementation Components:



#### Zoho CRM

Central hub for customer data from prospecting through ongoing account management



#### Zoho Forms

Streamlined data capture and lead generation processes



#### Zoho Analytics

Individual sales dashboards and performance tracking



#### Zoho Motivator

Sales team engagement and target tracking



#### 3CX Integration

Telephony system integration for call logging and tracking



#### SOAP API Integration

Seamless connection with historic quoting and printing software

### Integration Strategy:



#### Unified Customer Data

All customer information centralized in Zoho CRM with complete lifecycle tracking

#### Daily Synchronization

Scheduled daily updates ensure both CRM and printing systems remain synchronized



#### Automated Workflows

Follow-up processes triggered automatically without user input

#### Performance Tracking

Individual dashboards keeping sales teams focused on targets and goals

# Implementation

## Phased Implementation Strategy

Newton Print adopted a strategic phased approach based on business priorities, starting in 2022 and continuing to evolve:



### Phase 1: CRM Foundation (Months 1-4)

- Implemented core Zoho CRM for customer relationship management
- Established customer data structure from prospect to ongoing client
- Set up initial user training and adoption processes



### Phase 2: Forms and Data Capture (Months 4-6)

- Deployed Zoho Forms for streamlined lead capture
- Integrated forms with CRM for seamless prospect management
- Automated initial prospect qualification processes



### Phase 3: Analytics and Dashboards (Months 6-8)

- Implemented individual sales dashboards for performance tracking
- Set up target monitoring and progress visualization
- Created management reporting for business insights



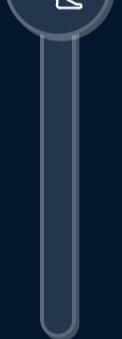
### Phase 4: System Integration (Months 8-12)

- Developed SOAP API integration with historic quoting system
- Connected printing software for seamless record flow
- Implemented daily scheduled updates between systems



### Phase 5: Communication Integration (Months 12-15)

- Integrated 3CX telephony system for call logging
- Automated call record creation and customer interaction tracking
- Enhanced customer communication history visibility



### Phase 6: Workflow Automation (Months 15+)

- Implemented automated follow-up workflows
- Deployed Motivator for sales team engagement
- Continuous optimization and feature enhancement

## Implementation Approach

### Partner Collaboration

Working with Axithorn was essential for success:

- Designed custom solutions for printing industry requirements
- Managed complex SOAP API integration development
- Provided ongoing training and support throughout rollout
- Delivered responsive support for customization requests

### Change Management

- Phased rollout based on business priorities
- Comprehensive user training for each phase
- Regular feedback sessions to refine processes
- Ongoing support for user adoption and optimization

### Technical Configuration

- Custom CRM configuration for printing industry workflows
- SOAP API development for legacy system integration
- Automated workflow design for follow-up processes
- Dashboard customization for individual sales tracking

## Overcoming Challenges

### Complex Legacy Integration

The historic quoting system required sophisticated SOAP API integration. **Solution:** Axithorn developed custom integration solutions ensuring seamless data flow while maintaining system reliability.

### Customization Requirements

Newton Print had specific customization needs that many CRM providers couldn't accommodate. **Solution:** Zoho's flexibility combined with Axithorn's expertise delivered tailored solutions meeting all requirements.

### User Adoption

Implementing the first dedicated CRM system required significant change management. **Solution:** Phased implementation with comprehensive training and ongoing support ensured smooth adoption.

# Results

The Zoho implementation delivered significant improvements across Newton Print's operations, transforming their customer management capabilities and operational efficiency.

## Quantifiable Business Impact

### Manual Workload Reduction

- Significant reduction in manual administrative tasks
- Automated follow-up processes eliminating manual scheduling
- Streamlined data flow between quoting and printing systems

### Customer Management Excellence

- Complete customer lifecycle tracking from prospect to ongoing management
- Centralized customer data accessible across all team members
- Improved customer interaction history and communication tracking

### Sales Performance Enhancement

- Individual sales dashboards keeping teams focused on targets
- Motivator integration improving sales team engagement
- Better visibility into sales pipeline and performance metrics

### System Integration Success

- Seamless flow between CRM and printing software via SOAP APIs
- Daily scheduled updates maintaining system synchronization
- Elimination of data silos and manual data transfer processes

## Strategic Achievements



### Fully Functioning System

Delivered a comprehensive CRM solution that handles the complete customer journey while integrating seamlessly with existing printing operations.

### Automated Workflow Excellence

Implemented sophisticated automated workflows that schedule follow-ups without user input, improving customer engagement consistency.

### Business Impact Achievement

Delivered hugely positive business impact through improved efficiency, better customer management, and enhanced sales performance.

## Qualitative Benefits

### Operational Efficiency

- Streamlined processes reducing administrative burden
- Automated workflows improving consistency
- Better resource allocation and time management

### Enhanced Customer Experience

- Complete customer interaction history
- Consistent follow-up processes
- Improved response times and service quality

### Team Performance

- Individual dashboards driving accountability
- Motivator keeping sales teams engaged
- Clear visibility into targets and achievements

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# Lessons Learned and Best Practices

Based on Newton Print's implementation journey, the team offers valuable insights for businesses considering similar CRM transformations:

## Key Recommendations

### 1 Choose the Right Partner

"James has worked hard to produce the results we're looking for. He takes care to understand what we're hoping to achieve so that he can find a way to a solution." — **Simon Besley**

### 2 Plan for Complex Integrations

Legacy systems with SOAP APIs require specialized expertise. Ensure your implementation partner has experience with complex integrations and can deliver robust solutions.

### 3 Implement in Phases Based on Priorities

Start with core CRM functionality, then build out additional features based on business priorities. This approach ensures early value delivery while managing change effectively.

### 4 Focus on Automation Opportunities

Identify manual processes that can be automated, particularly follow-up workflows and data synchronization between systems.

### 5 Invest in Sales Performance Tools

Individual dashboards and motivation tools like Motivator can significantly improve sales team engagement and performance.

### 6 Plan for Ongoing Evolution

CRM implementation is not a one-time project. Plan for continuous optimization and feature enhancement as business needs evolve.

### 7 Ensure Comprehensive Communication Integration

Integrating telephony systems like 3CX ensures all customer interactions are captured and tracked effectively.

## Industry-Specific Advice

For businesses in the printing industry or those with similar legacy system challenges:

- SOAP API integrations can be complex but are achievable with the right expertise
- Daily synchronization processes help maintain data consistency across systems
- Custom CRM configurations can accommodate industry-specific workflows
- Partner expertise is crucial for navigating customization and integration challenges

## Looking Ahead

Newton Print's CRM transformation continues with ongoing optimization and feature enhancement:

### Current Focus Areas:

- Enhancing automated workflow capabilities
- Expanding dashboard functionality for deeper insights
- Optimizing integration performance and reliability
- Continuous user training and adoption improvement

### Future Opportunities:

- Advanced analytics and reporting capabilities
- Mobile CRM functionality for field teams
- Enhanced customer self-service portals
- Additional Zoho module integrations

The transformation from manual processes and disconnected systems to a fully integrated CRM solution has positioned Newton Print for continued growth and improved customer service in the competitive printing industry.

# About Axithorn



# AXITHORN

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

## Services:



### Zoho CRM Implementation

Complete implementation and migration services



### Custom Development

API integrations and custom solutions tailored to your needs



### Business Consulting

Business process consulting and optimization



### Ongoing Support

Continuous support and optimization services

## Contact:

### Email:

[info@Axithorn.com](mailto:info@Axithorn.com)

### Website:

[www.axithorn.com](http://www.axithorn.com)



### Ready to transform your business with Zoho?

Contact Axithorn today to discuss how we can help you implement CRM solutions, integrate legacy systems, and achieve operational excellence.