

Case Studies

Case Study: Streamlining Operations for a Fast-Growing Telco

Project Snapshot

- **Industry:** Telecommunications
- **My Role:** Lead Consultant & Solutions Architect
- **Duration:** ~1,600 hours
- **Scope:** Full Zoho One implementation + Custom Customer Portal
- **Goal:** Reduce admin overhead, unify data, improve customer experience, and support business scale

Where It Started

When I first engaged with this telco client, they were growing fast — but their systems were stuck in survival mode.

They were using disconnected tools, working across silos, and relying heavily on manual processes to manage sales, provisioning, support, billing, and account management. Every new customer added more admin, more delays, and more stress.

Some of the issues they were facing:

- Sales and support teams were duplicating effort across tools
- Quoting and onboarding involved multiple handovers and delays
- Customers had no visibility — even for simple things like ticket tracking or current services
- The credit approval process was manual and error-prone
- Their operations lacked clear, real-time reporting

They needed more than a system upgrade — they needed a full operational rethink.



What I Delivered

Over approximately 1,600 hours, I led the discovery, solution design, implementation, and testing of a fully integrated Zoho One system and a custom-built Customer Portal — designed from the ground up to match how the business actually worked.

I Started With Deep Discovery

I ran in-depth workshops across every business unit — sales, presales, provisioning, projects, support, and finance — to document what was working, what wasn't, and where automation could reduce friction.

This gave me the foundation to not only digitise their processes, but significantly improve and simplify them before a single line of code was written.

Key Systems I Implemented

- **Zoho CRM:** I built pipelines for product-based sales, added custom modules for Sites and Subscriptions, and automated pre-sales tasking.
- **Zoho Desk:** I implemented a three-tier support system integrated with the customer portal, with escalation logic and time-based SLAs.
- **Zoho Projects:** I set up project templates that could auto-generate provisioning steps based on product type and customer configuration.
- **Zoho WorkDrive & Sign:** I automated document generation and signature capture for quotes, contracts, and onboarding docs.
- **Zoho Subscriptions & Books:** I linked these to drive recurring billing workflows and automate renewals and invoices.
- **Zoho Analytics:** I designed real-time dashboards for sales, provisioning, churn indicators, customer satisfaction, and support team load.

Building the Customer Portal

One of the most impactful components of the project was the **customer portal**, which I designed and built to:

- Show each customer their current services, grouped by site
- Allow them to log and track support tickets directly
- Provide access to invoices and payment history



- Deliver outage notifications for their region or service
- Manage user permissions securely

This eliminated countless support calls and gave customers the control they'd been asking for.

The Impact

Here's what changed once the platform went live:

Area	Before	After	Result
Sales Cycle	~21 days	~9 days	>55% faster
Admin per Sale	3–4 hrs	<1 hr	~75% less admin
Project Setup	1.5 hrs	10 mins	>85% faster
Support Response Time	~2.1 days	<0.9 days	57% faster
Rework / Errors	~30%	<5%	>80% improvement
Support Capacity	Maxed out	Doubled	2x team throughput

I also saw a major improvement in client satisfaction and internal morale — because teams weren't wasting time on things that should have been automated.

Why It Worked

This project was successful because I took the time to deeply understand how the business functioned, not just what tools they were using.

- I reused proven automation patterns and over 2,600 scripts from my Deluge code library
- I worked closely with each team to ensure the system fit their actual workflow



- I focused on *right-first-time delivery*, so rework was almost non-existent
- I built every component with scale in mind, so they could grow without tech debt

It was a big build, but one that delivered real and measurable ROI — in speed, efficiency, and customer experience.

- Ran a deep discovery phase to align systems with actual business processes
- Reused automation assets from my 2,600+ script code library to speed up delivery
- Focused on eliminating rework through “right-first-time” delivery
- Built every component — CRM, portal, automation — with future scale in mind

This transformation laid the foundation for sustainable growth and gave the business the tools it needed to scale without chaos.

Case Study: Digitising Operations for a National Consulting Firm

Project Snapshot

- **Industry:** Professional Services (Leadership & Culture Consulting)
- **My Role:** Lead Consultant & Solutions Architect
- **Duration:** ~1,200 hours
- **Scope:** Full Zoho One implementation, Scheduling Automation, CRM Setup, Workflow Automation
- **Goal:** Eliminate admin bottlenecks, automate consultant scheduling, and unify service delivery processes

Where It Started

When I first engaged with this consulting firm, they had a fantastic client offering — but behind the scenes, operations were heavily manual and highly fragmented - "process Spaghetti". They were relying on a mix of tools like Outlook, Excel, OnePageCRM, Formstack, and SurveyMonkey to manage scheduling, proposals, delivery, and follow-up.

The scheduling process alone was eating up over 180 days of staff time annually. Proposal generation was inconsistent. Key revenue data lived in individual inboxes. Variations in project scope weren't tracked properly. Nearly every touchpoint involved manual handling, which introduced risk, delay, and duplicated effort.

They weren't just looking for a system — they needed an operational overhaul that would scale.

What I Delivered

Across ~1,200 hours, I designed and implemented a fully integrated solution using Zoho One, tailored to match the firm's real-world processes rather than forcing a rigid framework.

I Started With Deep Discovery

I worked with every stakeholder — sales, delivery, finance, operations — to map current

workflows, identify duplication and delays, and design a smarter way of working that aligned with how the team actually delivered value to their clients.

Key Systems I Implemented

- **Zoho CRM:** I replaced OnePageCRM with a tailored CRM, including deal tracking, client segmentation, and proposal generation templates.
- **Zoho Projects:** I set up templated delivery plans for recurring services, with automatic task assignments.
- **Zoho Bookings & Calendar Integration:** I built a scheduling automation engine that pulled consultant availability and allowed smart session allocation.
- **Zoho WorkDrive & Sign:** I enabled contract generation and electronic signature processes tied directly to CRM workflows.
- **Zoho Analytics:** I configured dashboards to track revenue, utilisation, project health, and consultant availability.
- **Zoho Forms & Campaigns:** I consolidated feedback loops and customer comms previously scattered across SurveyMonkey and Mailchimp.

The Impact

Here's what changed once the new platform went live:

Area	Before	After	Result
Sales Cycle	~18 days	~7 days	>60% faster
Admin per Sale	~2.5 hrs	~30 mins	~80% reduction
Project Setup	1 hr	12 mins	>80% faster
Consultant Scheduling	~4 back-and-forths	0 (self-serve)	100% automated
Proposal Turnaround	2–3 days	~1 hour	>90% faster
Reporting Time	6–8 hrs/month	1 hr/month	~85% time saved



On top of the numbers, I saw a huge boost in team morale. With manual scheduling and admin work automated, staff could focus on their real strengths — delivering workshops, building relationships, and scaling impact.

Why It Worked

This wasn't just a system swap — it was a real transformation of how the business operated:

- I ran a deep discovery phase to align systems with actual business processes
- I reused automation patterns from my library of 2,600+ Deluge scripts, speeding up build time
- I focused on *right-first-time* delivery, which meant minimal rework
- I built the solution with future growth in mind — scalable, repeatable, and easy to maintain

By simplifying operations and embedding automation into every stage of service delivery, the business is now set up to scale efficiently — without needing to scale headcount at the same rate.

Code Samples

Code Example: Auto-Generate and Send Proposals for E-Signing from a Deal Record

What it Does

This automation generates a customised proposal document directly from a CRM deal. It pre-fills client name, project details, and pricing into a branded proposal template, then sends it to the customer for e-signature — all triggered with a single click.

Business Benefit

- Reduces proposal turnaround time from hours to minutes
- Eliminates formatting inconsistencies and human error
- Ensures compliance with pricing and brand standards
- Increases win rate by accelerating the deal cycle
- Fully traceable and auditable via integrated e-sign platform

This solution is ideal for high-velocity sales environments or any business looking to improve professionalism and speed in client proposals.



Code Example: Automated Consultant Scheduling Based on Availability and Skill Match

What it Does

This automation matches session requests (e.g. training or delivery) with available consultants based on required skills and calendar availability. It automatically assigns the right resource, updates the CRM record, and notifies the consultant via email — no human intervention required.

Business Benefit

- Eliminates manual scheduling effort and back-and-forth emails
- Ensures sessions are staffed with appropriately skilled consultants
- Prevents double-bookings and capacity conflicts
- Enables fast, confident client confirmations
- Scales seamlessly across large delivery teams and recurring engagements

It's particularly effective for service businesses juggling multiple team members, complex availability, and skill-based allocations.



Code Sample: Post-Session Automation: Feedback, Timesheet, and Invoice Trigger

What it Does

Once a client session is marked as completed, this automation handles all the necessary follow-up tasks. It sends a feedback survey to the client, logs the consultant's hours in a timesheet record, and generates an invoice in the finance system — instantly and reliably.

Business Benefit

- Reduces admin workload by automating repetitive tasks
- Speeds up billing by ensuring invoices are triggered without delay
- Ensures consistent post-session processes, improving client experience
- Encourages faster timesheet compliance
- Closes the loop between delivery and revenue recognition

Ideal for businesses running workshops, coaching, consulting, or service-based programs — this ensures every session is closed off properly and profitably.



Code Sample: Dynamic Workflow Routing Based on Deal Value and Type

What it Does

This automation intelligently routes deals through different workflows based on value thresholds, product type, or industry. For example, high-value or strategic deals may require approvals, additional documentation, or multi-departmental collaboration — while low-value or standardised products follow a fast-track process.

Business Benefit

- Reduces complexity by matching the workflow to the actual deal type
- Speeds up processing of low-risk, low-value deals
- Ensures compliance and due diligence for strategic accounts
- Improves forecasting accuracy by surfacing relevant data at the right time
- Increases user adoption by keeping CRM screens clean and relevant

This approach is especially useful in sales teams juggling varied pipelines — such as SaaS, professional services, or licensing.

Code Sample: Automated AI-Powered Email Summarisation into CRM Notes

What it Does

When a customer sends an email to a shared inbox (e.g. support@ or sales@), this automation uses an AI model to summarise the email content and log it as a note in the relevant CRM record. If no match exists, it creates a lead and assigns it to the appropriate team.

Business Benefit

- Saves hours of manual email review and CRM data entry
- Ensures no communication is lost or overlooked
- Provides quick visibility into client sentiment and urgency
- Enables future automation by structuring unstructured email content
- Strengthens accountability and handovers in shared inbox environments

Particularly valuable in support-heavy industries, large account teams, or any business receiving frequent inbound enquiries.



Code Sample: Multi-System Subscription Management with Proration Logic

What it Does

This automation manages recurring subscriptions across Zoho Subscriptions, CRM, and the finance system. It handles upgrades, downgrades, start/stop mid-cycle changes, and calculates proration dynamically — then pushes the correct figures into invoices, reporting, and renewal reminders.

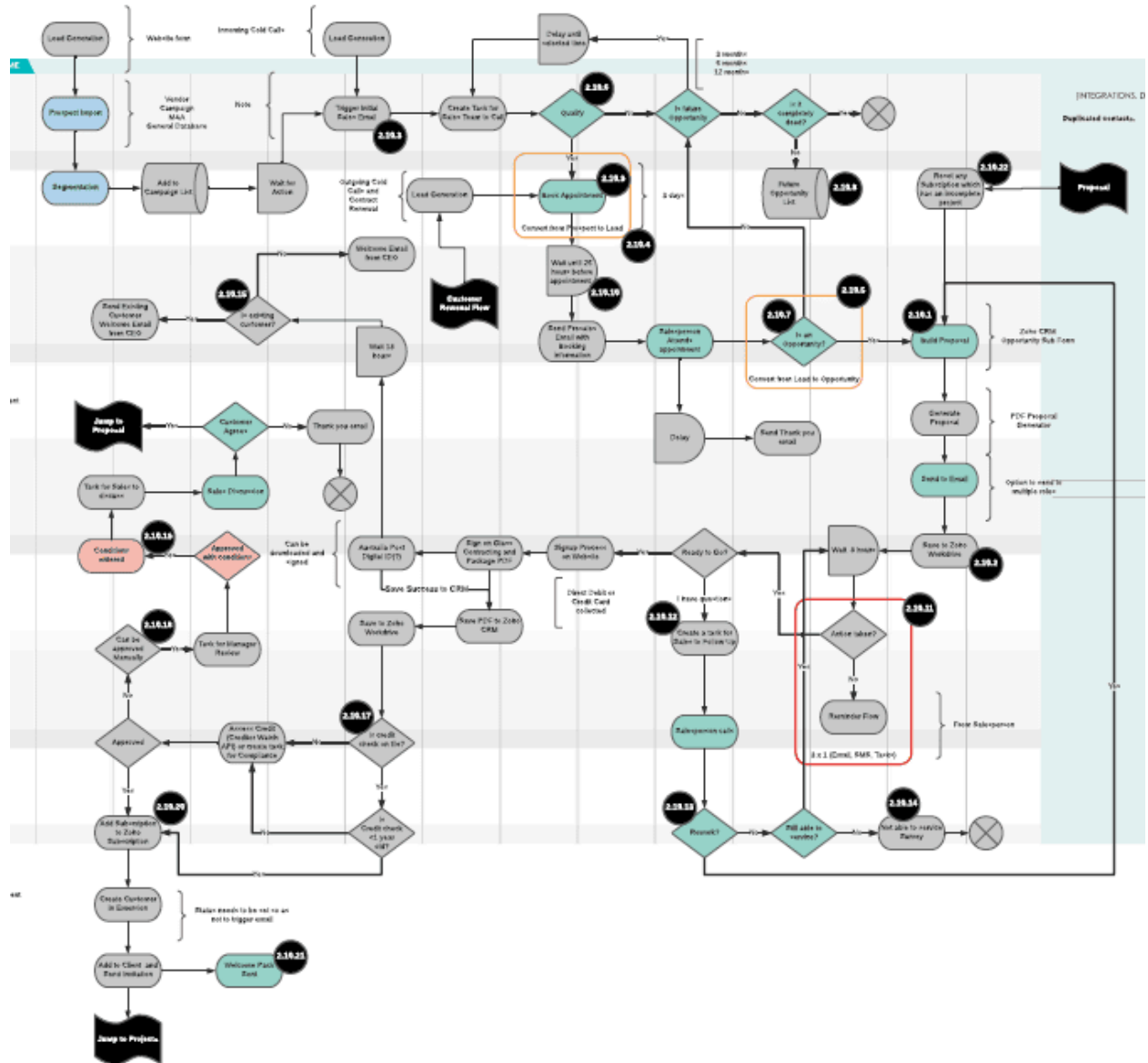
Business Benefit

- Reduces friction in complex billing cycles (monthly, quarterly, annual)
- Eliminates manual adjustments or credit notes
- Ensures invoices match exactly what the customer is using
- Supports customer flexibility without risking revenue leakage
- Provides clear subscription history for reporting and forecasting

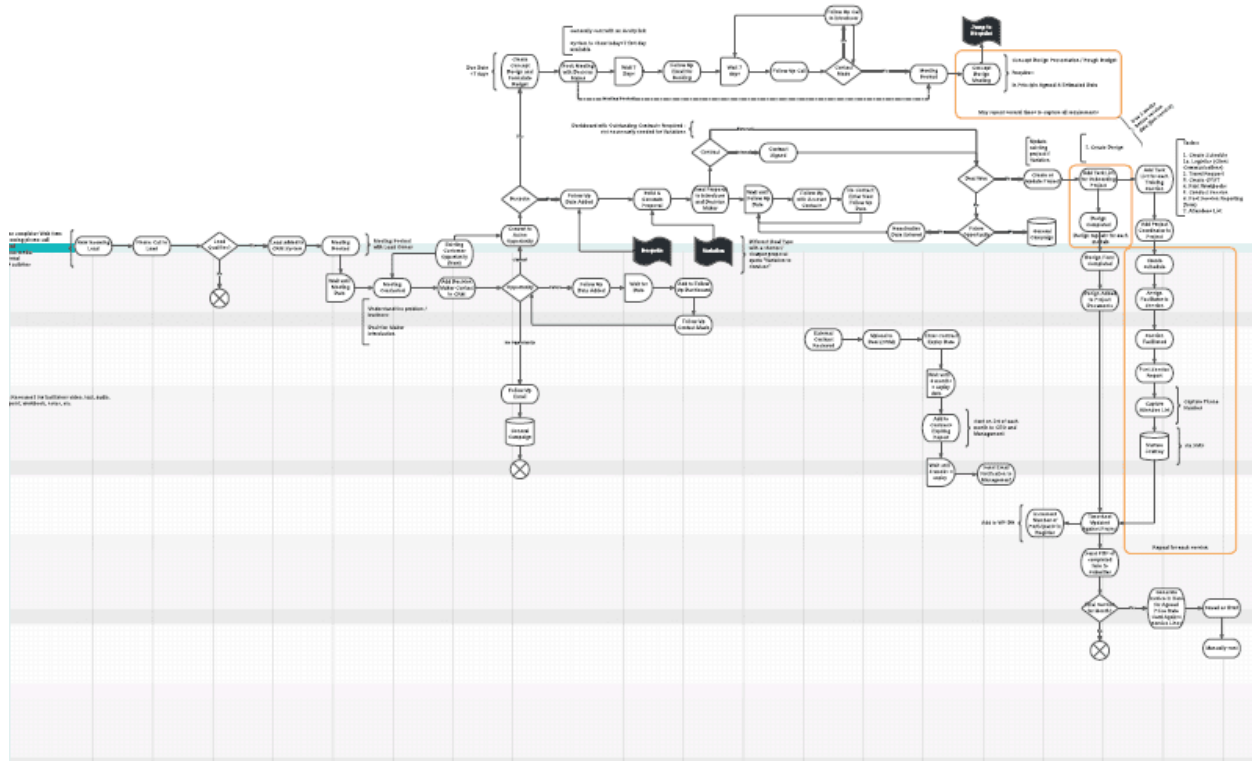
Ideal for SaaS platforms, licensing businesses, and membership-based services.

Process Discovery Work Samples

Process Discovery: Telecommunications Company



Process Discovery: Consulting Company



Book Session

Booking New <TrainingType> Session

Preferred Start Date

1/1/10

Number of Consecutive Days

4

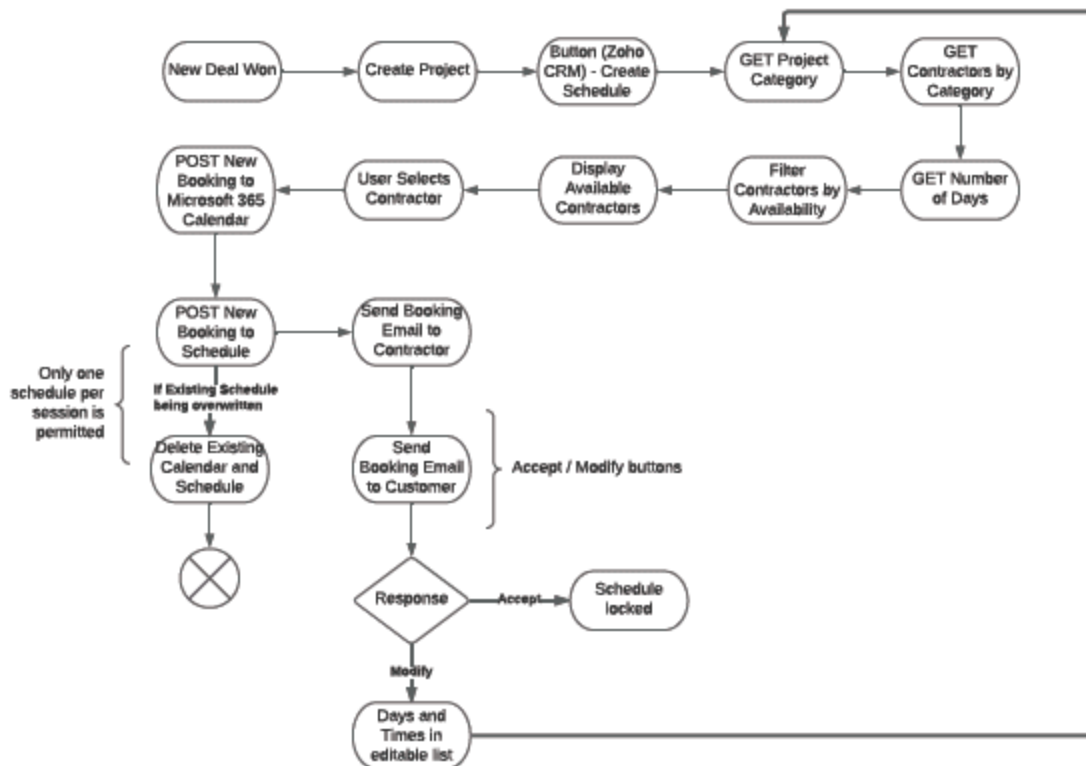
Available Consultants

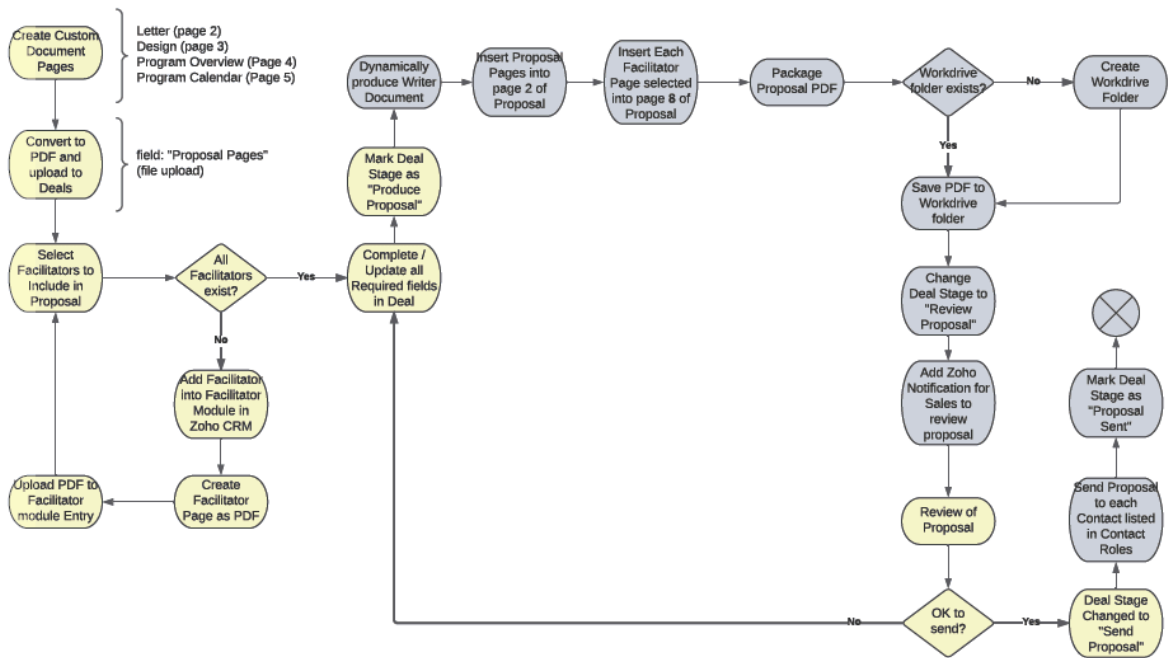
Nico Smith

Murphy Jones

Robert Smith

Book Now





Testimonials

Tim Alice

I worked with Adam on the delivery of CommBank's chatbot, Ceba.

Adam managed the rollout on behalf of Nuance who were the company providing the underlying engine.

The team and I enjoyed working with Adam. We particularly appreciated his commitment, openness and willingness to collaborate closely. He brought great structure to our interactions and I found him to be proactive and very engaged.

He was an affable presence around the office and was more than happy to assist with anything we required. He was key to us delivering our most recent feature on Ceba!

Louise Dawson

Thanks Adam for the discovery workshop today. Feeling really excited to transform my business like never before. You were able to quickly identify the gaps in the business and create a very positive pathway moving forward very excited to experience the execution feeling very confident with your skill set and all that you bring to the table.
thank you

Esther James

Adam's extraordinary interpersonal skills almost outshine his analytical and business process mapping skills. His ability to interpret clear and efficient pathways (at blistering



speeds) from granular, vague or complex information provided to him is seriously enviable. Very highly recommended.

Harry Turner

Adam has been great through the design and build process of our new platform. Key for me is his willingness to challenge our assumptions and processes rather than just doing what we say. In my view always leads to a better outcome. Communicated well throughout the process, has been clear about how we best move forward when the inevitable challenges occur. Highly recommended.

Keertana Ravi

I worked with Adam on a chat bot pilot project for a NFP. Adam was excellent at analysing exactly what we as an organisation needed, and helped us develop a product that met our objectives. He was very good at explaining complex topics around artificial intelligence, and had regular checkins to make sure the work was tracking well, and that we were all on the same page. He is also very personable and was great to work with.



Let's Chat

I'm available on 0400077222 or via email to adam@adamwinchester.com for a confidential discussion.