



Case Study



# How a custom lead-to-invoice solution built on Zoho increased productivity, customer retention, and growth at ABA

## About ABA

Founded in Knoxville, Tennessee in 2011, Accountants and Business Advisors, LLC (ABA) provides business advisory services for short- and long-term financial planning. ABA consistently achieves 10–15% in organic growth year-on-year, largely due to their successful word-of-mouth referral program within their target industry segment of physicians, dentists, veterinarians, and small businesses.

## Solution summary

Siloed data and a reliance on manual workflows was stifling growth for ABA Advisors. ABA implemented a custom Zoho solution that integrated a CRM with automated project management, invoicing, and BI solutions and has seen dramatic improvements in productivity, customer retention, and growth.

*The time saved using Zoho is incalculable. We are able to perform functions and communicate with clients at a scale and frequency never before possible.*

Robert Craig,  
COO, ABA Advisors

**100%**  
adoption

**70%**  
increase in service quality

**150%**  
increase in productivity

# The Challenge

Accountants and Business Advisors (ABA) was running on outdated accounting software that did not have the functionality required to handle ABA's unique business model. A particular challenge was finding the right billing solution for both recurring and one-off service fees. The result was time-consuming, manual workflows, particularly for practice management processes, like billing and project tracking. Siloed systems and internal communication issues also caused project delays and a lack of external visibility for clients.



***We were really siloed and restricted in growth. We were growing, but we had a larger and larger number of clients we couldn't serve efficiently. That's the problem Zoho solved for us.***

**Robert Craig,**  
COO, ABA Advisors

These issues impacted both the speed and accuracy of the services ABA could provide, which led to churn increasing almost as fast as growth. ABA needed a software solution that would:

- 1 Address internal and customer-facing communication gaps**
- 2 Reduce manual workloads through automation**
- 3 Enable frictionless handoffs throughout the entire client life cycle**
- 4 Adapt flexibly to their business processes, rather than requiring ABA's processes to fit the software**

# The Solution

With the help of specialized Zoho implementation partners, ABA built a custom CRM, project management, and invoicing system on top of Zoho's ecosystem. Cross-app automations, third-party integrations, and custom low-code apps now deliver a smooth, seamless user experience incorporating all business processes from lead to invoice.

## Solution highlights:

- ✔ Automated tasks and alerts in CRM to streamline lead conversion and catch issues, missing details, or delays before they can impact the end customer
- ✔ Automated the billing process for completed projects, cutting the monthly billing cycle by 2 weeks, and leveraging Zoho Subscriptions for recurring revenue
- ✔ Automated project creation and assignment with detailed emails pulling key data from the system, closing internal information gaps
- ✔ Centralized data and embedded custom Analytics dashboards, streamlining data sharing and providing increased visibility into project timelines and workloads
- ✔ Launched a CRM customer portal to enable clients to check and update their information, upload financial documents, download tax returns and cash flow statements, and e-sign paperwork

***One of the things we were looking for is flexibility. We were able to get very granular with the level and number of custom fields to make sure we're really addressing their specific financial needs."***

**Robert Craig,**  
COO, ABA Advisors

## Benefits and ROI

The Zoho implementation has improved hundreds of processes across the company, freeing up time to focus on strategic initiatives to prepare for further growth. Better tracking systems and data centralization within the company have greatly improved ABA's service quality and accuracy, with customer experience and retention going up and the number of issues caused by miscommunications going down. Advisors can now take on a more proactive role in advising clients, even while managing a higher client load.

Since starting its digital transformation, ABA has seen:

**5X**

increase in  
customer base

**37.5%**

revenue  
increased

**150%**

increase in  
productivity

**70%**

increase in  
service quality



*Now, we're truly set up for the next 10 years of growth.*

*We're focused on the future, not trying to fix immediate pain points.*

**Robert Craig,**  
COO, ABA Advisors

Now the system is in place, ABA's next goal is to develop its BI capabilities for more data-driven strategic decision-making. The plan is to build an executive dashboard in Analytics, breaking down how each service package is performing, and offering future projections.

Zoho offers a suite of intelligent enterprise business software, including an award winning CRM suite, the industry's only comprehensive analytics and BI platform, and a powerful low-code development ecosystem.

Visit [zoho.com/enterprise](https://zoho.com/enterprise) to learn more about our offerings for larger organizations.