



Harbor Industries – Case Study: Unifying Retail Operations with the Zoho Ecosystem

Executive Summary

Harbor Industries, a Michigan-based retail solutions manufacturer, delivers end-to-end merchandising and engagement tools across four specialties: Custom Retail, Convenience Fixtures, Digital Solutions, and Casework. With over 75 years of experience and a global client base, Harbor needed a digital infrastructure capable of supporting its complex, multi-faceted business model.

The company faced challenges common to growing enterprises: fragmented data, manual data entry, and limited reporting across customer service, sales, and marketing teams. Their systems were disconnected, leading to delayed approvals and inconsistent communication.

Harbor Industries partnered with Cornerstone Solutions to implement and customize a unified **Zoho Ecosystem**, integrating **Zoho CRM, Zoho Desk, Zoho Projects, Zoho Campaigns, and Zoho Analytics** to centralize data, automate critical workflows, and provide executive-level visibility.

The Challenge

Before partnering with Cornerstone Solutions, Harbor's operational efficiency was hindered by several disconnected systems and manual processes:

1. **Fragmented Customer Service and IT Support:** Customer and internal IT requests were managed across siloed systems, resulting in long resolution times and a lack of data consolidation with sales records.
2. **Inefficient Sales and Engineering Workflows:** The critical **RRF** process—required for new or custom engineering work—involved manual approval routing and unique ID tracking, slowing down the deal-to-project handover. Sales data, such as the crucial **IFS Customer Number**, had to be manually synchronized between Company and Deal records.
3. **Limited Marketing Automation:** Marketing efforts lacked alignment with CRM data. Contact segmentation was cumbersome, domain authentication was incomplete, and there

was no mechanism to easily track prospect engagement journeys from campaigns back into the CRM.

4. **Lack of Executive Insight:** Leadership required real-time visibility into sales velocity, deal movement, and forecasting accuracy (e.g., comparing "yesterday's" forecast versus "today's") but relied on static, outdated reports.

Implementation

Cornerstone Solutions executed a phased implementation focused on custom development, system integration, and advanced reporting across the Zoho platform.

Unified Data Foundation (Zoho CRM & Zoho Desk)

- **Zoho CRM Optimization:** The core system was enhanced with **custom functions** to automatically populate the **IFS Customer Number** from the Company record onto all related Deal records, ensuring data consistency and eliminating manual entry.
- **RRF Workflow Automation:** A new, custom-developed workflow was built to automate the **RRF approval process**. This workflow automatically generated and assigned a unique RRF number for each request associated with a deal, ensuring tracking integrity and sending immediate email notifications upon approval.
- **Zoho Desk for Service and IT: Zoho Desk** was implemented to centralize both **Customer Service** and **Internal IT Support (ITSM)** ticketing. This included building out a self-service Help Center and defining a clear support architecture, enabling faster response times and improved ticket routing.

Marketing and Project Synergy (Zoho Campaigns & Zoho Projects)

- **Zoho Campaigns Integration: Zoho Campaigns** was fully configured and integrated with CRM. This involved **domain authentication** and setting up the **CRM-to-Campaigns bridge** to ensure lead mapping and list alignment were seamless. Marketing teams gained the ability to:
 - Use website forms to automatically create leads in the CRM.
 - Connect calendar links and tracking within email campaigns to measure prospect engagement.
- **Zoho Projects Configuration: Zoho Projects** was configured to support engineering and marketing workflows. Project templates were created with predefined milestone tracking, allowing for the automatic conversion of approved Deals/RRFs into active Projects and ensuring the sales and service teams had visibility into project progress.

Strategic Reporting (Zoho Analytics)

- **Custom Dashboards: Zoho Analytics** was implemented to provide executives with live, dynamic dashboards. Custom reports were developed to track changes in critical sales metrics, allowing management to compare **forecast metrics, closing dates, and amounts** over time ("yesterday vs. today") and enabling better decision-making and sales coaching.

Results

Harbor Industries now operates on a cohesive, centralized Zoho ecosystem that supports end-to-end retail solutions delivery, from initial lead capture to final service resolution.

Key Outcome	Impact Metric	Zoho Application(s)
Operational Efficiency	100% reduction in manual RRF tracking and IFS Customer Number data entry.	CRM, Projects, Desk
Sales Velocity	Faster RRF approval and unique ID generation streamlined the deal-to-project handover.	CRM, Projects
Customer Experience	Centralized ticketing and CRM data access led to faster response times for customer service and internal IT requests.	Desk, CRM
Marketing Effectiveness	Seamless lead mapping and domain authentication provided accurate tracking of campaign engagement and prospect journeys.	Campaigns, CRM
Strategic Insight	Live dashboards provided immediate visibility into sales forecasting accuracy and deal pipeline changes.	Analytics

With Zoho, Harbor Industries transformed siloed departmental operations into a fluid, automated process, empowering their teams to focus on strategic initiatives and maintaining their industry leadership.

About Harbor Industries

Harbor Industries delivers end-to-end retail solutions through four specialties: Custom Retail, Convenience Fixtures, Digital Solutions, and Casework.² Recognized as one of West Michigan's Best and Brightest Companies to Work For, Harbor fosters a culture of innovation and empowerment.

About Cornerstone Solutions

Cornerstone Solutions is a Zoho Partner and Advanced Solutions Provider, specializing in comprehensive Zoho implementation for growing businesses. Cornerstone offers deep expertise in automation, data migration, and user adoption strategies.