



Sarah O Jewelry – Case Study

Executive Summary

Sarah O Jewelry is a Denver-based fine jewelry brand specializing in custom designs, engagement rings, and handcrafted pieces. Known for their modern, artistic approach to jewelry design, Sarah O has grown rapidly both in-store and online. With multiple sales channels—including retail locations, e-commerce, and custom design consultations—they needed a unified system to track complex sales processes, streamline integrations, and improve visibility across their business operations.

The Challenge

Before partnering with Cornerstone Solutions, Sarah O Jewelry faced difficulties managing multiple sales pipelines and synchronizing data across various platforms. Their business relied on a combination of systems—including **Lightspeed** for point of sale, **Shopify** for online sales, and **Klaviyo** for marketing automation—all of which operated independently. This led to duplicate data, inefficient workflows, and limited visibility into customer interactions and order statuses.

Sarah O sought a solution that would:

- Unify their in-store, online, and custom sales processes.
- Integrate CRM data with Lightspeed, Shopify, and Klaviyo.
- Automate reporting, lead tracking, and customer communication.
- Provide actionable analytics to improve sales efficiency and customer engagement.

Implementation

Multi-Pipeline CRM Configuration

Cornerstone Solutions restructured Sarah O's **Zoho CRM** to accommodate multiple pipelines—including Custom Design, Special Order, and Case Sales. Each pipeline featured its own set of deal stages and automated workflows, enabling sales associates to track unique customer journeys from initial consultation to final delivery. Contact and deal ownership automation ensured accuracy and accountability across the team.

Lightspeed and Shopify Integrations

Through a series of custom **API functions and Zoho Flow automations**, the Cornerstone team synchronized key data between Zoho CRM, Lightspeed POS, and Shopify. These integrations allowed for automatic updates of deal records, product SKUs, and sales information. Special attention was given to **work order tracking, inventory management, and automated invoicing** based on transaction type.

Klaviyo and Marketing Automation

To enhance Sarah O's marketing capabilities, Cornerstone implemented a **bidirectional integration between Zoho CRM and Klaviyo**. This connection allowed customer profiles, email preferences, and subscription statuses to stay synchronized across platforms. Custom Flows were developed to manage **email and SMS consent tracking, unsubscribe handling, and automated profile updates**, ensuring compliance and improved marketing accuracy.

Workflow Automation and Custom Functions

Dozens of **custom workflows** were deployed to automate repetitive tasks, including deal creation from Acuity appointments, email notifications for post-purchase surveys, and invoice tracking. Functions were built to handle advanced operations such as updating contact owners, calculating stage durations, appending product SKUs, and moving attachments between related records.

Analytics and Dashboards

Cornerstone developed a suite of **Zoho Analytics dashboards** that combined data from CRM, Lightspeed, and surveys. Custom SQL queries were written to track metrics such as **average deal stage duration, conversion rates by location, and customer satisfaction scores**. These dashboards gave Sarah O's leadership real-time visibility into business performance and team efficiency.

Training and Ongoing Support

Cornerstone provided weekly strategy and development meetings, ensuring that Sarah O's staff received hands-on guidance throughout each phase. Training sessions focused on CRM adoption, form usage, and best practices for managing leads, deals, and customer communication across integrated platforms.

Results

The implementation of Zoho CRM and its integrations with Lightspeed, Shopify, and Klaviyo transformed Sarah O Jewelry's operational efficiency. The company now has a **unified view of its sales pipelines**, improved data accuracy, and seamless synchronization between systems. Automated workflows reduced manual data entry, while real-time analytics empowered leadership to make informed decisions.

Since implementation, Sarah O has seen:

- **Significant time savings** in managing multi-channel sales data.
- **Improved accuracy** in customer records and order tracking.
- **Streamlined reporting**, with a single dashboard for key performance metrics.
- **Enhanced customer engagement** through automated surveys and marketing syncs.

Overall, Sarah O Jewelry gained the clarity, automation, and system alignment needed to scale their growing business with confidence.