D3UC – Case Study

Executive Summary

D3 Unified Communications (D3UC) is a veteran-owned, white-label UCaaS provider that empowers Managed Service Providers (MSPs) to grow their monthly recurring revenue. While their service model was robust, their internal operations were stifled by disconnected systems and manual workflows. Critical financial processes relied on error-prone spreadsheets, and marketing efforts lacked the data visibility needed to identify high-value targets. Partnering with Cornerstone Solutions, D3UC transformed its operations by centralizing billing, automating profit calculations, and implementing an intelligence-driven marketing ecosystem within Zoho One.

The Challenge

Before partnering with Cornerstone Solutions, D3UC's team was losing days each month to manual data entry and "swivel-chair" management across disparate platforms like QuickBooks, MailChimp, and Excel. Invoicing was a massive bottleneck; it required cross-referencing multiple spreadsheets (such as the "Pricing Generator") to calculate commissions and split profits with their MSP partners—a process that was both time-consuming and vulnerable to human error.

On the marketing side, the team struggled with a manual prospect list that offered zero insight into engagement or ROI. They had no way to track the effectiveness of their campaigns or identify which leads were actively visiting their site.

Their main objectives were to:

- **Eliminate manual invoicing:** Automate the monthly billing cycle and commission calculations within Zoho Books.
- **Centralize Financial Data:** Replace Excel-based profit calculations with automated, real-time reporting.
- **Gain Marketing Visibility:** Integrate Zoho SalesIQ and Marketing Automation to identify and track high-value sales targets.
- **Streamline Operations:** Move from a fragmented software stack to a unified Zoho One environment.

Implementation

Automated Financial Operations Cornerstone Solutions engineered a custom pricing engine within Zoho CRM to replace the legacy "Pricing Generator" spreadsheets. This new module captures complex pricing tiers and MSP-specific profit margins automatically.

By leveraging the Zoho Books API, Cornerstone created a "one-click" invoicing system. A custom function was built to recursively generate customer invoices in batches, pulling pricing directly from the CRM account records. This process also automated the calculation of MSP commissions, ensuring that financial data—including profit splits—was always synchronized and accurate without manual intervention.

Intelligence-Driven Marketing To solve the "blind" marketing issue, Cornerstone integrated Zoho SalesIQ with the CRM and Marketing Automation platforms. The team implemented advanced lead scoring rules that tracked website behavior, allowing D3UC to distinguish between casual browsers and serious prospects.

The prospect list was migrated into a dynamic CRM environment where marketing journeys were automated. Cornerstone configured the system to track engagement metrics—such as email opens and page visits—and feed that data back to the sales team in real time, enabling them to target leads with higher engagement scores.

Results

The transition to a unified Zoho One environment fundamentally changed D3UC's operational efficiency. What previously took the finance team several days of stressful manual calculation is now accomplished with automated precision.

Key outcomes include:

- **Time Savings:** Automated the monthly invoicing process, saving the team several days of manual work every billing cycle.
- **Financial Accuracy:** Automated profit and commission reporting eliminated the risk of errors inherent in manual spreadsheet calculations.
- **Marketing Effectiveness:** SalesIQ integration provided clear visibility into campaign performance, allowing the team to identify which marketing efforts were actually driving revenue.
- **Targeted Sales Intelligence:** Lead scoring enabled the sales team to focus strictly on high-engagement targets, filtering out low-quality leads and increasing efficiency.

D3UC now operates with a scalable financial engine and a transparent marketing pipeline, allowing them to focus on growing their MSP network rather than managing paperwork.