

ELOQUENT



Unlocking Growth: Case Studies in CRM, ERP, and Fractional CTO Services

An introductory overview of case studies demonstrating the transformative impact of CRM, ERP, and Fractional CTO services across diverse industries.



Orion Investigations: Modernizing a Legacy Case Management System

Orion Investigations, a risk and claims services company, transformed its outdated in-house case management platform into a cloud-based CRM system, improving efficiency and client transparency.

Altura Leasing Group: Proposal Automation and Sales CRM Integration

EQUIPMENT FINANCING FIRM

Altura Leasing Group provides equipment leasing and financing solutions to businesses.

LEGACY SALES PROCESS

Altura Leasing Group's sales team was drowning in manual steps, using PDF attachments, scattered folders, and struggling to track proposal status.

CRM-INTEGRATED PROPOSAL PORTAL

Altura Leasing Group implemented a streamlined sales process inside a new CRM system, connected to a custom proposal portal with automated document generation, e-signature capability, and status tracking.

OUTCOMES

- 60% faster proposal lifecycle - Accurate pipeline forecasting via CRM reporting - Reduced document errors and enhanced compliance - Happier sales reps and clients

Nova Health Insights: Compliance-Driven Architecture for Sensitive Data



SEPARATION OF ENVIRONMENTS

Executed a clean separation of environments - one for Research, one for Client Services, and one for Admin.



AUDIT LOGS AND ALERTS

Implemented audit logs and automated alerts to monitor for any data access violations.



ROLE-BASED ACCESS CONTROLS

Implemented role-based access controls down to the field level to ensure data remained in the right hands.



ACHIEVED HIPAA COMPLIANCE

Ensured the implementation met all HIPAA-aligned controls, earning internal audit clearance.

BY RESTRUCTURING ITS DATA ENVIRONMENTS AND IMPLEMENTING ROBUST SECURITY CONTROLS, NOVA HEALTH INSIGHTS WAS ABLE TO SAFEGUARD SENSITIVE HEALTHCARE DATA, ACHIEVE HIPAA COMPLIANCE, AND PROVIDE PEACE OF MIND TO EXECUTIVES, COMPLIANCE OFFICERS, AND CLIENTS.

Solvara Systems: Empowering Training and Compliance with CRM

SOLVARA SYSTEMS' CHALLENGES

With a growing national workforce, Solvara Systems needed a better way to ensure employees completed their training - both at hire and on a recurring basis. Their spreadsheet-driven system left too much room for error, especially in regulated roles.

IMPLEMENTING A CRM-POWERED TRAINING PORTAL

We developed a front-end training portal connected to CRM logic on the back end. Each employee's progress could be tracked, with automatic reminders and escalation workflows for overdue items. Managers could log in and instantly see where their teams stood.

OUTCOMES

- 100% onboarding compliance within the first 7 days
- Reduced HR team workload by 30%
- Increased accountability among employees and managers
- Real-time dashboards for leadership oversight

Ventura Equity Partners: ERP Rollout for a Multi-Brand Portfolio

Metrics showing the impact of the ERP implementation across Ventura Equity Partners' portfolio

70%

INVENTORY ACCURACY

100%

**COGS REPORTING
STANDARDIZATION**

100%

**P&L REPORTING
STANDARDIZATION**

90%

**SHARED ECOMMERCE
FULFILLMENT READINESS**

Volterra Energy: Scaling with ERP – From QuickBooks to an Enterprise Backbone

1. REPLACED QUICKBOOKS WITH AN ERP

Handled complex order management and revenue recognition

2. AUTOMATED WARRANTY TRACKING AND SERVICE SCHEDULING

For industrial customers

3. GAINED REAL-TIME VISIBILITY INTO INVENTORY LEVELS

Across warehouses

4. REDUCED MANUAL RECONCILIATION TIME BY 80%

In accounting

5. POSITIONED THE COMPANY FOR ITS NEXT FUNDING ROUND

With investor-ready financial reporting

Unlocking Growth: Case Studies in CRM, ERP, and Fractional CTO Services

The case studies presented demonstrate the transformative power of CRM, ERP, and Fractional CTO services in driving operational efficiency, enhancing compliance, and positioning organizations for sustainable growth. By leveraging these technologies and expertise, companies across diverse industries have been able to modernize their systems, optimize workflows, and gain real-time visibility into their operations - ultimately unlocking new opportunities for success.

