NODE & NINE + Ti SALES

ZOHO PARTNER + CUSTOMER CASE STUDY

Built for the Road: How Ti-SALES Implemented a CRM Its Outside Sales Team Actually Uses

Water & Wastewater Equipment Distribution · Sudbury, MA · 49 Employees

Zoho Advanced Partner Node9 layered Zoho CRM on top of the Microsoft Dynamics GP and SalesPad systems Ti-SALES kept by design. The result is 100% adoption across sales and one account record every department can share.

THE CHALLENGE

This system continues to work well for Ti-SALES' back office; however, there was no system in place for outside sales managers to log and maintain customer records. As Node9's Statement of Work points out, sales, quoting, and order-management processes for Ti-SALES were fragmented and spreadsheet-driven.

THE SOLUTION

Alongside the standard Leads, Contacts, Accounts, and Deals, Node9 built custom modules for Orders, Invoices, Quotes, Shipments, Returns, and RMAs—so Dynamics GP transaction data is visible to salespeople who never open the ERP. Zoho CRM mobile's check-in button—one tap to log an account visit—became the deciding factor in a choosing Zoho over HubSpot and Salesforce.

THE RESULT

What changed is the exposure underneath it. That record used to depend on individual relationships living in individual heads, in a workforce moving through a retirement wave.

100%
ADOPTION ACROSS OUTSIDE SALES

17
OUTSIDE SALES TERRITORY MANAGERS

75%
OF STAFF USE A ZOHO PRODUCT

49
EMPLOYEES COMPANY-WIDE

63
YEARS IN BUSINESS

<1
ACCOUNTS LOST PER YEAR

Zoho One

KEY APPS USED

Zoho CRM · Zoho Desk · Zoho Analytics · Zoho Projects · Zoho Sign · Zoho Forms

Key Results

Before Zoho, Microsoft Dynamics GP and its SalesPad bolt-on handled products, pricing, quoting, orders, and invoices for Ti-SALES, and both stayed exactly where they were. What Zoho CRM added, built by Node9, was the layer the company had never had: a system its outside sales team would actually open, and behind it a single account record every other department could share.

The Business Outcome for Ti-SALES

- **Mandatory adoption across outside sales.** CRM use is required for Ti-SALES' 17 outside sales territory managers, written into everyone's quarterly and annual goals and tied directly to bonus.
- **Half to three-quarters of the company on Zoho.** Of Ti-SALES' 49 employees, Sales and Marketing Operations Manager Igor Alves estimates "over 50%" use a Zoho product regularly, while CFO Jeff Zammett puts that number around 75%.
- **A ticketing system where there had never been one.** Before Zoho Desk, Ti-SALES' support team logged customer calls by hand inside Basecamp, their project-management tool. There was no address a customer could email to have a ticket created and tracked.
- **Standard project documents down to one click.** Ti-SALES' Pro Tank Maintenance and Service group's health-and-safety-plan and task-order documents, previously assembled by hand for every new project, now generate from a Node9-built mail-merge template.
- **A visit cadence the system enforces itself.** Territory managers set a visit interval per account—every 90 days, for example—and Node9-built automations email them when a check-in hasn't been logged against it.
- **Account history that survives retirement.** Four or five territory managers have retired since go-live. What they knew about their accounts stayed behind in CRM instead of leaving with them.
- **A five-month implementation evolves into a lasting partnership.** Node9 signed the agreement on December 19, 2024, and the Statement of Work closes May 12, 2025. Node9 has been on a continuously renewed retainer ever since, through one implementation and roughly five smaller projects.

What the Node9 Implementation Delivered

- **Custom SalesPad transaction modules, inside CRM**. Alongside the standard Leads, Contacts, Accounts, and Deals, Node9 built custom modules for Orders, Invoices, Quotes, Shipments, Returns, and RMAs—so Dynamics GP transaction data is visible to salespeople who never open the ERP.
- **A three-party integration, not a rip-and-replace**. Ti-SALES' existing SalesPad developer wrote the code pushing data into CRM. Node9 designed the modules and fields it lands in, and built the outbound workflows, triggers, and webhooks that send CRM data back through Ti-SALES' middleware to SalesPad.
- **Hundreds of user-defined fields, mapped across**. Ti-SALES' SalesPad environment carries hundreds of unique user-defined fields per customer and per inventory item, all of which had to be reconciled against the new CRM schema.
- **A deciding mobile feature no competitor had.** Zoho CRM mobile's check-in button—one tap to log an account visit—became the deciding factor in a choosing Zoho over HubSpot and Salesforce. Node9 then built custom

visit-frequency reporting and automated overdue-visit alerts on top of the check-in data it generates.

- **Automated lead capture**. A "Contact Us" web form feeding Zoho CRM directly, replacing website inquiries that had no systematic routing.
- **Zoho Desk for the repair department**, with a Zoho Form customers use to submit repair requests straight into the ticket queue, plus the automations and notifications around it.
- **An integration to Ti-SALES' third-party work-order system**, pushing repair and maintenance jobs out of CRM and receiving status data back.
- **Security, email, and training scaffolding**. Manager and user security profiles, unused modules hidden and menus reorganized around the sales process, Microsoft Office 365 email sync with the Outlook CRM plugin, and Train-the-Trainer sessions for one to two internal subject-matter experts.

ABOUT TI-SALES

Ti-SALES was founded in 1963 and operates out of Sudbury, Massachusetts, distributing water meters, pumps, fluid-handling equipment, and metering projects—plus chemical feed pump repair and tank maintenance services—to water utilities, contractors, consultants, and resellers across New England and upstate New York. It runs three other business units alongside its core meter business, carries roughly 5,000 SKUs, and has 49 employees today, 16 of whom are outside sales territory managers.

The customer base is almost entirely municipal, and that shapes everything about how Ti-SALES sells. "We have a finite amount of customers," Jeff said. "We work with municipalities, and they're not really making any more of those." With no meaningful supply of new accounts, the company's central sales metric is not acquisition but retention—and the standard is absolute. "Our company edict and model for 63 years is we're not allowed to lose an account," Jeff said. "Our average is losing less than one account per year."

The commercial problem underneath all of this is timing. A municipality changes out its water meters roughly every twelve to fifteen years—a project worth millions—and in between those cycles Ti-SALES has to stay present. A customer that just installed a competitor's meters can still buy pipe, fire hydrants, washers, valves, pumps, or tank-cleaning services, and Ti-SALES' territory managers are trained to go find one of those every time they walk in.

> "I don't care if it's a pen or $100,000 worth of meters—sell them with the idea of selling them something, to keep that relationship, to keep the conversation going. So when they do look to do a large meter change-out for millions and millions of dollars, they still know who we are."
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> **Jeff Zammett, CFO, Ti-SALES**

That is a fifteen-year relationship campaign run across hundreds of accounts by seventeen people who are almost never at a desk. It is also, precisely, a CRM problem.

ZOHO IMPLEMENTATION PARTNER: NODE9

Node9 is a Zoho Advanced Partner founded and led by Dave Stauffer, who became a Zoho partner roughly nine years ago. He started a consulting business, needed software to run it, and picked Zoho after discovering his first client was running Zoho.

Today the firm is Zoho and nothing else. "My entire business is now Zoho and Zoho only," Dave said, "or at best it's integrating something else with Zoho." Node9 sees two kinds of client: one arrives with no back-office system at all and Node9 builds from a blank slate; the other is older, larger, already running an ERP, and needs a modern layer bolted on top. Ti-SALES is squarely the second kind, and it is a pattern Node9 runs repeatedly.

> "We have a lot of customers like Ti-SALES that have these older ERPs, but they have a more modern need—their workforce has more modern needs around mobile apps and things like that. So we're syncing the transactional data from the ERP. The ERP is source of truth for their products, their prices, their quoting, their orders, their invoices—all that still lives inside the ERP. But we give them a modern CRM that their sales team can use and have visibility into that data."
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> **Dave Stauffer, Founder, Node9**

On the Ti-SALES account, Node9 works across more of the business than a single point of contact. Jeff is, in Dave's description, "the C-level executive that kind of sponsors everything"; Igor is "the day-to-day Zoho operational person." But Node9's consultants also work directly with the sales, purchasing, and maintenance teams.

> "It really comes down to the buy-in—the implementation has tremendously impacted the way that we look at our sales, the way that we track our sales, and it's really helped with customer interaction and customer retention."
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> **Jeff Zammett, CFO, Ti-SALES**

The Challenge: A Back Office That Worked, and a Sales Team It Couldn't Reach

Before Node9 came on, Ti-SALES was using Dynamics GP to run its accounting and SalesPad to handle transactions. This system continues to work well for Ti-SALES' back office; however, there was no system in place for outside sales managers to log and maintain customer records. These territory managers, who Jeff calls the most valuable asset to the company, needed a mobile CRM to input customer data while out in the field, across the United States.

As Node9's Statement of Work points out, sales, quoting, and order-management processes for Ti-SALES were fragmented and spreadsheet-driven. Manual data entry and duplicated effort were commonplace. Website inquiries were neither automated nor routed, and there were no unified dashboards anywhere.

Put those together and the exposure is specific. A company whose entire model is never losing a municipal account, across a fifteen-year replacement cycle, had no durable record of who it actually knew at each municipality—and an aging workforce whose retirements would carry decades of that knowledge out the door.

Underneath the tooling gap was a data gap. Contacts had retired or moved on with no record of it, and no reliable database tracked any of it. "We were working well with inventory, working well with creating the orders, but the actual account data, customer data, was outdated," Igor said. "So it was basically starting from scratch with CRM."

The Solution

Choosing Zoho and Node9

Ti-SALES ran its own evaluation before any partner entered the picture, sandboxing Zoho against HubSpot and Salesforce. Mobile was not the headline criterion going in—scope, price, and usability were—but the team understood early that it would end up being the tiebreak. "We knew that mobile would be like a deal-breaker," Jeff said. "If the software didn't have a strong mobile application, our sales guys wouldn't use it." The reasoning traces straight back to who the project was for: "The whole reason to move towards the CRM was for the, the outside team. So our outside sales staff, because that's where we had the biggest drop-off."

The button

Igor frames Ti-SALES' whole sales design as a deliberate constraint on how much software a territory manager should have to touch. "We don't want our territory managers spending time in front of a computer inputting information," he said. "We want them nurturing customer relationships and spending time face to face. Our whole market is built on in-person interactions."

Against that constraint, one item in the Zoho CRM mobile app did more work than any dashboard could: a check-in button that logs an account visit in a single tap, with no meeting record to create and no fields to fill.

> "One feature that Zoho had that we didn't see across the other platforms was just a check-in feature... As soon as we saw the feature, we asked if HubSpot or Salesforce had something that was literally that simple, and they didn't. For us, that was a huge deciding factor, because we could go to our territory manager and say: all you got to do is click a button."
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> **Igor Alves, Sales and Marketing Operations Manager, Ti-SALES**

The ask was intentionally minimal. "We're not trying to spend hours and hours for them to input all this information into a computer," Igor said. "We just want them to be able to track how often they're visiting their accounts." Dave notes the feature is specific to the CRM mobile app rather than the desktop product—one of a small handful that are—and Igor found that even Zoho users did not know it was there.

Implementation: A Layer, Not a Replacement

Ti-SALES already had a developer who knew SalesPad and had built the Dynamics GP integration; that person kept the data pipeline. "Lou and I set up the CRM," Dave said, "so custom modules to store all this transactional data that they talk about having in their ERP." Node9 designed the destination first, then handed the specification to the person who could fill it.

The payoff shows up as an absence of work. “The salespeople don’t even touch the ERP, but the data from that ERP is then available in the CRM,” Dave said. “So they can look on their phone at an account record and they’re like, oh, this order hasn’t shipped yet. They don’t need to log into the ERP to do that.” A rep answering a customer’s question about a shipment does not need to know Dynamics GP exists.

The rest of the build was scaffolding: personalization of the lead-conversion process and sales pipeline based on discovery, up to eight hours of go-live data import covering contacts, accounts, and all six transaction types, the built-in CRM-to-Analytics sync with report security, and a custom end-user video walking the sales process alongside admin and email-plugin training.

Ti-SALES’ SalesPad environment had accumulated hundreds of unique user-defined fields per customer and per inventory item, all of which had to be reconciled against the new CRM schema in partnership with the SalesPad developer. Jeff is aware of what that cost: “we really made their life difficult.” The upside is that the same mapping is why the data is now reachable by departments that never had it.

Adoption: The Hardest Part of the Project

Getting seventeen territory managers to keep a CRM current took more time, and Ti-SALES is candid that it did not happen on its own. The starting position was a blank record and a sales force that had never had one.

Igor’s framing to the team was deliberately modest—not a mandate at first, but an offer. “That’s how I always started the conversation to our outside sales,” he said. “Look, from this point forward, you have a place to put this information.”

The team he was selling it to was split roughly down the middle: half the territory managers had used a CRM at a previous employer, and half had been at Ti-SALES for ten or fifteen years and never had. Igor leaned on the first group to demonstrate the value to the second, and on the quarterly pipeline reviews he and the VP of sales run with each rep to make the benefit visible. “These meetings are getting shorter and shorter,” Igor said, “because you’re not having to remember all this information from just the top of your head or sift through Excel spreadsheets. We’re picking up right where we left off.”

Ti-SALES then backed the cultural work with structure, which is the part most implementations skip. Learning Zoho was written into every sales employee’s quarterly and annual goals and objectives, and CRM use was tied directly to territory managers’ bonus structure. Natural turnover did the rest. “When you have new people coming in, they don’t know anything else,” Jeff said.

> “We tell new hires on day one: At Ti-SALES, we use Zoho. You’ll get all the tools to learn, but you need Zoho to be successful in your job. It will quite literally help you make more money.”
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> **Jeff Zammett, CFO, Ti-SALES**

That last line is the whole adoption strategy compressed into a sentence: for a commissioned sales force, tying the tool to the paycheck is more persuasive than any training program. The result, per Igor, is that “all of our territory managers” now enter information every day.

CRM in Practice

Outside sales is the heaviest Zoho user group at Ti-SALES, and the account record they maintain is critical to driving revenue and keeping customers. “It starts with our outside sales team—they’re responsible for maintaining all of the

customer records, and uploading new opportunities," Igor said. "All the information is linked to an account. So every other department touches that account at a certain level."

In the field, a territory manager checks in on a visit with one tap, logs what happened, and pulls up synced ERP data—order status, shipment tracking, invoice history—on a phone, without ever opening Dynamics GP or SalesPad. Behind that, the check-in data drives the visit-frequency reporting Ti-SALES asked Node9 to build once it saw what the button was capable of. That is the mechanism by which a relationship model becomes a system: the cadence a rep commits to is recorded, and the platform notices when it slips.

Ti-SALES also feeds Analytics dashboards back into CRM for outside sales, and uses Zoho Sign heavily for customer agreements—particularly the loaner agreements the support team issues. The company uses Zoho Projects to tie together sales, operations, and finance data, giving each department visibility into where a project stands and what actions to take.

Desk in Practice

Support is Ti-SALES' second-largest Zoho user group. Calls used to come in, someone wrote them down, and the record went into Basecamp—a project-management tool being used as a call log. "It wasn't a native ticketing system that you can just email to," Igor said. "So implementing something like Zoho Desk, where tickets get created and tracked, made support's life a lot easier. And that's integrated natively to the account in Zoho CRM, so everything is now connected."

Node9's Lou Nolt built the Desk implementation for Ti-SALES' pump repair department, including a Zoho Form that lets customers submit a repair request directly into the Desk queue, plus "a bunch of automations and notifications." The native tie to the CRM account is what makes it more than a queue: a territory manager walking into a municipality can see the open support history, and support can see what sales has been working on.

The Retainer Era: What Came After Go-Live

The pattern Node9 sells is an implementation followed by a consulting retainer, and Ti-SALES is the version of that model that works hardest. Asked how long the project took start to finish, Jeff's first answer was a question: "are you ever finished?" Dave contrasts Ti-SALES directly with clients who buy a retainer and rarely use it: here it "is getting renewed multiple times a year because they have some pretty steady work."

What that bought Ti-SALES was not maintenance. It was capacity for the wave of requests that arrives the moment a company discovers what a platform can do—and Igor, as the one internal person expected to answer them, is clear about what that would have cost him.

> "Right after we did the go-live last year, you get a lot of asks internally: oh, can we do this in Zoho, can we do that in Zoho? And so having that four to six months of one-on-one time with Dave and Lou understanding our business model, they became basically our extension of Zoho—our internal specialists."
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> **Igor Alves, Sales and Marketing Operations Manager, Ti-SALES**

The consequence was that Igor stopped being the bottleneck on purpose. "So I started to pass the baton, where we have department heads actually working directly with them," he said. "A lot of what Lou is alluding to isn't even coming through me anymore." Any department head can now go straight to Dave or Lou with the question Igor rates

as the most valuable one: "is there a module that already exists in Zoho that I don't even know about that we can leverage?"

The retainer work itself is a list of small, specific removals of manual labor. Lou built the Zoho Desk instance and its customer-facing repair form, and took on the Pro Tank Maintenance and Service group's mail-merge template—"so now with a click of a button, they can get their documents ready and send it out to their customers."

Beyond that: a steady stream of custom functions and workflows automating the sales process—"Igor is really good at asking for automations from me," Lou noted—the automated overdue-visit notifications, custom visit-frequency reporting, and an integration to the third-party system Ti-SALES uses for work-order management.

Benefits and ROI

Data that survives turnover

Asked what Zoho actually changed, Jeff did not lead with time or cost. He led with accuracy—and with the fact that accuracy is a function of adoption, not of software. The test case is a retirement, which for Ti-SALES is not hypothetical. When a longtime territory manager hands off an account, the incoming rep now inherits a record rather than a rumor—the successor is "not calling on someone who's retired or dead or no longer works for that town." The quality and integrity of that information, Jeff said, "has never been stronger."

Ti-SALES has had to redraw territories repeatedly during a period of fast hiring, and account-level history—revenue by territory, the last large meter project, what an account is likely to buy over the next three to ten years—is what makes that possible without guesswork.

Forecasting on numbers instead of a gut feeling

The second return is a change in how Ti-SALES plans. Jeff and the VP of sales build the company's financial models together; what changed is that the sales side of those models can now be defended.

Ti-SALES now forecasts on a multi-year horizon with account-level support underneath it, and leadership reports out with what Jeff calls "very valuable, very granular information that we know is accurate—and we've never had that done automatically before."

Time returned to the field

This is the return Ti-SALES explicitly could not price, and Jeff said so on the record rather than estimate: "quantifying that from a time standpoint is hard to do, from a monetary standpoint, but it's really allowed a tremendous time saved for everyone, and the domino effect is significant."

What can be named are the specific places the time came from. Pipeline reviews are shorter because reps no longer reconstruct account history from memory or spreadsheets. The Pro Tank group's documents went from manual assembly to one click. Support stopped hand-logging calls into a project-management tool. And territory managers stopped needing anyone to look up an order status on their behalf, because it is on their phone. The chain runs back to the button: the check-in feature is why adoption held, which is why the data is accurate, which is why the forecast works.

Retention protected, not created

One number deserves care. Ti-SALES loses less than one account a year, but that is a 63-year company record that long predates Zoho—the standard the business was built to hold, not a result the CRM produced. What changed is the exposure underneath it. That record used to depend on individual relationships living in individual heads, in a

workforce moving through a retirement wave. It now depends on a record any rep can pick up. Jeff credits the adoption work, not the license.

63	<1	17
YEARS IN BUSINESS	ACCOUNTS LOST PER YEAR	TERRITORY MANAGERS

Where Things Stand Today

Dynamics GP is no longer supported by Microsoft and SalesPad is a niche bolt-on, so Ti-SALES is moving its back office to NetSuite—replacing both of the systems Node9 built around. NetSuite has a native CRM. Ti-SALES is keeping Zoho anyway.

> "We would still continue to work with Node9 and Zoho, even though NetSuite has a native CRM... It works great for us, we customize the hell out of it. NetSuite's going to be the better long-term solution [for the back end], and it plays nice with Zoho."
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> **Jeff Zammett, CFO, Ti-SALES**

That is the durable version of the result. A CRM chosen for one button, layered over an ERP that is now being replaced, has become the piece Ti-SALES plans around rather than the piece it reconsiders. Node9 remains on retainer, with department heads reaching Dave and Lou directly. Ti-SALES' own assessment of that partnership is short: "we're in awe of Dave ourselves. He's doing stuff with Zoho that we wouldn't think to do ourselves."

Sixty-three years in, Ti-SALES still only loses one account per year, if any. The difference now is that relationships they've worked tirelessly to build no longer live in seventeen people's memories. They live in a record updated one tap at a time.