



Professional Services Firm CRM

Professional Technology Consulting

The Origami Corporation

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From Spreadsheets to a Single Source of Truth: Transforming a Boutique Marketing Agency with Origami CRM

1.1

Executive Summary

A boutique marketing agency managing 50+ active clients across spreadsheets and email threads needed a scalable, compliant way to coordinate client work, track interactions, and report on performance. We implemented and customized Origami CRM to mirror the agency’s end-to-end workflow, integrated it tightly with their email system and mail hosting, and conducted a GDPR compliance audit to safeguard client data and formalize privacy controls. The result: a single source of truth for all client interactions, a 60% reduction in time spent on administrative tasks, improved email deliverability and traceability, and a monthly optimization cadence with a dedicated support specialist to continually tune processes and reporting.

1.2

The Challenge

The agency’s growth outpaced its operational tooling. With 50+ active clients, account teams were juggling spreadsheets, shared drives, and fragmented email chains to manage campaigns, retainers, and approvals. Common pain points included: - Limited pipeline and project visibility across accounts, leading to missed handoffs and duplicated work. - Manual effort to track client communication, campaign assets, budgets, and approvals. - Lack of standardized processes for onboarding, briefs, change requests, and reporting. - No centralized system of record for client interactions, making it difficult to assess performance or audit activity. - Heightened exposure to GDPR risks due to ad hoc data storage, unclear retention practices, and inconsistent consent tracking.

The agency needed an integrated CRM that reflected how they actually worked—one that captured every client touchpoint, embedded approvals and SLAs, integrated with email, and supported compliance by design.

1.3 Our Approach

We led a phased engagement spanning discovery, design, implementation, and change management, anchored by five core services:

- **crm-implementation:** Customizing Origami CRM to the agency's operating model, pipelines, and reporting needs.
- **business-process-optimization:** Streamlining workflows from lead intake through invoicing and client reporting.
- **mail-hosting:** Stabilizing and securing email operations and integrating mail seamlessly into CRM records.
- **compliance-audit-gdpr:** Establishing GDPR-ready data governance, including records of processing and DSR workflows.
- **dedicated-teams:** Assigning a named support specialist to drive adoption and continuous improvement on a monthly cadence.

Our guiding principles were “process-first” design, privacy-by-design controls, and minimal disruption to in-flight client work.

1.4 Implementation

We delivered the solution in coordinated workstreams that aligned technology, process, and compliance.

1) CRM Implementation and Customization

- **Data Model:** We created custom entities in Origami CRM for Clients (Accounts), Contacts, Projects/Retainers, Campaigns, Tasks, and Approvals. Custom fields captured industry, retainer tier, channel mix, assets, budget, and consent basis.
- **Pipelines & Stages:** Separate pipelines for new business, onboarding, active retainers, and projects ensured clarity from pitch to delivery. Each stage carried automated task checklists, SLA timers, and required approvals where applicable.
- **Automation:** Built rules for lead routing, kickoff task bundles on project creation, automated reminders for overdue approvals, and status updates triggered by email or asset uploads. Playbooks standardized client onboarding and campaign brief intake.
- **Reporting & Dashboards:** Role-based dashboards showed pipeline health, utilization, campaign milestones, and SLA adherence. Executive views aggregated revenue forecast and client activity; account views focused on project status, open tasks, and recent interactions.

- **Security & Access:** Implemented role-based access controls (RBAC) with least-privilege permissions, MFA, and SSO integration with the agency's identity provider. Field-level controls protected sensitive PII.
- **Data Migration:** Consolidated spreadsheets and contact lists were cleansed, deduplicated, and mapped to the CRM schema. We used a staging environment to validate mappings, run integrity checks, and perform UAT before cutover. Historical email threads were linked where feasible to maintain context.

2) Email Integration and Managed Mail Hosting

- **Mail Hosting:** We standardized the agency's mail hosting with enforced TLS in transit, geographically appropriate data residency, automated backups, and retention policies aligned to GDPR and business needs.
- **Deliverability & Security:** DNS was configured with SPF, DKIM, and DMARC to improve deliverability and protect brand reputation. Inbound filtering and malware scanning reduced noise and risk.
- **CRM Integration:** Bi-directional sync and journaling ensured that emails were automatically associated with the correct Client, Contact, and Project records based on address and subject tagging. A universal BCC address and add-ins enabled one-click filing from the inbox.
- **Collaboration:** Shared inboxes for "hello@" and "support@" were mapped to queues in Origami CRM so that client messages became trackable cases or tasks with SLAs and ownership, reducing missed inquiries.
- **Templates & Snippets:** Standardized communications (onboarding, brief requests, approval nudges) were templated with variables from CRM records to reduce manual drafting and ensure consistency.

3) GDPR Compliance Audit and Privacy by Design

- **Assessment & RoPA:** Conducted a GDPR readiness assessment and documented Records of Processing Activities (RoPA) for marketing and CRM processing purposes.
- **Lawful Basis & Consent:** Captured lawful basis at the Contact level (contract, consent, legitimate interest) and surfaced it in workflows. Opt-ins and unsubscribe preferences were synchronized with mail tools and enforced in outreach templates.
- **Data Subject Rights (DSR):** Implemented DSR workflows for access, rectification, and erasure directly in CRM, with audit trails and SLA tracking. Requests could be initiated from shared inboxes and routed for approval.
- **Security Controls:** Encryption at rest, TLS for data in transit, strict RBAC, session management, and comprehensive audit logging. Data minimization rules restricted the collection and retention of unnecessary PII.
- **Retention & Deletion:** Configured retention schedules tied to client status and legal obligations, with automated review reminders and soft-delete windows prior to final deletion.

- **Contracts & Training:** Updated Data Processing Agreements with providers, validated subprocessor lists, and delivered staff training on handling PII, consent, and DSR procedures.

4) Business Process Optimization

- **Standard Operating Procedures:** Co-created SOPs for client onboarding, campaign briefs, approval management, scope changes, and closeout. These were embedded as CRM playbooks.
- **Work Intake & Triage:** Deployed structured forms that intake essential details and automatically generate tasks, due dates, and approvers based on project type and channel.
- **SLA Management:** Defined response and approval SLAs with automated escalations, improving predictability for clients and internal teams.
- **Resource Visibility:** Introduced workload views and task queues to balance assignments and avoid bottlenecks, supporting more accurate timeline commitments.

5) Dedicated Teams and Change Management

- **Named Specialist:** A dedicated support specialist serves as the agency's point of contact for configuration requests, reporting tweaks, and training.
- **Monthly Optimization:** Standing sessions review adoption, backlog items, and performance metrics. Incremental improvements (e.g., new dashboards, workflow refinements) are deployed with versioned change notes.
- **Enablement:** Delivered role-based training, quick-reference guides, and an internal knowledge base to accelerate onboarding of new team members.

1.5 Results & Impact

- **One System of Record:** All client communications, tasks, approvals, and assets are now anchored in Origami CRM, providing end-to-end visibility and eliminating version conflicts from spreadsheets.
- **60% Less Administrative Time:** Automation, standardized templates, and embedded playbooks reduced manual data entry and status chasing, freeing the team to focus on creative and strategic work.
- **Better Client Responsiveness:** Shared inboxes tied to CRM queues and SLA-driven workflows improved response consistency and reduced missed inquiries.
- **Stronger Compliance Posture:** Documented RoPA, explicit lawful basis tracking, DSR workflows, and retention rules provide verifiable GDPR readiness and reduce regulatory risk.
- **Higher Email Reliability:** SPF, DKIM, and DMARC configurations, combined with managed hosting and journaling, improved deliverability, traceability, and security for client communications.

- **Actionable Reporting:** Real-time dashboards support account reviews, forecasting, and performance management, enabling informed decisions and transparent client updates.
- **Continuous Improvement:** With a dedicated specialist and monthly optimization, the CRM and processes evolve with the agency's needs without disruption.

1.6 Technologies & Services Used

- **Services:**
 - crm-implementation
 - business-process-optimization
 - mail-hosting
 - compliance-audit-gdpr
 - dedicated-teams
- **Platform & Integrations:**
 - Origami CRM (custom entities, automation engine, dashboards, RBAC)
 - Mail hosting with TLS enforcement, backups, and retention policies
 - Email security: SPF, DKIM, DMARC
 - IMAP/SMTP connectors and journaling for email-CRM sync
 - SSO/MFA via the agency's identity provider
 - ETL tooling for data migration and deduplication
 - Audit logging and monitoring for compliance

1.7 Conclusion

By aligning technology with process and compliance, we transformed a spreadsheet-driven operation into a disciplined, CRM-led workflow without sacrificing the agility a boutique agency needs. Origami CRM now functions as the single source of truth, mail hosting is secure and integrated, and GDPR controls are embedded into daily operations. The agency reclaimed 60% of its administrative time, improved client responsiveness, and gained the confidence that comes with audit-ready data governance. With our dedicated support specialist leading monthly optimization, the platform continues to adapt—positioning the agency to scale services, onboard clients faster, and deliver a consistently excellent client experience.

About The Origami Corporation

The Origami Corporation is a leading technology consulting firm specializing in cloud migration, DevSecOps, cybersecurity, and digital transformation. We help organizations navigate complex technological challenges and achieve their business objectives through innovative, secure, and scalable solutions.

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