

# case study



## Case Study

Cyberleaf's Journey to Multiple Streamlined Processes



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## Overview

Many years ago, Waterleaf International decided to use Zoho as a way to replace cumbersome spreadsheets to track their pipelines. After discovering the range of functionality that Zoho brings, and realizing that if they'd gone with a CRM centric solution instead, they wouldn't have been able to meet their business objectives. Waterleaf decided that Zoho was the best platform to help them build, manage and scale their business.



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## The Solution

SuccessFULL Solutions has been able to assist Waterleaf International / Cyberleaf in four main areas:

- Sales automation and information management - Using opportunity flows, workflows, blueprints, etc., we have been able to build and manage an effective process for their sales team
- Onboarding tracking - Waterleaf's growth required a method for tracking onboarding activities. We used workflows and procedures within Zoho Projects to give them visibility to their customers' progress and automate communications with customers
- Subscription management - building an effective tool for customer, subscription, and renewal management, which is critical to scaling their business
- Analytics - making a massive amount of data and information digestible and giving them visibility in a single place





- **Company:** Waterleaf International / Cyberleaf
- **Industry:** Cybersecurity
- **Business Type:** B2B
- **Location:** Fort Myers, FL



## Executive Summary

Cyberleaf strives to democratize cybersecurity, bringing top tier protection to small and medium enterprises. They enable their clients to protect their vital systems and information via their comprehensive, economical approach to managed cyber protection.



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## History

Waterleaf International was formed in 2011, starting off as a consultancy. After the founder, Adam Sewall, worked on advanced custom networks for some time, the company started doing work for cable operators, telecom providers, and municipalities. Once COVID hit, smart city applications weren't their clients' top priority anymore so Waterleaf was asked to help them with cybersecurity, giving birth to Cyberleaf. Now Waterleaf/Cyberleaf duals as a network business and cyber business operated by dedicated network engineers, scientists, and threat hunters.



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## **Implementation**

Although Waterleaf had already customized their Zoho system to an extent, SuccessFULL Solutions was able to take them to the next level of automation and preparation for growth and scaling.

## **Marketing and Sales**

We have assisted Waterleaf's marketing team in taking their marketing strategies and translating them into a working process within Zoho CRM that helps the sales team effectively drive results



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## Implementation

### Customer Onboarding Process

Waterleaf's customers have tasks that need to be completed in order to set up their network for security. We've been able to build a process that guide their customers through those tasks in a timely manner and also give the Cyberleaf team visibility on how their customers are progressing in the onboarding process. Automated communications and reminders have helped the onboarding team drive each customer to completion more seamlessly.



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## Implementation

### Subscription Management

Waterleaf's services are subscription-based. In order to prepare for growth and the ability to service an influx of customers adequately, they need a custom subscription management system that we, SuccessFULL Solutions, continue to construct using Zoho Billing integrated with Zoho CRM. We've been able to build small automations that contribute to the major streamlining effort for this process.





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## Implementation

### Analytics and KPI's

There's great value in capturing the activities of the multiple teams that make up Waterleaf's organization. Analytics help Waterleaf study the company's progress, conversions and data so that they can make improvements and best serve their customers. We have built custom overviews, dashboards and reports to give them the insight they need in order to be proactive for customer renewals, drive processes to completion and find additional ways to minimize manual efforts, making scaling more achievable. Zoho Analytics and also Zoho CRM homepage functionality has been used to accomplish this.

**David Levitan**  
**President/COO**

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Keitha's system analyst background and the mentality that she brings regarding application solutions, has been extraordinarily helpful. We envision a lot of things that we want to accomplish, but her ability to translate them into system requirements and then successfully implement had been a critical resource for us.

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- **Zoho Partner:** SuccessFULL Solutions
- **Contact:** [Keitha McAdams](#)
- **Book a Consultation** [here](#)



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