

Bitrix24[®] Partners

Implementation case

J&D Consulting – Digital Transformation and Workflow Centralization with Bitrix24

Partner **Bit24** • Andorra | Spain

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J&D Consulting is a business advisory firm led by **José Miguel Pérez, Partner**, Director, and Administrator. Known for delivering expert consultancy services, the company sought a smarter, more streamlined way to manage operations as part of its digital transformation strategy.

- ✗ **No clear traceability** for clients and tasks, making follow-up difficult
- ✗ **Disorganized workflows** with no unified lead or opportunity management
- ✗ **Non-stop switching** between Outlook, Excel, and Word
- ✗ **Lack of administrative** control over workflows and teams

Working with Bitrix24, the team implemented a fully customized CRM and adapted it to J&D Consulting's specific workflows.

- ✓ **CRM customization** – A tailored CRM was created to manage client data, opportunities, and communication in one place.
- ✓ **Automation of repetitive tasks** – Key workflows like client onboarding and sending reminders were automated.
- ✓ **Unified internal management** – Bitrix24 tasks, meetings, calls, and email tools replaced multiple disconnected apps.

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*“A clear example of **Bitrix24's value** came just after its implementation in January 2020. Two months later, **the COVID-19 lockdown** began. Even with the entire team working remotely, the firm could assign and track daily tasks in real time, maintaining full control over workflows without in-person oversight.”*

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The results?
Outstanding



Higher conversion rates – Better CRM tracking translated into more successful client engagements.



Improved visibility and control – Management gained real-time insight into team activity and process status.



Increased client satisfaction – Faster, more organized operations led to happier clients, who, in turn, referred more business.

José Miguel Pérez shared that Bitrix24 **didn't just solve existing issues** – it **unlocked new opportunities** for growth, positioning J&D Consulting for long-term **success**.

Want to join?
Follow the link in **the description**.

