ORACLE LAW FIRM

CUSTOMER CASE STUDY

Zoho One across the business

CRM	WorkDrive	Sign	Desk	Analytics
Relationships	Documents	E-signatures	Service requests	Dashboards

The Final Straw Was the ACT Field Limit. The Bigger Opportunity Was Zoho One.

Industry: Legal services
Technology: Zoho CRM, WorkDrive, Sign, Desk, and Analytics
Consulting partner: Active Sales Technology

The challenge: The firm's requirements had outgrown ACT!

Oracle Law Firm represents clients in personal injury, car accident, and workers' compensation matters. Its business depends on managing important client relationships and detailed information throughout the client journey.

Oracle needed automation and more advanced reporting the ACT! environment could not provide. But one specific limitation brought the decision into immediate focus: only 602 fields are available in an ACT! layout before it became corrupted due to a 32 KB limit.

The firm needed to capture more information than its existing layout could accommodate. That constraint became the final straw—and the catalyst for a broader technology change.

The move: Build around the firm's information needs

Working with Active Sales Technology, Oracle moved from ACT! to Zoho CRM within Zoho One.

The decision addressed more than the immediate layout problem. It gave the firm a platform with greater flexibility to organize information, configure workflows, and develop reporting around its operational requirements.

Oracle's goal was clear: support the way the firm needed to work, with room to evolve as those requirements changed.

Beyond CRM: Expand the value of the move

Oracle now uses several Zoho One applications alongside CRM:

- **Zoho WorkDrive:** Document storage, sharing, and team collaboration.
- **Zoho Sign:** Electronic signatures for agreements and other documents.
- **Zoho Desk:** Tools for tracking and managing incoming requests.
- **Zoho Analytics:** Advanced reporting and dashboards for examining operational data.

This broader adoption gives Oracle tools that extend beyond client records to include documents, signatures, request management, and business analysis.

The outcome: More room to work—and grow

A field-layout constraint triggered Oracle's departure from ACT! But the lasting value of the move is broader: more adaptable CRM and access to business applications that support the firm's expanding needs.

Oracle now uses Zoho One across multiple functions, giving it a foundation for continued automation and deeper reporting.

One limitation prompted the switch. A broader business platform made the switch worth pursuing.

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