



A four-week sprint from Pipedrive to a revenue engine on Attio.

Standout Solutions, a promotional products distributor in Detroit. commonsku for orders, QuickBooks for the books, Attio for the pipeline.

Fix CRM and lifecycle

Connect systems and data

Automate manual GTM work

“I don’t want any of these deals to fall through the cracks.”

Jesse F., founder and CEO, Standout Solutions

<4 wks

from kickoff to full-team cutover, Pipedrive retired

17,900+

records live in Attio: 2,900 companies, 11,800 people, 3,100 deals

20+

live automations across Zapier and Attio workflows

\$110,987

of open receivables wrongly marked paid, caught and corrected

–34%

pipeline overstatement removed. Every number now audits to QuickBooks

Context

A five-person distributor and an ASI Fastest-Growing honoree. Orders ran in commonsku, the books in QuickBooks, and the pipeline in a Pipedrive instance that one person used. Reorders, open quotes, and dormant accounts lived in memory and spreadsheets.

Constraint

Standout’s revenue is repeat business, and nothing watched the book. Reorder timing lived in reps’ heads. Quotes went quiet with no follow-up. The CRM disagreed with the order system and with the books, so nobody trusted any of the three.

A reliability problem wearing a CRM problem’s clothes. The tool was not the constraint. The absence of a system that noticed things was.

Approach

Connect the three systems first so there was one truth to act on. Then build the machine that watches the book, one workflow at a time, each tied to a deal that would otherwise slip. Then make sure people read what it produced.

What we built on Attio, commonsku, QuickBooks, and Zapier

The plumbing. Three systems, one truth.

- **Every commonsku project auto-creates an Attio deal** and its stage flows from sales order to invoice to paid. Nobody does data entry.
- **Only a QuickBooks payment marks a deal paid.** The governing rule that keeps the pipeline honest against the books.
- **A voice button on the founder’s phone.** He talks, Attio gets the lead, the deal, and the task, with the right rep assigned.

The brain. A machine that watches the book.

- **Relationship status recomputed nightly** from each account’s own order rhythm. An annual buyer and a monthly buyer are judged on their own clocks.
- **Automated reorder, quote, and mockup chasers** with suppression rules, so no client is nudged mid-conversation.
- **A re-engagement program for quiet accounts**, wave-ranked by lifetime revenue, exiting the moment a client replies.

Adoption. Reports people read, training people do.

- **Morning digests** for each rep, **a Friday scoreboard** for the CEO, and **a Monday cracks report** of stalled deals by owner.
- **Two two-hour sessions** with laptops open, and **a 19-module self-serve hub** so the system survives the next hire.

Result

Full-team cutover in under four weeks with Pipedrive retired. **\$110,987 of open receivables** that had been marked paid, found and corrected. A 34% overstatement in the pipeline gone, with every number now auditing to QuickBooks.

Proof it works: within 24 hours of the first automated check-in task, a rep was emailing a \$318K-lifetime account about holiday orders. Nobody had a reminder for that account the week before. The machine watches the book. The humans sell.