

Odoo Migration For a Built-in Furniture Manufacturer and Retailer

How replacing a home-grown, feature-poor CRM with Odoo CRM and Loyalty & Rewards functionality enabled a Polish built-in furniture manufacturer and retailer to save **≈ \$600,000**, increase lead-to-order conversion **from 1.4% to 3%**, and boost customer retention by **10%**.

Industry:
Retail, Ecommerce

LEGACY SOFTWARE MODERNIZATION

ENTERPRISE AUTOMATION

Business challenge

When your core business systems fall behind the pace of your company's growth, the gap between potential and performance tears open so wide that it becomes impossible to ignore.

Staff used to face CRM freezes every morning when all employees logged in at once

Loading a customer profile or order history could take up to 25 seconds. For a company operating in three cities, it caused delays in order processing even outside peak seasons.

Customers' website experience suffered, too

If product or checkout pages took more than 4-5 seconds to load (a frequent occurrence due to real-time CRM calls), visitors bounced and carts were abandoned.

Besides poor performance, outgrowing their existing system manifested in the lack of functionality and limited scalability:

No lead tracking

The client used many different channels for customer acquisition, including paper flyers, SMS campaigns, cold and hot calls, and several websites. But without solid tracking mechanisms in place, they couldn't tell where and when a lead arrived, and see which lead generation strategies made the most impact.

No multi-language support

The client planned to expand into neighboring countries, starting with the Czech Republic and Slovakia, and had to ensure the CRM could be localized for future on-site teams.

Slow feature development

As all the functionality was hard-coded, adding new features such as lead tracking (or even minor tasks like adding new fields) required code changes and complex database schema redesigns. But the client's in-house team was already swamped by technical debt and had no bandwidth for new feature development.

No system for tracking repeat customers

It was vital to boost hyper-personalization, reward loyal customers, and encourage repeat purchases at scale through a targeted discount system.

To top it all off, the **old system was largely undocumented**, with the CRM creator as its sole knowledge keeper. This put core business processes like customer and order management at risk of being bottlenecked by a single individual.

Caught between either squeezing more out of their existing CRM or replacing it with a more feature-rich, scalable system, the client needed a seasoned **CRM partner** to estimate the budget for both paths and implement the winning option.

Instinctools brought the hands-on experience needed to navigate the decision and act on it.

Solution

First, to address the "stay vs. migrate" dilemma, our business analyst modeled **both options over a three-year perspective**.

Modernizing the legacy CRM

to make it more scalable, crafting a loyalty module from scratch would have cost the client around \$300,000, and then just as much yearly to maintain this house of cards.

Three-year TCO ≈ \$900,000 at the very least

With the possibility of nearly **triple cost savings** over three years, combined with all vital functionality and unlimited scalability, the direction was clear: migrate. Next, we had to decide on the SaaS CRM best aligned with the client's needs.

Switching to an up-to-date SaaS CRM

with a ready-made loyalty module would have required up to \$150,000-250,000 for initial migration and then \$60,000-120,000 yearly for licenses and software upkeep

Three-year TCO ≈ \$330,000-600,000

There were three options on the table: Odoo, Salesforce, and SAP. Considering the client's time, budget, and flexibility constraints, **Odoo, with its CRM module and Loyalty & Rewards functionality, spoke directly to their needs:**

- **All the requirements covered out of the box**, without costly add-ons, integrations, or heavy customization
- **Faster time-to-value** thanks to pre-built modules
- **Lower vendor-lock-in and higher flexibility** due to the system's open-source foundation

We followed a **master-replica switch strategy** to achieve the industry's **below-5-second downtime gold standard**. Instinctools' **dedicated team** had to do a lot of the groundwork to ensure a smooth transition from the old environment to the new one.

01 Pre-migration

Since the client's **self-written custom CRM** was riddled with **numerous undocumented customizations** that could make things trickier down the road, we began by reverse-engineering and documenting the old system. With our **AI-powered practices in SDLC**, the task took only **two days instead of the usual three weeks** it would have required if done entirely by humans.

The team also used **AI tools for data-related operations** for data quality checks, its cleansing, mapping, and backup, as well as archiving outdated and unnecessary data. That way, we sped up the tasks by 60% while cutting their cost by 35%.

At this stage, we also reviewed **data encryption mechanisms** to ensure they won't slow down software performance. To strike the **right balance between speed and security**, we chose selective encryption for database fields, rows, and columns containing PII instead of encrypting the entire dataset.

02 Legacy CRM to Odoo migration

Our **Odoo implementation** team moved in iterations. First, we defined a migration framework – a clear, structured plan for moving data from the old CRM to Odoo, which included:

- **Transformation rules**, such as merging duplicates, standardizing formats, etc.
- **Entity migration order** with a dependency-aware sequence for tables, transactions, and related objects to ensure their interrelationships don't break downstream
- **Error-handling procedures** with the rollback-and-retry strategies, if any issues arise during migration
- **Data integrity checks** to confirm that no inconsistencies or errors slip through

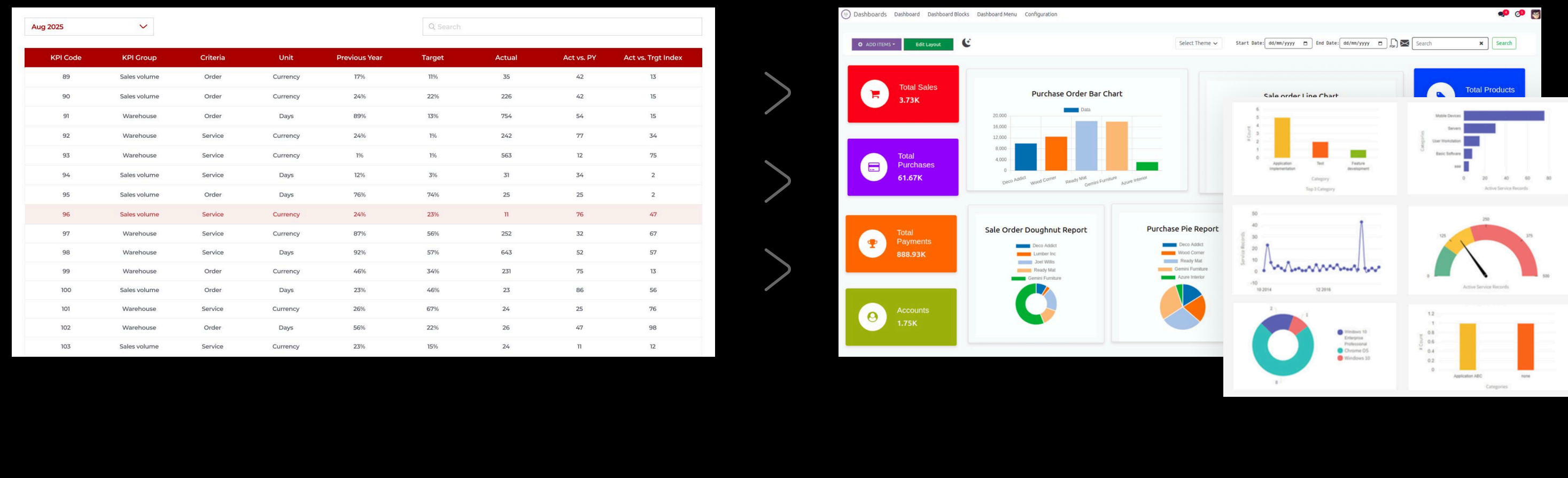
With the framework in place, we ran a small-scale **test migration** to spot and fix edge cases. After refining the playbook, we proceeded with the full migration, which kept business operations uninterrupted, staying well within the below-5-second downtime standard.

03 Odoo Loyalty & Rewards module adoption

Odoo modules are designed to click together like LEGO, so we implemented the loyalty module and wired it to the CRM for a continuous data flow of customer info, purchase history, and more. With promotions fully digitized, the client gained **two immediate wins**:

- Automated calculation of loyalty percentages and customer recognition across different channels
- Advanced personalization thanks to tailored recommendations of additional products

Both the CRM and loyalty modules provide built-in **analytical dashboards**, which we customized to track the client's key metrics. New easy-to-grasp visualizations replaced clunky Excel tables.



04 Post-migration

To make sure the system was fully prepared for daily use, we:

- **Tested performance under real-world load**
The dedicated team checked the system for speed and stability to verify that the user experience is hitch-free.
- **Enabled end-users**
We ran online training sessions to help staff quickly adapt to the new software and shared recordings for ongoing self-training and easy refreshers.

05 Extra-mile website performance optimization

Since the CRM is tightly integrated with the client's ecommerce platform, **improving website performance** and customer experience was a strategic part of our migration efforts. Instinctools' team:

- **Implemented Nginx as a load balancer** to distribute requests across multiple application servers, ensuring higher availability and smoother performance during traffic spikes.
- **Added Redis as a smart caching layer** for frequently accessed data, reducing response times and improving overall system performance.

Those efforts resulted in faster page loading speed and a **20% drop** in cart abandonment rate.

Before

- Legacy, feature-limited CRM with poor performance
- Largely undocumented software reliant on a single knowledge keeper
- Costly to scale and maintain

After

- Up-to-date, feature-rich, customizable CRM
- SaaS software with detailed documentation
- Easy to operate and scale across regions

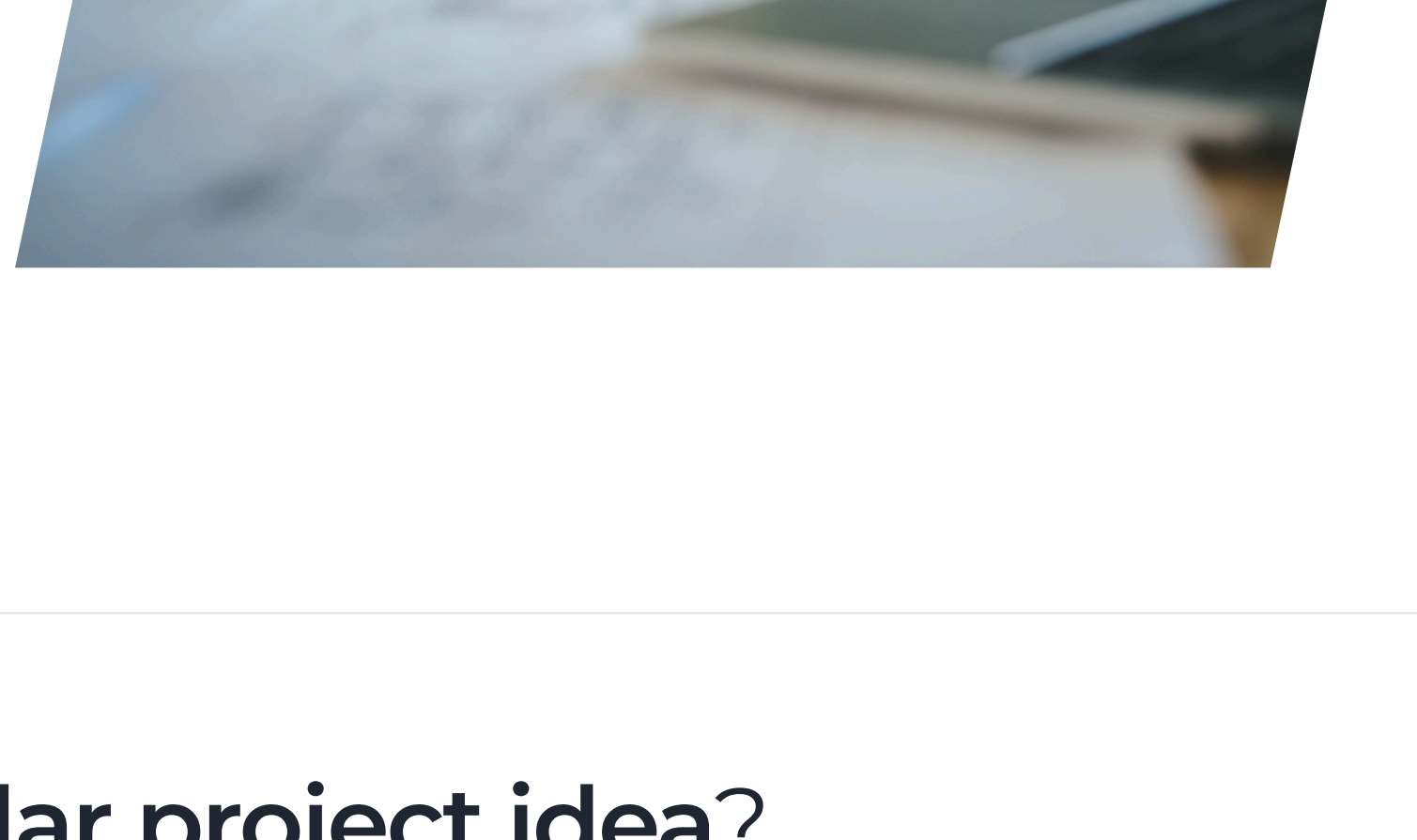
Business value

- **≈ \$600,000** TCO savings
- **< 5-second** downtime during the transition from one system to another
- **x 2** in lead-to-order conversion via automated conversion pipelines and timely follow-ups
- **+10%** in customer retention thanks to the adoption of a trackable loyalty program and targeted offers
- **+15%** in marketing ROI through clarity on high-ROI channels and wise budget reallocation

Multiplier effect

The desire to stick to legacy software that still works is perfectly rational, especially when the sticker price of modernization looks higher than patching holes and creating temporary crutches. But there's always a tipping point when outdated software starts working *against* you more than for you.

Weighing different options of dealing with **legacy systems**, you may need expert guidance. That's when **seasoned software consultants** can step in with proven strategies to address the challenges in your CRM, ERP, or other systems.



Do you have a **similar project idea**?