

CASE STUDY

Empowering Sales Teams through Automation: How a B2B Services Company Reduced Operational Burden with HubSpot Sales Hub

Overview

In the competitive B2B services landscape, operational efficiency is crucial to driving revenue growth. Systems Plus partnered with a U.S.-based B2B services company to implement HubSpot Sales Hub, transforming their sales processes through automation, centralized lead management, and advanced analytics. This implementation significantly reduced operational burden, enabling the sales team to focus on selling and delivering a consistent customer experience.

Challenges

The company faced several inefficiencies in its sales operations:

1. High Operational Overhead

Sales representatives spent 60% of their time on administrative tasks, reducing their focus on selling.

2. Fragmented Lead Management

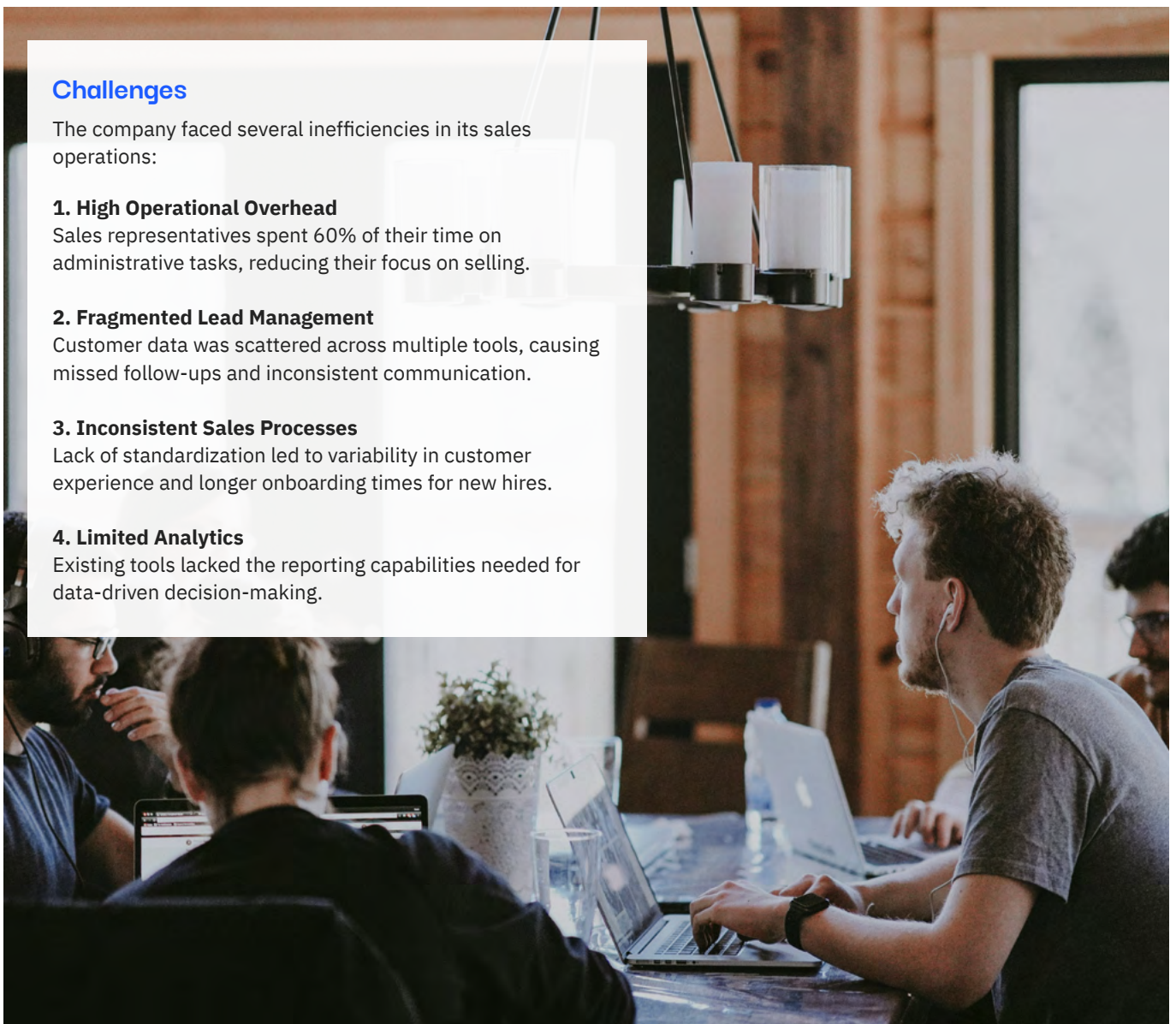
Customer data was scattered across multiple tools, causing missed follow-ups and inconsistent communication.

3. Inconsistent Sales Processes

Lack of standardization led to variability in customer experience and longer onboarding times for new hires.

4. Limited Analytics

Existing tools lacked the reporting capabilities needed for data-driven decision-making.



Solution

Systems Plus designed and implemented a comprehensive solution using HubSpot Sales Hub to address these challenges. Key elements included:



1. Sales Automation

Automated lead tracking, follow-ups, and deal management workflows eliminated manual data entry and administrative overhead.



2. Centralized CRM

Consolidation of customer data enabled real-time lead tracking and streamlined engagement.



3. Standardized Sales Playbooks

Customized playbooks ensured consistency in processes and reduced onboarding time for new hires.



4. Advanced Reporting

HubSpot's analytics tools delivered actionable insights to optimize sales strategies.



5. Team Training

Systems Plus conducted tailored training sessions to ensure the sales team could effectively leverage the platform.

Implementation Roadmap

The project was completed in five phases over four months:



Data Migration

Consolidated data into HubSpot to create a unified lead management system.



Workflow Automation

Configured automated workflows for lead assignment and follow-ups.



Playbook Integration

Standardized sales activities using structured playbooks.



Team Training

Delivered workshops and personalized coaching.



Performance Optimization

Monitored key metrics to refine workflows and address challenges.

Results

The collaboration with Systems Plus yielded transformative results:

1. Increased Selling Time

Time spent on selling rose from 40% to 70%, thanks to automation.

2. Operational Efficiency

Administrative tasks were reduced by 50%, saving 15 hours weekly in meeting scheduling and follow-ups alone.

3. Enhanced Consistency

Standardized processes improved customer experiences and reduced onboarding time by 25%.

4. Data-Driven Decisions

Advanced reporting enabled the identification of bottlenecks and the optimization of sales workflows.

Conclusion

Through its strategic partnership with Systems Plus, the company revolutionized its sales operations using HubSpot Sales Hub. By reducing operational burdens and empowering the sales team with tools and training, Systems Plus enabled a scalable, efficient sales process that drives long-term growth and exceptional customer experiences.

Founded in 1987 by Mr. Nikunj Jhaveri, Systems+ offers a comprehensive suite of IT services, including Managed GIC services, DevOps, Cloud Consulting, Development and integration support, and SOC/NOC services. We specialize in serving global clients across various sectors such as (but not limited to) Retail, FMCG, Logistics, Manufacturing, and Financial Services. Our approach to service delivery ensures maximum business agility through the integration of cutting-edge technology with legacy systems. As industry leaders in building managed Global In-house Centers (mGICs), we've successfully set up over 25 active mGICs, ensuring cost-efficient, high-quality solutions, and simplifying the offshore journey for our clients.

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