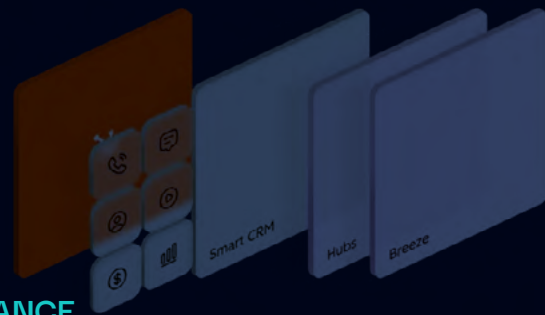




CASE STUDY · MANUFACTURING & AUTOMOTIVE PERFORMANCE

HubSpot CRM Implementation:

Standardizing Sales Operations for a Global Automotive Performance Brand

INDUSTRY

Automotive performance manufacturing & retail distribution

ENGAGEMENT

Clean-slate HubSpot CRM rebuild

SALES TEAM

80+ Reps (internal + retail/distributor)

PLATFORM

HubSpot Sales Hub (+ Service & Marketing roadmap)

INTEGRATIONS

Power BI, ERP, RingCentral, Snowflake → Workato

APPROACH

Process-first MVP · ~75% change management

AT A GLANCE

Key Outcomes Achieved

A fast-growing performance brand was running its highest-value distributor and retail relationships out of spreadsheets and inboxes - with each rep personally carrying 200+ accounts and no shared system to manage them. Systems Plus replaced that with a single, trusted system of record, and got the whole sales floor to actually use it.

**20%**

Increase in sales velocity

**90%**

Active adoption across the team

**5 hrs**

Saved per rep, every week

**12,000+**

Accounts now in one system

CUSTOMER CONTEXT & BUSINESS CHALLENGE

Our customer is a global automotive performance brand serving regional distributors, retail partners, and direct-to-consumer channels worldwide. As the business grew, sales operations became increasingly dependent on spreadsheets and emails, making it difficult to maintain a consistent view of customers and opportunities.

The existing CRM had seen limited adoption and was then abandoned due to undefined sales processes and inconsistent usage across teams. As a result, sales visibility was fragmented, pipeline management was unreliable.

**No system of record**

Customer, activity, and account data lived across spreadsheets, inboxes, and a legacy CRM no one trusted. With 200+ accounts per rep tracked from memory, follow-ups slipped and accounts went cold.

**Undefined process, low adoption**

An earlier CRM rollout was over-configured and under-adopted, and the sales process had never been formally defined, so data quality stayed low.

**Governance pressure**

As a public company, the platform had to be SOX-compliant and auditable, with a clear change-management process behind every change.

THE APPROACH

A Phased, Adoption-First Strategy

Systems Plus was engaged as a strategic partner, not just an implementer. Rather than rebuild the over-complicated system, we reset to a clean-slate, “process-first” rebuild with a single near-term goal: ship a deliberately simple, easy-to-use system that the sales team would adopt - then layer on sophistication once it stuck.

Four principles shaped every decision:



Built for daily selling

We set up HubSpot as the single activity and account-management workspace that powers day-to-day selling, outreach, and account plans - one screen where reps run their book, with the reports they rely on embedded right alongside.



Adoption over configuration

Roughly 75% of the effort went into change management, not technical build. Keeping the MVP simple lowered the barrier to entry for reps coming straight off spreadsheets.



Persona-based enablement

Reps, directors, and executives each consume data differently - so each got a workspace, dashboard, and training track tailored to how they actually work.



A foundation built to scale

Governance, role hierarchy, and a future-state integration architecture were designed in from day one, so later phases - automation, Service Hub, AI - could be added without re-platforming.

THE SOLUTION

A Scalable CRM Built for Sales Execution

The solution established HubSpot as the centralized platform for managing customer data, sales activities, and pipeline visibility, with standardized workflows designed to drive consistency and user adoption from day one

A standardized, trusted system of record



An out-of-the-box pipeline for renewals and upsells, plus a lead form and workflow that routes new B2B leads to the right owner.



A single dashboard combining native HubSpot activity and adoption reporting with embedded Power BI for validated revenue and parts/inventory data - one screen, one truth.



A scalable contact-sync solution to solve the “80% of contacts in Outlook” problem, replacing fragile manual uploads.



Cleanup and re-assignment of ~1,500 orphaned accounts using clear territory and vertical logic.

Role-aware visibility from rep to boardroom



Executive & C-suite

Organization-wide oversight

Portfolio distribution and engagement-risk heatmaps

Forecast oversight and gap-to-target monitoring



Sales Director

Full visibility of their team

Team activity tracker for coaching

“Untouched account” risk views to drive re-engagement



Sales Rep

Own accounts only

Customer 360 “rep cockpit” with activity widgets and next-best-action tasks

Account-health properties: tier, health flag, last-contacted days

ENABLEMENT

Driving CRM Adoption across 80+ Sales Representatives

To maximize the value of the implementation, Systems Plus supported the sales organization with structured onboarding, role-based training, and continuous post-launch enablement, helping ensure standardized processes and consistent adoption.



Structured Go-Live Support

Live onboarding sessions and an on-demand knowledge library to ensure continuous learning beyond implementation.



Role-Based Training & Q&A

Interactive training, office hours, and ongoing support to help users resolve issues quickly and build confidence.



Adoption Monitoring

Continuous tracking of platform usage, user feedback, and adoption trends to identify and address friction early.



Sales Champion Program

Internal power users enabled to promote best practices and drive peer-to-peer adoption across the sales organization.



Knowledge Transfer

Train-the-trainer sessions and comprehensive documentation to support long-term onboarding and platform ownership.



Phased Capability Rollout

A focused MVP approach that prioritized core sales workflows before introducing advanced CRM capabilities.

Because governance and integration were designed in from the start, later phases such as automation, customer-health scoring, Service Hub, and AI extend the same platform rather than requiring a rebuild.

RESULTS & BUSINESS IMPACT

The HubSpot CRM implementation established a standardized sales operating model with improved visibility, stronger user adoption, and measurable gains in sales productivity.



Proactive Pipeline Management

Accounts inactive for 30 days, 6 months, or 12 months are automatically identified for timely follow-up and pipeline recovery.



Real-Time Sales Visibility

Role-based dashboards provide sales leadership with live performance insights, replacing manual reporting and fragmented data sources.



Higher Sales Productivity

Standardized workflows reduced time spent on manual tracking, contributing to an approximately 20% improvement in sales velocity.

For the first time my team can see every account in one place, and I can coach from real numbers instead of guesswork.”
- Sales Director

THE TAKEAWAY

HubSpot CRM: A Foundation for Scalable Sales Growth

By replacing fragmented sales processes with a standardized HubSpot CRM, the customer established a scalable sales operating model built on trusted data, consistent execution, and enterprise-wide adoption. Beyond modernizing CRM capabilities, the engagement created a foundation for improved sales visibility, faster decision-making, and long-term business growth.

ABOUT SYSTEMS PLUS

Systems Plus is a HubSpot solutions partner that architects scalable, AI-ready revenue operations for enterprise and high-growth organizations. We go beyond implementation - pairing deep platform expertise with process design, governance, and adoption-focused enablement so technology investments deliver measurable business outcomes.

Build a CRM Your Teams Will Actually Use

Implementing HubSpot is only the first step. We help organizations standardize processes, drive user adoption, and turn CRM investments into measurable business outcomes.

[Talk to our HubSpot experts](#) ↗

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