

Transforming HubSpot from cost center to sales accelerator



Client profile: (40 person systems integrator)

(XClient RedactX), an e-commerce development agency with strategic partnerships with Shopify and Salesforce, was struggling to justify their growing HubSpot investment. With a small marketing team and one Business Development Representative (BDR) handling all lead generation activities, they needed to optimize their approach to marketing automation and sales outreach.

Challenge: Communication strategy misalignment

Despite investing in HubSpot Marketing Pro, Red Van Workshop was primarily using it for personalized one-to-one communications. Their BDR was manually handling outreach that could have been automated, creating inefficiencies that limited sales velocity. Additionally, their database was approaching the contact limit threshold, filled with outdated contacts from trade shows and partner organizations that didn't represent actual sales opportunities.

"We wanted it to seem more like one-to-one contact, not just throwing stuff at the wall to see if it sticks." - Kristin S, CLIENT RVW

The hidden problem

Our audit revealed a common issue: large HubSpot investment, low-utilization of tools to actually grow. This misalignment resulted in:

- Unnecessarily high costs for HubSpot features they rarely used
- Manual processes that could have been automated through Sales Hub
- Marketing contacts being consumed by non-prospect relationships
- Limited visibility into which campaigns were effective

Solution: Strategic realignment & feature optimization

1. Contact classification & management

We implemented a custom "Contact Type" property system to properly categorize different relationship types and created automated workflows to maintain data hygiene. This approach allowed Red Van Workshop to properly identify which contacts should count as marketing contacts.

2. Communication channel optimization

Rather than using mass marketing tools for personalized outreach, we shifted their strategy to leverage Sales Hub for one-to-one communications, reserving Marketing Hub for true one-to-many campaigns. This adjustment aligned their tools with their actual communication needs.

3. Engagement tracking & lead scoring

We implemented lead scoring based on engagement metrics and contact properties, enabling the BDR to prioritize outreach to the most promising prospects. Custom lists were created to target prospects based on specific engagement patterns.

Key takeaway

Many organizations invest in powerful tools like HubSpot but use only a fraction of their capabilities. By properly aligning your communication strategy with the right HubSpot features, you can transform it from a cost center to a sales acceleration engine.

Revenue Juice specializes in helping clients accelerate revenue growth by aligning their people, processes and technology and maximizing their HubSpot investment. Contact us to discover how your organization can create a juicy pipeline.

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