SUCCESS STORY | CONSULTING

Sales Consulting Firm Simplifies Data Architecture Before Migrating to HubSpot CRM

INDUSTRY

Consulting

COMPANY GOALS

Structure data in an easy-to-understand, meaningful way and migrate it to the HubSpot CRM for a single source of truth

WEBSITE

winsales.io

Introduction

Why they partnered with Kuno

As sales consulting company, Win Sales Solutions helps companies execute on sales strategy and get in front of the right people. This meant the firm had two lines of business they were pursuing in parallel: selling on behalf of clients, as well as for themselves. With these two unique data scenarios, Win Sales Solutions needed a way to keep the two data sets separated while easily being able to extract the reporting they needed to hand off to clients.

Expectations of partnership

HubSpot brought Kuno Creative into the sales process to develop a plan for architecting the firm's data and migrating it to HubSpot Sales Enterprise. The project plan included HubSpot onboarding and training so the Win Sales Solutions team could see how data lived and worked in their new CRM, helping them understand how to best use the data to their advantage.

Benefits Kuno offered

Kuno's team of RevOps experts collaborated with the client to develop a customized data migration plan that kept everyone aligned and instilled confidence in their team. As a HubSpot Onboarding Accredited agency, Kuno was able to guide the client through every step of HubSpot onboarding and training, from the technical setup to providing strategic direction.

The Challenge

When Win Sales Solutions first came to Kuno, they had multiple sources of truth for their data. Across four systems, there were nearly 25,000 records. Jumping between the four systems created a lot of extra manual work for reps, as did the fact that many reps used database enrichment tools as makeshift CRMs. The use of fragmented systems, alongside the complex nature of the firm's data associations, also made it harder for reps to generate reports and quickly follow up with clients on their performance.

While Win Sales Solutions saw the value in moving to HubSpot, they were concerned about the downtime involved. There wasn't an option to put down phones for a week. They needed a vetted migration process that would let them do business as normal in parallel with the project.

The Strategy

A customized project plan

To ensure the Win Sales Solutions team felt comfortable with the steps and direction to a successful migration, Kuno laid out their customized project plan in the pre-sales process. The plan spelled out the project schedule and key milestones while speaking to the client's downtime concerns.

Once a client, the first step was to decide how to bring the data over to HubSpot. Much of the data was already in Google Sheets, which lent itself well to the use of Excel. Kuno worked with the client to make sure data being brought into the system was viable and accurate and was going to help them better perform. Our team also had to adjust processes and reconcile data from database enrichment platforms. After the initial import, we were able to connect these platforms through HubSpot integrations to enrich both existing and new contact records.

Entity Relationship Custom Object
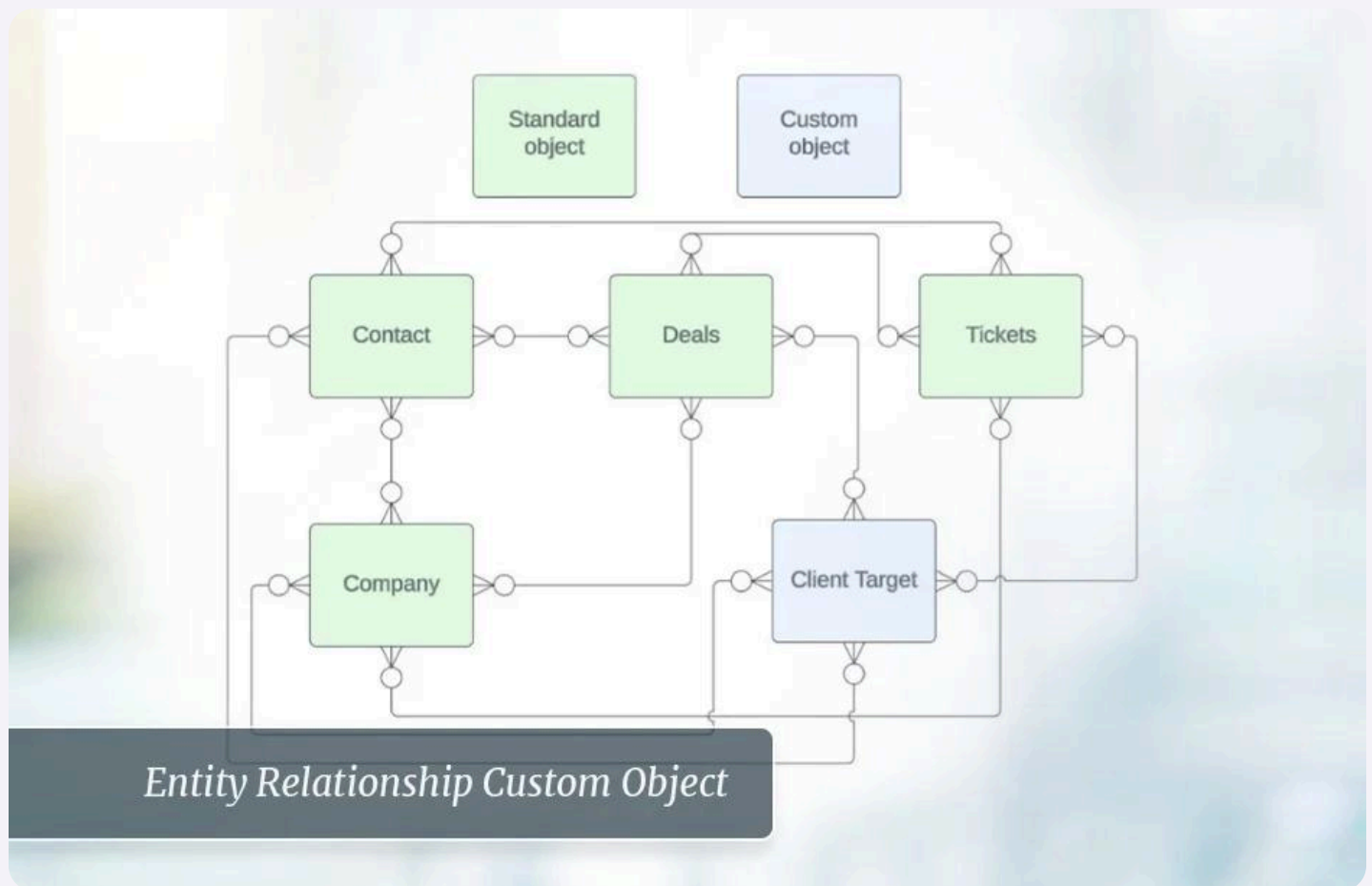
The discovery process

During the discovery process, we identified the need for a custom object to house "client target data". This data represents companies that Win Sales Solutions works for. We diagrammed a custom object to support the firm's unique data scenarios, with a clear delineation between customers, their customers' customers and the contacts attached to each scenario. The custom objects created became the basis for reporting.

While the data was formatted and validated for onboarding, the client was able to maintain business as usual. This was supported by good communication via the project timeline and a final data pull at the end of business on a Friday to minimize any data gaps. By Monday morning, new records were imported for a complete database ready for the Win Sales team to utilize.

Results

A single source of truth

With the completed HubSpot migration, Win Sales finally had a central CRM that served as a single source of truth. Whereas activities were not previously tracked and had to be manually added to a spreadsheet, sales reps and leaders now had full transparency around activities logged against contact records. With a custom data structure in place, sales reps no longer had to spend hours pulling a simple client target report. They could generate reports in seconds and, in so doing, provide a better experience for their clients.

From the collaborative approach to the ease with which HubSpot CRM helped reps do their jobs more effectively, there was a 100% adoption rate among Win Sales' reps. This was a further nod to the overall success of this migration project and achieving its intended goals.

Quick Stats

100%

Rep Adoption Rate

1

Source of Truth

50%

Reduction in Time Spent Pulling Reports

Need Help Optimizing Your Company's Tech Stack?

Schedule a free consultation with one of Kuno's experts.

Let's Plan Your Growth

kuno CREATIVE

kunocreative.com