

How a \$100M Consultancy Saved \$500K Annually, Streamlined Operations and Accelerated Growth

About the Client: Growing Through Smart Advice and Strategic Acquisitions

This digital strategy firm helps SMB companies grow through smart technology choices. Serving as trusted partners and extensions of their client's teams, the firm offers services ranging from infrastructure optimization and solution recommendation to customer experience design and digital marketing campaigns.

The company has enjoyed rapid growth and a roster of repeat business, which today delivers over \$100 million in annual revenue. Over the past 10 years, the firm has made strategic acquisitions to round out its portfolio.

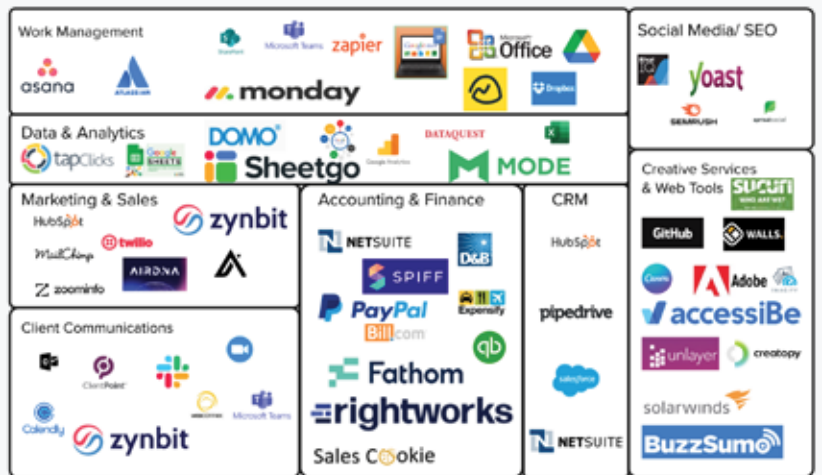
The Challenge: Overcoming the Hidden Costs of Disconnected Systems

While growth through acquisitions offers new capabilities and scale, it also creates operational challenges that can slow progress. This firm faced hurdles that are common with acquisitions, including:



Inherited Frankenstein Infrastructure

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Disconnected Systems Required Manual Intervention

Because the systems were so disconnected, a great deal of manual intervention was required to communicate across the business units. Teams, including high-level managers, were forced to process data by exporting and importing data via spreadsheets. This led to inefficiencies, manual errors, high operational costs, and siloed communications.

“When we wanted to run a campaign, it meant using six to ten systems—building a landing page in one, finding clients in another, building proposals in a third, tracking data in spreadsheets, and importing it into reporting tools. It was a nightmare of inefficiency,”

VP of Marketing



Lack of Agility

Every organization's top concern is attracting new business, and agility is key in a dynamic environment. However, the company's infrastructure was a major hindrance that stymied its new business development efforts.



High Costs

Maintaining these fragmented systems came with a hefty price tag—about \$500,000 in annual software license fees alone. And that was just the start: the legal team and purchasing agents spent considerable time reviewing the licenses and contracts each year.



Complexity

Some CRM systems are extremely complex, and Salesforce requires a dedicated expert to manage them. The firm wanted a more intuitive CRM system so it wouldn't need a dedicated headcount. CRM systems are supposed to help sales teams identify new opportunities and plan their strategies. To benefit from them, the system must be user-friendly.

The Solution: Building a Unified, Scalable Platform with HubSpot

Finding a Path Forward

Faced with costly inefficiencies and disconnected systems, the firm sought a scalable, unified platform to consolidate operations and support its growth ambitions. HubSpot was the solution for centralizing marketing, CRM, and sales processes under one roof.

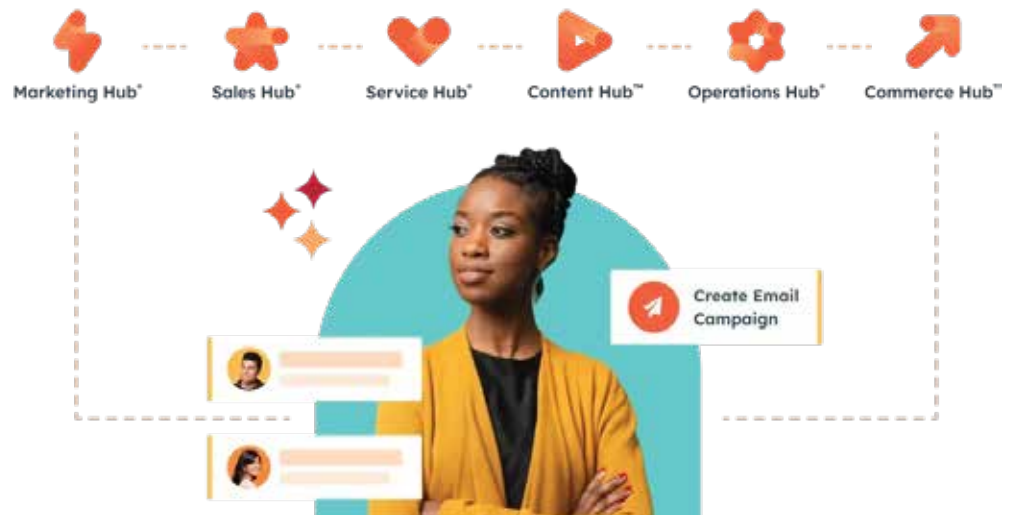
The VP of Marketing recognized an opportunity to improve tracking and coordination of marketing activities. "How do I combine website, email, event, and social media assets? That was our starting point," he explained. With a HubSpot license already in place, the team began building a unified system of record.

But HubSpot's impact didn't stop there. Its advanced tools, such as Configure, Price, Quote (CPQ), allowed the company to streamline pricing and product management. "The CPQ lets us get very sophisticated with our products, enabling detailed margin analysis and other strategic insights," explained the VP of Marketing.

To learn more please visit orange142.com

Simplified Migration

Migrating data from 12 different systems is a complex challenge, but HubSpot's robust integrations enabled smooth data transfer and consolidation. The firm successfully transitioned platforms like Salesforce, NetSuite, and multiple CRMs into a unified ecosystem without requiring extensive manual intervention.



Automated End-to-End Workflows

HubSpot unified the company's tools into a single system, replacing manual data transfers and spreadsheets with automated workflows. These workflows connect marketing, sales, CRM, CPQ, and deal tracking, eliminating repetitive tasks and improving efficiency.

By automating data processes, the company gained real-time insights, reduced errors, and empowered teams to focus on high-value activities like strategy and customer engagement.

"With HubSpot, we can now execute campaigns, manage deals, and generate reports—all within one platform. It's streamlined processes that used to take months into just weeks," said the VP of Marketing.

One standout transformation was a year-end match program offering customers matched purchase credits. Previously, such campaigns required coordinating six to ten disconnected systems and took three to four months to complete. The campaign was planned, executed, and launched with HubSpot in just three weeks.

"We've never been able to launch a campaign as quickly and efficiently as we did with HubSpot—it's a game-changer," the VP of Marketing shared. By leveraging HubSpot's automation, the company achieved a level of efficiency and visibility previously impossible, setting the stage for scalable growth.

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Enabled AI-Readiness

Standardizing and centralizing data across the organization has laid the groundwork for the company to benefit from strategic AI initiatives.

Fragmented systems notoriously create inconsistent and siloed data, making it impossible to apply AI tools effectively. However, HubSpot's unified platform lets the company normalize and consolidate its data, ensuring it is clean, accessible, and ready for advanced analytics.

To learn more please visit orange142.com

Results: Lasting Benefits in Cost, Efficiency, and Innovation



Substantial Cost Savings

Consolidating operations on HubSpot saved the company \$500,000 annually in software license fees. Considering the \$3 revenue-to-expense ratio, this savings translates to \$1.5 -- \$2.5 million in avoided revenue targets. These savings and reduced labor costs have significantly improved the company's bottom line.



Accelerated Campaign Launches

HubSpot has reduced campaign execution timelines from several months to just weeks. Faster launches allow campaigns to run longer, maximizing their impact and creating more opportunities to attract new business.



Enhanced Operational Efficiency

With HubSpot's unified platform, the company eliminated manual processes, enabling real-time insights and streamlined workflows. Teams now focus on strategic initiatives and customer engagement rather than repetitive administrative tasks, fostering innovation and growth.



About HubSpot

HubSpot is a customer platform that helps businesses grow better. With over 1,700 app integrations and tools like AI-powered engagement hubs and Smart CRM, HubSpot supports over 238,000 customers worldwide, including brands like DoorDash, Reddit, and Tumblr.