



CASE STUDY

**TRANSFORMING A DISORGANIZED
CRM INTO A SCALABLE SALES
INTELLIGENCE ENGINE**

EXECUTIVE SUMMARY

A mid-sized transportation and logistics company engaged JMB Digital Solutions to overhaul its HubSpot CRM, which was plagued by incomplete data, inconsistent processes, and limited reporting capabilities. JMB executed a structured 90-day CRM transformation focused on data cleanup, workflow automation, and reporting optimization. The result was a fully structured CRM that improved sales responsiveness, enabled forecasting visibility, and provided leadership with real-time insights into pipeline performance.



Client Background

The client is a growing transportation and logistics company with an expanding sales team and increasing demand for structured customer relationship management. As the organization scaled, its HubSpot CRM environment became cluttered with inconsistent data, fragmented reporting, and manual processes that hindered sales performance and leadership visibility.

To support continued growth, the company needed a more structured CRM system capable of driving efficiency, improving follow-up processes, and enabling leadership to manage the sales pipeline effectively.

THE CHALLENGE

Over time, the client's CRM environment had accumulated significant data inconsistencies and operational inefficiencies. Contact records were incomplete or incorrectly assigned, important segmentation fields were missing, and multiple dashboards existed with little clarity around which metrics mattered most.

Sales teams relied heavily on spreadsheets outside of the CRM to track performance, which created data silos and limited the ability of leadership to forecast revenue or evaluate pipeline health accurately.

Without structured workflows or automated routing, follow-up activities were inconsistent and response times varied widely. As the organization continued to grow, these inefficiencies threatened sales productivity and reduced leadership's ability to manage performance effectively.

THE SOLUTION

JMB Digital Solutions built an end-to-end system designed to increase fundraising efficiency, JMB Digital Solutions implemented a phased CRM transformation designed to restore data integrity, automate sales processes, and create actionable reporting.

The engagement began with a comprehensive CRM data audit and cleanup process to establish a reliable data foundation. JMB then introduced structured workflow automation and lead routing to ensure that new leads were consistently assigned and followed up on in a timely manner.

Finally, JMB redesigned the client's reporting architecture, replacing fragmented dashboards with a streamlined system that provided clear insights for leadership, marketing, and individual sales representatives.

This structured approach transformed the CRM from a basic contact repository into a strategic sales intelligence platform.

IMPLEMENTATION

The project was executed in three phases over a 90-day period.

Phase 1: Data Cleanup and Structuring

JMB conducted a full CRM audit and cleaned more than 60,000 contact records, correcting incomplete data and reassigning contacts to active sales representatives. Key segmentation fields were standardized to support accurate reporting and targeting.

Phase 2: Workflow Automation and Lead Management

Automated workflows were implemented to improve lead routing and follow-up processes. These workflows ensured that incoming leads were automatically assigned to the appropriate sales representatives and that follow-up tasks were consistently triggered.

Phase 3: Reporting and Sales Visibility

JMB consolidated reporting and created **custom dashboards for marketing leadership, sales management, and individual sales representatives**. These dashboards provided real-time insight into pipeline health, conversion metrics, and individual performance.

In addition, sales leadership gained access to forecasting tools that allowed them to evaluate pipeline strength and manage revenue expectations more effectively.



RESULTS

- **100% increase in response rate** through automated follow-up workflows
- **60,000 contact records cleaned and standardized** to improve CRM accuracy
- **Automated lead routing implemented** to ensure consistent assignment and faster response times
- **Custom dashboards created** for marketing, sales leadership, and individual sales representatives
- **Real-time sales forecasting** visibility for management
- Elimination of manual spreadsheet tracking across the sales team
- Improved accountability and transparency throughout the sales cycle

Client Feedback

“This is so awesome. I feel like I finally have visibility and can drive accountability and really understand what is going on in the sales cycle instead of relying on 10 spreadsheets.”

-VP of Sales



If your organization is struggling with CRM adoption, data quality, or sales visibility, JMB Digital Solutions can help transform your CRM into a powerful engine for growth. Our structured approach to CRM optimization enables teams to improve efficiency, gain actionable insights, and scale with confidence.