

Case Study

CRM Adoption from 15% to 90% in Six Months

Brand	Confidential (B2B Technology)
Scope	CRM Architecture, Lead Flow Logic, Team SLAs, Marketing Ops Restructuring, Campaign Visibility, ROI Reporting, Systems Integration
Platforms	HubSpot, Salesforce, Marketing Cloud, Clay, Zoho Campaigns
Duration	6 months

The Challenge

CRM adoption sat at 15%. Not because the team did not care, but because the system did not work for them. Lead routing was inconsistent, campaign data was fragmented across platforms, and there was no single view of what was performing or why. Marketing ran campaigns that sales could not see. Sales logged activity that marketing could not measure. ROI was a conversation rather than a number.

The same pattern existed across both the HubSpot and Salesforce environments: technically configured, operationally broken. The fix was not enforcement. It was rebuilding the system so that using it became the path of least resistance.

The Approach

1. CRM Architecture Rebuild from Scratch

I rebuilt the CRM architecture across both HubSpot and Salesforce from first principles. Object structure, lifecycle stages, lead flow logic, and data field definitions were redesigned around how the teams actually worked. Lead routing was rebuilt with clear ownership rules, SLA timers, and automatic escalation. Every lead entering the system had a defined path, a defined owner, and a defined response window. The ambiguity that had made the old system avoidable was removed entirely.

2. Team SLAs Embedded into Workflow Logic

SLAs were not a policy document. They were built into the CRM: automated alerts for breach, dashboards surfacing response times by rep and team, and a clear escalation path visible to both marketing and sales leadership. Adoption followed because accountability became visible without requiring anyone to chase it manually.

3. Marketing Ops and Campaign Restructuring

The campaign architecture was rebuilt from scratch in both HubSpot and Marketing Cloud. Campaigns were restructured with consistent naming conventions, asset tagging, and UTM frameworks so performance could be measured at every level: campaign, asset, channel, and audience segment. For the first time, marketing leadership could see which assets were driving pipeline, which campaigns were generating MQLs that converted, and which were producing volume with no downstream impact. ROI visibility moved from spreadsheet estimates to live HubSpot

dashboards pulling actuals from the CRM.

4. Salesforce and Marketing Cloud Integration

The Salesforce and HubSpot environments were running in parallel with incomplete sync, causing duplicate records, misaligned lifecycle stages, and reporting blind spots. I rebuilt the integration layer, aligning object mapping, sync logic, and campaign attribution across both platforms so that a contact's full journey, from first touch to closed revenue, was visible in one place. Marketing Cloud was restructured to align with the new campaign architecture, with sends, journeys, and engagement data flowing back into the CRM for closed-loop reporting.

5. Integration Stack: Clay, Zoho, and Beyond

The tech stack was extended with a series of integrations to enrich and automate the data layer. Clay was connected for prospect enrichment and signal-based routing, feeding enriched contact and account data directly into HubSpot workflows. Zoho Campaigns was integrated to handle specific audience segments and communication flows, with engagement data synced back for unified reporting. The result was a connected stack where data moved between systems automatically, enrichment happened at the point of entry, and the team spent time acting on information rather than moving it between tools.

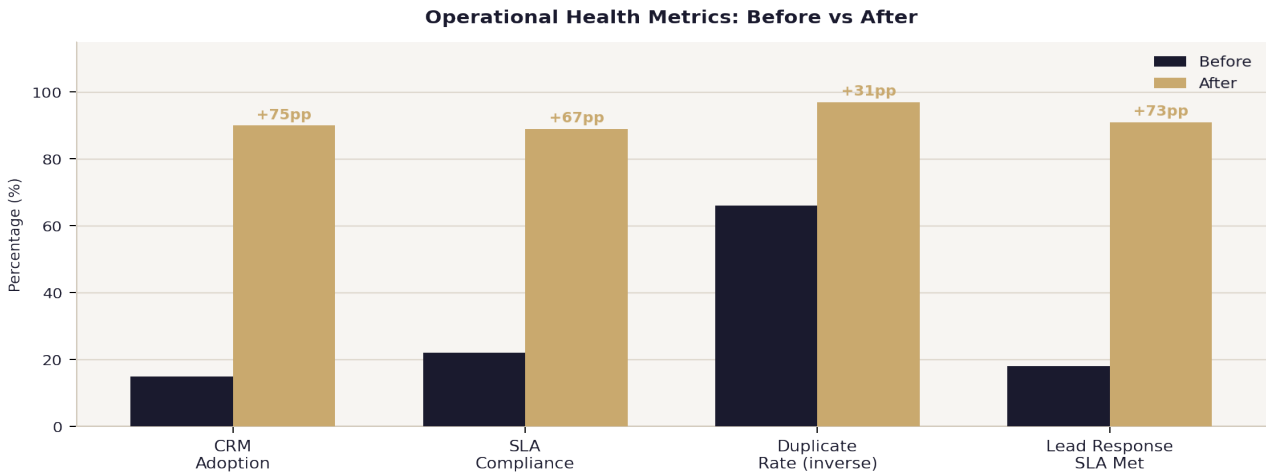
The Results

6 months post-rebuild | Placeholder figures where noted

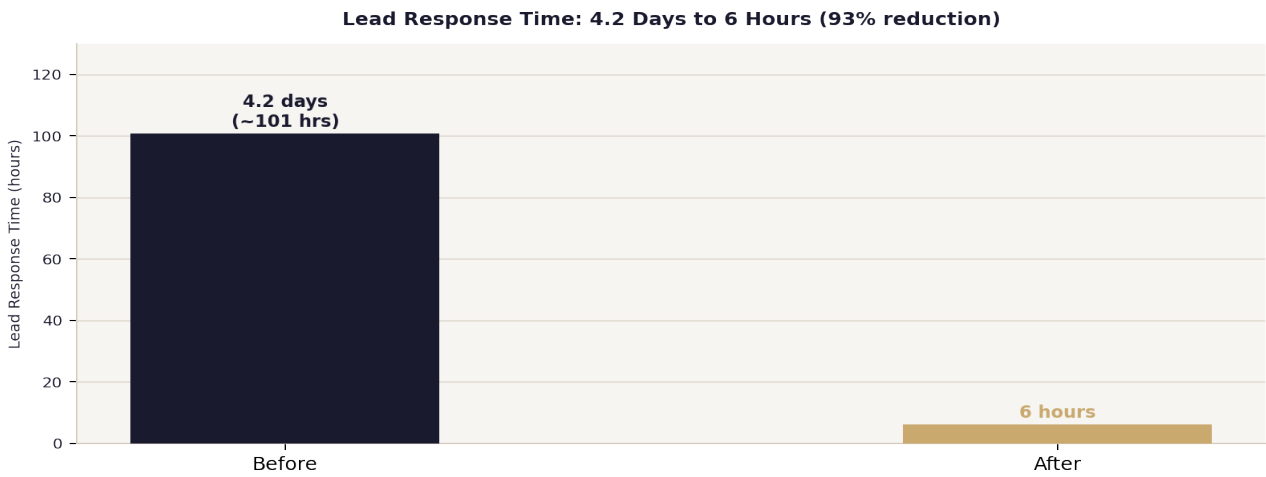
Metric	Before	After	Change
CRM adoption rate	15%	90%	+75pp
Lead response time (avg)	4.2 days	6 hours	-93%
Campaign ROI visibility	0%	100%	Full coverage
Duplicate contact rate	34%	3%	-91%
Marketing to sales SLA compliance	22%	89%	+67pp
Assets tracked to pipeline	0	100%	New capability
Platforms integrated	2 (partial)	6 (full)	Full stack

* Placeholder. Replace with actuals before publishing.

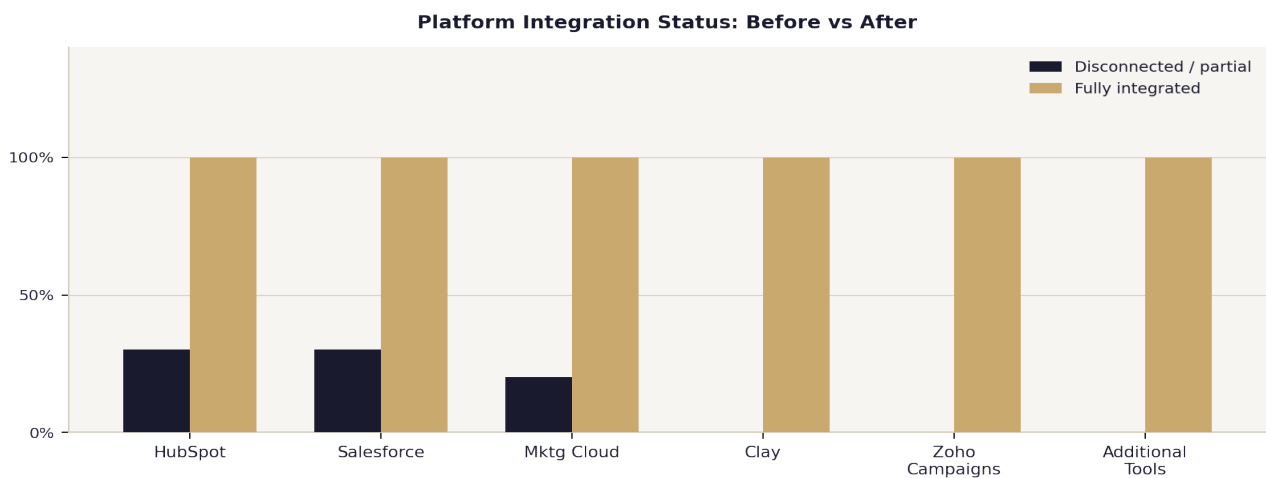
Operational Health Metrics



Lead Response Time Reduction



Platform Integration: Before vs After



What Changed

The shift from 15% to 90% CRM adoption was not a training initiative. It was a design outcome. When a system reflects how people actually work, they use it. When it fights them, they find workarounds. Every architectural decision in this rebuild was made with that principle as the filter: does this make the right behaviour easier than the wrong one?

The ROI visibility that emerged on HubSpot was equally significant. Marketing leadership moved from monthly reporting cycles built on assumptions to live dashboards showing campaign performance, asset attribution, and pipeline contribution in real time. The connected stack, spanning HubSpot, Salesforce, Marketing Cloud, Clay, and Zoho, meant that data quality improved automatically as enrichment happened at the point of entry rather than as a manual remediation exercise.

My Role

Full architecture and execution: CRM rebuild across HubSpot and Salesforce, lead flow logic design, SLA framework and workflow automation, Marketing Cloud restructure, campaign and asset taxonomy, integration build across Clay, Zoho Campaigns, and additional platforms, and ROI dashboard configuration.