

Building a Scalable HubSpot Engine

for a Global Manufacturing Technology Company



The Win at a Glance

Sagefrog partnered with a global manufacturing technology company with a large reseller network to transform its HubSpot portal from a disorganized, manual database into a scalable automation engine, improving lead visibility, eliminating redundant asset creation, and replacing annual cleanup with always-on data hygiene.

The Challenge

When the Company partnered with Sagefrog for a comprehensive HubSpot audit, its environment had become increasingly difficult to manage, limiting visibility into lead activity, complicating reseller management, and creating unnecessary manual work.

Key Platform Pain Points:

- **Disorganized Database:** The CRM environment lacked structure, making clean list management and active campaign support difficult.
- **Broken Lead Flow:** Lead routing depended on an outdated external system, limiting visibility into lead status, ownership, and reseller accountability.
- **Manual Reseller Management:** Each new reseller required cloned landing pages and workflows, creating 50+ nearly identical assets and making reporting difficult.

The Solution

Sagefrog audited the portal and executed a phased optimization plan focused on data quality, lead routing, and long-term efficiency.

Key Strategic Initiatives:

- **Prioritized Data Cleanup:** Broke immediate database needs into clear workstreams based on impact and implementation effort.
- **HubSpot-Native Lead Routing:** Replaced the external CRM dependency with lead assignment and routing within HubSpot.
- **Automated Data Hygiene:** Removed the need for annual system cleanup projects by automatically removing unengaged and invalid records.
- **Growth-Ready Reseller Framework:** Eliminated the need to manually clone reseller assets, reducing administrative overhead and simplifying onboarding.
- **Custom Reporting Dashboards:** Created analytics views that give leadership clear visibility into lead activity and reseller engagement.

From Manual Cleanup to Always-On HubSpot Performance

The Results: A Cleaner, Smarter, More Scalable HubSpot Ecosystem

PREVIOUS MANUAL PROCESS

Annual Data Cleanups: The team relied on a time-consuming mass deletion each year to keep the database clean.

External Lead Assignment: Lead routing depended on a legacy system with limited tracking, broken feedback loops, and weak accountability.

Bloated Asset Duplication: New reseller onboarding required manually cloning 50+ landing pages and workflows.



NEW AUTOMATED SOLUTION

Continuous Data Hygiene: Automated workflows suppress or remove unengaged and invalid contacts, improving deliverability and reporting accuracy.



HubSpot-Native Lead Routing: Lead ownership, routing, and reporting now fully live within HubSpot.



Growth-Ready Infrastructure: A centralized routing model eliminated asset cloning and keeps the system organized as the reseller network grows.

How HubSpot Automation Transformed Marketing & Sales Efficiency

OPERATIONAL IMPROVEMENT

Automated data hygiene

HubSpot-native lead routing

Centralized reseller framework

Custom dashboards

Reduced asset duplication

MARKETING VALUE

Better email deliverability and reporting accuracy

More accurate attribution and campaign tracking

Easier campaign execution across reseller channels

Clearer visibility into marketing performance

Less time managing HubSpot assets

SALES VALUE

Higher-quality lead data

Faster lead follow-up

More consistent partner management

Better insight into reseller contribution

More time focused on revenue-generating activity

Ready to Optimize Your HubSpot Portal?

With Sagefrog, HubSpot becomes the system behind smarter growth: cleaner data, stronger automation, clearer reporting, and tighter alignment between marketing and sales. Whether you're untangling a messy platform, scaling campaigns, or proving performance to leadership, we help turn HubSpot into a growth engine your team can trust.



SCAN TO CONNECT
WITH SAGEFROG