Modernising Legacy Sales Systems: An Industrial Pumps Case Study

Utilities Sector

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The Background Story

When a leading industrial pumping solutions manufacturer and distributor approached Fileroom, they were grappling with challenges that are all too common in their industry: lengthy sales cycles, complex approval processes, and most critically, a technology stack that wasn't keeping pace with their growth ambitions.

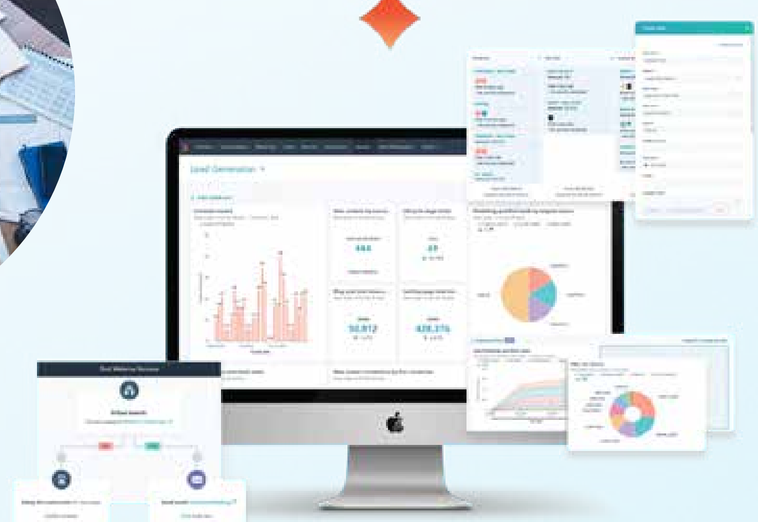
Our initial assessment revealed a fragmented data landscape. The sales team was wrestling with an aging Salesforce CRM platform that was expensive and couldn't effectively connect customer interactions across multiple touchpoints, including a failing integration with their Simpro Field Management platform.

Despite having a wealth of customer data at their disposal, the sales team was forced to rely on manual processes, leading to sluggish quote generation, delayed customer responses, and a disconnect between marketing insights and sales execution.

The Challenges?

- **Extended sales cycles**
- **Declining conversion rates**
- **Valuable opportunities slipping through the cracks**

The Fileroom team recognised this as an opportunity to demonstrate how our expertise in sales operations transformation could revolutionise their business. By introducing our integrated solution, we were confident in HubSpot's ability to fully integrate with Aircall and Simpro, allowing our client to streamline their processes, introduce intelligent automation, and leverage the full potential of their customer data to drive revenue growth.



The Sales Landscape

Having worked closely with sales leaders across the industrial sector, we understood the unique pressures faced. We knew that selling high-value pumping solutions isn't just about the product – it's about managing complex relationships and project requirements, coordinating with multiple stakeholders, and maintaining momentum through lengthy sales cycles.

When we sat down with the sales leadership team, their frustrations were immediately clear. Sales representatives were spending precious hours wrestling with an outdated Salesforce CRM and manually generating quotes, rather than doing what they do best – building relationships and closing deals. Despite having invested in collecting customer data over the years, the team couldn't easily access or use these insights when they needed them most.

We identified several critical pain points that were all too familiar to the sales leadership:

- **Their legacy Salesforce CRM system was rigid and inflexible,** unable to adapt to their evolving sales processes and growth ambitions.
- **Sales reps were duplicating data entry and spending hours manually generating quotes and proposals,** leading to slow response times and frustrated customers.
- **Valuable selling time was being consumed** by repetitive data entry tasks, increasing the risk of errors.
- **Critical customer insights were scattered across different systems,** making it difficult for sales teams to access the information they needed quickly during crucial conversations.
- **Marketing leads weren't effectively tracked and nurtured** through the sales pipeline, leading to missed opportunities.

For the sales leadership team, these weren't just operational headaches – they represented missed opportunities to grow the business, meet their targets and support their sales team's success.

"Our sales team has the expertise and relationships to drive significant growth, but they're held back by systems that just haven't kept pace with how modern B2B sales work."

Business Objectives

Working closely with the sales leadership team, we aligned on five core objectives that would transform their sales operations:

- **Accelerate Deal Velocity:** By reimagining their quoting process and customer response workflows, we aimed to dramatically reduce the time from inquiry to proposal, enabling their team to maintain momentum in critical deals.
- **Transform Data into Action:** Rather than letting valuable customer insights remain locked away, we recommended to implement real-time analytics to empower sales representatives to make informed decisions during crucial customer conversations.
- **Free Up Selling Time:** Intelligent automation of routine tasks would give the sales team back the hours they needed to focus on what matters most – building relationships and closing deals.
- **Create a Seamless Revenue Engine:** By bridging the gap between marketing, sales and customer engagement data, we would ensure that every lead was effectively nurtured with the right information at the right time.
- **Drive Sustainable Growth:** Our solutions would establish scalable processes that would not only boost immediate revenue but create a foundation for continued sales acceleration.

Pain Points

The company faced several challenges:

- **Legacy Systems:** The outdated Salesforce CRM platform and quoting systems were not designed for the complex sales needs of the company, resulting in inefficiencies and a lack of integration.
- **Manual Processes:** Sales reps were continuously bogged down by administrative tasks like data entry, follow-ups, and generating quotes, which prevented them from focusing on selling and building relationships.
- **Underutilised Data:** Despite having vast amounts of data, the sales team could not make effective use of it. Data was fragmented and siloed, with no integrated systems to provide actionable insights in real time.
- **Misalignment of Teams:** Sales and marketing teams were operating in silos. Marketing-generated leads didn't reach the sales team with all the relevant information on time, and there was no structured follow-up or alignment between the teams, leading to lost opportunities.

These challenges highlighted the need for a comprehensive strategy to modernise the sales approach, streamline operations, and improve team collaboration.

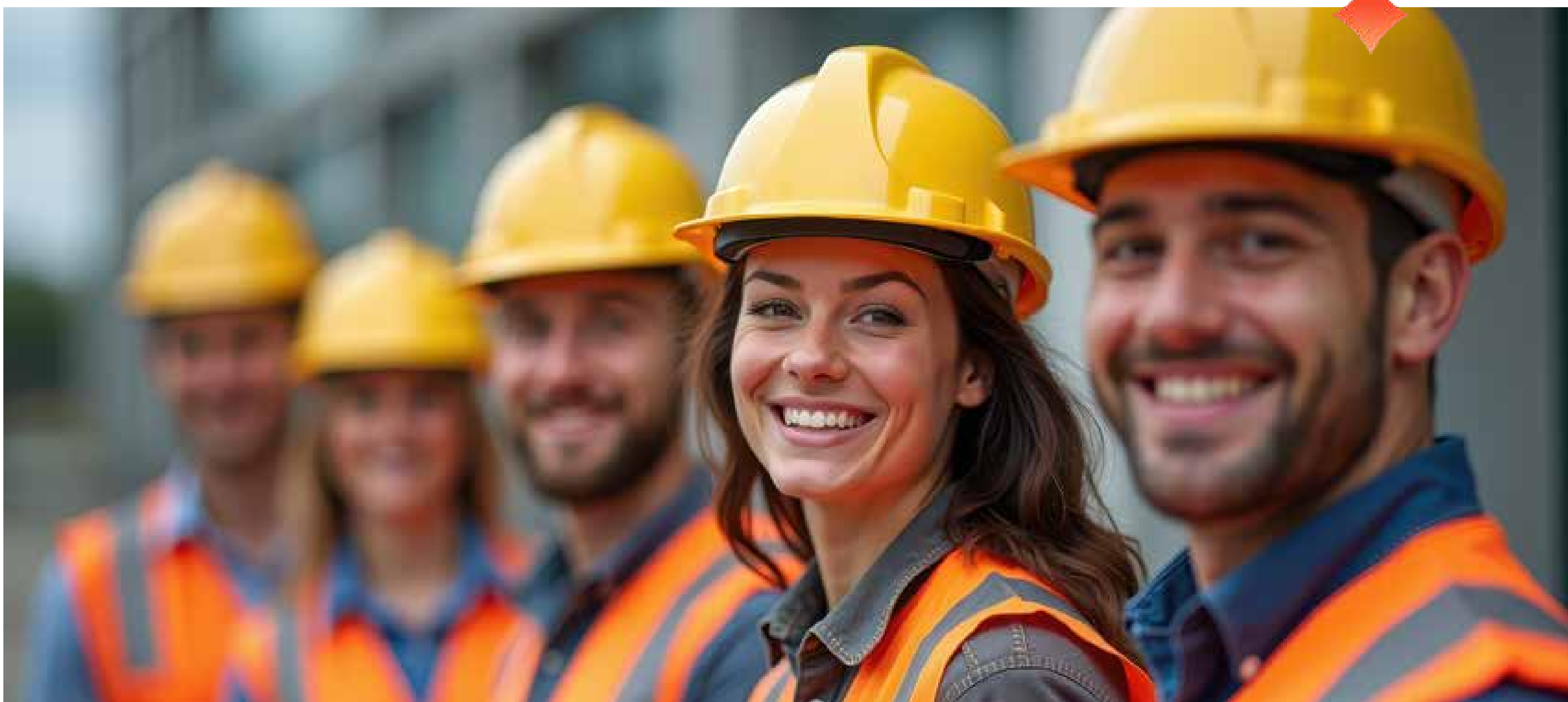
The Transformation Journey

Our partnership began with deep-dive sessions alongside the sales, marketing, and operations teams. Rather than imposing a solution, we invested time in understanding their day-to-day challenges and what truly mattered to their success.

This collaborative approach led to a four-pillar transformation:

- **Modernising Their Sales Foundation:** We migrated them away from Salesforce and implemented HubSpot's integrated CRM platform, chosen specifically for its ability to support complex B2B sales cycles and seamless integration ability with Simpro. This gave their sales team a single source of truth for tracking opportunities and managing customer relationships, replacing multiple disconnected systems with one unified platform.
- **Improving Sales Productivity:** By identifying and automating their most time-consuming tasks, we helped the sales team reclaim valuable hours. Quote generation that once took days now happened in minutes, lead qualification became systematic rather than subjective, and follow-ups were triggered automatically while maintaining a personal touch.
- **Empowering Data-Driven Decisions:** We transformed scattered data into actionable intelligence. The sales team gained real-time insights into customer behavior, lead scoring became more accurate, and sales forecasting shifted from gut feel to data-driven precision. For the first time, the sales leaders had a clear view of the pipeline and could make proactive decisions about resource allocation.
- **Building a Unified Revenue Team:** Breaking down the traditional barriers between sales and marketing, we created seamless workflows that ensured no lead fell through the cracks. Marketing could now see and evidence how their efforts translated into sales outcomes, while the sales team received leads enriched with valuable context about customer interests and engagement.

The project wasn't just a technology implementation – it was a comprehensive transformation of how their revenue team operated. By focusing on both systems and people, we helped create a more agile, efficient, and collaborative sales organisation ready to capture market opportunities.



Measurable Business Impact

- **Accelerated Deal Velocity:** Through intelligent automation of the quoting process, what once took days now happened in hours. Sales representatives could respond to customer inquiries with detailed, accurate quotes while opportunities were still hot – maintaining crucial momentum in complex sales cycles.
- **Scalable Revenue Growth:** The modernised sales processes are now supporting significant revenue growth. More importantly, we established scalable foundations that would support continued acceleration of their sales performance.
- **Higher Quality Conversions:** By creating a seamless handoff between marketing and sales, leads are no longer falling through the cracks. The sales team can now engage prospects with the right information at the right time, dramatically improving conversion rates across their pipeline.
- **Transformed Sales Productivity:** Our automation initiatives freed up selling time. Sales representatives are finally focusing on what they do best – building relationships and closing deals – rather than wrestling with administrative tasks.

But the most telling metric wasn't in the numbers – it was in the transformation of their sales culture. Their team shifted from feeling constrained by their tools to being empowered by them, setting the stage for sustained growth and market leadership.

45% Improved Productivity

29% Conversion Increase

Executive Insights

The transformation journey fundamentally changed how the organization approached sales leadership. What began as a technology upgrade evolved into a complete reimagining of their sales operations, empowering leaders with real-time visibility and their teams with tools that amplified rather than hindered their expertise.

As Their Business and Sales Leaders Reflected:

"What Fileroom helped us achieve went far beyond our initial expectations. We weren't just looking for new software – we needed a partner who understood the complexities of industrial sales and could help us transform our approach.

Our sales leaders now have real-time insights to make strategic decisions, our teams are freed from administrative burdens, and we can focus on what truly matters – building customer relationships and driving growth. This hasn't just changed how we sell; it's transformed how we compete in the market."

Our partnership demonstrates what's possible when sales organisations embrace modern tools and processes while maintaining their focus on relationship-driven selling. For industrial B2B companies still struggling with legacy systems and manual processes, there's a better way forward – one that empowers rather than constrains sales teams.

Checklist for Sales Leaders Considering Digital Transformation

Based on our experience partnering with industrial sales organisations, we've identified several key factors that can make or break a sales transformation initiative:

1. **Start with Your People, Not Technology:** The most successful transformations begin by understanding how your sales team actually works. Spend time with your representatives, understand their daily challenges, and involve them in selecting solutions. Their buy-in and input are crucial for adoption.

2. **Focus on Quick Wins First:** While comprehensive transformation takes time, identify opportunities for immediate impact. Whether it's automating quote generation or streamlining lead handoffs, early wins build momentum and demonstrate value to stakeholders.

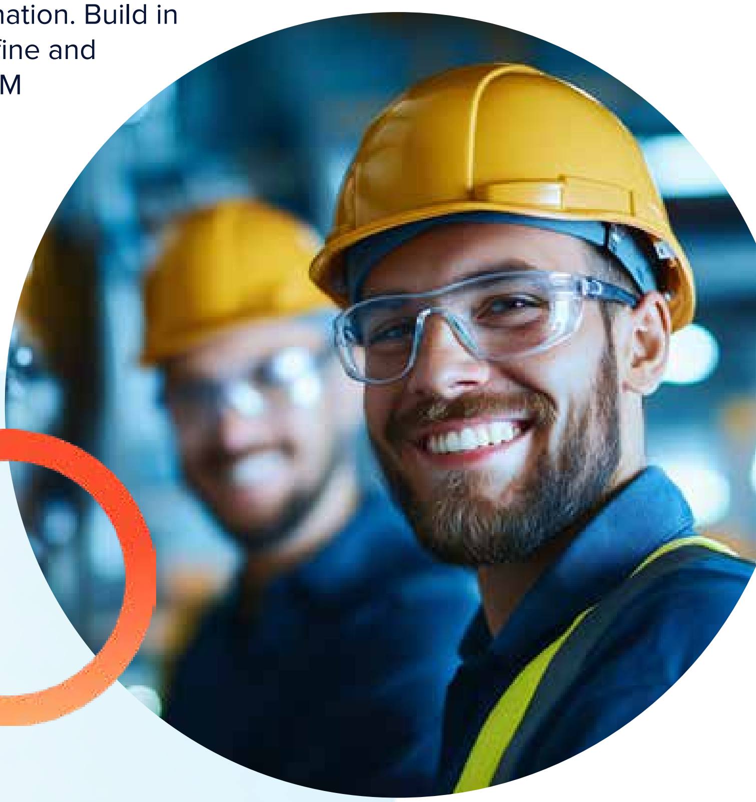
3. **Think Evolution, Not Revolution:** Rather than attempting to change everything at once, prioritise changes that deliver the highest value with the least disruption. This approach allows your team to adapt gradually while maintaining performance.

4. **Invest in Data Quality Early:** Clean, reliable data is the foundation of any sales transformation. Before implementing new tools, ensure your customer and sales data is accurate, standardised, and well-maintained.

5. **Build Cross-Functional Alignment:** Success requires more than just sales team buy-in. Engage marketing, operations, and IT stakeholders early to ensure your transformation efforts align with broader business objectives and technical capabilities.

6. **Plan for Continuous Improvement:** The most successful sales organisations view transformation as an ongoing journey, not a destination. Build in regular reviews and feedback loops to continuously refine and optimise your processes, as well as implement new CRM feature enhancements.

Remember, digital transformation in sales isn't about replacing the human element – it's about empowering your team to spend more time on what they do best: **building relationships and closing deals.**



If you're interested in knowing more about the specific outcomes:

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