



LDP Associates

CLIENT

Data Center Power Solutions

INDUSTRY

57

EMPLOYEES

35

HUBSPOT USERS

IMPLEMENTATION SUMMARY

Objectives

- Unify on a flexible, powerful CRM
- Achieve better CRM-CPQ integration
- Customize for project-driven sales
- Unify marketing and sales teams

Configuration

- HubSpot Sales Hub Enterprise
- HubSpot Operations Hub Enterprise
- DealHub CPQ
- PSOhub Project Management

Technical

- Migration from Salesforce CRM
- Delivery of HubSpot with DealHub CPQ
- Custom UX functionality
- Advanced integration with Box.com
- Complex enterprise reporting

IMPACT

27%

GREATER
DEAL FLOW
ACCURACY



HUBSPOT CASE STUDY

LDP ASSOCIATES

Replacing Salesforce and Gaining a Growth Platform

The goal of an enterprise software implementation is to make operations better and more efficient, not just replicate old and inefficient processes in a new platform. At **LDP Associates**, a commitment to detailed process mapping enabled a migration to HubSpot that powered serious results.

Selection

LDP Associates had long been a Salesforce shop, running CRM on the platform as well as Salesforce CPQ and a project management tool from the Salesforce app exchange. And yet, while everything came with a single vendor's logo, the products did not work in a unified manner and sales personnel were largely frustrated and loathe to embrace them further. Recognizing that Salesforce was not the right platform for their growth, **LDP Associates set about looking for other CRM solutions and ultimately selected HubSpot CRM** along with CPQ and project management tools within the HubSpot Ecosystem.

Implementation

Wendt Partners was the first HubSpot partner to also become a DealHub CPQ partner while also becoming the first North American partner for PSOhub, a purpose-built project management and PSA platform for HubSpot. This expertise, combined with detailed knowledge of the client's use case and a well-documented custom integration plan to **automate document management between HubSpot and Box.com** led to a truly unified "single pane of glass" solution. Wendt Partners' expertise in working with complex industrial and technical companies also played a major role in the project's success.

Success

With a technically sophisticated client-side team, **Wendt Partners was able to rapidly move through the implementation process** with an eye on both training and technology, resulting in high adoption rates and a truly unified CRM for the entire enterprise.

Testimonial

"Our team is nearly all engineers, each with his or her own way of doing business. This is a very sophisticated and stubborn user base – not the easiest group to convince to undertake massive change in their processes and technology. Wendt Partners worked meticulously on every step of the way to help me, and our entire team, achieve true success with HubSpot."

BEN SEAGER

CHIEF TECHNOLOGY OFFICER, LDP ASSOCIATES



Begin Your HubSpot Implementation Journey Today

Contact Doug Wendt, Senior Partner at **718-841-7169** or via email to doug@wendtpartners.com.