



The Brooks Group

CLIENT

Professional Services

INDUSTRY

37

EMPLOYEES

20

HUBSPOT USERS

IMPLEMENTATION SUMMARY

Objectives

- Integrate marketing and sales for a more fluid customer journey
- Increase sales velocity and up-sell/cross-sell opportunities
- Enable more dynamic collaboration across the team

Configuration

- HubSpot Sales Hub Professional
- HubSpot Marketing Hub Professional
- HubSpot Operations Hub Professional

Technical

- Migrate off Salesforce CRM
- Customize pipelines and automations
- Advanced workflows and reporting

IMPACT

72%

MORE
MARKETING-TO-SALES
LEAD CONVERSIONS



THE BROOKS GROUP

Unlocking Growth by Migrating from Salesforce

When the team at **The Brooks Group**, an award-winning sales consulting firm, was looking for ways to increase their own sales velocity, they realized it was time to leave Salesforce behind and migrate to a far more agile and nimble platform: HubSpot CRM.

Selection

The Brooks Group **specializes in sales consulting and training of highly complex industries** such as manufacturing, distribution, construction, transportation, medical devices, pharmaceuticals and energy. As an award-winning firm with an enviable track record of success, The Brooks Group itself was eager to leverage these accomplishments to increase the velocity of its own client acquisition and revenue growth. Recognizing that Salesforce CRM was hindering rather than enabling their go-forward strategy, the firm's leadership elected to migrate to HubSpot Sales Hub and HubSpot Marketing Hub for a unified approach.

Implementation

Wendt Partners recognized that The Brooks Group needed very specific processes inside HubSpot to reflect the firm's wide range of practice areas and services, as well as their focus on industry-specific solutions. Modeling that inside HubSpot **set the stage for a truly integrated view of clients and prospects** alike across the customer journey, and made the firm's own sales process flow more smoothly. The Wendt Partners team also brought extensive knowledge of Salesforce CRM that made mapping and executing the migration smooth.

Success

As a result of this journey, The Brooks Group is **now a true believer in the power of HubSpot** and is unified on a single CRM platform – something they also strongly recommend to their clients. This process has directly enhanced their sales velocity and growth, making new account acquisition as well as up-sell and cross-sell

Testimonial

"Ensuring a smooth migration from Salesforce was one of our most essential priorities and the Wendt Partners team delivered across the board. They enabled us to not only achieve a smooth transition, but also enhance how we do business by harnessing the broader capabilities of HubSpot to support our own growth."

SARAH TERRELL

DIRECTOR OF SALES OPERATIONS, THE BROOKS GROUP



Begin Your HubSpot Implementation Journey Today

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