

CRM & Sales Operations Transformation

Freight Brokerage

From Pipeline Chaos to Predictable Revenue

- 100%** Data Hygiene on Migration
- 3x** Pipeline Visibility
- 60 Days** Full Deployment



The Situation

A regional freight brokerage had scaled its carrier network and shipper relationships faster than its internal operations could keep pace. Sales reps tracked deals in spreadsheets. Follow-ups fell through the cracks. When a senior rep left, the pipeline walked out the door with them. Leadership had no real-time view into deal health, velocity, or which customer segments were actually converting. Marketing spent on campaigns that generated form fills, not freight volume.

The Problem Breakdown

What Was Broken

Pipeline managed in spreadsheets and memory with no structured handoffs between BDRs and account managers.

The Business Impact

Institutional knowledge lost with every rep departure and leadership forecasts built on gut feel, not data.

The Missed Opportunity

Expansion revenue missed on existing shipper accounts and onboarding new reps taking months instead of weeks.

What We Built

Custom HubSpot Environment

Rebuilt from the ground up with lane-based pipeline stages, carrier tracking, and load-volume deal properties.

Data Migration & Hygiene

Executed a clean-start migration with 100% hygiene enforcement, eliminating duplicate contacts and dead pipeline.

Marketing Attribution

Connected marketing campaigns to deal outcomes so leadership could see which efforts drove actual freight revenue.

Purpose-Built Automation

Every automation was purpose-built for their GTM motion, ensuring seamless handoffs and consistent follow-ups.

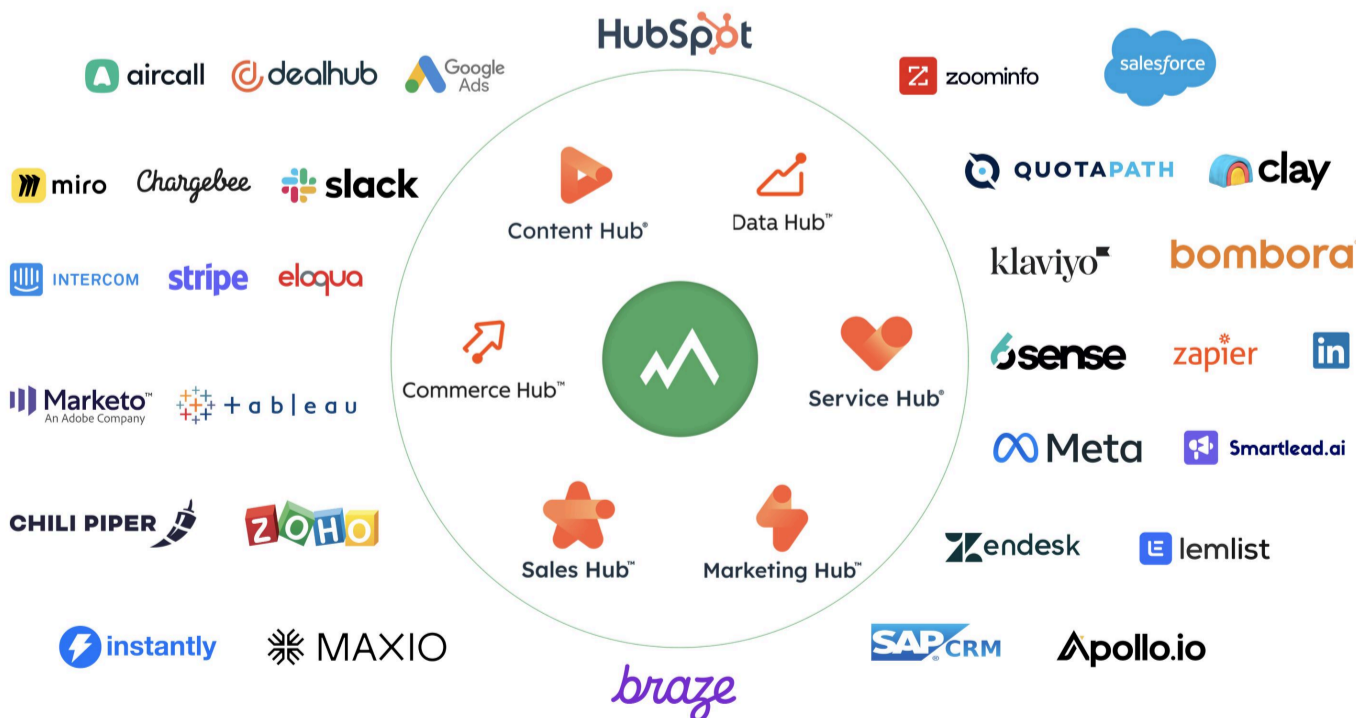
Carrier Relationship Tracking

Integrated carrier tracking directly into the sales workflow to better manage shipper relationships.

The Outcome



Tech Stack We Deal With



Our Partners