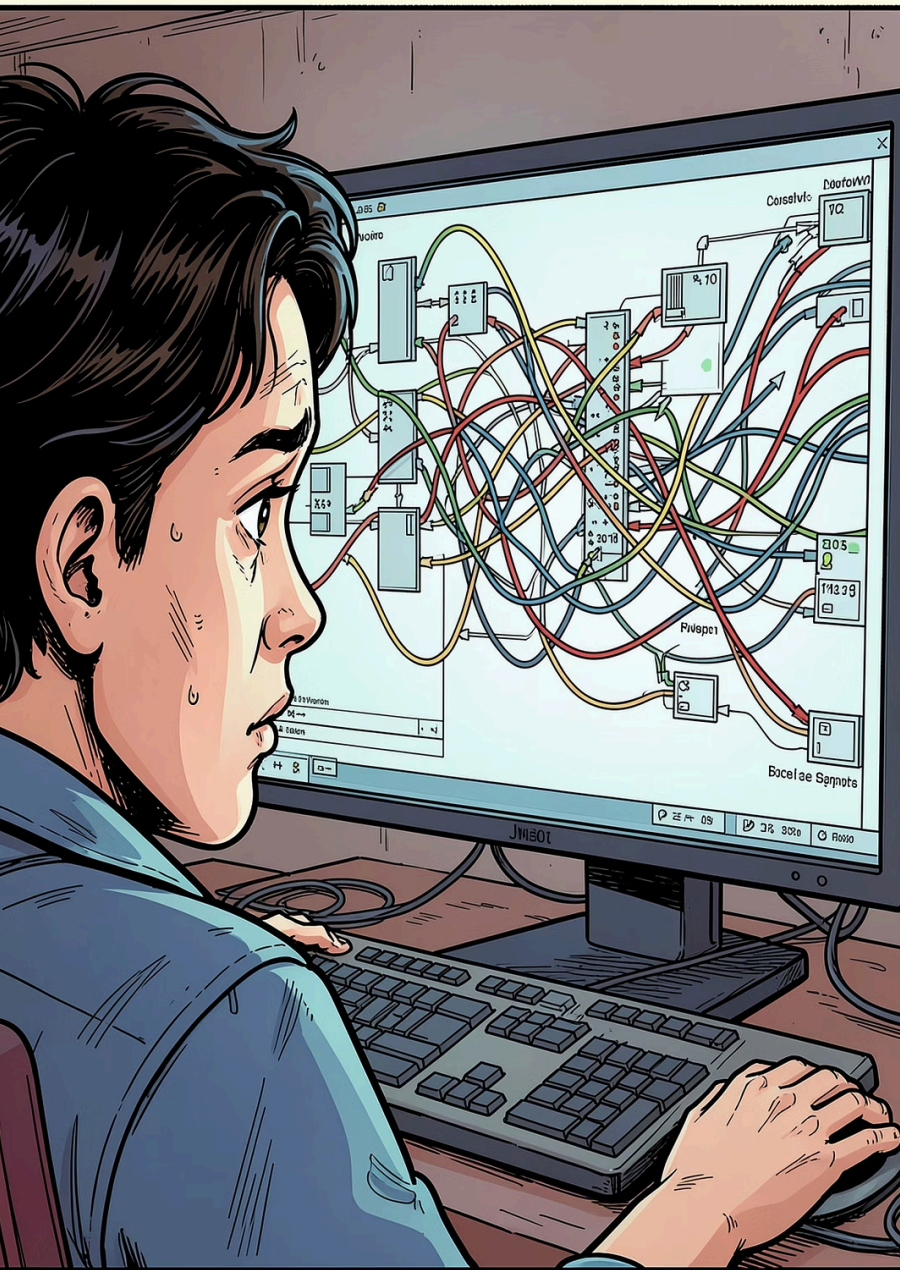


CLIENT CASE STUDY

# Cleaning Up the Foundation

How SheroCommerce turned a cluttered HubSpot portal into a reliable revenue engine — through data hygiene, CRM optimization, and workflow automation.

The logo for SheroCommerce, featuring the word "shero" in a lowercase, sans-serif font. Below the text is a horizontal bar that is red on the left and dark grey on the right.



CLIENT OVERVIEW

# SheroCommerce.com

SheroCommerce came to Sales Marketing Automation with a HubSpot portal that had grown faster than its underlying structure could support. Contacts, workflows, and reporting had been layered onto an architecture never built to scale. The result: a system that technically worked — but one the team could no longer fully trust.

## THE CHALLENGE

# A System That Worked, But Couldn't Be Trusted

### Duplicate Records

Contacts and companies accumulated across multiple import sources, making it difficult to identify the true status of any relationship.

### Broken Workflows

Overlapping logic, inconsistent triggers, and steps that no longer matched how the team actually sold.

### Unreliable Pipeline

Pipeline stages didn't reflect real deal status — forecasting required manual double-checking rather than direct trust in the numbers.

### No Health Monitoring

Small issues compounded quietly in the background until they became visible as bigger problems.

## OUR APPROACH

# Four Connected Pillars

Sales Marketing Automation approached this engagement as a full operational audit and rebuild – not a series of isolated fixes.

1

Data Cleanup & Deduplication

2

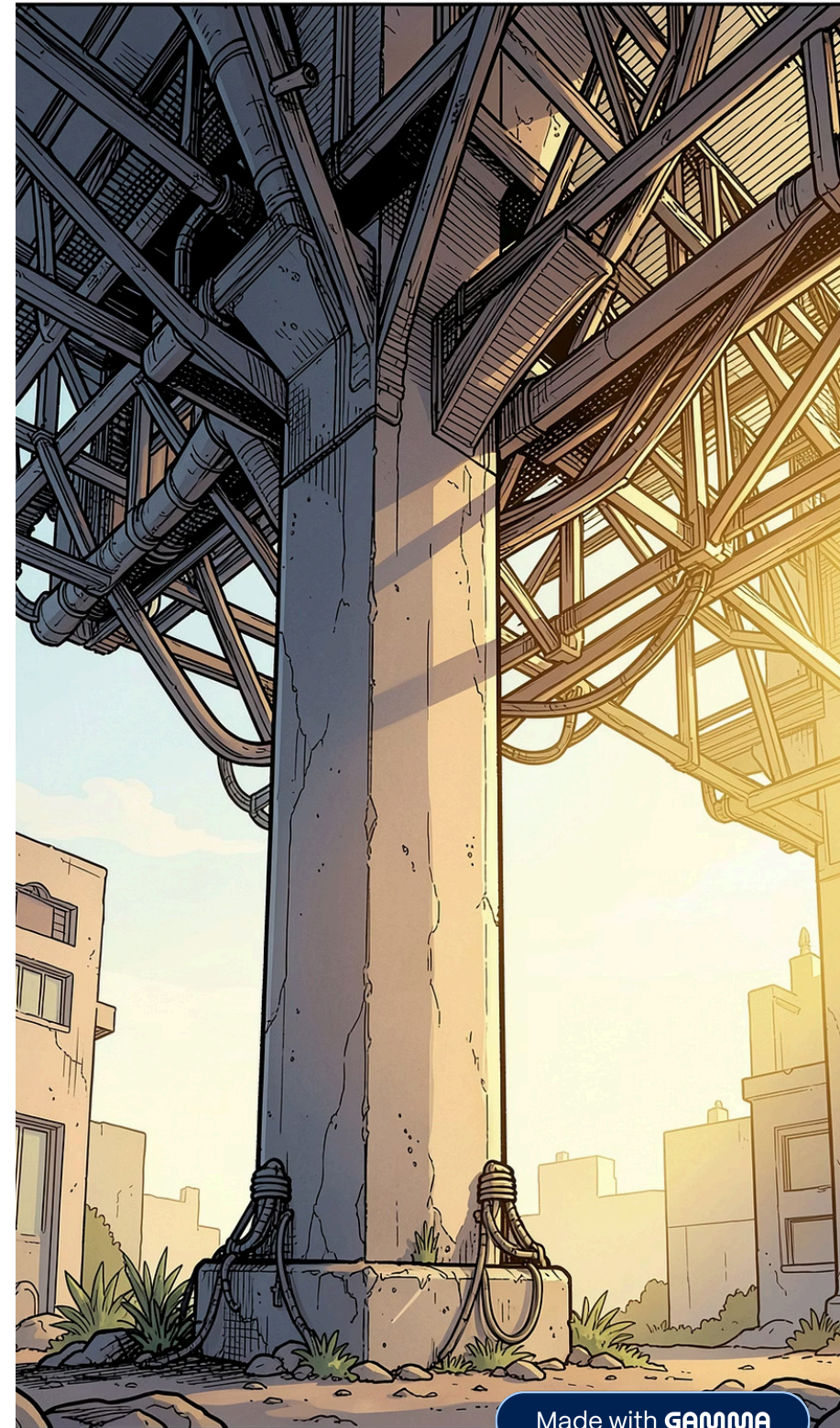
Sales & Marketing Workflow Optimization

3

Pipeline Automation & Process Alignment

4

System Health Reporting & Monitoring





PILLAR 1

# Data Cleanup & Deduplication

A full audit of contact and company records identified duplicates, inconsistent field values, and broken associations between contacts, companies, and deals.

Records were deduplicated and standardized, with **clear rules established for how new data should be entered and merged** going forward – so the same issues would not simply reappear over time.

# Sales & Marketing Workflow Optimization

## What We Did

Reviewed every active workflow across sales and marketing, removing redundant automation and correcting logic that no longer matched SheroCommerce's actual sales process.

Key workflows were rebuilt to reflect how the team genuinely wanted leads and deals to move through the pipeline.

- ❏ **The goal:** Automation that works quietly and accurately in the background — not automation the team has to work around.

PILLAR 3

# Pipeline Automation & Process Alignment

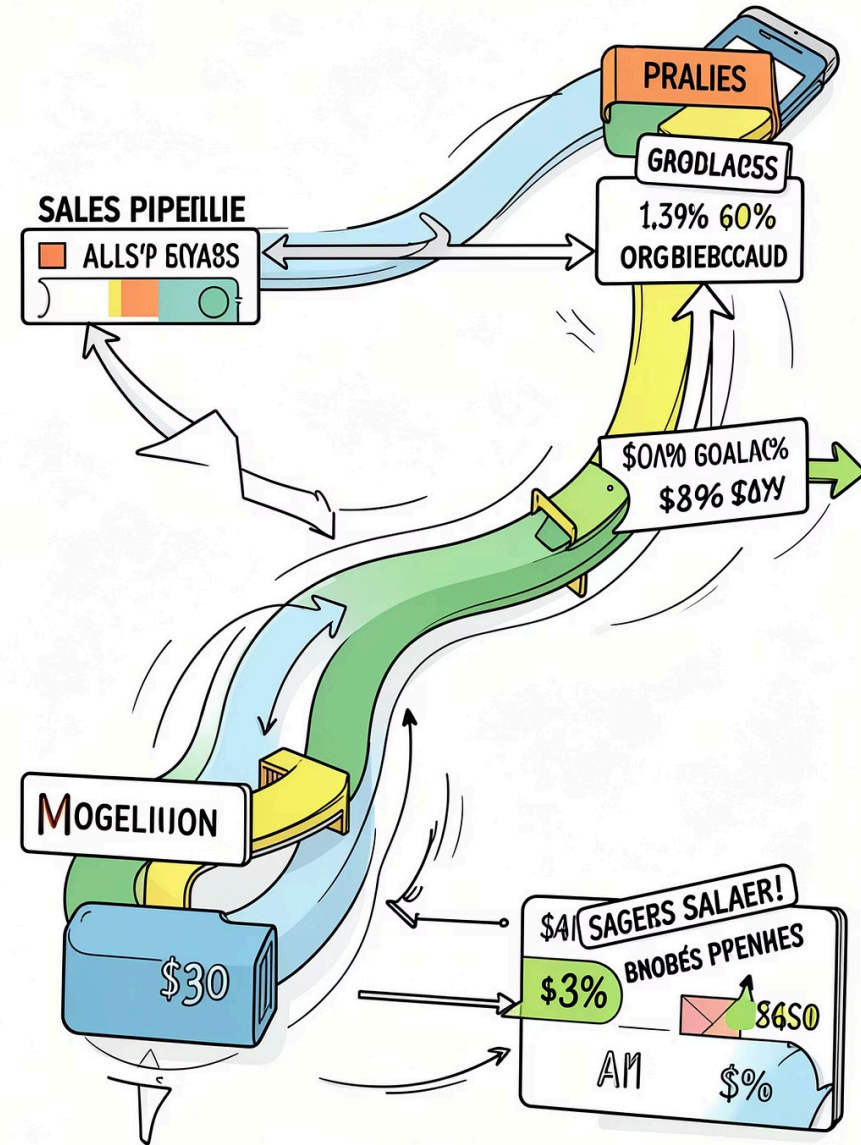
With clean data and rebuilt workflows in place, pipeline automation was restructured so that **deal stages, lifecycle stages, and task creation moved in sync.**

Before

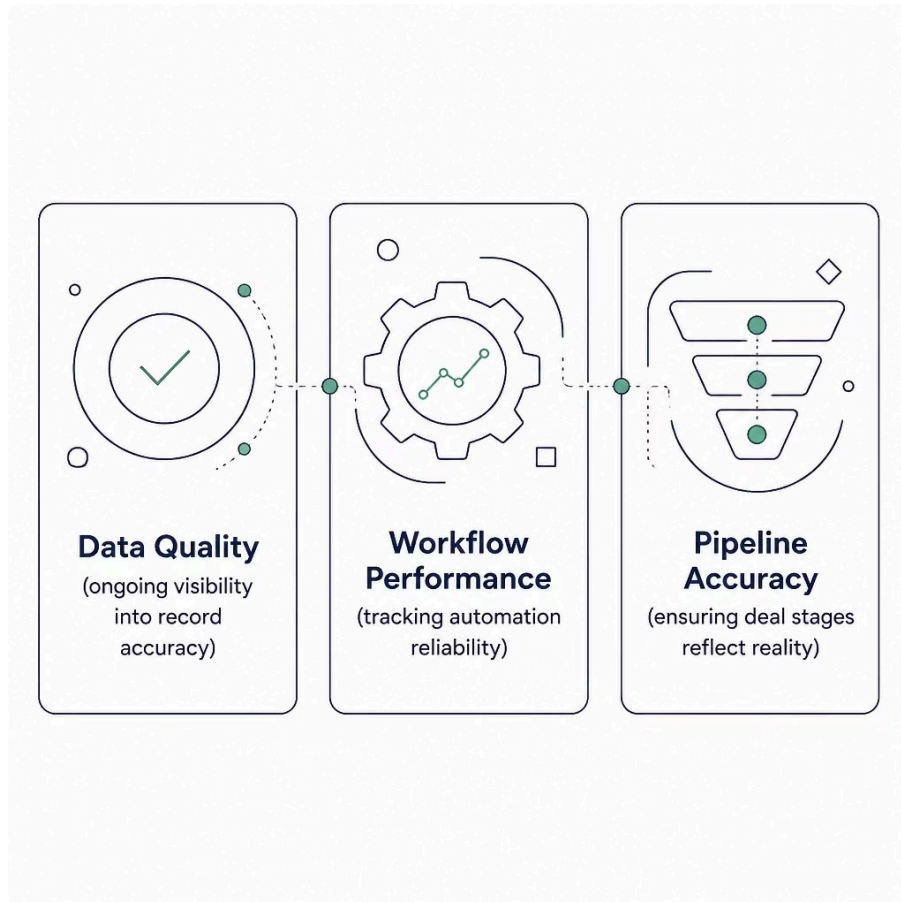
Manual, repetitive work just to keep the pipeline current.

After

Pipeline view that reflects reality — not approximation.



# System Health Reporting & Ongoing Monitoring



## Reporting Built for the Portal Itself

Reporting was built focused specifically on the **health of the HubSpot portal** — not just campaign performance.

This gave the SheroCommerce team ongoing visibility into data quality, workflow performance, and pipeline accuracy, so future issues could be caught early rather than discovered after they had already affected reporting or revenue.



## THE OUTCOME

# A Foundation Built for Accuracy and Scale

### Single Source of Truth

Sales and marketing now work from one trusted set of records.

### Real Pipeline

Automation reflects the team's actual process, reducing manual cleanup and freeing time for selling and strategy.

### Ongoing Confidence

Reporting on performance and system health gives leadership confidence in the numbers driving their decisions.

Perhaps most importantly, the engagement shifted SheroCommerce's relationship with their own CRM. What had been a system the team **worked around** became a system the team could **rely on**.

WHY IT MATTERS

# Reliability Is an Ongoing Discipline

Many HubSpot portals don't fail because the platform is limited. They lose reliability over time because data hygiene, workflow logic, and reporting accuracy are treated as **one-time setup tasks** rather than ongoing operational discipline.

SheroCommerce's experience reflects a common turning point: the moment leadership decides that a system supporting real revenue decisions needs to be **actively maintained and trusted**, not just technically functional.

## About Sales Marketing Automation

A multi-platform marketing automation consultancy helping clients across HubSpot, Salesforce, Go High Level, Klaviyo, and other CRM and marketing platforms build smarter systems and more reliable campaigns.

[salesmarketingautomation.com](https://salesmarketingautomation.com)