

CUSTOMER STORY · MANUFACTURING

Manufacture My Product

73%

Reduction in staff hours managing follow-ups (15 hrs/week → 4 hrs/week)

Manufacture My Product was running a complex, relationship-led manufacturing operation through inboxes, spreadsheets, and operator memory, despite already having HubSpot in place. INSIDEA restructured the entire system in six weeks by separating sales from operations, deploying a custom Orders...

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

PARTNER TIER

Elite Solutions Partner

HubSpot's highest partner tier



HubSpot Onboarding



Platform Enablement



CRM Data Migration



Custom Integration



CRM Implementation

THE CHALLENGE

Manufacture My Product managed a complex manufacturing operation through inboxes, spreadsheets, and operator memory. Although HubSpot was already in place, overlapping pipelines, duplicated properties, broken forms, and mixed sales and order stages made the system unreliable. Critical stages like sample development and quote follow-ups relied entirely on manual tracking, with no reminders, stall detection, or...

WHAT INSIDEA BUILT

Sales Hub Pro · Custom Objects · Workflows · Forms

✓ Mapping the business before changing a setting

Stakeholder interviews, pipeline audit, sales process shadowing, tool audit, signed objectives. Surfaced the need of "process-led, not sales-led" that shaped every...

✓ Two-pipeline model + Custom Object schema

Sales Pipeline (Deals object): 8 stages from New Enquiry to Order Confirmed. Orders Pipeline (Custom Object): 4 stages from Order Created to Completed. Property schema...

✓ Rollup properties for client lifetime value

Total Order Value and Total Commissions Collected built as rollup properties on the Contact record, aggregated from associated Order records. Catie now sees lifetime...

✓ Six workflows, each protecting one revenue moment

Sales Follow-Up Automation, Quote Follow-Up Tasks, Sample Phase Automation, Stalled Deal Detection, Form-to-Deal Creation, Deal-to-Order Handoff. Property-triggered...

✓ No forced migrations, the right tool for each job

Bi-directional Gmail logging. HubSpot Forms one-way deal creation. Google Slides retained as the visual quoting surface. Suppliers tracked via property + dynamic lists...

✓ End-to-end testing, live training, post go-live support

Full sales cycle scenario walked through both pipelines. Order automation confirmed firing on deal confirmation. Live training March 12. Operator running independently...

MEASURABLE RESULTS

73%

Reduction in operator hours managing follow-ups (15 hrs/week → 4 hrs/week)

100%

Daily active CRM usage maintained since training (March 12)

5→0

Manual deal-to-order handoff steps eliminated through automation

50→12

Pipeline stages collapsed into two clean, purpose-built pipelines

Want results like these in your business?

A 30-minute strategy call to map your systems and goals. Fixed-fee proposal if we are a fit.

[Book a Strategy Call →](#)