

CUSTOMER STORY · SAAS

Project Map It

88%

Renewal rate, up from 76% before automated retention

Project Map It, a B2B SaaS platform serving home improvement contractors, was running its commercial operation on Excel. Subscription pricing across four tiers was recomputed manually each month. Sales commissions were reconciled by hand with no privacy controls. Renewals had no pipeline. Worst of...

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

Project Map: It had built a successful product. Their map-based portfolio tool was helping contractors close more in-home appointments, and the customer base was growing across single-location roofers, multi-location service companies, and large national accounts. But the commercial infrastructure underneath the product had not kept pace with that growth. Subscription revenue was reconciled by hand each month....

WHAT INSIDEA BUILT

HubSpot Sales, Service & Operations Hub + Custom Portal

✓ Seven-Step Calculated Property Chain

Plan Amount → Discount Logic → CT Payout % → PMI Amount → CTP → Commission Rate → Rep Commission. The chain runs every time a deal is created or updated. No human ever...

✓ Separate Renewal Pipeline With 90-Day Trigger

When a deal's close date comes within 90 days and the deal stage is still Active, a new deal is automatically created in the renewal pipeline, the customer is enrolled...

✓ Per-Rep Commission Dashboards With System-Level Privacy

Each rep sees only their own numbers. Admins and leadership see all four. The privacy is enforced by HubSpot ownership filtering rules, not by trust or by emailed PDFs....

✓ Custom HubSpot-Powered Customer Portal

The one piece of the engagement that's genuinely custom-built rather than configured. Six components: HubSpot-authenticated login, dynamically rendered CSM card, live...

✓ Partner Attribution Dashboards

SRS Distribution, ABC Supply, and CertainTeed each have a dedicated dashboard. When a form is submitted with a partner attribution field populated, the resulting deal...

✓ Six Workflows Replacing Fourteen Manual Processes

Churn tagging with auto-date capture and Slack notification. Renewal trigger with conditional firing. Onboarding follow-up with day-1, day-7, day-14 escalation....

MEASURABLE RESULTS

88%

Renewal rate, up from 76% before automated retention

68%

Onboarding completion within 21 days, up from 42%

\$61K → < \$2K

Stripe-to-HubSpot reconciliation gap closed

75%

Reduction in monthly reconciliation hours (28-32 → 6-8)

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 →](#)