FlexKey Case Study

How Elefante RevOps Transformed FlexKey's Revenue Operations with a Full HubSpot Migration and AI-Powered Quote Automation

QUICK FACTS

Industry	Information Technology & Services (Public Sector)
Growth Stage	Scale-Up
GTM Maturity	Accelerated Growth
Company Size	~300 employees
Primary Technology	HubSpot (Sales Hub, Marketing Hub, Content Hub), Google Apps Script, OpenAI API, QuickBooks

SITUATION

FlexKey is a technology solutions company serving the public sector — supporting government agencies, healthcare organizations, and educational institutions with enterprise IT procurement and support. With approximately 300 employees and a complex, multi-distributor sales model, FlexKey manages a high volume of product quotes, project engagements, and ongoing customer relationships across a demanding client base.

When FlexKey came to Elefante RevOps, their operations were anchored in Salesforce — a platform that had accumulated years of institutional data across thousands of records, files, and internal communications. The sales team was manually processing vendor PDF quotes across multiple distributor formats, and the marketing and project management functions were operating in tools disconnected from their CRM. Growth was being hampered not by lack of demand, but by operational drag — the kind that compounds quietly until it becomes a ceiling.

STRUGGLE

FlexKey was dealing with four compounding operational challenges when they engaged Elefante:

Salesforce overhead and fragmentation: Years of data — including 7,976 files, attachments, Chatter messages, and opportunity records — were locked in Salesforce, a system increasingly costly to maintain and difficult to work across teams.

Manual quote processing bottleneck: FlexKey's sales team received vendor PDF quotes from multiple distributors, each with different formats. Reps manually extracted product names, SKUs, and pricing into HubSpot — time-consuming, error-prone, and completely unscalable.

Disconnected marketing and project management: The marketing team had no structured presence in the CRM, and project management was handled in ClickUp, outside any visibility into the sales pipeline. There was no unified view of the customer lifecycle.

Website not connected to CRM: FlexKey's WordPress website operated independently of HubSpot. Trade show leads, inbound form submissions, and website visitor data were not flowing into the CRM in any structured or automated way.

7,976 records migrated from Salesforce to HubSpot with complete history, attachments, and context preserved.

Quote processing automated end-to-end: what previously required hours of manual data entry now happens in under 7 minutes, across any vendor PDF format.

Sales, marketing, and project management unified inside a single HubSpot environment — no more fragmented tools or siloed data.

Marketing team operational in HubSpot with branded email campaigns, structured lead import workflows, and full pipeline visibility.

Website fully connected to CRM pipeline, with inbound leads, chatbot interactions, and trade show contacts flowing automatically into HubSpot.

ClickUp phased out, replaced by HubSpot project management — reducing the number of tools the team needs to operate in daily.

SUMMARY

FlexKey arrived at Elefante carrying the weight of a fragmented tech stack — Salesforce holding years of institutional data, manual quote workflows slowing the sales team, and marketing and project management operating in disconnected silos. Through a systematic HubSpot transformation, Elefante helped FlexKey consolidate their revenue operations into a single, intelligent platform. The standout deliverable was a custom AI-powered quote automation that eliminated hours of manual data entry per deal by using OpenAI to read vendor PDFs in any format and sync structured product data directly to HubSpot — purpose-built for FlexKey's multi-distributor sales model.

Today, FlexKey's sales, marketing, and project management teams operate from a unified HubSpot environment backed by a complete migration of their historical CRM data. Every vendor quote is processed automatically. Every trade show lead has a structured path into the pipeline. The website drives connected, trackable demand. For a company that serves the complex procurement and compliance needs of government, healthcare, and education clients, this unified infrastructure does more than save time — it builds the operational capacity to scale with confidence.