

From Fragmented Systems to a Unified Revenue Engine

How Indicate Technologies centralized sales, fulfillment, and operational workflows in HubSpot—replacing spreadsheet-driven processes with automated pipelines, task orchestration, and integrated quoting and documentation.

Quick Facts

FOUNDED 2004	GROWTH STAGE Scale-up
GTM MATURITY Normal Growth	INDUSTRY Manufacturing – Industrial Machinery

Solutions Provided

- HubSpot Implementation
- Data Architecture
- Workflow Automation
- Reporting & Dashboards

Situation

Indicate Technologies was operating a \$10M revenue business with increasing complexity across equipment sales, service contracts, and consumable materials. They wanted to consolidate operational workflows into HubSpot to improve reporting visibility and streamline sales and fulfillment coordination.

Their sales motion is highly technical and relationship-driven, typically entering organizations through engineering teams before expanding to commercial decision makers. At the start of the engagement, their revenue operations maturity was early stage—with disconnected tools and limited lifecycle visibility.

Pain Points

Operational Fragmentation: Sales, fulfillment, and accounting processes were spread across Sugar CRM, spreadsheets, QuickBooks, and manual coordination—making it difficult to track orders and operational

progress.

Limited Visibility and Reporting: Leadership relied on manual spreadsheet exports from HubSpot reports to analyze business performance and operational metrics.

Complex Order Fulfillment: Orders often included equipment, services, and consumables with different operational steps, but there was no unified system to coordinate those activities.

Sales and Operations Misalignment: Sales, service, and accounting teams used separate processes, creating inconsistent handoffs and limited visibility across the customer lifecycle.

Impact & Solution

Indicate Technologies partnered with elefante RevOps to restructure their operations around HubSpot as the central system. elefante implemented structured pipelines, automated workflows, and integrations across HubSpot, PandaDoc, QuickBooks, and Shopify.

HubSpot Operational Architecture: Rebuilt operational foundation by consolidating sales and fulfillment into a unified HubSpot pipeline covering the full lifecycle from lead to fulfillment completion.

Process Automation and Workflow Design: Stage-based workflows and task automations were implemented to coordinate order validation, fulfillment activities, and cross-team handoffs.

Custom Operational Data Model: Custom objects were introduced to manage equipment artifacts, shipping and receiving records, and document management associated with deals.

System Integrations: Integrations were developed across HubSpot, PandaDoc, QuickBooks, and Shopify to support quoting, document generation, and accounting preparation.

Revenue Architecture and Sales Framework: elefante implemented the SPICED framework to standardize discovery and improve internal collaboration across teams.

Results

Operational System of Record

HubSpot became the central platform for managing sales progression, fulfillment stages, task execution, and operational documentation.

Automated Fulfillment Tracking

Fulfillment progress now updates automatically based on operational task completion, reducing manual coordination across teams.

Improved Process Visibility

Leadership can monitor deal progression, fulfillment status, and operational activity directly inside HubSpot.

Scalable Operational Processes

Documented workflows and automation now support onboarding new team members and scaling operational capacity.

Integrated Revenue Lifecycle

Indicate can now coordinate quoting, order processing, fulfillment, and accounting preparation within a unified operational architecture.

Summary

Indicate Technologies transitioned from fragmented spreadsheets and a legacy CRM to a centralized operational system built in HubSpot. Sales, fulfillment, quoting, and operational tracking are now managed through structured pipelines, automation, and integrated tools—giving the team a single system to coordinate complex equipment and service orders.

This foundation provides clear visibility across the full lifecycle from deal creation through fulfillment and operational completion.