

From Spreadsheets to a Scalable Revenue Operating System

How L.H. Dottie modernized sales execution, automated executive reporting, and increased efficiency by 56% with HubSpot Enterprise.

Quick Facts

FOUNDED 1965	ANNUAL REVENUE \$100M+ ARR
TEAM SIZE 500 employees	INDUSTRY Manufacturing – Nuts, Bolts & Hardware

Solutions Provided

• HubSpot Implementation
• Data Architecture
• Automated Reporting
• Oracle Integration

Situation

Dottie was a mature, scaled organization modernizing revenue operations after decades of operating with legacy systems and manual processes. They needed to replace spreadsheet-driven sales management and manual executive reporting with a centralized CRM that improved visibility without disrupting their field-driven, relationship-heavy sales model.

Their go-to-market motion is relationship-driven and channel-focused, placing inventory with distributors and supply houses so contractors can access Dottie products through trusted vendors. At the time, their revenue operations maturity was early stage, with fragmented workflows, inconsistent data governance, and limited system-level visibility across teams.

Pain Points

Manual systems and reporting: Executive reporting was built in Word docs and spreadsheets, sales activity tracking was inconsistent, and service requests were managed through PDFs and email threads with no structured routing.

Lack of visibility and alignment: Leadership lacked a single trusted view of weekly activity or pipeline outcomes. Inconsistent account ownership, hierarchy, tiering, and pipeline definitions made reporting difficult to trust.

Technical data bottlenecks: Oracle EBS being on-prem required custom integration work. Complex parent-child account structures, POS edge cases, and inconsistent activity logging created duplicate records and unreliable dashboards.

Low CRM maturity: The core constraint was process maturity rather than market strategy—operations had never been systematized in a modern CRM.

Impact & Solution

Initially engaged to improve visibility and reporting, elefante RevOps quickly became a strategic partner in modernizing L.H. Dottie's revenue operations. elefante implemented HubSpot Enterprise in a phased approach—replacing spreadsheets with standardized pipelines, automated executive dashboards, structured workflows, and a scalable Oracle integration foundation.

HubSpot Enterprise Suite Implementation: Implemented as the centralized operating system, replacing manual reporting with standardized pipelines, dashboards, and workflows built for a field-driven sales organization.

Data Model and Integration Framework: Introduced clean account-based architecture with parent-child hierarchy, Diamond/Gold/Silver/Bronze tiering, and a phased Oracle integration leveraging Account Number, Branch identifiers, and HubSpot Record IDs.

Data Governance and Team Enablement: Required fields, naming conventions, saved views, dashboards, and structured onboarding were implemented to improve adoption, data integrity, and activity logging consistency.

Automated Workflows: Manual weekly recaps were replaced with automated dashboards. Printed price change requests were digitized into HubSpot form-to-ticket workflows. A Health Score was deployed using order-based acquisition, retention, and expansion metrics.

Results

56% Efficiency Increase

Manual reporting and spreadsheet processes were eliminated, freeing the team to focus on selling and managing distributor relationships.

Revenue Growth: \$97M → \$100M+

Revenue grew alongside improved operational discipline, with retention up 8%, acquisition up 5%, and distributor coverage expanded by 12%.

Automated Executive Reporting

Manually compiled weekly leadership updates were replaced with automated dashboards consolidating activity and revenue metrics.

Standardized Visibility and Scalable Infrastructure

The team can now view standardized customer performance metrics inside the CRM, automatically distribute leadership reports, and route internal requests through structured workflows.

Health Score Intelligence

Each customer record now displays last year's order value, this year's order value, and YoY percentage change—directly powering the Health Score used to prioritize accounts.

Summary

Before elefante RevOps, L.H. Dottie relied on spreadsheets, manual reports, and fragmented systems that made performance difficult to trust and scale. After elefante, they had a HubSpot-centered operating system with standardized pipelines, automated executive reporting, and real order data powering account health.

By moving from manual, reactive processes to a centralized and data-driven revenue engine, Dottie didn't just improve efficiency—they gained consistent visibility into retention, acquisition, and expansion across their distributor network. From fragmented operations to full visibility, L.H. Dottie now has the operational foundation to scale with confidence.