From Salesforce Chaos to a Unified HubSpot GTM Engine in 12 Weeks

See how UrbanBound's partnership with elefante RevOps transformed their entire go-to-market operations—migrating from a fragmented Salesforce stack to a unified, automated HubSpot engine in just 12 weeks.

Quick Facts

FOUNDED	ANNUAL REVENUE
2011	**$8M+ ARR (scaled from $5M in 6 months)**

TEAM SIZE	INDUSTRY
50 employees (began at 30)	**SaaS / HR Tech**

Solutions Provided

- CRM Migration (Salesforce → HubSpot)

- HubSpot Onboarding

- HubSpot Training & In-App Enablement (Supered)

- Automation Design across Sales, CS & Marketing

Situation

UrbanBound was operating on a legacy Salesforce stack that presented multiple barriers to growth:

- Fragmented data created duplicates, missing associations and inconsistent records.
- Core GTM processes like lead routing, handoffs and renewals were largely manual.
- Sales, CS and Marketing operated in silos, each with their own spreadsheets and workflows.
- CRM adoption was low; many reps bypassed Salesforce entirely in favor of side tools.
- Service operations had no SLAs, no unified ticket pipeline and no NPS feedback loop.

Leadership required a consolidated system enabling one GTM motion, with adoption, automation and governance built in.

Pain Points

No single source of truth: Leaders couldn't trust reports or forecasts because data was inconsistent, incomplete and scattered across tools.

Heavy manual admin: Reps and CS teams spent too much time on manual handoffs, task creation and spreadsheet updates instead of talking to customers.

Broken handoffs & customer experience: Lead qualification, sales-to-CS and CS-to-support transitions were inconsistent, leading to dropped balls and a disjointed customer journey.

Low CRM adoption: Teams saw Salesforce as extra work, not as an enabler—so processes lived in people's heads and offline documents.

Limited visibility into service performance: With no SLAs, no unified ticketing and no NPS loop, leadership lacked insight into post-sale health and customer satisfaction.

Impact & Solution

Over 12 weeks, elefante RevOps designed and delivered a full Salesforce → HubSpot migration, then turned HubSpot into UrbanBound's operational backbone.

End-to-End Salesforce to HubSpot Migration: Full lifecycle: audit & planning → data mapping → test migration → full migration → automation build → enablement → hyper-care.

Full-Lifecycle HubSpot Activation: Activated Sales Hub, Service Hub, and Marketing Hub concurrently to support the entire customer lifecycle, from lead to renewal.

Automation Across the GTM Engine: Built 12 workflows covering lead routing, deal alerts, CS handoffs, renewals, NPS, escalation SLAs, and ABM triggers.

In-App SOPs and Adoption Enablement: Embedded in-app SOPs via Supered so reps could follow the process inside the tool they already use—supported by role-based live trainings and an adoption dashboard.

Structured, Phased Delivery: Weeks 1–12 followed a structured rollout from discovery and system design through test + production migration, workflow automation, and enablement (including 20+ Supered SOP cards and role-based trainings). The project closed with a 30-day hyper-care period featuring weekly office hours, bug fixes, optimizations, and a final hyper-care report.

Results

100% Data Integrity Preserved
All historical Salesforce data migrated to HubSpot with integrity fully preserved.

3x Efficiency Gain via Automation
Reduced administrative burden by ~66% through automated routing, handoffs, renewals, and service SLAs.

92% GTM Team Adoption in 30 Days
Achieved rapid adoption within the first 30 days through role-based training and in-app SOPs.

One Unified Revenue Engine
Sales, CS, and Marketing now operate from a single, trusted system of record—with clear dashboards across pipeline, renewals, NPS, and CSAT.

Summary

UrbanBound's partnership with elefante RevOps transformed HubSpot from "just another CRM" into the backbone of their go-to-market engine. By consolidating systems, cleaning and migrating historical data, and embedding process directly into the tools teams use every day, UrbanBound moved from fragmented, manual operations to a unified, automated GTM motion in just 12 weeks.

With Phase 1 complete, UrbanBound is now ready for Phase 2: a deep RevOps audit (Bow-Tie funnel), 40 additional Supered SOP cards, a monthly Automation Accelerator retainer, and advanced API integration into their proprietary platform.