LEAD *to* MARGIN
ADVISORY

pipedrive
Authorized Partner

MULTI-BRAND METAL-BUILDING RETAILER · SALES COMPANY · ~90 PIPEDRIVE USERS

ONE CRM FOR 12+ LEAD SOURCES, 6 PIPELINES AND EVERY SALE.

An online and inside-sales retailer of metal buildings, selling through about 35 manufacturer partners, tracked quotes in standalone software with no connection to its ad platforms, phones or accounting. Nobody could say what the close rate was. We moved the business to Pipedrive and built everything around it.

2×	**20% → 40%**	**8.5% → 12%**	**+27%**
Work done with the same team	Share of leads that got a quote	Close rate	Revenue per ad dollar

WHAT WE BUILT IN PIPEDRIVE

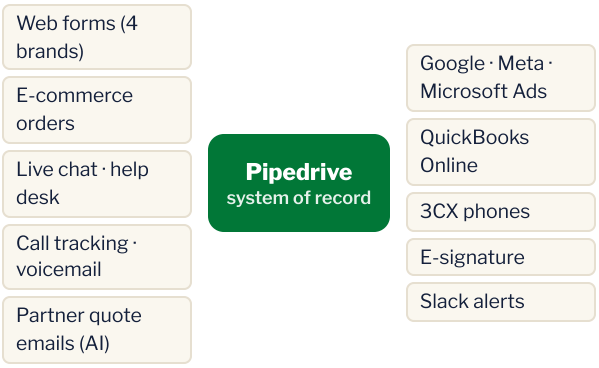
- **Migration:** 140 users and 500,000 records moved from legacy quote software in about six weeks: company-wide training, then a weekend data import with raised API limits and no downtime.
- **6 pipelines** covering the whole order life: sales, customer service, processing, cancellations, invoicing and disputes.
- **99 active automations.** The busiest runs about 6,400 times every two weeks: lead clean-up, auto-created follow-up activities, owner assignment and round-robin routing.
- **12+ lead sources flow in automatically** through a custom integration hub (80+ API endpoints): web forms, e-commerce orders, live chat, call tracking, help desk, voicemail and partner quote emails read by AI.
- **Closed-loop ads:** Pipedrive stage changes (qualified, quoted, won) are sent back to Google Ads, Meta, GA4 and Microsoft Ads as offline conversions.
- **Accounting handoff:** won deals post to QuickBooks Online automatically, with amounts over $5,000 routed to human review, replacing manual entry and the old ERP.
- **Also connected:** 3CX phones, e-signature events, and AI summaries of daily activity.

PIPELINES

Sales → Qualified lead → Working on details → Quoted → Negotiating → Verbal commitment → Closed

Then → Customer service → Processing → Invoicing → Cancellations → Disputes

INTEGRATION MAP



MORE RESULTS

One system
of record, no fragmented data or paper processes

AI-ready
clean, connected data for AI tools

~350/mo
orders reach accounting with no re-typing

3 mo → 9 wk
new sales-rep ramp time

Work led in an executive operating role. Results are from the business's own reporting, 2024 to 2025, after the move to Pipedrive alongside sales-process and hiring changes. Not a promise of future results. Company not named.

Want the same in your Pipedrive? Talk to the person who built it:

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