LEAD *to* MARGIN
ADVISORY

pipedrive
Authorized Partner

STEEL-BUILDING MANUFACTURER & INSTALLER · DEALER NETWORK + COMMERCIAL SALES

ORDER TO INSTALL IN ONE PIPELINE, WITH AI READING THE ORDER FORMS.

A manufacturer and installer of steel buildings sold through hundreds of independent dealers and its own commercial team. Orders arrived as PDFs and scans, status lived in a few people's heads, and dealers called the office to find out where a building stood. We made Pipedrive the backbone of the whole order life, from order received to installed.

2× orders
Order volume doubled, same office staff

13 stages
One pipeline from order received to installed

Hundreds
Dealers tracking orders themselves

First time
Cost and margin on every job

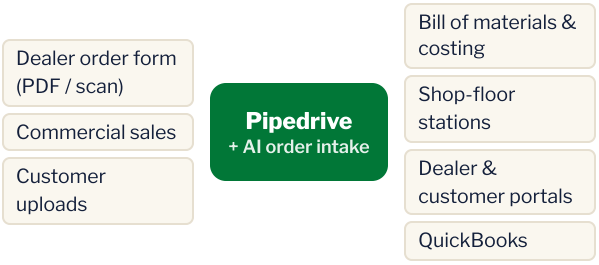
WHAT WE BUILT IN PIPEDRIVE

- **4 pipelines:** orders (13 stages, including engineering/CAD and permitting, fabrication, dispatch and install), dealers, commercial sales and disputes.
- **AI order-form intake** (live since April 2025): vision AI reads order PDFs and scans, writes structured line items onto the Pipedrive deal, and builds the bill of materials, with a guard against invented products.
- **Pipedrive feeds production:** sold deals flow into a 3D estimating and costing platform and a shop-floor portal with 10 fabrication stations, so the shop builds exactly what was sold.
- **Dealer and customer portals** read live from Pipedrive: dealers see every order by stage, and customers follow an 11-step progress bar, upload site photos and permits to the deal, and message support.
- **Native apps:** QuickBooks, Mapsly for routing and territory maps, DocuSign and 3CX phones.

ORDERS PIPELINE

Order received · **Verification** · **Revision** · **Engineering / CAD / permitting** · **On hold** · **Ready** · **Scheduling review** · **Fabrication** · **Dispatch / en route** · **Installed**

HOW AN ORDER FLOWS



RESULTS

Days → minutes
to produce a quote

First time
job costing and margin visible before the sale

Fewer calls
dealers and customers check status themselves

Less scrap
fewer ordering mistakes, faster production

Results are from the business's own operations, 2025 to 2026. Built in an executive operating role with a small development team. Not a promise of future results. Company not named.

Running orders through Pipedrive? Talk to the person who built this:

Christian Nipper, Founder · 336-444-6509
Email: christian@leadtomargin.com
Office: Mount Airy, NC · on site in NC/VA, remote US-wide
Book a call: 15-minute scoping call · leadtomargin.com