LEAD *to* MARGIN
ADVISORY

pipedrive
Authorized Partner

Professional Services & Integration Profile

Pipedrive setup, migration and automation for small and mid-size sales teams

We help trialing customers get Pipedrive set up the right way, so their team actually uses it and they convert with confidence. We design pipelines around how they sell, move their data in cleanly, build their automations, connect their other tools and train the team.

1. TECHNICAL SPECIALTIES & CORE FOCUS

Partner specialties

- **Implementation & setup:** pipelines, stages, custom fields and permissions designed around the customer's real sales process.
- **Data migration, cleanup & import:** from other CRMs, quote tools and spreadsheets into native Pipedrive fields, with history kept and duplicates removed.
- **Sales automation:** lead routing, round robin, follow-up activities and stage rules, so nothing depends on memory.
- **API & integrations:** phones, web forms, e-commerce, email, QuickBooks Online and ad platforms, through native apps, Make/Zapier or the Pipedrive API.
- **Reporting & analytics:** Insights dashboards for close rate, speed to lead and rep activity.
- **Training & consultation:** live team training and an owner walkthrough before go-live.

Key industry expertise

We build pipelines around the buying behavior and deal cycles of:

- **Home services & contractors** (roofing, exteriors, remodeling, HVAC: high lead volume, fast follow-up)
- **Manufacturing & building products** (quote to order to install)
- **Dealer & distributor networks** (partner-sourced orders, status tracking)
- **Multi-brand sales teams** (many lead sources into one pipeline)
- **Professional & B2B services** (lead to proposal to onboarding)

Founder Christian Nipper has led Pipedrive rollouts as a sales executive. Lean Six Sigma Black Belt · Certified Intuit ProAdvisor.

2. SERVICE OPTIONS

ENGAGEMENT MODEL	TYPICAL PROJECT SCOPE & DELIVERABLES INCLUDED
Launch Fixed project · up to 10 users	One pipeline designed around their sale, data cleanup and import (up to 5,000 records), 3 automations, a web form and 1 live team training. Live in about 2 weeks.
Growth Fixed project · 10–25 users	Up to 3 pipelines with lead routing, full migration (up to 25,000 records), 10 automations, phones, forms and email connected, an owner dashboard, 2 trainings and 30 days of support.
Advanced Comprehensive · 25+ users	Multi-team discovery and pipelines, complete migration, QuickBooks/ERP sync, ad conversion tracking, custom API work, custom dashboards and 60 days of post-launch support.
Pipedrive Admin Monthly retainer	Their outsourced Pipedrive administrator: ongoing changes, new users and fields, automation upkeep and a monthly review with the owner.

Every engagement is a fixed price, confirmed in writing after the discovery call. The customer pays Pipedrive directly for their subscription and pays us only for services.

3. GETTING STARTED WITH OUR TEAM

Introduce us by email and include the booking link below. We hold the discovery call within 1–2 business days and send a written offer within 24 hours, so the customer can accept inside their trial. Co-selling status is updated within 72 hours.

Ready to build their pipeline? Contact us:

Agency main line: 336-444-6509

Direct partner channel: christian@leadtomargin.com

Office location: Mount Airy, NC · on site NC/VA, remote US-wide

Booking link: 15-minute call with Christian Nipper