

CRM RESCUE & IMPLEMENTATION

From CRM *Chaos* to One Source of Truth

Family Solutions for Care · 2025

2 mo

VS 12+ MONTHS STALLED

15K

CONTACTS RECOVERED

16

AUTOMATIONS ACTIVE

14

TOOL INTEGRATIONS

A healthcare services company stuck for over a year with 3 CRMs, corrupted data, and a team running operations out of spreadsheets. We resolved in 2 months what a prior partner couldn't fix in 12.

— THE CHALLENGE

Stuck with 3 CRMs. None of them working.

Family Solutions for Care manages complex insurance and healthcare relationships. Their technology stack had become a liability — a year lost to an underqualified partner left them further behind than when they started.

3 CRMs in parallel

Beatrix, a custom CRM, and HubSpot running simultaneously — no clean data sync, migration stalled for over a year with no resolution in sight.

Dirty, broken data

Prior developer triggered HubSpot's contact blacklist by deleting and re-importing records. 15,000+ contacts with corrupted associations and duplicates.

Spreadsheets as fallback

Team had abandoned all three systems and was running the entire business manually — error-prone and completely unsustainable for growth.

"None of us are tech-savvy and we would not have realized the other provider would probably spend another year figuring out how to fix this whole mess."

— FAMILY SOLUTIONS FOR CARE TEAM

— OUR APPROACH

Strategic consolidation, not another band-aid.

01

Diagnosis

Aligned with the existing dev partner to map all failure points. Identified that the custom CRM buildout fundamentally lacked the expertise to succeed.

02

Strategic Pivot

Advised client to consolidate 100% into HubSpot — eliminating two systems and ending a year of technical debt in a single decision.

03

Data Recovery

Bypassed HubSpot's import blacklist via direct API imports to restore all 15K contacts flagged from prior bad migrations.

04

Infrastructure Build

Built a complete HubSpot architecture: 3 custom objects, 60+ properties, proper associations, parent-child company hierarchies, full data migration.

— BY THE NUMBERS

A complete HubSpot infrastructure — built in 2 months.

15K

CONTACTS IMPORTED

15K

DEALS CREATED

3K

COMPANY RECORDS

15K

CLAIMS (CUSTOM OBJ.)

3

CUSTOM OBJECTS

60+

CUSTOM PROPERTIES

16

AUTOMATIONS ACTIVE

14

TOOL INTEGRATIONS

— INTEGRATIONS & AUTOMATIONS

HubSpot at the center of their entire operation.

14 TOOL INTEGRATIONS

- ✓ QuickBooks — billing & invoicing sync
- ✓ PandaDoc — automated document generation
- ✓ Gmail / Google Workspace
- ✓ Scheduling tools (meetings & follow-ups)
- ✓ Partner system integration (in progress)
- ✓ + 9 additional connected tools

16 ACTIVE AUTOMATIONS

- ✓ Lead assignment & routing workflows
- ✓ Claims status update notifications
- ✓ Policy renewal reminder sequences
- ✓ Data enrichment & deduplication flows
- ✓ Follow-up task creation on deal stages
- ✓ Internal team alert workflows

— DATA ARCHITECTURE

Untangling a complex record structure.

OBJECTS & RELATIONSHIPS

- ✓ Policy holders — primary + secondary contacts
- ✓ Companies — carriers, providers, insurers (parent-child)
- ✓ Claims — custom object, multiple per policy holder
- ✓ Deals — one per policy holder for pipeline tracking

TECHNICAL WORKAROUNDS

- ✓ API imports to bypass HubSpot blacklisting
- ✓ Unique ID fields for contacts sharing same email
- ✓ Duplicate record deduplication at scale
- ✓ Association labels for all relationship types

— RESULTS

Main issues resolved. Team fully operational in HubSpot.

2 mo

TO FIX 12+ MONTHS STALLED

What a prior partner couldn't resolve in over a year — **we fixed in 2 months**. The team now works 100% out of HubSpot with clean data, active automations, and a roadmap for continued growth.

- Single source of truth — team works 100% out of HubSpot, no more spreadsheets
- Full data integrity — 15K contacts, deals, and claims properly structured and associated
- Blacklist bypass — recovered all contacts lost due to failed prior imports via direct API
- Automated workflows reduced manual tasks and eliminated key operational gaps
- QuickBooks + PandaDoc integration streamlined billing and contract workflows
- Active roadmap: custom partner integration in scope to automate lead transfers

— ONGOING ENGAGEMENT

This wasn't a one-time fix — it's a growing partnership.

✓ COMPLETED

HubSpot Onboarding

CRM setup, data structure,
team training & initial
automations

✓ COMPLETED

Rescue & Migration

3-CRM-to-1 pivot, full API data
migration, custom objects built

• ACTIVE

Continued Support

Ongoing coaching,
infrastructure improvements &
new automations

→ IN SCOPE

Partner Integration

Connect systems, automate
lead transfers, cross-org
handoffs