



LAKE ONE

# How Lake One Digital helped Gerard Daniel align their sales and marketing and increase the speed of their sales activity through a migration to – and integration with – Hubspot CRM



“Lake One was amazing at migrating our CRM platform to Hubspot and getting our client data in great shape. We didn’t have the luxury of shutting down to do the transition, either – we had to do it live. Lake One handled everything quickly and seamlessly. It’s allowed us to greatly align our sales and marketing and now everyone has access to our data at the same time and sees the big picture.”

**BEN HENNEBERGER**  
gerarddaniel.com

When Digital Marketing Strategist Ben Henneberger of Gerard Daniel discovered Lake One Digital, he was frustrated with the usability and integration issues he was having with his current CRM, Pipeliner.

Gerard Daniel, a company that provides mesh, separation, and filtration solutions to a variety of critical industries, had been successfully using Hubspot's Marketing Hub Professional for their marketing software and didn't like that the CRM they were using didn't integrate with it.

This lack of integration was essentially keeping their sales and marketing efforts disconnected from each other, as well as lowering the efficiency and speed with which they could communicate with new leads.

Yet while Henneberger was eager to move to a CRM that did integrate well — specifically Hubspot CRM — **he was also nervous about transferring the company's large amount of client data** without the risk of losing any or corrupting it.

Gerard Daniel had more than 17,000 individual contacts, roughly 7,000 company contacts, and a plethora of open and closed deals inside their current CRM, as well as more than 1 million records in their internal database.

Despite Henneberger's digital marketing experience and knowledge of CRM



platforms, he said he knew migrating to a new CRM quickly and accurately would be better performed by experts.



**“The data transfer between two CRMs is never easy to do,” Henneberger said. “We needed to make sure that we didn’t lose data, and that we had data congruence between the new CRM and our marketing software. We also needed to have the ability to create reports, as well as have the same reports that we were using in the old CRM be available immediately.”**

“It was a daunting task because we had a lot of data to move and a short time to move it in, and we’d also created a mess of it trying to get the other CRM to work. **I knew I needed help to get the transfer done well.**”

Gerard Daniel’s Hubspot rep recommended they contact Lake One Digital, so Henneberger reached out to set up a call and said he was immediately impressed.



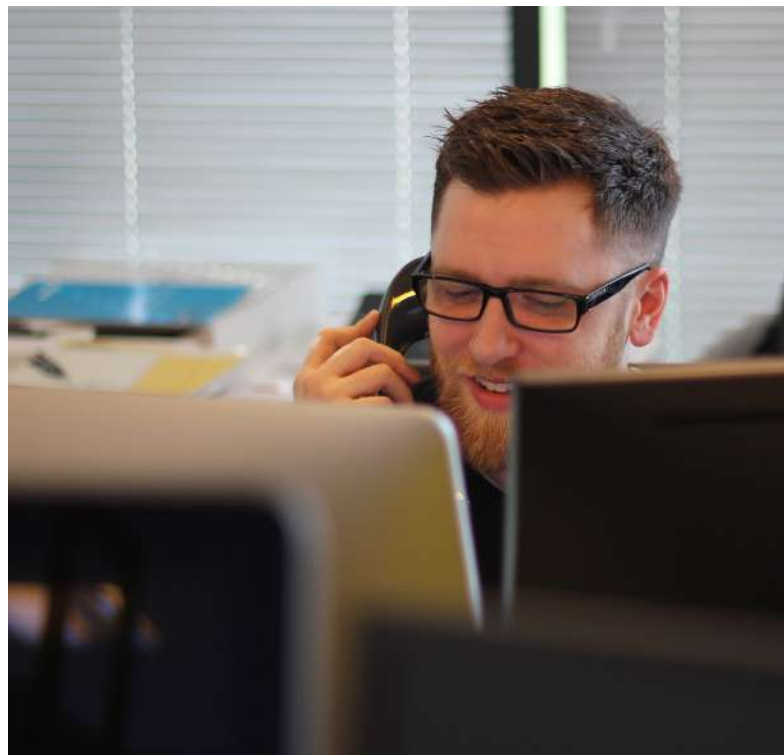
“Lake One was amazing,” Henneberger said. “They got right back to me and asked how they could help. When we got on the call, I told them the issues I was having and I could tell by the questions they asked that they were experts. They even began to talk about some of the problems I was experiencing before I could get them out of my mouth because they understood the process so thoroughly.”

So, Henneberger hired Lake One and they quickly got to work, which started with Henneberger sharing the main goals he wanted to accomplish with Hubspot CRM, as well as helping Lake One get a firm grasp on Gerard Daniel’s data.

“I had a few calls with them to explain our data, since I was the one that designed the structure in the old CRM, and vaguely knew how I wanted the data correctly structured in the new HubSpot CRM,” Henneberger said. “Then they spent time investigating that structure and our Hubspot marketing software to figure out how they could best do the transfer with the least amount of data loss. **Within a few days they had solutions theorized.**”

When Lake One began the data migration to Hubspot, **they were up against some challenges.**

Not only did they need to have the migration completed within three weeks before Gerard Daniel’s contract with Pipeliner expired, but they also had to conduct the migration in real time so that the Gerard Daniel sales team could start working on their open deals in Hubspot immediately.





Hubspot was a huge success, and **the results of doing so have been positive and numerous** – beginning with the amount of time they saved in not having to handle the CRM migration themselves.

**Henneberger said that despite the pressure, the Lake One team rolled up their sleeves and did whatever needed to be done for a successful transfer** – which in a few cases required some ingenuity.

For example, it became clear that there was no easy way to download exports from Pipeliner, so the Lake One team got creative and ran reports to gather the data first, then exported those.

This worked well to get most of Gerard Daniel’s deal, contact, and company data transferred over, but it still left all of their notes inside their old CRM.

To troubleshoot this, the Lake One team exported the data via an API call. Then, they used an Integration Platform as a Service (IPaaS) software to construct a workflow that took the data from Pipeliner, associated it to the correct records in HubSpot, and then exported it over.

Henneberger said that the migration to



“Lake One was able to help us move things over and get our data organized into great shape,” Henneberger said. “It saved me tons of time. If my intern and I would’ve done it it would’ve taken us months, but with Lake One doing it for us we were able to do it in less than two weeks.”

Besides the massive time savings, the biggest benefit of all has been the way migrating to Hubspot CRM has **aligned their sales and marketing** and provided a more efficient – and faster – flow in their client acquisition process.

“Before, sales didn’t have access to a lot of the data we had in terms of marketing,” Henneberger said. “Our sales team lived in our old CRM and marketing was all in Hubspot, and I was in the middle, carrying the data across.

**“Now, all of the data lives in the same place.** Sales is able to see our leads’ interactions, and can go in and see where



with Lake One Digital, not only because they understand Hubspot so well, but also because of their deep knowledge of data.



“Lake One’s experience and understanding allows them to quickly identify how your sales and marketing is working and show you how to transform them to work more correctly and efficiently.”

a prospect was on our website when they submitted their lead, so they know what someone is interested in. There’s also not a lag time anymore between when a ‘request for a quote’ comes in and when it gets through to the sales team directly.”

Henneberger was so happy with Lake One’s work — as well as the relationship they’ve formed — that **he hired them for another project**, which involved setting up Hubspot CRM’s customized quote feature.

He noted that any business that is looking to migrate to Hubspot CRM — or even just integrate better within it — is in great hands

“But even more than that, they have such amazing knowledge of data. Dealing with data is a big skill that not a lot of people truly know how to do. Anyone can work with data in an Excel spreadsheet, but when you’re talking about live data and living data that is changing every day — and you understand how that data interacts with other things — that’s a much more intricate skill to have. Lake One really has that. **They are true experts who get projects done** — correctly — in the best possible way, and on time.” ☾

To learn more about how Lake One Digital can **transform your business’s sales and marketing strategy** through our Hubspot Implementation and Integration Services, go to [lakeonedigital.com](https://lakeonedigital.com)