

CASE STUDY · CRM & PIPELINE

The margin was hiding in plain sight.

How a week of deliberate CRM work — and a new website wired directly into it — surfaced an \$80K deal, freed a sales team from spreadsheet reporting, and reshaped how a 50-person company decided which deals were worth chasing.

CLIENT

Technology reseller & radio service provider (anonymous)

ENGAGEMENT

CRM rollout, website build, pipeline & sales process

INDUSTRY + SIZE

50+ people · \$10M+ revenue

PUBLISHED

2024

HEADLINE UNLOCK

\$80K+

Single upsell in the first two weeks, from signal already in the pipeline.

HRS / WEEK

25+

Reporting hours reclaimed across the 5-person sales team.

EFFICIENCY LIFT

~50%

Qualitative handoff gain from the 10-person ops team.

KICKOFF → LIVE

1 wk

CRM, website, and trained team — deliberately, not rushed.

01 · THE CHALLENGE

A stalled rollout and a spreadsheet tax.

The client was a 50+ person, \$10M+ technology reseller and radio service provider. They sold parts, they installed systems, and they serviced what they sold. The work was there. The problem was that nobody could see it clearly.

They had started onboarding Monday.com, but adoption was uneven. Most teams were still running the business out of their own Excel spreadsheets — each one a private source of truth, none of them talking to each other.

SYMPTOMS ON THE GROUND

- 01 Five salespeople pulling numbers out of multiple spreadsheets every day to produce their own reports.
- 02 Invoicing data re-keyed and reformatted by hand because no two spreadsheets matched.
- 03 Website service inquiries arriving as emails, then copied into whatever system the receiving rep happened to use.

- 04 No pipeline view across the team — deals sat in individual inboxes and individual tabs.
- 05 A shared suspicion that money was being left on the table, with no way to prove it or point at where.

SALES TEAM

5 reps

Each maintaining their own spreadsheets, each reporting to leadership on their own terms.

MANUAL REPORTING TIME

~5 hrs / rep / week

Data pulled by hand from multiple sources, daily, to produce the kind of reporting a CRM would generate automatically.

02 · WHY I GOT THE CALL

Someone who would build it, not scope it.

I came in through a prior colleague who knew two things about me: I handle project management and tooling end-to-end, and I don't spend the engagement building a deck about the engagement.

They needed the system stood up, the website built, and the team trained — and they needed someone who could do all of it without handing off the hard parts to a second vendor.

THREE REASONS THIS ENGAGEMENT GOT THE CALL

01

Direct communication

Same-day replies. Working sessions with sales and PMs, not status reports about working sessions.

02

Build, don't brief

I wasn't there to describe the stalled rollout back to them. I was there to finish it.

03

Full-stack scope

CRM configuration, website in NextJS + TypeScript, API integration, training — one person, one accountability line.

A quick note from me — this engagement needed alignment before it needed software. The reason it landed in one week is that leadership was already bought in. Tools don't fix culture. When the culture is ready, tools move fast.

03 · PHASE 01 — ALIGN, THEN BUILD

One week. Five deliberate days.

Normally I'd open with "measure the waste first." This one was different — the measurement didn't exist yet. The CRM was half-adopted, the website wasn't feeding anything, and the pipeline was a concept instead of a view. You can't diagnose a system that isn't running. So the first phase was **building the seeing**.

DAY 01

Alignment

Sat down with sales leads and PMs. Agreed on pipeline stages, qualification criteria, what a "deal" looked like across service, resale, installation, and maintenance. No software touched yet.

DAY 02

Build

Configured Monday.com around the agreed model. Built a NextJS + TypeScript website with custom forms wired into the Monday.com API — service and lead requests dropped straight into the pipeline.

DAY 03

Validate

Ran real inquiries and real deals through the system with the sales team. Found the rough edges. Fixed them same-day.

DAY 04

Train

Walked sales and PMs through the live pipeline, dashboards, and the handoff points between teams.

DAY 05

Train again, tweak

Second training pass after a day of real usage. Small adjustments based on what people actually did, not what they said they would do on day four.

Week two was when the real unlocks started hitting. The build was deliberate, not rushed — and that's why it held.

04 · PHASE 02 — KILL THE SPREADSHEET TAX

Real-time dashboards where there used to be a daily reporting chore.

The first thing the new system took off the team was the thing nobody had been tracking: the hours spent every day reproducing what the CRM could now produce for free.

Before, each of the five salespeople was pulling numbers out of multiple spreadsheets daily. Invoicing

was its own tax — reformatted and re-entered by hand because no two source spreadsheets used the same structure. After, dashboards lived inside Monday.com and updated in real time. The daily reporting chore disappeared.

WHAT THE DASHBOARDS RETURNED TO THE TEAM

REPORTING HOURS SAVED

25+ hrs / wk

Across the 5-person sales team. Roughly 5 hours per rep, every week, reclaimed from manual spreadsheet work.

OPS HANDOFF EFFICIENCY

~50% lift

Qualitative gain from the 10-person ops team. Handoffs now include complete, accurate needs on the first pass.

SOURCES OF TRUTH

Many → one

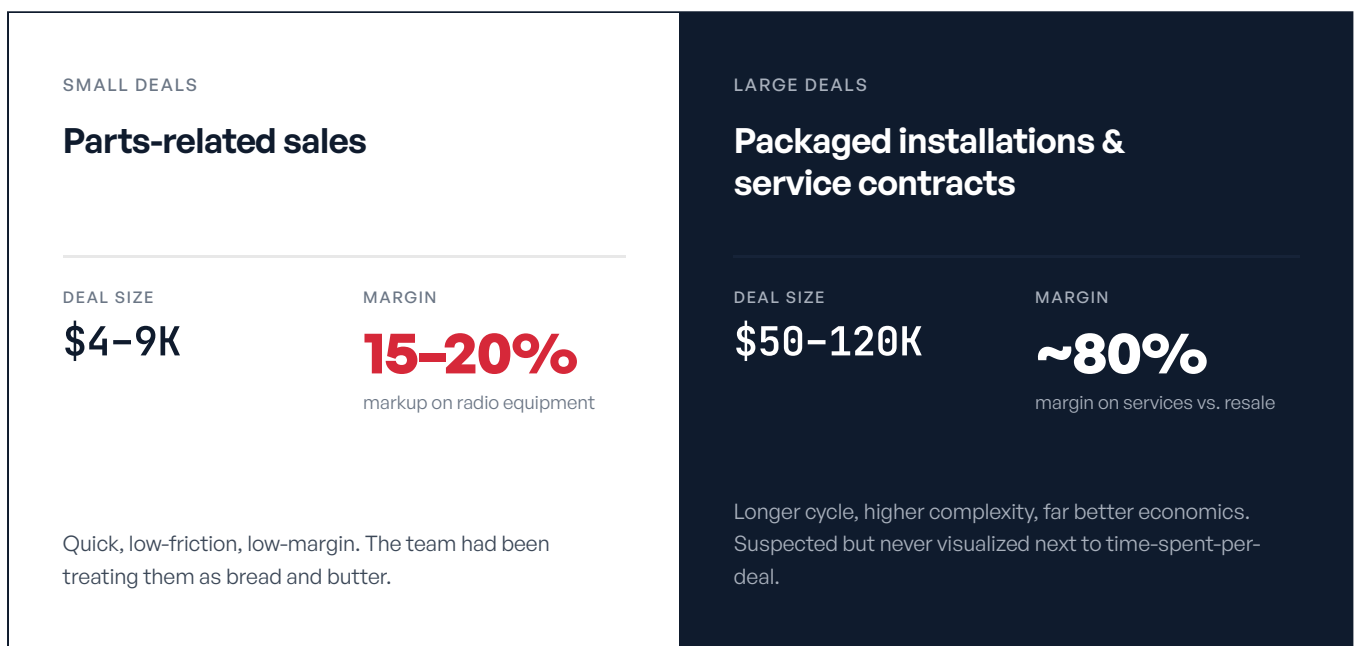
Private spreadsheets replaced by a shared pipeline every team could see and act on.

The reporting win was the obvious one. The handoff win mattered more. When sales handed a deal to ops with complete information the first time, ops stopped chasing missing context and started executing.

05 · PHASE 03 – THE REVEAL

15–20% on parts. 80% on services. Nobody could see the split.

Once the pipeline was live and the data was clean, a view opened up that leadership had suspected for years but never been able to put on a screen: where the money actually came from.



WHAT CHANGED ONCE IT WAS VISIBLE

The visualization made the call obvious to everyone at once.

01

Faster disqualification

of parts-only small deals that were eating sales time.

02

Cleaner sales-to-ops handoff

so small deals got processed and cleared off the backlog quicker.

03

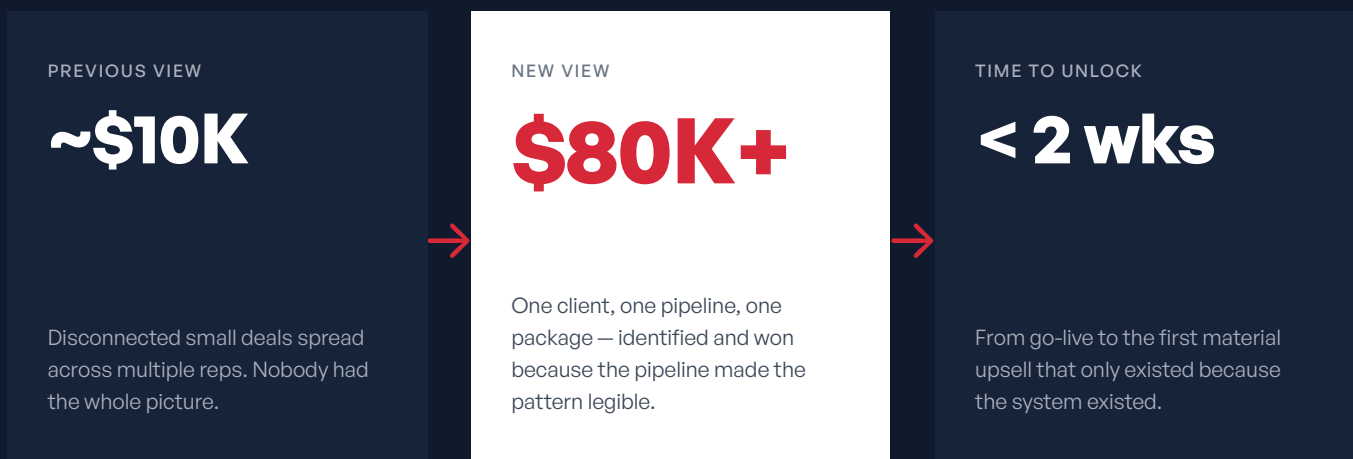
More time to chase packages

installations, service contracts, white-glove maintenance.

The pivot wasn't "stop serving small customers." It was "stop treating small deals like they deserve the same attention as six-figure ones." The visualization made that call obvious to everyone at once, which is the only way a sales culture actually changes.

A pattern that was invisible in five inboxes became obvious in one pipeline.

In the first weeks of the new system live, a client showed up in the pipeline with multiple small opportunities spread across more than one sales rep — parts, installs, small service asks. Individually, they totaled under \$10K in disconnected deals. Individually, that's all anyone had ever seen.



On one pipeline view — with lead qualification showing it was a larger business and the deal shapes suggesting an in-flight larger project — the pattern was unmistakable. The team formulated a package and presented it before the next verbal contact. The website integration kept feeding this loop: parts requests became early signal for sales to formulate a package before the first call.

WORTH SAYING OUT LOUD

This \$80K didn't require a new product, a new pricing model, or a new hire. It required one view of one pipeline. The deal was already in the building. Nobody could see it.

07 · CHANGE MANAGEMENT

The tools work when the teams want them to.

Not every team at the client adapted. Sales, project management, and operations — the teams I was directly engaged with — were ready, aligned, and executing from day one. Other groups (finance, purchasing, admin) were slower to move, and some were still running the old spreadsheet-pulling routine the CRM was designed to eliminate.

It didn't hurt the outcome for the teams in scope. It did create a foreseeable pain point: every team that stays on the old workflow becomes a manual bridge the others have to walk across. The bottleneck doesn't disappear — it moves.

The lesson: align the entire org on the change before the software goes in, not after. Implementation is the easy part. Adoption is the whole game.

08 · FINAL IMPACT

What one deliberate week actually did.

HRS / WEEK	EFFICIENCY LIFT	SINGLE SALE	TO LIVE
25+	~50%	\$80K+	1 wk
Sales reporting hours reclaimed per week across the 5-person team.	Handoff efficiency gain reported by the 10-person operations team.	Upsell unlocked in the first two weeks, from signal already in the pipeline.	From kickoff to fully deployed CRM, website, and trained team.

CONCLUSION

Visualizing your data in real time — without spending hours producing the view — inevitably surfaces waste you didn't know you had and opportunities already sitting in the pipeline. The margin was always there. The system made it visible.

HAVE A SIMILAR PROBLEM?

**Send me a
message. We'll
know in one call
if this fits.**

Short note is fine. I reply the same day, usually within an hour.

EMAIL DIRECT

contact@corey.consulting

ONLINE

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