

Driving Sales with Equipment Lifecycle Visibility

The Challenge

The client builds and ships their own equipment, but had no scalable way to track it post-sale, or tie it back to upsell opportunities. They struggled with:

- Managing all equipment data in spreadsheets controlled by one person, creating bottlenecks and risk
- No visibility into where equipment was in its lifecycle—making it hard to time service or upgrade conversations
- Missing key upsell moments when customers finished paying off equipment or hit service milestones

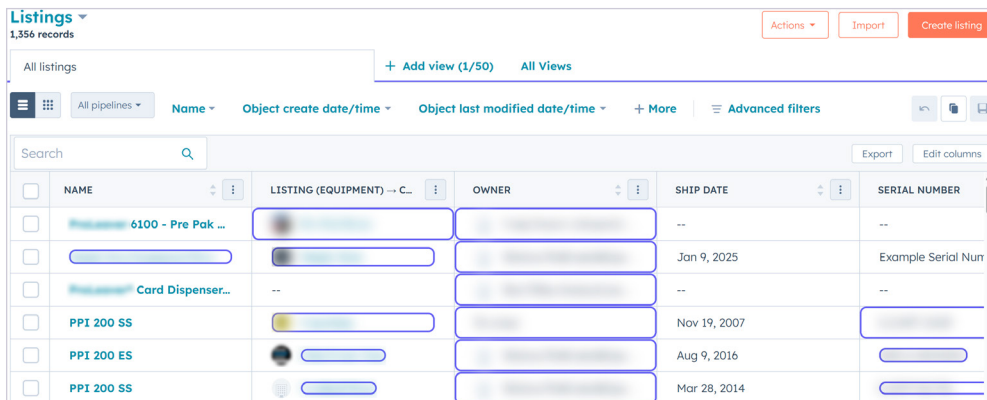
The Solution

We repurposed HubSpot's new Listings object to serve as a live inventory and asset tracking system. Each piece of equipment is now automatically logged and associated with the customer, with critical data like ship dates, service intervals, and payoff timelines built in. Sales and service teams get alerts when there's an opportunity to engage.

The Impact

The client can now:

- View every shipped unit and its lifecycle status inside HubSpot
- Spot high-value upsell moments—like payoff completions or upcoming service needs
- Eliminate manual tracking in spreadsheets and reduce single-person dependency
- Equip both sales and service teams with shared, real-time insight into customer assets



NAME	LISTING (EQUIPMENT)	OWNER	SHIP DATE	SERIAL NUMBER
6100 - Pre Pak ...			--	--
Card Dispenser...			Jan 9, 2025	Example Serial Nurr
PPI 200 SS			Nov 19, 2007	
PPI 200 ES			Aug 9, 2016	
PPI 200 SS			Mar 28, 2014	

The Details

Industry:
Manufacturing

Business Area:
Sales and Service

- Tools Used:**
- Custom Object (Listings)
 - Deals
 - Quotes
 - Workflows
 - Reporting



Equipment (6) + Add

Bacon Card Feeder
Serial Number: [redacted]
Ship Date: --
Equipment

PPI 200 ES
Serial Number: [redacted]
Ship Date: 08/09/2016
Equipment

CONVEYOR
Serial Number: --
Ship Date: 08/09/2016
Equipment

BACON INTERLEAVER
Serial Number: [redacted]
Ship Date: 11/02/2018
Equipment

CONVEYOR

