

# From Spreadsheets to HubSpot: Equipment Lifecycle Management Made Easy

## The Challenge

A key component of manufacturing and production is the ability to track and manage equipment inventory. For one East Coast company, they were challenged by:

- Disorganized data stored in Excel, making it difficult to track key details like serial numbers, shipping dates, and payment statuses.
- Limited visibility into which machines were associated with which customers, slowing down customer service and sales opportunities.
- Missed revenue opportunities from not identifying when leases or purchases were approaching payoff or service renewal dates.

## The Solution

We recognized the client needed functionality outside of the default setup in HubSpot. Using one of HubSpot's new use-case objects (listings), our team retooled this to sync equipment with companies, deals, and contacts. This centralized system provides an intuitive way to track and manage all inventory for this client, right inside of HubSpot.

## The Impact

Thanks to this unique and centralized setup, the client can now:

- Instantly see which equipment is associated with any company or contact, streamlining internal operations and improving customer service.
- Proactively identify and target customers approaching payoff dates for upsell opportunities.
- Seamlessly manage service upsells with clear visibility into which accounts need attention, boosting revenue potential without additional tools or spreadsheets.

## The Details

**Industry:**  
Manufacturing

**Business Area:**  
Operations and Sales

- Tools Used:**
- Sales Pro
  - Marketing Pro
  - Listings Object
  - Workflows
  - Associations

