

LIFE SCIENCES DISTRIBUTOR: \$600K REVENUE GROWTH IN 90 DAYS

CLEANER DATA. TIGHTER OPERATIONS. MEASURABLE REVENUE.

KEY METRICS

\$600K

revenue increase in the first 90 days

40%

cleaner CRM data after cleanup & automation

80%

reduction in manual reporting effort

Industry: Life sciences equipment distribution

Services: CRM Optimization, Sales Ops, Reporting

● CHALLENGES

CRM data nobody trusted: duplicates, stale records, and empty fields made pipeline reports unreliable.

Manual reporting burden: weekly reporting consumed hours of skilled staff time across sales and finance.

Poor pipeline visibility: managers lacked a current, credible view of deals and rep activity.

Disconnected systems: sales, marketing, and reporting tools operated in silos with manual re-keying between them.

● SOLUTION

- Systematic CRM data cleanup with rules and automation to keep it clean
- Redesigned sales workflows and activity capture for the field team
- Automated reporting connecting CRM data to leadership dashboards
- Integrated the revenue stack so records flow between systems without re-keying

● BENEFITS

1 Revenue impact

Cleaner data and tighter follow-up converted directly into pipeline movement within the first quarter.

2 Trustworthy pipeline

Forecasts and pipeline reviews run on facts instead of caveats.

3 Reporting effort collapsed

Automated dashboards freed the team for higher-value work.

4 A foundation that scales

Workflows, rules, and dashboards keep compounding as the sales team grows.

A growing distributor whose revenue systems weren't keeping up: CRM data nobody trusted, manual reporting that consumed the week, and managers who couldn't see the pipeline clearly enough to coach it.

+\$600K

Proven results, not projections. New revenue attributed in the first 90 days of the engagement — before the systems had finished compounding.