HubSpot & GTM Optimization

GO TO MAREK

Better processes. Connected systems. More growth.

Analysis · Design · Implementation · Enablement

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Go To Marek

Growth often fails at the handoffs.

Even with HubSpot, potential goes unused when processes, data and teams don't work together.

Lost opportunities

Leads are worked too late, deals stall, and existing customer potential is overlooked.

Operational friction

Manual work, broken media flows, unclear responsibilities and poorly aligned handovers.

Lack of transparency

Incomplete data, unreliable reports and little clarity about bottlenecks.



My focus: design processes and implement them in HubSpot so they work in day-to-day practice.

An approach from diagnosis to adoption.

No concepts for the drawer: I guide the technical implementation and the rollout within the team.

1. **Analyze** Understand processes, data, systems and bottlenecks.
2. **Prioritize** Assess business impact, effort and dependencies.
3. **Design** Define target processes, data models and automations.
4. **Implement** Configure, integrate and test HubSpot.
5. **Enable** Document, train and verify adoption.

Iterative instead of big bang: start with one prioritized problem and expand step by step.



The entire customer journey in view.

Six functional optimization areas – supported by a shared HubSpot and data foundation.

01

Lead Management

02

Sales

03

Onboarding & Activation

04

Customer Success

05

Customer Service

06

Expansion & Recovery

Cross-cutting: CRM architecture · Data quality · Integrations · Automation · Reporting · Enablement



Lead Management Optimization

Turn relevant contacts into qualified, cleanly handed-over sales opportunities.

Typical challenges

Unclear lead definitions, missed follow-ups, inefficient qualification, lack of visibility into lead sources and handovers.

What I implement

Lead research & outreach processes; lead capture and routing; scoring and qualification; SDR/BDR workflows; reactivation; SLAs and AE handover.

Results & benefits

Faster response times, better lead quality, fewer lost leads and a traceable handover to sales.



Sales Process Optimization

Develop opportunities more systematically and manage sales processes reliably.

Typical challenges

Inconsistent deal pipelines, stalled deals, manual routine work, unclear forecasts and poor CRM usage.

What I implement

Deal pipelines and stage criteria; tasks and follow-ups; deal automation; quote and handover processes; forecasting, dashboards and sales views.

Results & benefits

Higher process quality, shorter cycle times, better conversion chances and more reliable pipeline visibility.



Customer Onboarding & Product Activation

Guide new customers and product users faster to their first measurable value.

Typical challenges

Gaps after closing, unclear onboarding steps, low activation and weak trial-to-paid conversion.

What I implement

Onboarding journeys and responsibilities; lifecycle triggers; linking product and CRM data; activation paths; trial/freemium handover and reports.

Results & benefits

Faster time-to-value, more consistent onboarding and better foundations for conversion and long-term use.



Customer Success & Retention

Actively develop customer relationships instead of only reacting to cancellations.

Typical challenges

Risks are spotted late, customer support is reactive, renewals are poorly structured and responsibilities stay unclear.

What I implement

Customer health signals; success processes and playbooks; renewal workflows; risk segments; escalations; lifecycle and installed-base reporting.

Results & benefits

Earlier risk detection, better coordinated support, higher customer retention and more transparency across the installed base.



Customer Service Optimization

Simplify support processes and create a reliable service experience.

Typical challenges

Tickets get lost, handovers take too long, SLAs are hard to manage and teams work in separate systems.

What I implement

Help desk and ticket pipelines; routing, priorities and SLAs; automations; knowledge base and self-service structures; service reports.

Results & benefits

Faster handling, less manual work, clear responsibilities and more consistent customer experiences.



Expansion & Revenue Recovery

Identify potential in the existing customer base and deliberately reactivate lost opportunities.

Typical challenges

Upsell and cross-sell signals go unused, inactive accounts are forgotten and lost deals are not re-evaluated.

What I implement

Expansion signals and segments; account and buying group visibility; reactivation workflows; handovers between CS and sales; revenue reports.

Results & benefits

More structured expansion, better use of existing demand and systematic potential management.



Technical HubSpot expertise as the foundation.

I translate target processes into a maintainable, usable CRM system – including adjacent tools.

CRM & data model

Objects, properties, associations, lifecycle, pipelines and permissions

Automation

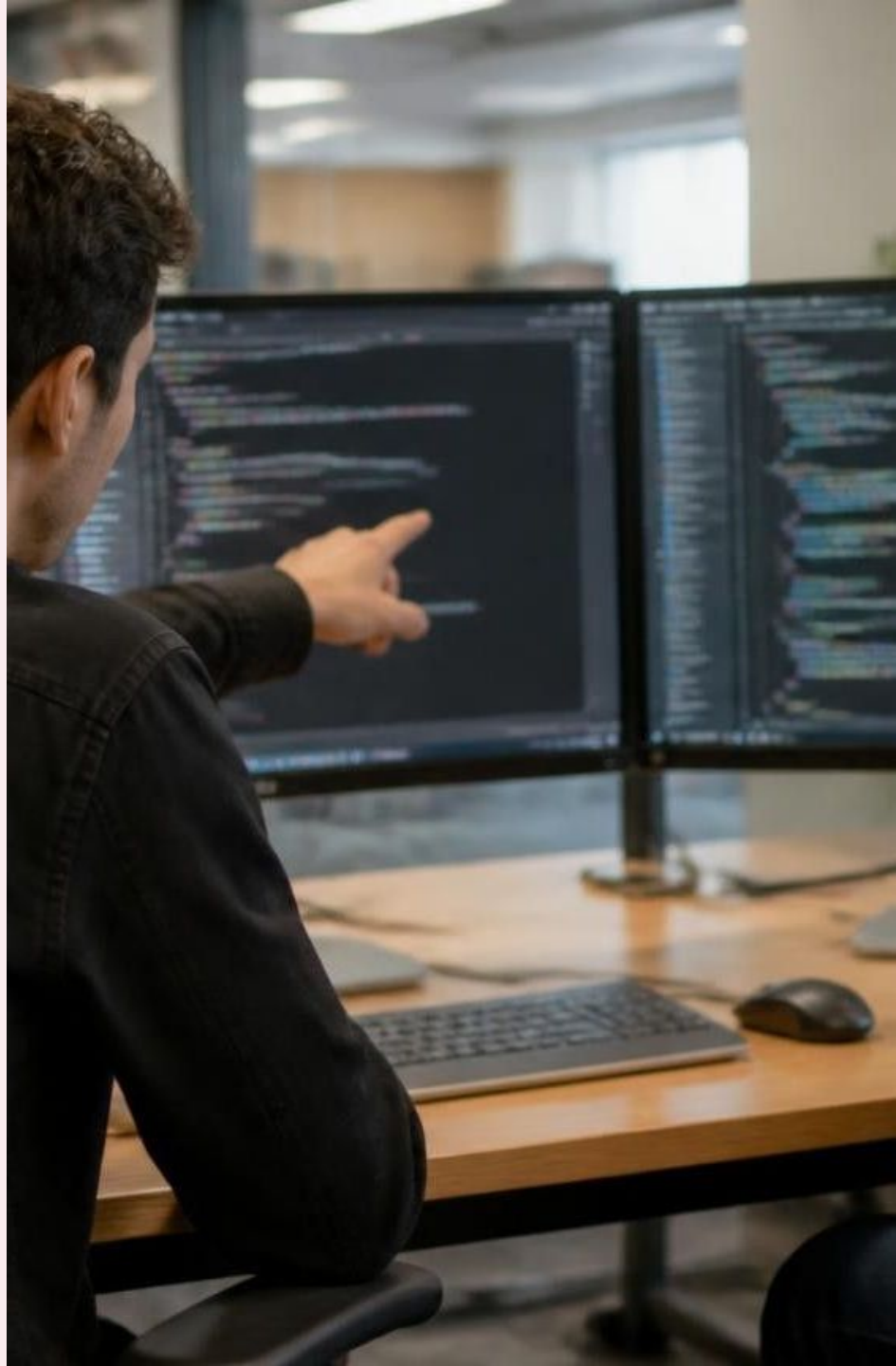
Workflows, routing, notifications, custom code and process logic

Integrations & migration

Data migration, interfaces, synchronization and data cleansing

Transparency & usage

Reports, dashboards, views, segments, documentation and training



Concrete deliverables instead of abstract consulting.

Results are tailored to your needs – from a clear roadmap to a productive HubSpot setup.

Strategy & design

Process maps · target architecture · prioritization · data models

System & implementation

Features · Objects · Properties · Workflows · Integrations

Governance & insights

Reports · dashboards · views · segments · data quality checks

Enablement & Adoption

Documentation · training · rollout · usage review



Two sensible ways to work together.

The starting point depends on whether a specific problem is already known.



A · Solve a specific problem

We start with a clearly defined bottleneck, define goals and success criteria, and implement a prioritized solution. Ideal for urgent needs.

B · Process Assessment

We systematically analyze a process area, identify bottlenecks and create a prioritized implementation roadmap. Ideal for broader optimization needs.

Both paths can lead into step-by-step, modular further development.

Why Go To Marek?

Strategic process understanding and technical implementation from one source.

Senior expertise

15 years of experience in marketing, growth and CRM – on the agency and client side, especially in B2B SaaS and technology.

End-to-End Delivery

From analysis and design through HubSpot implementation to training, documentation and adoption.

Pragmatic & independent

Best practices instead of unnecessary complexity, clearly prioritized measures and an honest assessment of HubSpot's fit.



Where is your company losing potential today?

THE NEXT STEP

Whether it's a single bottleneck or broader process optimization: We'll find a sensible starting point.

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