# pixcell◑

**Case Study:**

# Hatching Dragons' Operational Reset - Simplified sales flow, secure data, and team-level visibility



## Hatching Dragons
Education for a new world

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**2014**
Founding Year

**30+**
Employee Count

**1m +**
Annual Revenue

Hatching Dragons is a UK-based early years education provider offering bilingual Mandarin-English nursery programs. Founded in 2014, the company focuses on delivering immersive, intercultural, and linguistically rich experiences for children aged six weeks to five years. With locations in London, including the City of London, Westminster, and Canada Water, Hatching Dragons aims to foster global citizenship and cognitive development through its unique curriculum.

Marketing Hub Professional

Sales Hub Professional

Service Hub Professional

**Hatching Dragons is a UK-based bilingual nursery group offering Mandarin-English immersion. As operations grew, they struggled with a cluttered pipeline, limited team visibility, and data loss. Pixcell.io rebuilt their HubSpot setup—separating sales stages, restoring key data, and introducing role-specific dashboards—resulting in cleaner reporting and better team oversight.**

The Pixcell team—combining Implementation and Technical Consultants with a dedicated Customer Success Manager—partnered closely with Hatching Dragons to simplify their sales pipeline, recover lost data, and build custom dashboards for clearer team performance tracking within HubSpot.

# The Challenge

Hatching Dragons faced 4 core operational challenges while scaling:

- **Unclear Sales Visibility & Reporting Gaps:** A tangled sales pipeline made it difficult to track conversions, team performance, and overall progress. Sales and after-sales processes were lumped together, leading to skewed data and poor visibility into what was working.
- **Risky Automation Errors & Data Loss:** An improperly set-up automation workflow caused critical data—like emails and contact records—to be deleted. This not only disrupted communication but also risked losing valuable lead and customer history.
- **Lack of Insight Into Team Performance:** The management team lacked a clear, detailed view of how individual team members were performing—missing data on calls, inbox management, tickets handled, and feedback responses.
- **Disconnected Data Between Contacts and Deals:** Updates like funding requests, discounts, or changes in childcare hours were logged only at the contact level, with no structured link to the related deal. This caused confusion, data gaps, and made it difficult to track changes without errors.

**Solution**

# Redesigning the Sales & After-Sales Experience

- Created a dedicated sales pipeline focused solely on **pre-sale stages**, separating it from the **after-sales** journey. This shift gave the team clearer visibility into deal progress, improved reporting accuracy, and made it easier to identify what was driving conversions.
- Built **supporting workflows** from scratch—automating prospect outreach based on deal stages, simplifying task assignments, and cutting out unnecessary steps. The result was a streamlined, focused process that reduced complexity and made it easier for the team to take timely, relevant actions.

# Data Loss to Data Recovery: Fixing the Gaps

- After identifying the root cause of the data loss, we conducted a full **audit** of existing workflows to understand what went wrong. We **restored all affected contacts** and rebuilt key lists to ensure no critical data was missing.
- Manually reviewed the history of each affected contact to retrieve and re-enter missing email addresses, ensuring communication records were complete and usable going forward. This hands-on fix helped **recover valuable lead information** and prevented further loss.

**Solution**

# From Guesswork to Clarity: Team Performance Made Visible

- Created individual **dashboards** for each team member, giving managers a clear, real-time view of performance. Each dashboard was further tailored based on the specific pipelines that team member handles, ensuring the data stays relevant and actionable.
- Dashboards now include call activity, ticket handling, feedback submissions, and inbox management insights—making it easier to track workload, identify support needs, and recognise top performers.

# Automated Contact-to-Deal Data Sync via Zapier

- We used Zapier to automate the **transfer of key updates**—like funding, discounts, and schedule changes—from contact records to their associated deals.

- Each **contact was matched to the correct deal** using a unique identifier (child ID), ensuring the right data moved without errors or manual input.

# The Result

- **Clearer, purpose-built sales pipelines –** With sales and after-sales now split into separate pipelines, the team works more efficiently—leading to faster handovers, cleaner reporting, and less internal confusion.
- **Recovered Data and Reliable Workflows –** Critical contact data and email histories were restored, while faulty workflows were corrected—giving the team confidence in their data and reducing the risk of future loss.
- **Real-time visibility into team performance –** Custom dashboards built for each team member now provide real-time insights into calls, tickets, feedback, and inbox activity—making it easier to manage output and support team success.
- **Seamless Data Flow Between Records –** With automated syncing in place, the team no longer has to manually copy updates between contacts and deals. All changes are reflected in the right place—cutting down errors, saving time, and giving staff a complete view of each case in one spot.

## Cennydd John
## Founder

Before you get HubSpot, you need to get Pixcell. They have to be the strategic partner prior to implementation as they will ensure the entire CRM and its full functionality - from forms through to marketing automations, from email through to sequences - reflect the business, brand and your target customer. We've gone through countless numbers of people who say they know and understand your business (they don't / won't / can't, at least not from desk research alone) - pixcell ask, consult and then add serious value.

Testimonial

**6+**

Years of HubSpot
Experience

**10,000+**

Hours of HubSpot
Projects

**50+**

Global
Customers

**100%**

Customer
Satisfaction

# pixcell

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**Tailored CRM Consultancy, Seamless Integration!**

HubSpot Gold Partner Consultancy specialising in sales and marketing operations, dedicated to building and enhancing your HubSpot experience.