



Case Study:

Refining Lead Segmentation and Sales Processes at Profit&



profit&

www.profitand.com

profit&

2016

Founding
Year

10+

Employee
Count

\$1M

Annual
Revenue

Established in 2016, Profit& is a pan-European management consultancy headquartered in London. The firm specialises in implementing digital planning platforms like Anaplan and Jedox to develop dynamic, collaborative, and intelligent planning models. These solutions enhance decision-making processes across various sectors, including transport & logistics, manufacturing & consumer packaged goods, and technology.



Marketing Hub
Professional



Sales Hub
Enterprise

Profit& is revolutionising business planning and performance management with advanced digital solutions. As they expanded, they faced challenges in managing lead data and streamlining their sales processes. Pixcell.io partnered with Profit& to optimise their HubSpot setup, enhancing lead segmentation, refining their sales pipeline, and providing greater visibility into their prospecting efforts, resulting in more targeted outreach, improved data hygiene, and a more efficient sales workflow.

Here, the Pixcell project team, including Implementation and Technical Consultants and a dedicated Customer Success Manager, share their experience working with Profit& to optimise their sales processes, improve lead segmentation, and enhance cross-team visibility through HubSpot.



The Challenge

Profit& faced 4 key challenges impacting their sales and outreach efforts:

- **Disorganised Contact Data & Poor Segmentation:** Contact records were often incomplete or uncategorised by key fields like territory, industry, or technology—making it difficult to target the right audience across different markets.
 - **Untargeted Outreach:** With no defined personas or segmentation strategy, outreach lacked direction and consistency, resulting in low engagement and missed opportunities to connect with qualified leads.
 - **Scattered Prospecting Process:** New leads were being managed outside of the CRM, with no centralised system to track activity or funnel position—limiting visibility and consistency in follow-up.
 - **Inefficient Sales Pipeline Structure:** The sales pipeline had too many unclear stages and no criteria for progression, leading to poor data hygiene and limited insight into which deals were active or at risk.
-



Solution

From Disorganised Records to Segmented Campaigns

- **Audited and cleaned** the contacts and deals database to remove duplicates, complete missing data, and standardise fields—ensuring **accurate, usable records** for targeted outreach.
- Introduced segmentation by key attributes such as industry and territory, with **automated categorisation** to streamline lead organisation and improve communication relevance across markets.

<input type="checkbox"/>	NAME	SIZE	TYPE
<input type="checkbox"/>	Company Industry: Automative	395	Active
<input type="checkbox"/>	Company Industry: CPG	789	Active
<input type="checkbox"/>	Company Industry: Industrial	860	Active
<input type="checkbox"/>	Company Industry: Logistics	400	Active
<input type="checkbox"/>	Company Industry: Other	2,922	Active
<input type="checkbox"/>	Company Industry: Technology	573	Active
<input type="checkbox"/>	Company Industry: Transport	414	Active



Solution

Turning Generic Outreach into Targeted Engagement

- Developed six **buyer personas** based on core job functions (e.g. Sales, HR, Supply Chain, IT) to guide more tailored, relevant communication across teams.
- Defined rules for tagging contacts by job title and used workflows to automate persona assignment in the CRM—enabling **more targeted outreach and improved engagement.**

<input type="checkbox"/>	Persona: Finance Fiona	3,954	Active
<input type="checkbox"/>	Persona: HR Helen	30	Active
<input type="checkbox"/>	Persona: IT	1,801	Active
<input type="checkbox"/>	Persona: Sales Simon	65	Active
<input type="checkbox"/>	Persona: Supply Chain Susanne	348	Active
<input type="checkbox"/>	Persona: Sustainability Steven	26	Active





Solution

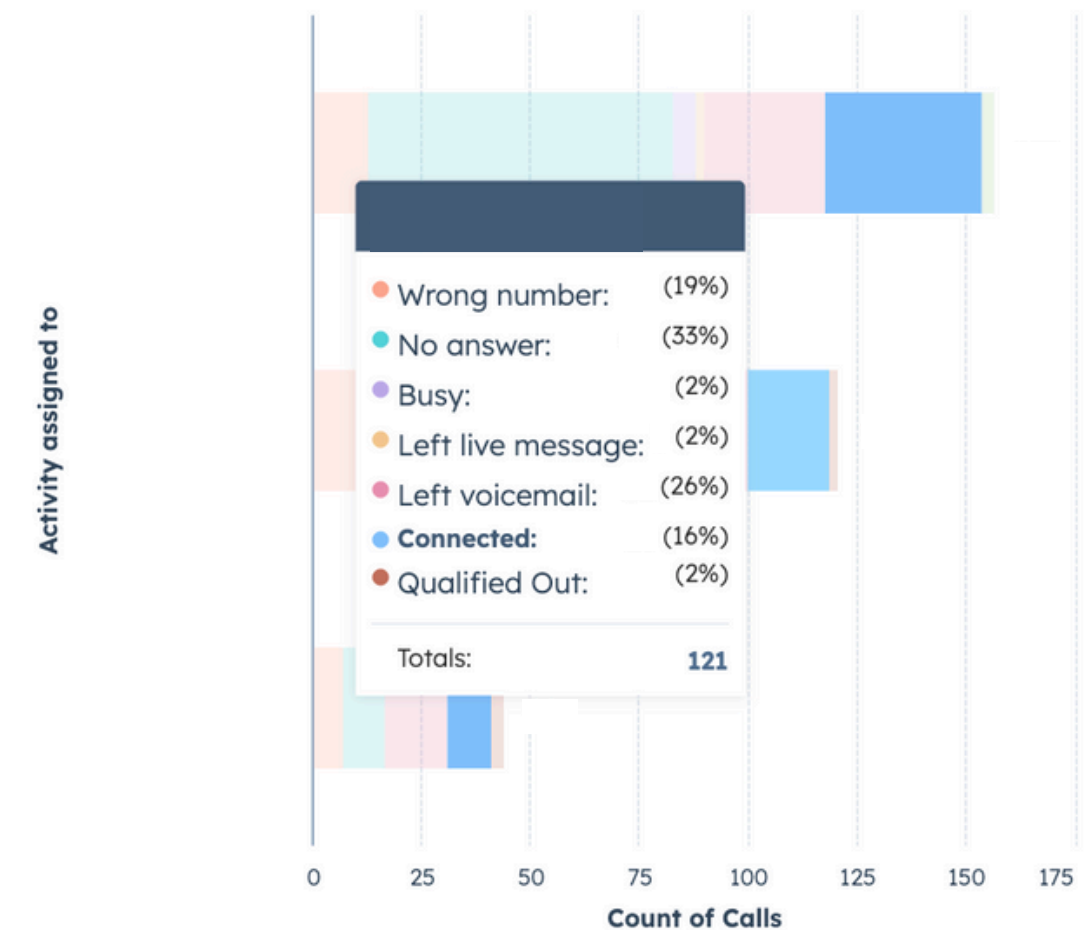
Centralising Early-Stage Sales Activity in HubSpot

- Built a **dedicated prospecting pipeline and workspace** in HubSpot, allowing the sales development team to manage early-stage leads in a centralised, trackable way.
- Created a custom **dashboard to report on cold calling activity**—showing results by industry, territory, rep, and call outcome (e.g. connected, no answer, disconnected).
- Added **tracking for meetings booked, task completion, and rep-level performance** to highlight what's working and guide future outreach strategy.

First Outreach Call Outcomes (by reps) ⓘ

IN THE LAST 30 DAYS FILTERS (1)

Wrong number No answer Busy Left live message
▲ 1/2 ▼





Solution

From Overcomplicated to Actionable: Fixing the Funnel

- Simplified the sales pipeline by **reducing unnecessary stages** and introducing clear entry criteria—ensuring only qualified deals moved forward, such as requiring a booked demo to enter the “Demo” stage.
- Added structured data fields to each pipeline stage to **capture key deal information**, making it easier for the team to monitor progress and maintain consistent data.
- Set up workflows to automatically tag deals as active or inactive based on recent activity, **helping the sales team focus on high-priority opportunities** and clean up pipeline clutter.

STAGE NAME	PROBABILITY
Discovery	20% ▼
Demo	30% ▼
Scope & Propose	50% ▼
Contract	75% ▼
Closed won	Won ▼
Closed lost	Lost ▼



The Result

- **Improved Lead Targeting & Outreach:** Better segmentation and enriched contact data enabled more relevant messaging and higher engagement across key markets. Targeted communications now reach the right contacts, increasing the effectiveness of both marketing and sales efforts.
 - **More Effective Sales Engagement:** Buyer persona mapping allowed the sales team to prioritise high-fit leads and personalise their outreach. This increased the quality of conversations and improved conversion rates throughout the sales journey.
 - **Enhanced Prospecting Efficiency:** A structured prospecting pipeline and dashboard now track cold outreach by territory, industry, and call outcome. The team has clear visibility into performance, enabling data-driven improvements in their outreach strategy.
 - **Streamlined Sales Pipeline & Deal Hygiene:** The pipeline was restructured with clear stage criteria, reducing confusion and improving data consistency. Active vs inactive tagging ensures reps focus on priority opportunities, improving deal velocity and pipeline health.
-



Grace Carruthers
Marketing & Alliances Manager

Pixcell supported Profit& in redefining our sales and marketing processes in HubSpot so that HubSpot works for our team as opposed to the other way around. The Pixcell team have always been very responsive, supportive and great to work with. Thank you for the fantastic difference you have made to how we operate.



6+

Years of HubSpot Experience

10,000+

Hours of HubSpot Projects

50+

Global Customers

100%

Customer Satisfaction



 London, UK

Empowering your Business with HubSpot

Tailored CRM Consultancy, Seamless Integration!

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