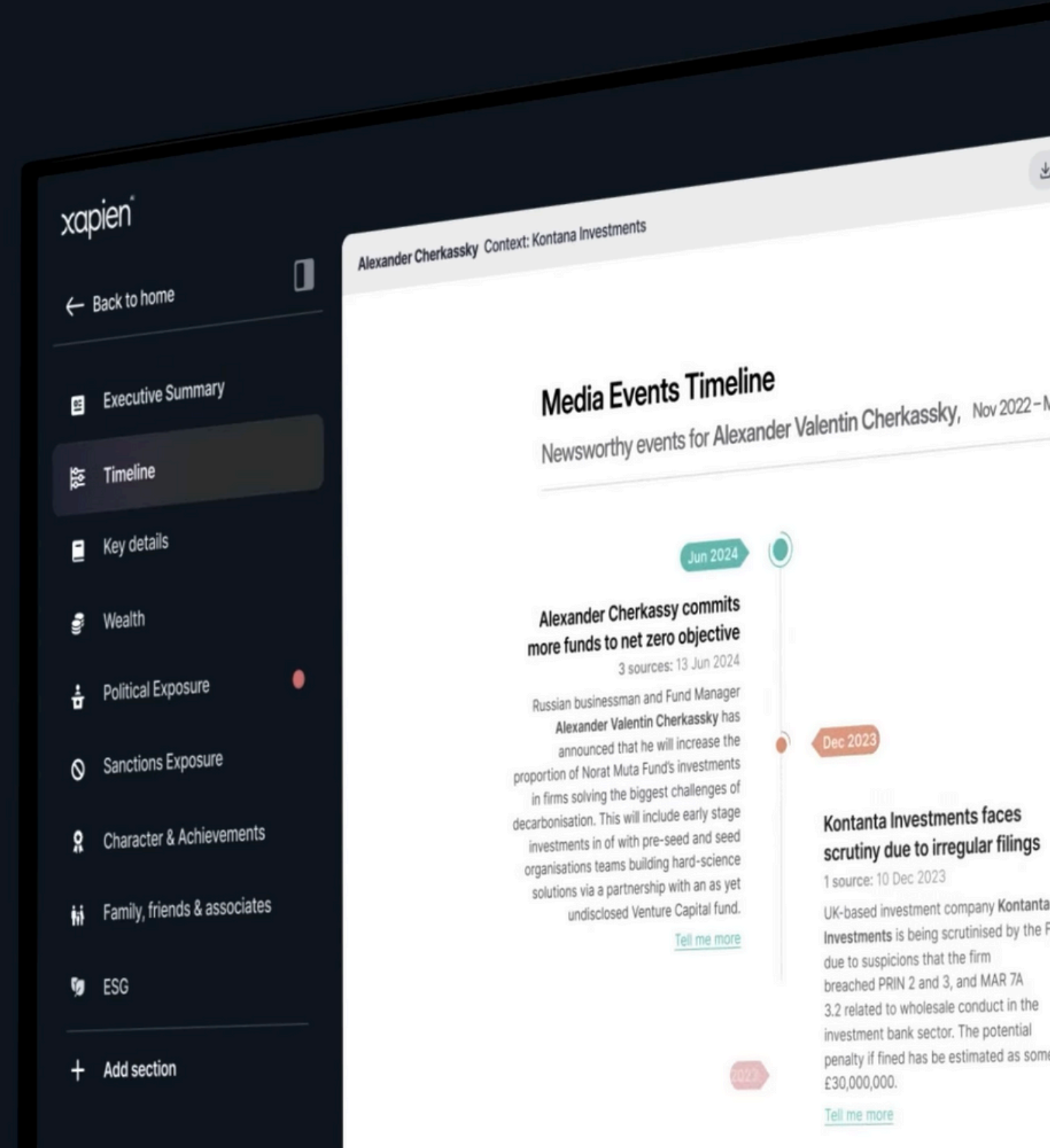




Case Study:

Scaling with Confidence at Xapien

Connecting Sales and Customer Success





2018

Founding
Year

50+

Employee
Count

\$2M

Annual
Revenue

Founded in 2018, Xapien uses AI to automate deep due diligence on clients, donors, and third parties in minutes. Its platform delivers fully sourced, detailed reports, helping teams make faster, more informed decisions. From legal firms to universities, Xapien is transforming how organisations understand who they're working with.



Marketing Hub
Professional



Sales Hub
Enterprise

Xapien is reshaping due diligence with AI-powered automation, helping organisations uncover critical insights in minutes. As their team grew, they needed a more connected and scalable system for managing marketing, sales, and customer data. Pixcell.io partnered with Xapien to optimise their HubSpot setup, enabling better visibility, faster processes, and smarter decision-making across teams.

Here, the Pixcell project team, including Implementation and Technical Consultants and a dedicated Customer Success Manager, share their experience working with Xapien to enhance their sales and customer success operations, streamline processes, and improve cross-team visibility through HubSpot.



The Challenge

Xapien encountered 4 major operational challenges while scaling:

- **Manual and Error-Prone Quote Creation:** Creating quotes using Word documents was inconsistent, time-consuming, and prone to mistakes. There was no central system, e-signature process, or product list to standardise details. Causing delays and frequent errors.
 - **Poor Visibility on Onboarding & Renewals:** Lack of a structured system meant the team had no clear view of onboarding or renewal progress. Without automation, both processes relied heavily on manual tracking, reducing efficiency.
 - **Communication Gaps Across Teams:** Without Slack integration, important customer actions weren't shared with the right teams in real time. This led to delayed responses, siloed information, and missed opportunities for timely follow-up.
 - **Limited Insight into Webinar Engagement:** Webinar data wasn't captured in the CRM, making it difficult to track attendance or interest. The team lacked insight to qualify leads or personalise post-event outreach based on engagement.
-



Solution

Improving Sales Efficiency with Smart Quote Templates

- **Replaced manual** Word documents with a standardised quote system within HubSpot, allowing the sales team to **generate and customise quotes** with a few clicks.
- Introduced **e-signature functionality** and **embedded dynamic Terms & Conditions** that fetch key information from the deal record – including customer details, pricing, and product selections. This automation streamlined the sign-off process, reduced errors, and saved time across the sales cycle.

Quotes (3) + Add

[Redacted]

- Signed (2/2)
- Expiring: 27/04/2025

Signature
Before you sign this quote, an email must be sent to you to verify your identity. Find your profile below to request a verification email.

[Redacted] Signed

[Redacted] Signed





Solution

Streamlining Onboarding and Renewals in HubSpot

- Created a dedicated **Customer Success pipeline** in HubSpot to manage onboarding and renewals in one streamlined view.
 - **Automated deal creation** and CSM assignment when a deal is marked “closed-won,” based on region or customer type.
 - **Mapped onboarding stages** (e.g. Kickoff, Go-Live, Adoption Check-in) with task triggers and email alerts to ensure nothing is missed.
 - **Tracked renewals** within the same pipeline using scheduled reminders, confirmation steps, and upsell prompts. **Improving retention** visibility and reducing manual work.
-



Solution

Right People, Right Time: Driving Cross-Team Alignment

- Integrated Slack with HubSpot to **improve cross-functional visibility**, identifying key stakeholders who required real-time updates.
- Mapped relevant customer actions (e.g. content downloads, form submissions) to tailored Slack notifications, ensuring timely updates and **improving team coordination and response**.



3. Send Slack notification

Send Slack notification to channel or user

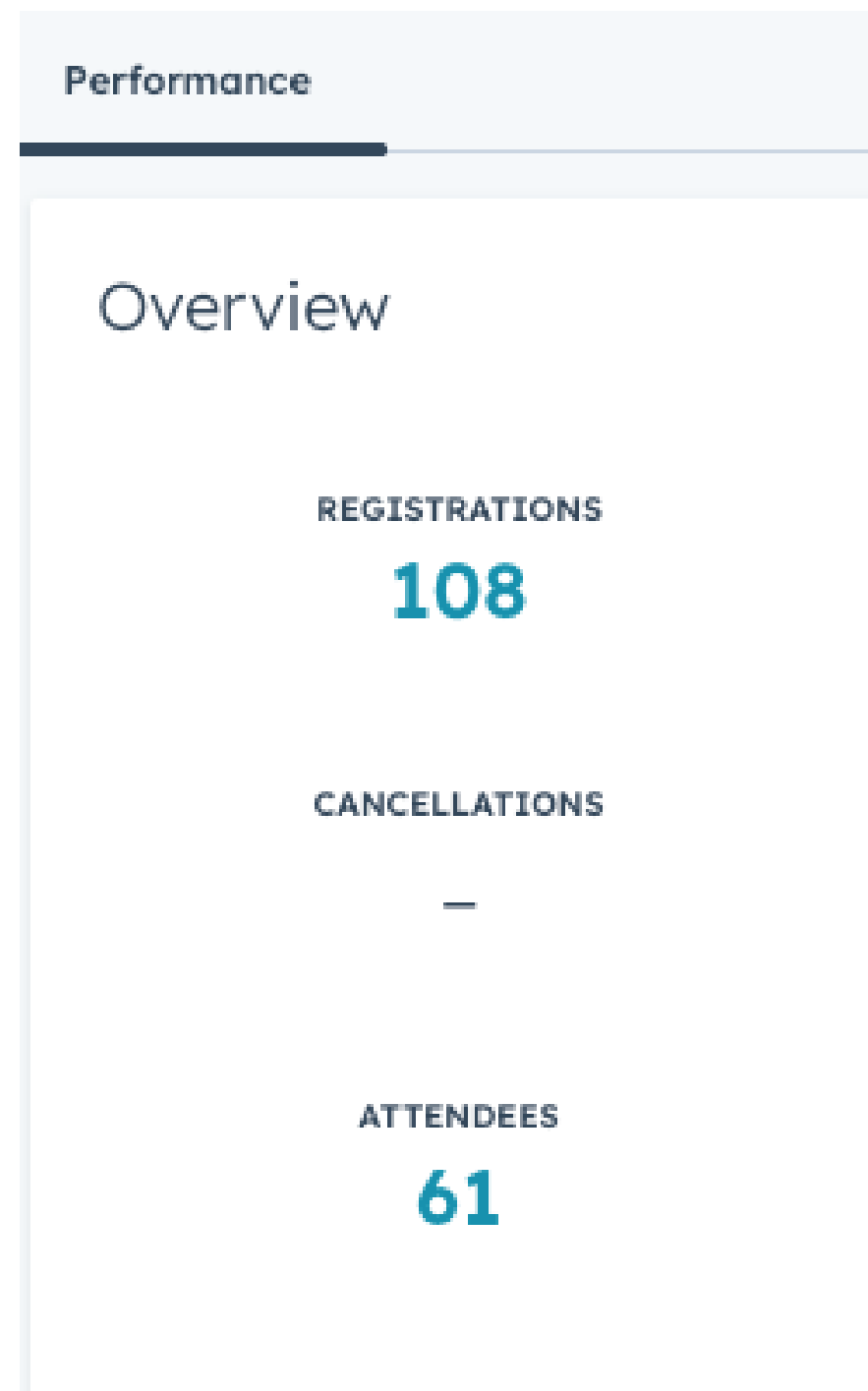




Solution

From Sign-Up to Attendance: Visibility That Drives Action

- Integrated **Zoom with HubSpot** to give Xapien full visibility into **webinar engagement**, ensuring all activity—from registration to attendance—synced automatically into the CRM for reporting and follow-up.
- Linked each webinar to a HubSpot campaign, enabling the team to **manage invitations, track sign-ups, and tailor follow-ups** based on actual attendance, making outreach more relevant and increasing post-event conversion opportunities.





The Result

- **Faster Quote Turnaround:** A standardised quote generation in HubSpot enabled the sales team to create accurate quotes quickly, reducing manual effort and improving consistency across deals.
 - **Improved Visibility on Onboarding & Renewals:** A dedicated Customer Success pipeline gave the team real-time oversight of onboarding progress and upcoming renewals, increasing efficiency and reducing the risk of missed steps.
 - **Smarter Internal Alerts:** HubSpot-triggered Slack notifications ensured key teams received real-time updates, improving coordination and speeding up response times across departments.
 - **Complete Webinar Insights:** The Zoom integration provided full visibility into webinar engagement within HubSpot, enabling tailored follow-ups and more effective lead qualification.
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Natalia Rivas
Marketing Manager

Pixcell has transformed our marketing with great HubSpot automations and detailed reporting. Their expert support for webinars, events, and more has truly streamlined our processes. Highly recommended!



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.
