AUTOMATED WORKFLOWS & CRM

Revenue Operations Automation & CRM Migration

CB Virtual Sales Assistant integrated with HubSpot CRM

📍 **UNITED KINGDOM**

REVENUE OPS
AUTOMATION

Revenue Operations Automation & CRM Legacy Migration

Automations

Revenue Operations Automation & CRM Legacy Migration

ENGAGEMENT MANDATE

A growing organisation reached the technical and operational limits of its CRM, resulting in data silos, manual reconciliation and delayed billing cycles.

The commercial impact included reduced cash-flow predictability, increased operational overhead and constraints on further growth.

> **CB Tech Consulting was engaged under a defined Statement of Work to design and deliver a scalable backend solution that removed these limitations.**

STATEMENT OF WORK DELIVERED

CB Tech Consulting led a revenue operations automation and CRM migration programme, with scope including:

Migration of legacy CRM logic into a scalable backend architecture

Design and delivery of a custom e-commerce backend

API-level synchronisation of ticket sales and attendance data into the CRM

Automation of member attendance, reconciliation, and settlement logic

> ✓ *The solution was delivered as a self-sustaining capability with no ongoing consultancy dependency.*

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COMMERCIAL & OPERATIONAL OUTCOMES

CASH FLOW
Same-Day
Billing and settlement cycles reduced from five days to same-day

OPERATIONAL SCALE
100%
Elimination of manual attendance data entry

EFFICIENCY
Reduced
Reduced reconciliation effort and operational overhead

COST REDUCTION
~£4,000
Approx. annual operational cost saving

RISK & CONTROL

- Automated data synchronisation eliminating reconciliation errors
- Clear separation of revenue logic from CRM platform constraints
- Clean delivery with no requirement for ongoing operational involvement