

From Manual Processes to a Unified **HubSpot** CRM for TransBnk



Client: Transbnk

Location: India

Industry: Financial Services

About Transbnk

Transbnk is a financial services company offering a transaction banking platform for enterprise clients. Operating in a complex, trust-driven ecosystem, Transbnk works with businesses that require clarity, compliance, and consistency across every customer interaction.

As the business grew, internal processes across sales, marketing, and service were still heavily manual and fragmented, making it difficult to scale operations efficiently.

The Challenge

Before working with MarkeStac, Transbnk did not have a centralized CRM system to support its teams.

- No defined CRM structure across sales, marketing, or service
- Lead and customer data scattered across spreadsheets, emails, WhatsApp, and individual memory
- Marketing activities were not tracked, with no clarity on lead sources or performance
- Service requests were handled manually with no ticket tracking or historical context
- Leadership lacked reliable dashboards and a single source of truth



These gaps limited visibility, slowed execution, and made scaling risky.

Services Provided



HubSpot CRM Implementation (Sales, Marketing & Service)



CRM Architecture & Data Structuring



Sales Pipeline Design



Marketing Automation & Lead Nurturing Setup



Service Ticketing & SLA Configuration



Reporting & Dashboard Development



User Training & Enablement

The Solution

MarkeStac partnered with Transbnk to design and implement a **complete HubSpot ecosystem from scratch**, focused on structure, visibility and long-term scalability.



CRM Foundation Setup

- Designed a centralized CRM structure aligned with Transbnk's business model
- Defined lifecycle stages, properties, and workflows to ensure data consistency
- Created a single system to manage the full customer lifecycle

Sales Pipeline Structuring

- Built a structured sales pipeline aligned with Transbnk's enterprise sales process
- Standardized deal stages and tracking methodology
- Enabled clearer deal visibility and forecasting
- Strategic Deal Stage Movement with Approvals

Marketing System Enablement

- Implemented lead capture across multiple channels
- Enabled lead segmentation and automated nurturing
- Established visibility into lead sources and campaign performance

Service Operations Setup

- Introduced structured service ticketing pipelines
- Enabled ownership, prioritization, and resolution tracking
- Maintained complete customer interaction history within the CRM

Reporting & Dashboards

- Built dashboards to track sales, marketing, and service performance
- Enabled management-level visibility for better decision-making
- Ensured consistent and reliable reporting across teams

Training & Adoption

- Conducted structured HubSpot training for Sales, Marketing, and Service teams
- Ensured teams could confidently use HubSpot in daily operations

The Results

Within a short period of implementation, Transbnk experienced a clear transformation in how their internal systems supported the business:

- One centralized CRM system across Sales, Marketing, and Service
- Improved visibility into leads, deals, and customer interactions
- Reduced dependency on manual tracking and scattered tools
- Clear, reliable reporting for leadership
- A CRM foundation built to scale with enterprise growth

Key Outcomes (Before vs After)

Before MarkeStac

- ✗ No centralized CRM system
- ✗ Scattered data across multiple tools
- ✗ Manual sales and service processes
- ✗ Limited visibility into performance

After MarkeStac

- ✓ Fully integrated HubSpot ecosystem
- ✓ Centralized and structured customer data
- ✓ Streamlined sales, marketing, and service workflows
- ✓ Clear visibility across the entire customer lifecycle

Why This Matters

For Transbnk, this engagement wasn't about implementing a CRM tool.

It was about building an operational backbone that could:

-  Support enterprise sales and service processes
-  Bring clarity across teams
-  Scale reliably as the business grows

Tools & Technologies Used

HubSpot CRM

HubSpot Sales Hub

HubSpot Email Sequences

Workflows & Automation

Custom Objects & Reports

Role-based Dashboards

Ready to Build a CRM That Scales?

A structured CRM foundation can dramatically improve execution, visibility, and decision-making.

Book a consultation with **MarkeStac** to see how we can help you turn your CRM into a scalable revenue system.

[Book a Demo](#)