

# From CRM Chaos to Clarity:

↳ TERN Group's **HubSpot** Transformation



**Client:** TERN Group

**Location:** Germany

**Industry:** Recruitment / Talent Solutions

## About TERN Group

TERN Group is a growing recruitment and talent solutions firm operating in a high-velocity, relationship-driven sales environment. As their outreach, data, and team size increased, their existing CRM setup struggled to keep pace with the business.

*They weren't lacking effort or intent - but their systems were no longer supporting scale.*

## The Challenge

Before working with MarkeStac, TERN Group faced several operational roadblocks inside their CRM:

- ❗ CRM data was cluttered, duplicated, and inconsistent
- ❗ No clearly defined sales and marketing structure
- ❗ Deal stages and data fields lacked standardization
- ❗ Reports and dashboards were inconsistent and unreliable
- ❗ Data was spread across tools with no single source of truth
- ❗ Sales and marketing teams struggled to trust the numbers

*These gaps slowed execution, reduced visibility, and made scaling risky.*

# Services Provided

-  HubSpot CRM Migration (Old Portal → New Portal)
-  CRM Architecture & Data Structuring
-  Sales Pipeline Design & Automation
-  HubSpot Email Sequences Setup
-  Reporting & Dashboard Development
-  Custom Object Configuration
-  Contact & Company Segmentation

## The Solution

MarkeStac partnered with TERN Group to rebuild their HubSpot ecosystem from the ground up focusing on structure, clarity, and long-term scalability



## CRM Foundation Rebuild

- Migrated TERN Group to a fresh HubSpot portal
- Audited existing data to remove redundancy and errors
- Re-imported contacts, companies, and deals and their associated activities with near-perfect accuracy
- Structured properties to ensure data was sortable, searchable, and usable



## Sales Pipeline Optimization

- Designed a sales pipeline aligned with TERN Group's real sales process
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- Standardized deal stages and definitions across the team
- Enabled clearer forecasting and deal visibility



## Automation & Workflows

- Built automation aligned with the sales structure
- Supported sales reps without removing human control



## Sales Email Consolidation

- Migrated from a third-party email tool to HubSpot Email Sequences
- Launched multiple, continuously running sales email campaigns
- Centralized all email activity inside the CRM timeline with proper logging.



## Reporting & Dashboard System

- Built custom reports aligned with business KPIs
- Created role-based dashboards for leadership and sales teams
- Ensured consistent, reliable reporting across the organization



## Custom Objects & Segmentation

- Implemented custom objects tailored to TERN Group's operations
- Segmented contacts and companies based on active sales campaigns

# The Results

Within weeks of implementation, TERN Group experienced a clear shift in how their CRM supported the business

- A single, reliable source of truth inside HubSpot
- Standardized sales execution across the team
- Reduced manual work for sales reps
- Clear, trustworthy reporting for leadership
- Improved visibility into outreach, engagement, and pipeline health

*The CRM evolved from a daily frustration into a system the team could confidently scale on.*

## Key Outcomes (Before vs After)

### Before MarkeStac

- ✗ Fragmented and cluttered CRM data
- ✗ Inconsistent reporting and dashboards
- ✗ Disconnected sales tools
- ✗ Limited confidence in forecasts

### After MarkeStac

- ✓ Fully structured HubSpot porta
- ✓ Reliable, role-based reporting
- ✓ Centralized sales communication
- ✓ Clear visibility across pipeline and performance

# Why This Matters

For TERN Group, this wasn't about adopting a new tool.

It was about building a CRM foundation that could:

-  Support daily sales operations
-  Scale with business growth
-  Provide clarity, not confusion

## 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](#)