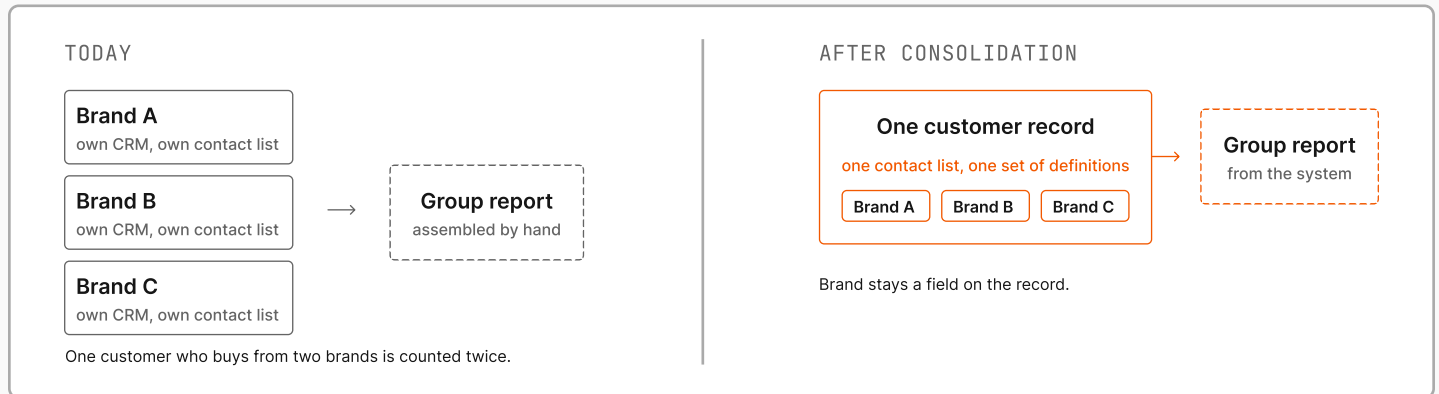


Every company you acquire arrives with *its own CRM*.

Cross-selling, shared services and group reporting all wait until the customer data sits in one place under one set of definitions. This covers the decisions that come first, why HubSpot fits, and how the work runs.



Four shapes this takes

A single bolt-on

One company joins an existing platform. The question is whose processes win.

A roll-up on a cadence

Several a year. The priority is a repeatable pattern; bespoke each time does not scale.

A carve-out

The business must leave the parent's systems by a deadline, often with no CRM of its own.

Portfolio standardization

No single deal. The fund wants comparable reporting across holdings that grew up apart.

The shape differs. The decisions underneath are the same.

The decisions that come first

Do we consolidate now, or phase it?

Migrate in stages, but decide the structure now. If you buy every year there is never a quiet moment, and every delay means absorbing several companies at once instead of one.

What to settle now: one customer record, one agreed set of definitions, one reporting model.

What gets standardized first?

The customer record, before anyone's workflow. And the first argument is about words, not software. One company calls it a lead, another an account. One counts a deal at proposal, another at signature.

Until those definitions are agreed, every report built on them is wrong, and nobody notices for a quarter.

How much standardization, how much local flexibility?

Standardize what has to be compared across the group; leave alone what makes each brand work. One customer record and one reporting model for everyone, while campaigns, sales stages and routing stay each brand's own.

You bought those brands for their markets. They usually have habits worth keeping.

How do we run several brands without chaos?

Keep the brands inside one system. Separate systems rebuild the silos you just paid to remove; merging everything into one list erases the distinctions the business runs on.

The middle path is above: brand becomes a field on a shared record.

How do we avoid more fragmentation?

Connect systems rather than replacing them. Your ERP, membership system or point-of-sale keeps doing what it does well: orders, invoices, pricing. And move the historical data across, not only current records.

If people cannot find last year's data in the new system, they quietly keep the old one running.

What actually goes wrong?

Three things, reliably. Duplicate records, which destroy trust in the numbers faster than anything else. Processes that cross company boundaries with nobody responsible. And teams who have already been through a failed CRM rollout.

That last group is not being difficult. They are protecting themselves, and they usually have reason to.

Why HubSpot usually fits this situation.

The feature list matters less than what happens the next time you buy a company.

One system instead of five

CRM, marketing, service, content and data in one place. Every connection you avoid building now is one you do not rebuild next time.

It repeats per company

Each brand gets its own sales stages, permissions and routing inside one account. The fourth company joins a pattern instead of starting a project.

No admin per company

One team runs the group. The difference between doing this fifteen times on paper and fifteen times in reality.

Reporting the sponsor can read

Group and company views come out of the system itself. No data team, no summary assembled by hand.

Fast enough for the hold period

Enterprise CRM takes months before anyone sees value. HubSpot is live in weeks, which is what a 100-day plan needs.

AI needs clean data first

Automation and AI pay off after duplicates are resolved and history sits in one place.

THE PART THAT DECIDES WHETHER IT WORKS

It has to fit what you already run.

ENGAGEMENT

HubSpot
pipeline, campaigns, service

INTEGRATION

Integration layer
custom middleware

SYSTEMS OF RECORD • UNCHANGED

ERP

Membership

POS

Commerce

These systems are older than the deal and none are being switched off. HubSpot sits alongside them rather than replacing them. Ask what happens to the ERP and the honest answer is usually: nothing.

Connecting the two is where a delivery partner earns their fee. Off-the-shelf connectors handle the easy cases; the ones that matter rarely are. We build those as **custom middleware**, so the system underneath can be swapped without rebuilding the CRM.

You are never finished. You keep buying, the systems keep changing. Get the foundation right early and every later change becomes an adjustment, not a rebuild.

How the work runs

FIRST

Agree the definitions

What counts as a lead, an account and a qualified opportunity, and who owns each process now it spans more than one company.

THEN

Build the shared record

Contacts, companies, pipeline and the brand model, with duplicates resolved first.

THEN

Bring the rest across

Marketing, forms and support migrated company by company. The ERP connected, not replaced.

THROUGHOUT

Earn the adoption

Every team sees its own process running before go-live. Training happens during testing, not afterwards.

WHAT GOOD ADOPTION LOOKS LIKE

FIRST 30 DAYS

All pipeline sits in one system. The side spreadsheets stop.

BY 90 DAYS

Leads route correctly between companies. Leadership quotes the CRM, not a hand-assembled summary.

BY 6 MONTHS

Marketing runs on one platform across all brands, and you still see which brand earned each deal.

BY 12 MONTHS

The next acquisition is onboarded in weeks, not quarters.

WHERE WE COME IN



Axelerant is a HubSpot Gold Solutions Partner and a digital engineering firm. We build the part in the middle: the connection between HubSpot and the systems that already run the business. All six hubs, and the integration work underneath.

On a live program: four brands, an ERP customized over many years, three hubs on one account, and middleware written to work with any ERP. Delivered inside HubSpot's co-delivery program.

Start with a consolidation assessment: a read of what you have, a check on whether the integrations are feasible, and a 100-day plan.

axelerant.com/platforms/hubspot

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