

Case Study

Client: Bone Digital

Overview

Bone Digital was looking for a custom solution to add to their HubSpot software. We built a bespoke deal pipeline to assist with forecasting projected income.



Key Takeaways



Bespoke technology build



Added reporting and data monitoring abilities



Ability to forecast projected income

Goals

1. Maintain data integrity with new custom build
2. Ensure new data seamlessly integrates with previous data
3. Develop bespoke solution and implement new technology

The Challenge

Bone Digital wanted to forecast projected income for all streams of their business. This was complex as Bone Digital had a 'milestone' payment process that could not be defined within a single deal.

They needed a custom build in order to track and report on this payment process.

The Solution

We developed a bespoke deal pipeline that automatically created milestone payments as new deals.

This enabled Bone Digital to track the various progress payments and forecast future revenue. We also built bespoke reports to accurately reflect the milestone payment process.

We ensured our new custom technology provided the functionality that Bone Digital needed by seamlessly integrating the new data with automated processes.

This helped to minimise the risk of human error and maintain data integrity.