



# Cargas and HubSpot

**CARGAS**®

**PRESENTED BY:**

**Eric Gervase**, Sales Manager

**Esther Angell**, Vice President

# Cargas At a Glance

190+

Employees

35+

Years in Business

15x

Best Places to Work in PA

1,000+

Software Implementations

## HubSpot Experience

- Grown from un-tiered to Platinum in 1.5 years as HubSpot partner
- Multiple Dynamics CRM to HubSpot integrations
- Custom HubSpot integrations
- Ongoing Optimization managed services
- In-house built integration between Cargas Energy ERP & HubSpot

## Our Superpowers

- 20 years of CRM experience
- ERP practices (Sage Intacct and Microsoft) and custom development team with broad industry knowledge (NetSuite, Epicor, Sage 100, AS400, Syteline, etc.)
- Cargas Energy ERP publisher (~300 customers)

### Manufacturing

KEYSTONE  
SINCE 1945  
LIGHT MADE EASY

YOUR CRITICAL LIFT EXPERTS  
ACECO  
American  
CRANE  
& EQUIPMENT CORPORATION

BRENTWOOD

FIL-TEC

### Prof. Services

McKONLY & ASBURY  
TAX  
ASSURANCE  
CONSULTING  
ACCOUNTING

DJK COUNSEL

Sai

e<sup>+</sup>  
ePlus Technology

### Energy

Homestead

SIERRA  
PROPANE

PARKER  
GAS CO. INC.  
Feel Comfortable With Us

PROPANE  
PLUS  
HEATING & COOLING



# Sales Support Team

---



**Esther Angell**  
*Vice President  
CRM*



**Eric Gervase**  
*Sales Manager*



**Wes Kintner**  
*Business  
Development Rep*



**Deanna Forbes**  
*Customer Success  
Manager*



**Jon Clemens**  
*Vice President  
DevSol*

# Co-selling with Cargas

## Collaborative Sales Process

- Discovery call(s) to define value and project requirements
- Product demonstrations to support your sales process and gain enthusiasm and buy-in from the customer
- Solution architecture, integration design
- Packaged and Custom Implementation and onboarding services



[Cargas & HubSpot Partner Page](#)

[Cargas HubSpot Ecosystem Page](#)

# What You Need to Know About Fuel Delivery

---

## Top Challenges

- Receding propane/fuel market (NY for example moving to electric-only builds)
- Legislation
- Staff recruitment and retention
- Supply chain for steel (becoming less of an issue)
- Manual processes (still using paper, no digital forms of scheduling, etc.)

## Learn More:

- [National Propane Gas Association](#)
- [What is Heating Oil?](#)

## Profile:

- Fuel delivery includes heating oil and propane.
- Businesses often also offer HVAC as well
- Might sell to both residential and commercial

## Personas

- Typically working with owner/operators
- Often do NOT have a formal sales team (CSRs do quoting, intake, and set-up)
- Non-technical users (adoption is an issue)
- Small mom-and-pop businesses
- Tied to local communities
- Might be selling to both residential & commercial

# Cargas Energy and Industry Experience

## Fuel Delivery Experience

- 15+ Years in the Energy Industry
- Built a vertical ERP for the retail energy space that manages their entire back-office (Cargas Energy)
- >300 Customers in the Energy Industry
- 8 new Energy customer adds on HubSpot in 2023, pre integration launch
- Launched an integration between Cargas Energy and HubSpot early 2024



# Key Talking Points for Fuel Delivery

---

## Why HubSpot?

- Best-in-Class that grows with your business
- Intuitive interface that's extremely easy to adopt
- Streamlined implementation gets you up and running quickly
- If you're already using Cargas Energy, an integration is available

## Why CRM & Marketing at all?

- You're already paying for marketing efforts (ads, events, flyers, etc.). Make sure that you're capturing information and staying top-of-mind.
- Create better interactions with your existing customers (Such as Will Call to Automatic Deliveries)

# Fuel Delivery Assets

**Cargas Energy website:**

[Cargas Energy & HubSpot Demo Center](#)

[Cargas Energy & CRM](#)

[Cargas Energy & HubSpot](#)

[Cargas Energy YouTube Channel](#)



[Cargas Energy & HubSpot Webinar](#)



[Why Fuel Dealers Need CRM](#)