



# Cargas and HubSpot

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PRESENTED BY:

**Eric Gervase**, Sales Manager

**Esther Angell**, Vice President

**CARGAS**<sup>®</sup>

# 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
- On HubSpot PAC (Partner Advisory Council)

## Our Super Powers

- 20 years of CRM experience
- ERP practices (Sage Intacct, Microsoft, Acumatica) 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

ACECO  
YOUR CRITICAL LIFT EXPERTS  
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

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**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



# Manufacturing Expertise

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**CARGAS®**

# Cargas and Manufacturing Industry

- 20+ Years in the Manufacturing Industry
- Integrate to multiple ERP platforms
- Diversified client base:
  - Heavy equipment
  - Chemical manufacturing
  - Distribution
  - Kitting



Industrial Service Solutions



# ERP Experience

## Current Practices

sage Intacct



Microsoft Dynamics 365  
Business Central



Acumatica

The Cloud ERP



Microsoft  
Dynamics™ GP

## Integration Experience



ORACLE  
NetSuite

JOBSCOPE®

Deltek®

ORACLE®  
JD EDWARDS



Sage



EPICOR

...and more

# Key Talking Points for Manufacturing Companies

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## Why HubSpot?

- Intuitive interface that's extremely easy to adopt
- Robust reporting to help manage sales portfolios
- Singular database for Marketing, Sales & Service means that your information follows the customer through their lifecycle
- Powerful marketing functionality

## Benefits of ERP & CRM Integration

- Manage recurring billing
- Streamline quote to cash process
- Customer visibility for sales, service, and operations
- Leverage your existing client data to better upsell/cross-sell
- Better forecasting



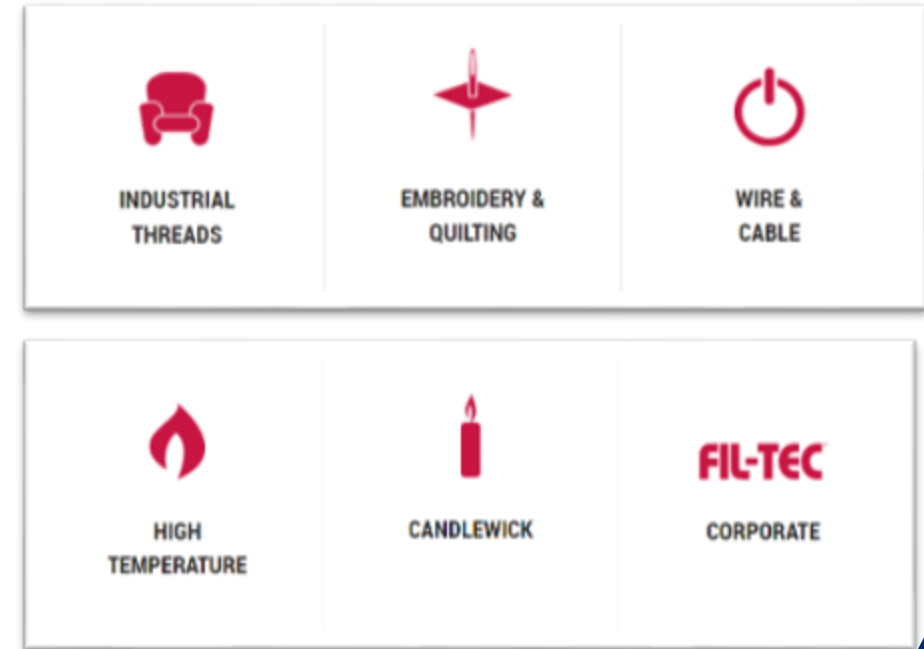
# Manufacturing Case Study

## Business Problems

- No visibility of customer interactions across functional teams
- Existing CRM didn't add value to the sales team (user experience, automation, marketing and service interactions visibility)
- Marketing team had disparate tools and no campaign automation capabilities. There was also no connection to customer records to initiate marketing campaigns.
- Service team had limited tools and needed a better way to handle customer service tickets to resolution.

## The Solution

- Full Enterprise implementation (Marketing Hub, Sales Hub, Service Hub)
- Integration to Aptean Ross (their ERP)



## D365 Integration Case Study

### Business Problems

- Struggled with advanced segmentation with existing marketing automation tool (ClickDimensions)
- Challenges with form building
- Limited Customer Support
- Future development of product

### The Solution

- Implement Marketing Hub
- Implement HubSpot published D365 CRM Integration

