

SUCCESS STORY

Salesforce – New Implementations With Netsuite & HubSpot Integrations



CHALLENGE

GPS Insight was looking to overhaul its sales infrastructure in order to streamline processes, improve automation, and reduce the operational overhead on its Sales Operations team. Their existing sales process was heavily dependent on NetSuite, which created challenges in quoting, data management, and marketing coordination. To address these issues, GPS Insight needed a brand-new Salesforce instance to manage sales and quoting. They also required integration between Salesforce and NetSuite to retain NetSuite for invoicing, along with the automation of quote generation and e-signature capture. Additionally, GPS Insight sought a more cohesive marketing automation strategy to replace the fragmented tools they were using.

SOLUTIONS

StreamForce Solutions delivered a seamless transformation by creating an integrated, future-ready ecosystem for GPS Insight. First, a new Salesforce instance was built with CPQ (Configure, Price, Quote) capabilities, designed to streamline the quoting and sales workflows. Next, Salesforce was integrated with NetSuite using Dell Boomi, automating the flow of data for billing and fulfillment. To further enhance efficiency, StreamForce integrated Adobe e-Sign, automating the quote-to-signature process and capturing signed documents directly within Salesforce. Additionally, historical sales data was migrated from NetSuite to Salesforce, ensuring continuity in customer transactions. On the marketing side, StreamForce simplified operations by transitioning GPS Insight from Marketo to HubSpot, which was integrated directly with Salesforce to create a unified system for marketing campaigns.



GPS Insight is a company that offers fleet management software and solutions designed to help businesses optimize their fleet operations. Their platform provides real-time GPS tracking, vehicle diagnostics, route optimization, and driver behavior monitoring features. GPS Insight serves a wide range of industries, including transportation, construction, utilities, and government, by improving fleet efficiency, reduce operating cost, and enhancing safety and compliance. The Company's technology enables businesses to manage their fleets more effectively, increase productivity, and make data-driven decisions to achieve operational excellence.

Scottsdale, AZ
50-100 Employees
Automobile

AT A GLANCE

Benefits

- Streamlined Sales Process: Automated quoting, e-signatures, and billing.
- Improved Data Flow: Seamless sync between HubSpot, Salesforce, and NetSuite.
- Faster Quote-to-Cash Cycle: Reduced time from quote to final invoice.

Challenges

- System Complexity: Integrating multiple platforms smoothly.
- Data Migration: Ensuring accurate transfer of historical sales data.
- Training & Adoption: Getting teams up to speed with the new system.

RESULTS

GPS Insight now operates with a fully connected, end-to-end sales ecosystem. Leads are captured in HubSpot and automatically synced with Salesforce, ensuring seamless data flow between marketing and sales. The sales team can quickly generate quotes and send contracts using Salesforce CPQ and Adobe e-Sign, with signatures finalized in real time, accelerating the sales cycle. Once deals are closed, they are automatically pushed to NetSuite, triggering billing and fulfillment without any manual intervention. The result is a streamlined and efficient sales engine that reduces manual overhead, accelerates quote-to-cash cycles, and provides a unified view of the customer journey.

SERVICE PROVIDED

- Salesforce Sales Cloud
- Salesforce Revenue Cloud (CPQ)
- NetSuite
- HubSpot
- Adobe e-Sign



“It’s obvious the team is well versed not only in the capabilities and functionality of Salesforce but able to navigate through a complex instance of NetSuite and its’ processes to offer a seamless transition for end users and system managers alike. Their expertise shows in consistent and reliable communication and project management. I’ve already offered their information to connections in the Computer Software industry. Looking forward to keeping StreamForce Solutions on as a trusted partner and hope to work with them to implement the rest of our business processes in the future.”

James Hayes
VP Revenue Operations
GPS Insight

ABOUT STREAMFORCE SOLUTIONS

At StreamForce Solutions, we empower organizations to achieve growth through innovative technology solutions and expert guidance. Our team of digital transformation specialists has extensive experience across various sectors, including SaaS, High-tech, Private Equity, Education, Healthcare, Manufacturing, Finance, HR & Payroll, Retail, and Automotive.

We deliver tailored solutions to meet unique client challenges, focusing on value creation, business process standardization, systems optimization, and robust Go-to-Market tech stacks. Our services span engineering, cloud transformation, and product development, leveraging the latest technologies and frameworks, including Generative AI. We enable hyper-automation and provide strategic AI proof of concepts and labs to showcase value. With a global delivery model and over 120 certifications, we ensure top-quality service and support.

