

Payroll Firm Gains Visibility & Control with an All-In-One Business Operating Platform



Founded in 2019, RPM Payroll built a successful and growing payroll, HR, and workforce solutions business by focusing on exceptional service and strong client relationships. However, expansion and growth highlighted manual processes that began to hold the business back.

INDUSTRY

Payroll, HR & Workforce Solutions

COMPANY LOCATION

Western New York

HUBSPOT PRODUCTS USED

Sales Hub · Marketing Hub ·
Operations Hub · Data Hub

OVERVIEW

As RPM Payroll continued to grow, they recognized that simply adding another software would be insufficient. The lack of connected systems caused redundancies and leadership lacked visibility into daily operations.

Revlet stepped in and identified the core processes that needed to be systematized within a single, connected operational platform and designed an implementation plan customized to RPM Payroll's unique needs.

1

Understanding the Problem

- Day-to-day operations used multiple spreadsheets and email inboxes
- Different processes managed in different locations
- Strong reliance on Excel and various documents to track customer information, billing and invoicing, sales opportunities, commission calculations, quoting, etc.

RPM Payroll's team was spending valuable time on administrative work, while disconnected information created opportunities for miscommunication, lost leads, and inconsistent customer experiences.

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Defining the Goals

Revlet guided the discovery and identification of the functional needs of the final product.

- ✓ Spend less time on administrative work and minimizing errors from manual inputs
- ✓ Increase capacity while continuing to meet the firm's high standard for client service
- ✓ Closing new business without losing profitability
- ✓ Provide leadership with greater visibility and control over operations

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Mapping Out the Solution

RPM Payroll needed full visibility into their operations to identify opportunities for improvement in their processes and deliver meaningful insights about their business.

The business needed a single thread of truth between the sales and service teams to pass through client data and share information. This would reduce redundancy and administrative work, improve accuracy of data, and create a more consistent customer experience.

SOLUTION BY REVLET

- ✓ Centralized **client communication** into a single location, giving the team a complete history of every interaction. Emails, phone call notes, meetings, follow-up tasks, and client requests could all be accessed from one client record.
- ✓ **Invoicing and billing processes** were consolidated and automated so quotes, invoices, payment tracking, and billing history could all be managed within the same system, without the manual data entry.
- ✓ **Leads, prospects, and opportunities** could be tracked throughout the entire sales pipeline, while marketing activities and follow-up campaigns were managed within the same connected platform.
- ✓ The centralized **commission tracking process** brought sales performance, commission calculations, and payment records together in one connected system, eliminating the need to manage calculations manually across spreadsheets.

RESULTS DELIVERED

The transition to a fully connected operating system was gradual and meticulous. This allowed ample time to onboard the team while encouraging feedback and discussion about the new system.

As your partner, Revlet is committed to taking this process at your pace and becoming a trusted resource for your team each step of the way.

Increased Productivity

- ✓ CRO saves 60+ hours annually on commission processing
- ✓ Improved support times and service quality
- ✓ Greater consistency in client experience
- ✓ Increased capacity for clients
- ✓ Decreased redundancy in data entry

Reduced Risk

- ✓ Improved service accuracy
- ✓ Reduced risk of human error
- ✓ Greater visibility into cash flow
- ✓ Reduced risk of missed communications

Increased Revenue & Profit

- ✓ Faster collections on outstanding payments
- ✓ Raised sales team accountability and follow-up
- ✓ Improved accuracy for commission data
- ✓ Clearer pipeline visibility with better sales forecasting
- ✓ Increased visibility driving smarter decision making
- ✓ More informed, data-driven financial planning

"Revlet didn't simply implement HubSpot. They helped us rethink how our business operates. Today our team spends less time managing spreadsheets and more time serving clients"



Phil Mule
Partner, RPM Payroll

ABOUT REVLET

Revlet helps growing businesses turn HubSpot into a real operational platform, not just a CRM. We start with the business, not the software. Our consultants lead everything from discovery and solution design through configuration, testing, training, and go-live. This continuity keeps projects aligned with our clients' goals.

Revlet works across industries, bringing a business systems and RevOps perspective to every engagement. If your team is managing growth through spreadsheets, disconnected systems, or a HubSpot platform that isn't earning its keep, Revlet can help you build what comes next.



**Explore an Operations Project
with Revlet. Book a Call with Us.**