UnitedOPS

SMALL BUSINESS CASE STUDY

LOGISTICS

Faster lead response for a logistics sales team

A regional logistics provider automated lead intake, task assignment and follow-up reminders.

REPORTED RESULTS

<10 min lead response time, down from hours

THE CHALLENGE

Sales reps were missing follow-ups, and leaders had limited visibility into which deals needed attention.

WHAT CHANGED

Form submissions created leads in Pipedrive. The workflow automated deal-stage changes, assigned tasks, sent reminders and posted deal updates in Slack.

OPERATING IMPACT

Automated alerts clarified follow-up ownership, and leadership gained a clearer view of the sales pipeline.

> *"Our reps no longer miss follow-ups. This saved us deals every week."*
>
> **VP of Sales, Regional Logistics Provider**

SYSTEMS USED Zapier, Pipedrive, Slack, Google Sheets

DISCUSS A WORKFLOW

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