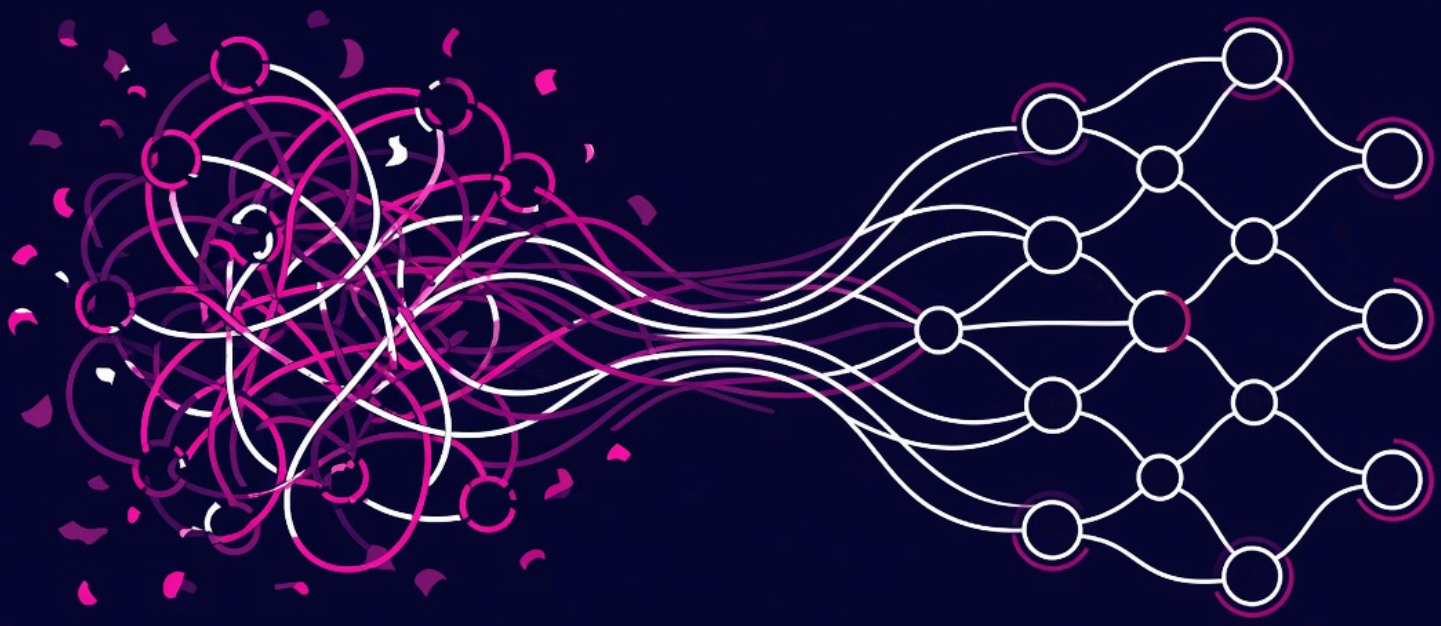
Origin.

A GROWTH GUIDE FOR COMMERCIAL AND SALES LEADERS



ORIGIN CRM RESCUE

Your CRM, rescued.

Fix the processes, data and tech your growth runs on. A guide for UK engineering, aerospace and defence teams.

We fix CRMs around the people who use them, then keep them fixed.

Salesforce | Microsoft Dynamics 365 | HubSpot

Check → Rescue → Run

origingrowth.co.uk

SELF-DIAGNOSTIC

Is your CRM helping you grow, or are you working around it?

Tick each statement that sounds familiar. Ask sales, marketing, service and leadership to answer separately. Where your answers differ is where to start.

- [ ] **Reports nobody believes**
  Leadership meetings start with an argument about whose numbers are right.

- [ ] **The real pipeline lives in spreadsheets**
  Sales keep their own trackers because the CRM is slower or less accurate.

- [ ] **Workflows nobody can explain**
  Automations fire, emails go out, fields change, and no one is quite sure why.

- [ ] **Duplicate and out-of-date records**
  The same company appears three times, and half the contacts have left.

- [ ] **Leads fall between marketing and sales**
  Handovers aren't clear, so follow-up is late, doubled or missed.

- [ ] **Growth or a merger has left you with a patchwork**
  Different teams, stages and tools bolted together, none of them quite matching.

- [ ] **The partner who built it has moved on**
  Nobody in-house owns the design, so every change feels risky.

- [ ] **People log in only because they have to**
  Adoption is low, and the CRM feels like admin, not a tool that helps.

0–2 ticks
A few rough edges. Worth a tune-up before they spread.

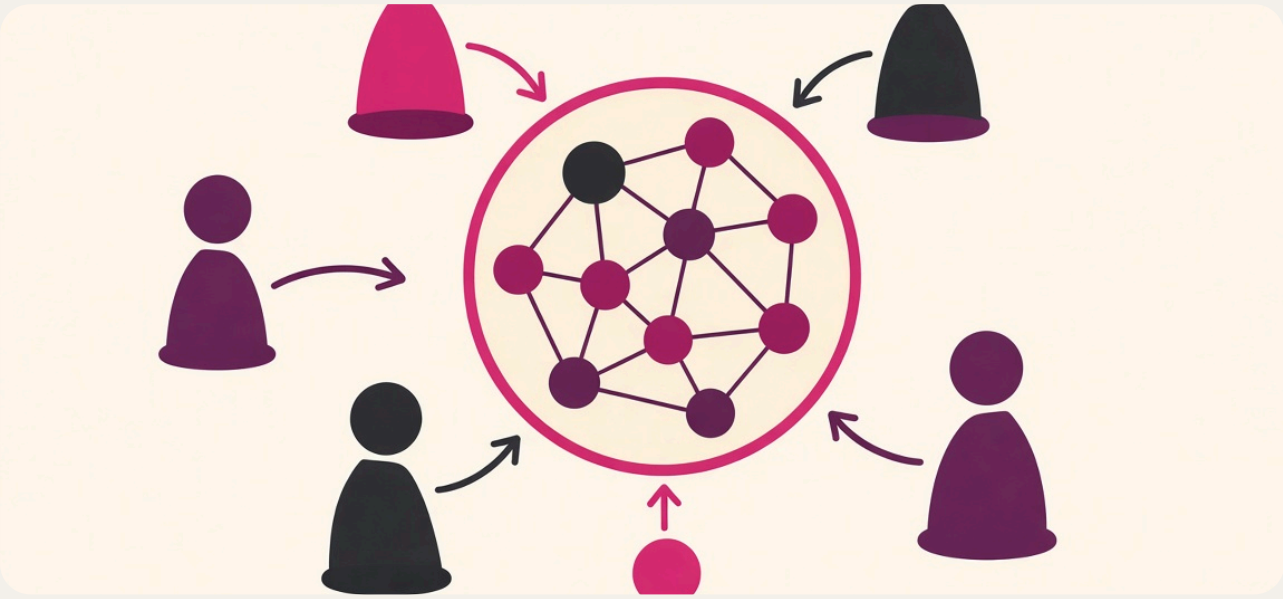
3–5 ticks
Your CRM has grown faster than your processes. Time for a Health Check.

6–8 ticks
Your team is working around the system. A rescue will pay for itself in trust.

WHY CRMS FAIL

Most CRMs don’t fail on features.

They fail because the business has grown faster than the system. Then the CRM starts holding growth back.



Salesforce, Dynamics 365 and HubSpot are all capable platforms. When one stops being trusted, the cause is rarely the software. It’s that the system was set up for a business that no longer exists: a smaller team, an older sales process, a pre-merger structure, or a partner’s idea of how you should sell.

People

The CRM doesn’t fit how teams really work, so they work around it.

Process

Stages, handovers and ownership were never agreed, so data drifts.

Technology

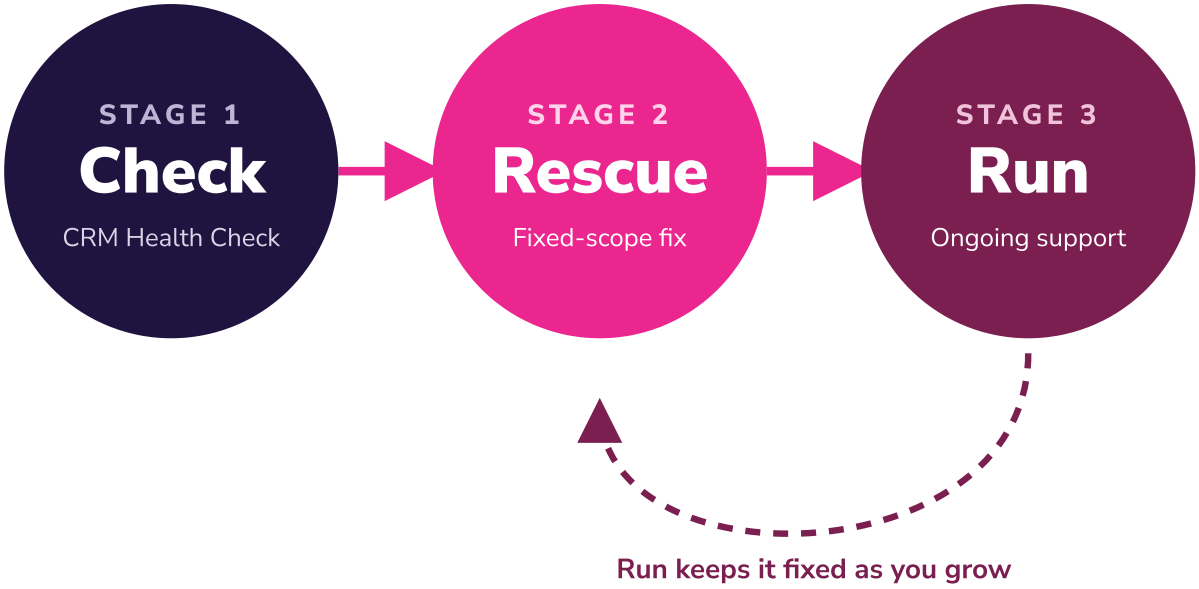
Only then: fields, workflows and integrations piled up over the years.

That’s why we start a rescue with people and process, not settings.

THE ORIGIN APPROACH

Check. Rescue. Run.

Three stages that take a CRM from doubted to dependable, so it drives growth instead of slowing it. Start with the free Check. Go as far as you need.



Check

We get the right people round one table to agree the growth goal, then about an hour in your system and a short list of what to fix first. Free, no strings.

Rescue

A fixed-scope project to assess, stabilise, simplify and govern your CRM around how your teams work, including a co-design step with the people who use it.

Run

Ongoing support and optimisation, so the gains are protected as the business changes.

Independent by design. We aren't tied to one vendor, so our advice is about what works for your people, not what a platform wants to sell. We work across Salesforce, Microsoft Dynamics 365 and HubSpot.

1 Check

The free CRM Health Check (about an hour)

A quick, honest look at what your CRM is costing you in time, trust and growth. We get the right people round one table to agree where the business wants to be, before we touch the tech.

What happens

1. **A short call to set the scene.** Which platform, which teams use it, and what growth you're aiming for.
2. **The right people round one table**, then about an hour in your system. Sales, marketing, service and leadership agree the growth goal — not just each team's own frustrations — then we look at data, pipelines, workflows, reports and how people actually use it.
3. **A short written list** of what to fix first, in plain English, ranked by impact, plus a simple baseline you can take to leadership.

What we look at

- Where teams see the CRM differently: those gaps start the conversation
- Data quality: duplicates, gaps and out-of-date records
- Pipelines and lifecycle stages against how you really sell
- Workflows and automations that misfire or overlap
- Handovers between marketing, sales and service
- Reports and dashboards leaders actually use
- Integrations and who owns the system

TIME FROM YOU	YOU GET	COST
About an hour with the people who use your CRM	**A short list of what to fix first**	**Free. No strings.**

If the list is short and you can fix it yourselves, good. That's a useful outcome too. If it isn't, it becomes the starting brief for a Rescue.

2 Rescue

A fixed-scope project to put it right

We fix what the Check found: the processes, legacy data and tech around your CRM, as well as the CRM itself. We start with the people who use it and the way your business really works.

What happens

1. **Assess.** Bring sales, marketing, service and leadership into one room to agree the growth goal, then map the journey from first contact to customer and find where information is lost.
2. **Stabilise.** Audit data and automation. Remove outdated and duplicate records, and fix or retire broken workflows.
3. **Simplify.** Rebuild pipelines, lifecycle stages, lead routing and reports around how your teams actually sell.
4. **Govern.** Agree who owns what, and put rules in place so the CRM doesn't become complex again.

What you get

- A shared picture of how the CRM should work, co-designed with the people who use it
- A cleaner, more reliable database
- Workflows that are reviewed, fixed and rationalised
- Pipelines and stages that match your sales process
- Clear handovers between marketing and sales
- A reporting foundation leaders can trust
- Simple governance for data and automation
- A phased roadmap for what comes next

SCOPE

Fixed, agreed up front from the Check

TIMEFRAME

Agreed with you after the Check

WAY OF WORKING

Co-designed with the people who use it

3 Run

Ongoing support

Most CRM projects stop at the fix. We don't. Run keeps your CRM fixed as you grow, through new teams, products, markets and contracts.

Protect

Keep data, automations and governance in good order, so the gains from the Rescue last.

Optimise

Small, regular improvements based on how people use the system and what the business needs next.

Support

A senior team who know your CRM, on hand when something changes or breaks.

What you get

- Support and response terms agreed with you up front
- Regular health reviews of data quality and automation
- A rolling backlog of improvements, prioritised with you
- Help with new teams, integrations and process changes as you grow

WHO IT'S FOR

Any CRM after a Rescue, or one already in good shape

TERM

Ongoing, on a plan that suits you

IN PRACTICE

Regular check-ins and quick help when something changes

CASE STUDY · HUBSPOT

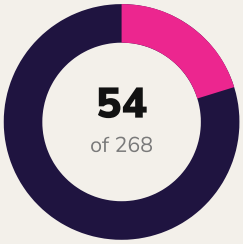
Rebuilding Binalyze's HubSpot as a foundation for growth

CLIENT	Binalyze, cyber security software (DFIR and forensic investigation)
PLATFORM	HubSpot
TEAMS	Sales, marketing and demand generation
ENGAGEMENT	HubSpot assessment, strategy and rebuild. We're still working with Binalyze today.

~95k
contact records audited, with outdated and duplicate records removed

268
workflows reviewed

54
workflows with errors found, and every one fixed



One in five workflows had errors

54 of 268 workflows weren't doing what they should. We fixed them all, and rationalised overlapping automations to cut complexity.

The challenge

HubSpot had evolved organically. Added tools, integrations and manual workarounds had created friction between sales, marketing and demand generation, with no shared view of prospects, customers and pipeline.

What we did

We started with people and process: mapping the journey, then assessing data, automation and reporting. We restructured lifecycle stages and handoffs, simplified deal pipelines, refined lead routing and introduced CRM governance.

> *"James and the team at Origin Growth listened carefully to what we needed, quickly understood our HubSpot challenges and knew exactly where to make improvements. They expertly removed redundant workflows, duplicate data and outdated contacts, leaving us with a cleaner, fit-for-purpose system that will support our growth without unnecessary complexity."*
>
> **Philip Hesketh · Director, Global Revenue Operations, Binalyze**

Connecting CRM to the people it serves, and to growth

Automate UK

PLATFORM Microsoft Dynamics CRM

WORK Digital infrastructure, website and CRM integration

+23%

member sign-ups in the first 3.5 months

Origin built Automate UK's digital infrastructure and website, and connected its Microsoft Dynamics CRM to the member side of the business.

James Edwards, Origin's CEO, designed the flows. The result: member sign-ups rose 23% in the first three and a half months.

Website — Member flows — Dynamics CRM

Ishida UK

PLATFORM Microsoft Dynamics CRM

WORK Consultancy on Ishida UK's Microsoft Dynamics CRM

QUICK SELF-SCORE

Is your CRM ready for growth?

Score each area from 1 (not at all) to 5 (completely). Add up your total out of 40.

AREA	1	2	3	4	5
Trust Leaders use CRM reports without checking elsewhere	○	○	○	○	○
Adoption Sales and marketing do their work in the CRM, not around it	○	○	○	○	○
Data quality Few duplicates, and contacts are kept up to date	○	○	○	○	○
Pipeline fit Stages match how you actually sell today	○	○	○	○	○
Automation Every workflow has a purpose and an owner	○	○	○	○	○
Handovers Leads move from marketing to sales cleanly and quickly	○	○	○	○	○
Integration The CRM connects to the other systems that matter	○	○	○	○	○
Ownership Someone owns the CRM design and how it changes	○	○	○	○	○

8–19
Rescue
Your team is working around the system. Start with a Check, then plan a Rescue.

20–31
Repair
Good bones, growing pains. A Check will show the quickest wins.

32–40
Run
In good shape. Keep it that way with ongoing support.

YOUR NEXT STEP

Book your free CRM Health Check.

If your CRM is holding growth back, let's take a look. We'll get the right people round one table and spend about an hour with your system, then give you a short list of what to fix first. No strings.

1 hr
About an hour with the people who use your CRM, and your system

1 list
A short, ranked list of what to fix first

£0
Free, with no obligation to go further

For Salesforce, Microsoft Dynamics 365 and HubSpot. Independent advice, focused on the people who use your CRM.

Book a time: calendly.com/james-origin/30min

Or visit our CRM practice at **origincrm.co.uk**

We fix CRMs around the people who use them, then keep them fixed.

Origin.

ABOUT ORIGIN GROWTH

A service-design-led digital agency.

We help organisations grow by designing, building and running digital services around the people who use them. CRM sits at the centre of that growth, and it's where service design makes the biggest difference.

Service design

Understanding how your teams and customers really work, before anything is built.

Digital engineering

Websites, platforms and integrations built to last.

AI and automation

Practical automation that takes admin off people's plates.

CRM

Salesforce, Microsoft Dynamics 365 and HubSpot. Independent, so we recommend what fits you, not a vendor.

TRUSTED BY

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