

HubSpot CRM Consulting & Training for Corporate Wellness Co

PROJECT DETAILS

-  Corporate Training & Coaching, CRM Consulting and SI
-  Jan. 2025 - Feb. 2025
-  Less than \$10,000

“ *"We were very satisfied with the experience."*

PROJECT SUMMARY

Boundify provided CRM consulting and system integration services for a corporate wellness company. The team set up and configured HubSpot CRM, created a dashboard, and trained the client's team.

PROJECT FEEDBACK

Boundify's work provided clear visibility into the client's sales pipeline and improved team adoption and daily use of HubSpot across sales and operations. The team had efficient project management, was responsive, and communicated smoothly. They impressed the client with their positive energy.



The Client

Please describe your company and position.

I am the CEO of DELI LIFE WELLNESS

Describe what your company does in a single sentence.

We help companies build a culture of well-being through corporate wellness programs that improve employee health, engagement, and performance.

The Challenge

What specific goals or objectives did you hire Boundify to accomplish?

- Set up and configure HubSpot CRM tailored to our operations
- Provide clear guidance to understand the platform and its tools

 Maria Fernanda
Espinosa
CEO, DELI LIFE WELLNESS

 Other industries

 Mexico

CLIENT RATING

4.5

Overall Score

Quality:  5.0

Schedule:  4.5

Cost:  4.5

Would Refer:  5.0

The Approach

How did you find Boundify?

Referral

Why did you select Boundify over others?

- Pricing fit our budget
- Great culture fit
- Good value for cost
- Referred to me
- Company values aligned

How many teammates from Boundify were assigned to this project?

2-5 Employees

Describe the scope of work in detail. Please include a summary of key deliverables.

Boundify supported us in the complete onboarding and optimization of HubSpot CRM, guiding our team from initial setup through to advanced usage. The project focused on creating a strong foundation for sales and marketing alignment, data visibility, and decision-making.

Key Deliverables:

Full setup and configuration of HubSpot CRM (pipelines, properties, users, integrations)

Step-by-step training sessions tailored to our team's level of knowledge

Dashboard and report creation based on our KPIs and business structure

The Outcome

What were the measurable outcomes from the project that demonstrate progress or success?

Clear visibility into our sales pipeline through custom dashboards and reports

Improved team adoption and daily use of HubSpot across sales and operations

Describe their project management. Did they deliver items on time? How did they respond to your needs?

Their project management was efficient and responsive. They delivered everything on time, solved issues quickly, and followed up consistently to ensure we were moving forward without delays.

What was your primary form of communication with Boundify?

- Virtual Meeting
- Email or Messaging App

What did you find most impressive or unique about this company?

What impressed us most was their consistent follow-up, positive energy, strong values, and the great attention they gave to every detail throughout the entire process.—not only do they offer excellent service, but they also bring strong human values, are highly responsible, and fully bilingual, which made communication smooth and efficient.



Are there any areas for improvement or something Boundify could have done differently?

We were very satisfied with the experience and have no suggestions for improvement at this time.

