agilix SOLUTIONS

CASE STUDY:

HubSpot Integration and CRM Transformation Across Sales, Marketing, and Service



vonazon

EXECUTIVE SUMMARY

If your ERP holds the truth about your customers but sales, digital sales, marketing and service work in separate tools, you know the cost: reports built by hand and no single view of the customer. **Agilix Solutions,** an industrial automation distributor and Rockwell Automation partner, faced exactly that, with managers rebuilding reports in Excel and SharePoint. Vonazon is bringing all four teams into **HubSpot**, and its central decision was to keep **Infor**, Agilix's ERP, in charge of customer data and build **HubSpot** around it.

As of November 2026, Agilix has completed the **ACE** sales-data refresh and cleanup, transitioned service engineers off **ConnectWise**, and begun using **HubSpot** for digital sales and marketing activity. The custom one-way Infor integration is live, with nightly ERP updates feeding the **HubSpot** environment. The next phase expands the engagement from technical implementation into role-based sales enablement, with a week-long onsite program in St. Louis planned for December and virtual hypercare extending into January 2027.

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ABOUT AGILIX

INDUSTRY: Industrial Distribution

Agilix Solutions is a multi-state electrical and industrial automation distributor serving contractors, manufacturers, utilities, and system integrators. As a Rockwell Automation distributor, Agilix provides a broad portfolio of products and solutions spanning industrial automation, electrical equipment, safety, datacom, power transmission, and industrial supply.

With operations across multiple locations and specialized product categories, Agilix supports complex customer relationships that require close coordination among sales, technical specialists, service teams, and manufacturing partners. Its business depends on accurate customer and product information, strong account management, and visibility across the entire customer lifecycle.

THE CHALLENGE

Agilix ran sales through **Web Presented CRM**, which the company branded internally as **ACE**, marketing in **Act-On** and service in **ConnectWise**, while digital sales worked in **HubSpot**. Each system supported its own function, but the information was not connected. Agilix's sales leader said the marketing team had been "fighting the alligator so to speak with making two systems … play together manually."

The gaps showed up in daily work:

- Digital sales kept its call lists in SharePoint.
- Marketing leads were handed to account managers by hand, with a task built manually in the CRM.
- **ConnectWise** had never been connected to the CRM or to **Infor**, so service work sat apart from the customer record.
- Managers who wanted a report exported the data to build it themselves.



So right now we're taking it offline to do reporting and we don't want to do that. We're going to Excel and SharePoint sites and all that stuff. We'd rather keep it all within HubSpot."

— Darin Harbor, Agilix Solutions

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WHY IT MATTERED

Three pressures made the old setup hard to keep.

Vendors want proof. Agilix has to “satisfy the vendors” by showing how target accounts turn into “actual opportunities.” Rockwell wants that broken out by segment, such as services. Agilix’s leaders put it plainly:

“We need to be able to report against specific product categories what our funnel looks like, what our wins, what our losses.”

— Darin Harbor, Agilix Solutions

Leaders need the right view, and no more. Agilix operates in three regions. Regional vice presidents should see only their region, branch managers see their branch, and leadership sees the whole company. Rockwell and Siemens specialists should not see each other’s accounts. About 115 to 120 people will use the system.

One customer view across the business. The larger goal is not just replacing tools:

“We’re trying to get to a holistic view of our customers.”

— Stephen Read, Agilix Solutions

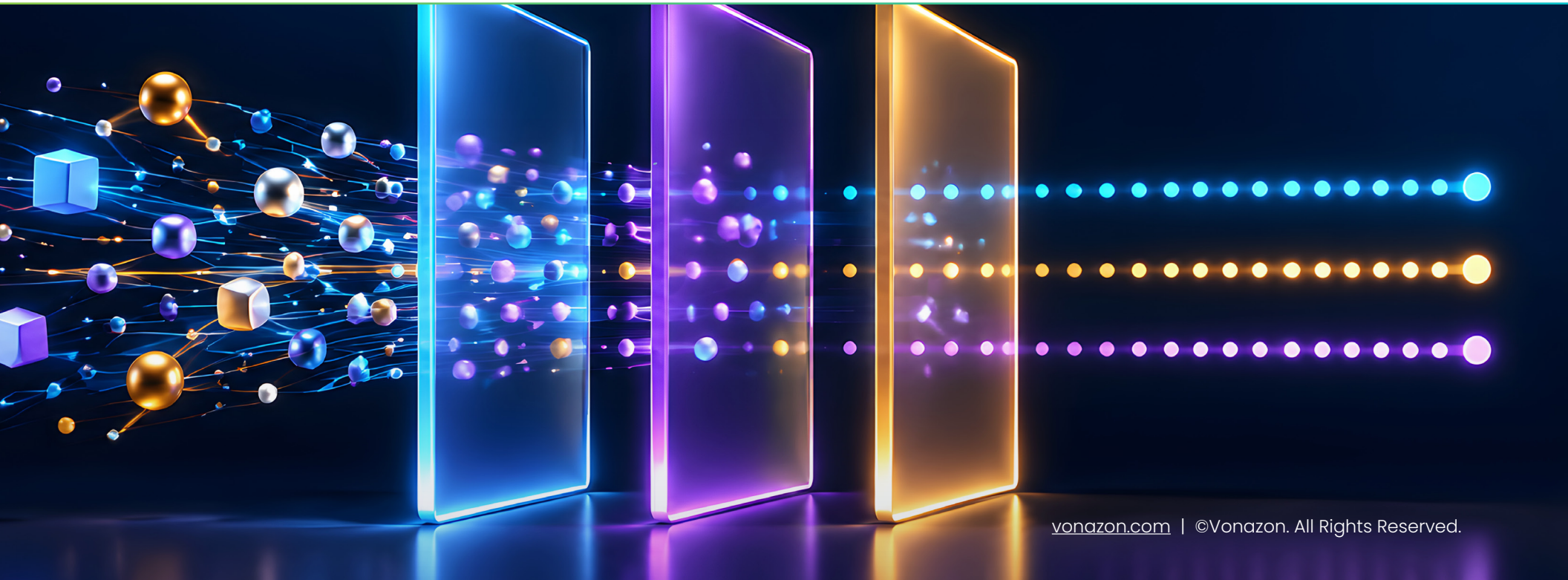
The calendar adds pressure. Agilix retired ConnectWise for service operations in October 2026 and plans to set an ACE retirement date after the broader sales organization is trained and operating in HubSpot.

WHAT VONAZON DID, AND WHY IN THIS ORDER

1 Mapped how Agilix sells before building anything

Discovery started with who owns which accounts and who needs to see what. Agilix's answer became the permission model: account managers see their own accounts, branch managers see their branch, and regional vice presidents see their region. Vonazon has now configured the users, teams and permission sets, with owner and sales representative code assignments live in **HubSpot**.

ACE kept separate pipelines for conversion, digital transformation, Rockwell and targets. Instead of copying them, Vonazon designed one all-encompassing opportunity pipeline with flags that filter by initiative. As Agilix described it, "the same pipeline, but it gets filtered down just to conversion opportunities."



2 Kept Infor in charge of customer data

Infor remains the authoritative source of customer data at Agilix, including the credit approvals required before orders can be entered. Vonazon engineered a one-way integration that now feeds nightly updates from **Infor** into **HubSpot** without writing data back to the ERP. Infor customer IDs anchor the relationship between customer records, order visibility, sales ownership and related service activity. This architecture keeps established ERP controls intact while giving front-office teams a shared view of the accounts they serve.





The link: The Infor customer ID connects companies, deals and service records in HubSpot, giving service work a path to the same customer record as sales.

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3 Rebuilt Infor's orders, ship-tos and vendors in HubSpot

Infor's order data does not fit **HubSpot's** defaults, so Vonazon had to decide where each relationship should live. Agilix customers often ship to many locations, so ship-tos became their own records linked to companies. Orders attach to the ship-to, not the line item, because a whole order goes to one location.

Orders also had to stay distinct from pipeline. In **Infor** an order is an approved quote, so Infor's orders and line items arrive in **HubSpot** as their own records, separate from the deals sales uses to forecast. Quoting stays in **Infor**, and quotes and orders are being tracked in an orders pipeline rather than adding another deal pipeline.

Vendor reporting forced a harder choice. One order can include products from several vendors, so reporting Rockwell revenue at the order level would overstate it. Vendor reports therefore run off line items, but **HubSpot** caps associations on the vendor record, and the project hit that cap. Vonazon's fix was to carry the **Infor** vendor number and name directly on each line item, so Rockwell reporting stays accurate without the associations.



4 Cleaned the data before building on it

A prospect created in **HubSpot** has no **Infor** ID, so converting it to a customer created a duplicate. Vonazon left every record with an **Infor** ID untouched, merged or removed the rest, and gave the digital sales team short guides for uploading lists without creating extra companies. Because **Infor** overwrites any field it owns, Vonazon also recommended fixing quirks such as all-caps names and names split across two fields in **Infor** itself. By September 24, the company count had fallen from about 20,000 to about 12,000.

5 Moved service first

Service had a hard deadline because Agilix was retiring **ConnectWise**. Vonazon built service dashboards showing hours per engineer, billable versus non-billable time and revenue by engineer, and coached employees individually through time entry. Service engineers began working in HubSpot in August, and the service organization completed its operational transition off **ConnectWise** in October 2026. After reviewing how the data would be structured, an Agilix team lead said, 'It looks like it's going to work for us.'



6 Waited to train sales until the model was settled

An early walkthrough of unfinished work left Agilix's team confused. An Agilix team lead warned that if training starts too early, 'they're going to hear it still in progress and just tune it out.' Vonazon and Agilix therefore organized a phased, role-based enablement approach. Leaders and managers would become the first line of support for their teams, while account managers and product specialists would learn the core activities of a typical working day. That plan has since expanded to include a week-long onsite sales training program and structured virtual reinforcement.



WHERE THINGS STAND

The technical foundation is now in place. Agilix's **ACE** sales history, including **23,246 companies, 15,360 contacts, 2,610 deals and 3,012 line items, was loaded into HubSpot**, followed by a completed data refresh and cleanup. Using authoritative **Infor** IDs to guide matching and retention, Agilix narrowed its active company database to approximately **12,000 records**. Regional, branch, account manager and specialist views are configured around the organization's sales hierarchy.

Agilix's departments are beginning to work from a connected commercial environment. Service engineers have moved off **ConnectWise** and manage their work in **HubSpot**; digital sales uses outreach sequences and governed list-upload processes; and marketing has transitioned away from **Act-On**. The one-way **Infor** integration is live, supplying nightly customer and transactional updates to **HubSpot** while keeping ERP governance in place. With that foundation established, the remaining challenge is translating configured capabilities into consistent sales-team habits.

HISTORICAL SALES DATA IN ACE CRM

23,246
companies

15,360
contacts

3,012
line items

2,610
deals

POST-DATA CLEANUP / ACTIVE DATABASE

12,000
companies

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EXPANDING INTO REAL-WORLD ADOPTION

To carry the implementation into daily sales activity, Vonazon and Agilix expanded the engagement to include a week-long, role-based onsite enablement program at Agilix Solutions headquarters in St. Louis, planned for December 2026. The program is designed for approximately 115 to 120 sales users across three regions and builds on the earlier manager-first onboarding approach. Rather than a generic **HubSpot** tour, sessions will use Agilix's **Infor**-backed account structures and real sales workflows to help each group practice the work it needs to perform.

Account managers will work through lead handoffs, opportunity management, and account and order visibility. Branch managers will focus on team dashboards, ownership exceptions and pipeline coaching. Product specialists and managers, including Rockwell and Siemens teams, will use role-specific views to follow targeted product categories. Regional vice presidents and directors will work with aggregated funnel, win and loss reporting so they can evaluate performance across their territories and respond to manufacturer reporting needs.



1 WEEK-LONG, ROLE-BASED ONSITE ENABLEMENT PROGRAM AT AGILIX HEADQUARTERS

120 sales users

3 regions



WHAT COMES NEXT

The December onsite program is planned as the bridge from implementation to sustained adoption. It will be followed by **four weeks of virtual hypercar**e extending into January 2027, with Vonazon's implementation team providing targeted office hours, workflow troubleshooting and reinforcement as employees apply the new processes to live work. The goal is to reduce the pull of legacy habits, improve confidence in everyday use and identify issues before they become barriers to adoption. Once Agilix confirms that its sales organization can operate reliably in **HubSpot**, leadership can establish a date to retire **ACE CRM**.

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infor | HubSpot



RUNNING INFOR AND HUBSPOT TOGETHER?

Replacing disconnected applications requires a clear decision about which system stays authoritative. At Agilix, that system is **Infor**. Vonazon built **HubSpot** around the ERP's customer and order logic, implemented a live one-way data feed, and extended the engagement into practical, role-based training and post-launch support. The result is a more connected foundation for sales, digital sales, marketing and service, with a deliberate plan to turn the technology into a daily way of working. If your ERP holds the truth while your teams work in separate systems, **we'd like to talk.**

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