

# Multiplying RevOps Capacity with HubSpot Optimization

As the market leader in providing contract documents to the construction industry, AIA Contract Documents serves a large, broad client base. To do so successfully, their small team needs access to data they can trust and a toolset that drives as much efficiency as possible.

The team had HubSpot in place and knew it was the ideal platform to support them, but they weren't satisfied with the way the platform had been implemented. To fully leverage the platform, they decided to find a new HubSpot consulting firm to fix existing issues and get continued support.

## The Challenges:

- Large discrepancies between HubSpot and financial reporting
- Manual, error-prone processes for churn and renewal reporting
- Misconfigured automations increasing workloads
- Difficulty troubleshooting/optimizing complex workflows
- Limited bandwidth to maximize HubSpot's value

These issues not only created distrust in the data but also significant amounts of manual work. The lack of a reliable system hindered decision-making and overall company performance.

## The Solution:

- AIA partnered with Simple Strat to optimize operations and improve data reliability and reporting capabilities. The ongoing collaboration involved a thorough audit of AIA's HubSpot portal, custom workflow optimizations, and data alignment strategies.

## The Results:

- ✓ Quickly resolved complex workflow issues
- ✓ Aligned HubSpot with financial reporting for reliable data
- ✓ Streamlined workflows for better efficiency and fewer errors
- ✓ Automated revenue churn and renewal reports for Finance
- ✓ Vastly expanded Revenue Operations capacity
- ✓ Reduced manual work with bulk price increases for renewals

## AIA Contract Documents

### CLIENT

AIA Contract Documents  
[aiacontracts.com](http://aiacontracts.com)

AIA Contract Documents specializes in providing contract documents for the construction industry, serving a diverse range of clients, from general contractors to the nation's leading builders. Even as a small company, they have become an indispensable resource and the leader in the market.

### INDUSTRY

Professional Services for  
Construction

### SERVICES UTILIZED

- Ongoing HubSpot Support

### CLIENT PERSPECTIVE

*"Everything flows better now. There are fewer errors, fewer questions from the sales team, and more guards in place to handle user error."*

### Nate Cavicchi

Revenue Operations at AIA

# A Deeper Look

Simple Strat was initially brought in to fix several workflows, “which a previous company and some internal stakeholders had set up without a full understanding of the whole ecosystem,” says Nate Cavicchi, head of revenue operations at AIA Contracts. “Simple Strat did a great job of cleaning that up and getting it to a good spot, so I could come in and not pull all my hair out.”

Additionally, “the discrepancies between HubSpot reporting and our financial reporting were vast and inconsistent. But with the changes we’ve made together, we’ve actually married the data very close.

**We have a lot more confidence in our numbers now, which is huge for our company.”**

## Why AIA Contracts Chose Simple Strat

The AIA Contracts team originally decided to work with Simple Strat due to the ease of getting started, as well as Simple Strat’s demonstrated domain knowledge. The AIA team members who were interviewing Simple Strat remarked that “they just knew their stuff.” Cavicchi, who joined the AIA team later, adds “I re-validated that a year later.”

“The team could easily get rolling with Simple Strat, instead of having countless onboarding meetings,” says Cavicchi. **“From Day 1 we were able to create with Simple Strat, and we’ve only grown from there.** The speed that they came on board was paramount.”

## The Choice to Renew and Expand their Partnership

When Cavicchi joined AIA Contracts, he reviewed existing processes and partners to make sure resources were being used as effectively as possible. “When I reevaluated and confirmed our partnership with Simple Strat, a big factor was **time** – I wanted a company that was intelligent enough to be able to take my requirements and make a solution very quickly.”

Cavicchi – who was first hired to manage HubSpot for AIA Contracts, and now bridges the gap between marketing, sales, and operations – says he finds there’s never enough time to accomplish everything he wants to. He doesn’t like wasting valuable time getting a partner up to speed on what AIA needs, or how it needs to be done.

He saw Simple Strat fit the bill. “I have no one else in-house who knows these systems like I do. And on a business strategy level, I want to be working with someone using the best practices across the industry. **Simple Strat basically allows there to be three of me.”**

He adds: **“So when we redid our budgeting, I made sure to budget for Simple Strat. And my boss actually raised that budget because she also sees the value.”**

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*So many things were **well beyond** what a normal company would have done.*

– Nate Cavicchi

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*The efficiency that Simple Strat created for me and this company **has directly impacted everything that we do,** and I cannot stress that enough.*

– Nate Cavicchi

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*All of this has really helped **solidify the direction that our company is going, because we’re able to get things done.***  
*We’re not working with small stuff.*

– Nate Cavicchi

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*Simple Strat basically **allows there to be three of me.***

– Nate Cavicchi

## Early Successes

Working with Simple Strat quickly created efficiencies for AIA Contracts: “The first big win for me and my team was getting revenue churn and renewal reports working for Finance. Being able to build that and present it to our board was huge; pulling data from HubSpot instead of it being a repetitive manual process.”

“The second big win for me was an issue I had with a large workflow. I could not figure it out for the life of me. I worked on it for almost a week, sent over to Simple Strat and within a day I had an answer.”

**“I know it sounds small, but having someone who will spend the time to go through the logic and really dig in – it’s made my life so much better.”**

## Looking at What’s Next

“We’re working on some larger projects, like the CMS changeover for our website,” says Cavicchi. “And we’ll be working with Simple Strat very closely to build a larger strategy from that, and hopefully beyond that, like an automation strategy in marketing and sales.”

## The Client Perspective

“Everyone wants a silver bullet in marketing – that one campaign that’s going to win everything. I come from background of 15 years in marketing, and I will say, that’s just *wrong*.” says Cavicchi. “It’s more about these small incremental things... The efficiency that Simple Strat has created for me and this company has directly impacted everything that we do, and I cannot stress that enough.”

He adds that he’s consistently impressed with Simple Strat’s educational content: “I actually attend the Simple Strat webinars and watch their videos. That’s huge. I never do that kind of thing.”

“I can trust Simple Strat to be a domain expert in the HubSpot world... There’s so much data flowing at me all day long, but being able to look at these snippets like that – and learn something actionable – has made Simple Strat invaluable.”

## AIA’s Advice on Working with Simple Strat



***Evaluate what you need, and then ask for it. Simple Strat will either get you what you need or point you to where you can get it.***

*They’re not going to oversell you on more – they actually undersell you a bit and allow you to build up. Let them learn your configurations too.*

*They’ll build on that foundation. To be blunt, I’ve paid for other top tier HubSpot support in the past, but Simple Strat does a better job.*



**Nate Cavicchi**

Revenue Operations  
AIA Contract Documents

## Ready to optimize your HubSpot?

Whether you want to improve workflows, enhance data accuracy, or drive efficiency, book a call with Simple Strat today.