



BRIGHTLINE PAINTING
PAINTING A BRIGHTER FUTURE

CASE STUDY:

Brightline Painting Consolidates B2B and B2C Sales Across Six Markets with a HubSpot CRM Migration



INDUSTRY

Home Services

COMPANY PROFILE

Brightline Painting is a fast-growing painting and drywall company serving residential, homebuilding, and commercial customers across six markets in the Southeastern United States.



BRIGHTLINE PAINTING

PAINTING A BRIGHTER FUTURE

Vonazon unified Brightline Painting's B2B and B2C sales activity in HubSpot, giving the company **visibility across six markets and more than \$1 million in weekly commercial bids.**

The migration transferred **99% of reviewed PMP contacts** and surfaced data issues before they affected reporting.

The consolidation gave the growing painting and drywall company a central view of leads, commercial bids, ownership, and market activity while preserving Monday.com for work management.

The Business Context

Brightline Painting was expanding faster than its sales systems could support. Residential repaint opportunities followed a high-volume consumer journey, while homebuilder relationships, commercial bids, contracting work, and referral partnerships involved longer cycles, more stakeholders, and different operational handoffs.

The company already operated across Greenville, Asheville, Wilmington, Myrtle Beach, Charleston, and Savannah. As Brightline added markets and service lines, leadership needed to see where every opportunity stood, who owned it, which business unit it belonged to, and how it would move into delivery.

That information lived across PMP, Monday.com, PaintScout, Make, Zapier, OpenPhone, QuickBooks, and employee knowledge. PMP held most residential leads. Monday.com housed commercial accounts, bids, referral relationships, and work management. PaintScout supported estimating. Each tool served a purpose, but no single view connected the full revenue picture.



“We’ve pushed out probably over a million dollars’ worth of commercial bids just within the last week, and that’s not captured anywhere except for in Jack’s head.”

Brightline chose HubSpot Sales Hub to centralize B2B and B2C sales activity, standardize pipeline management, and give leadership a clearer view of future revenue.



The gap was impossible to ignore when Brightline submitted **more than \$1 million in commercial bids in one week** without a central place to track them.



“We are a fast-growing painting and drywall company, and we need the tools, platforms, and infrastructure to handle that.”

THE CHALLENGE

This was not a simple contact import. Vonazon had to consolidate data from systems built for different teams, purposes, and definitions of the customer journey while Brightline continued selling, hiring, bidding, and expanding.

The initial PMP export contained more than 700 records, but ownership data was inconsistent and some records lacked names, email addresses, physical addresses, or other required fields. Spam and invalid Facebook inquiries sat beside legitimate opportunities. A later comparison exposed approximately **300 mismatched records across available data sets**.

Monday.com introduced a different set of problems. Commercial accounts, individual contacts, referral partners, bids, locations, and divisions were not always categorized consistently. National customers could operate differently by city or division, so a company name alone could not identify the right relationship or opportunity.

The organization also lacked a shared sales vocabulary. Contacts, owners, deals, opportunities, divisions, business units, regions, and locations meant different things to different stakeholders. Legacy stages such as “follow-up one,” “follow-up two,” and “follow-up three” did not show meaningful buyer progress or support reliable forecasting.

Brightline needed consistency without forcing fundamentally different customer journeys into one generic pipeline. The company also needed to preserve Monday.com for project delivery and PaintScout for estimating, which meant the HubSpot CRM migration had to improve sales visibility without disrupting downstream work.

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“The business doesn’t stop.””

A poor migration could have interrupted lead follow-up, estimating, project creation, ownership, or operational handoffs. Vonazon had to modernize the CRM while the business kept moving.

Challenges at a Glance



Consolidated and cleaned inconsistent customer data across multiple systems and data sources.



Standardized CRM structure, sales terminology, and pipeline stages for reliable reporting and forecasting.



Preserved unique customer journeys while maintaining integrations with Monday.com and PaintScout.



Executed the migration without disrupting active sales, estimating, or day-to-day business operations.

VONAZON'S APPROACH

Vonazon established HubSpot as Brightline's central CRM while preserving Monday.com for project management and PaintScout for estimating, creating a clear handoff from sales to delivery. The team built separate B2B and B2C pipelines, designed a scalable data model, migrated and cleaned customer records, and standardized ownership, reporting, and sales processes to support future growth. HubSpot automation, dashboards, and integrations then connected daily sales execution with reliable reporting and operational workflows without disrupting the business.

01

Defined HubSpot as the centralized CRM and system of record.

03

Designed scalable CRM architecture supporting future growth.

05

Automated sales workflows and reporting across integrated business systems.

02

Built separate B2B and B2C sales pipelines.

04

Migrated and cleaned customer data while preserving historical context.

Vonazon first defined the role of each system.

HubSpot would become the central CRM for contacts, companies, deals, ownership, sales activity, pipeline stages, and reporting. Monday.com would remain the work management environment, and PaintScout would continue supporting estimates. That decision limited disruption and established a clear handoff from sales into delivery.

With the system boundary set, **Vonazon separated Brightline's B2B and B2C sales motions.** Residential repaint opportunities could not share the same assumptions as commercial bids or homebuilder relationships. Vonazon created distinct B2B and B2C pipelines in HubSpot so each motion could follow the stages, ownership rules, and reporting logic its customer journey required.

The separation also gave Brightline a way to study sales-cycle variation. Some opportunities closed in as little as two weeks, while others took up to 17 months. Leadership did not yet know how many touches typically produced a response or opportunity.



"I do not have an accurate assessment of the average number of touches it takes for me to interact with a business before I can flip them or at least get them to give us an opportunity."

By capturing those interactions in HubSpot, Brightline could begin **measuring stage duration, follow-up patterns, activity volume,** and **pipeline movement** instead of relying on anecdotal knowledge.

Vonazon then designed the data model around Brightline's growth plans. Custom properties and filters distinguished homeowners, commercial contacts, referral partners, business units, deal types, markets, cities, divisions, project types, and contact roles. A repaint lead in Greenville and a homebuilder opportunity in Savannah could live in the same HubSpot portal without disappearing into a blended view.

Once the structure was defined, Vonazon prepared the PMP data for migration. The team reviewed required fields, resolved ownership where possible, and identified records that could not be created safely.



Of the 724 contacts reviewed in one migration phase, 714 were successfully created in HubSpot.

The remaining 10 lacked a first name, last name, and email address, the minimum identifying information HubSpot required.

The import did more than move records. It exposed the exact gaps Brightline needed to correct instead of hiding them inside a larger database. **Vonazon also preserved historical context** by planning a separate field for original PMP creation dates, since HubSpot's default creation date records when a contact enters HubSpot.



"We want to make sure we're building this out in a way that is going to support future location growth."

Commercial data from Monday.com required a different path. **Vonazon organized accounts, contacts, referral relationships, bids, locations, and divisions** before moving commercial opportunities into their own HubSpot pipeline. Rather than copying the old Monday.com CRM structure wholesale, Brightline migrated the information it had and refined naming conventions, ownership, qualification criteria, and pipeline stages once the real data was visible.

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“We’re trying to build a ship as we sail it.”

Vonazon managed that urgency by preserving working operational tools, segmenting records before building reports, and designing HubSpot so Brightline could refine processes without repeating the migration.



After the core records and pipelines were organized, HubSpot sequences, templates, snippets, tasks, workflows, and Sales Workspace features connected the new structure to daily execution. The design combined automation with rep-led activity, helping Brightline standardize follow-up without removing the personal engagement required across residential, commercial, and referral sales.

Reporting followed the same logic. HubSpot dashboards could be filtered by pipeline, business unit, deal type, market, location, stage, ownership, and revenue. **Vonazon also clarified how HubSpot could work with Monday.com, PaintScout, Make, OpenPhone, Geo Mapper, and other tools**, including which triggers and system responsibilities would support future automation.

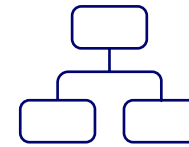
THE RESULTS:

The migration gave **Brightline a centralized, scalable CRM** without disrupting the operational systems that kept projects moving. With cleaner data, dedicated sales pipelines, and improved reporting, the company gained greater visibility into its sales performance while building a foundation for continued growth.



1 CRM across 6 markets

enabled scalable reporting,
automation, and future growth.



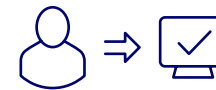
Separate B2B & B2C pipelines

improved sales tracking,
ownership, and forecasting.



300+ mismatched records identified

exposing critical data quality
issues before reporting.



99% of reviewed contacts migrated

into HubSpot, creating a centralized
B2C customer database.

THE RESULTS:

Vonazon created 714 of 724 reviewed PMP contact records in HubSpot, giving Brightline a centralized B2C database and identifying the 10 records that lacked the minimum information required for migration.

Brightline's residential and commercial opportunities now had distinct B2C and B2B pipelines in HubSpot. That structure replaced a fragmented view across PMP, Monday.com, and employee knowledge with a defined place to track ownership, stage, market, and revenue potential.

The change was especially important for commercial sales. Brightline had been managing more than \$1 million in bids during a single week without centralized tracking. HubSpot gave those opportunities a consistent record, association to the right contacts and companies, and a place in the appropriate pipeline.

The migration also turned hidden data problems into actionable work. Missing fields, invalid leads, ownership gaps, duplicates, and approximately 300 mismatched records became visible before they could distort reporting. Brightline could clean the database deliberately instead of carrying uncertainty forward.

The new HubSpot structure made it possible to separate performance by business unit, market, location, deal type, contact category, and owner while maintaining one CRM across six markets. It also created the activity history Brightline needed to evaluate stage duration, sales touches, pipeline velocity, and revenue distribution over time.

The available reporting period did not establish a verified revenue lift, conversion-rate increase, or time-savings figure. The immediate result was concrete: Brightline consolidated fragmented sales activity into HubSpot without replacing the Monday.com work management processes that kept projects moving.

That consolidation positioned Brightline to refine qualification criteria, improve forecasting, standardize follow-up, strengthen handoffs into Monday.com, and add automation as the company expanded.



"I want you to approach us as a professional services organization that's masquerading as a paint and drywall company."



With HubSpot at the center of sales, Brightline had a CRM structure aligned to that ambition and the complexity of its next stage of growth.

Planning a HubSpot CRM migration or platform consolidation without slowing your business?



**Let's map out a
safer path forward.**



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