

CLIENT CASE STUDY • PIPEDRIVE CRM

One CRM for a global milking systems maker.

How optimize.me rebuilt, consolidated and now runs Pipedrive for Waikato Milking Systems, turning three fragmented CRM accounts into a single source of truth for a sales team that spans New Zealand, Asia Pacific and Latin America.

Prepared by **optimize.me** · Pipedrive Practice · New Zealand

CLIENT

Waikato Milking Systems

INDUSTRY

Dairy technology & manufacturing

PLATFORM

Pipedrive CRM

ENGAGEMENT

Two phases + ongoing partnership

A milking systems leader, selling across three regions.

Waikato Milking Systems is one of New Zealand's best known dairy technology manufacturers, designing and building milking systems that are sold to farmers across New Zealand and exported through a dealer network into Asia Pacific and Latin America. Their sales operation is complex: long buying cycles, dealer-led deals, field days, and teams working in different regions and languages.

By late 2025 the business was running Pipedrive, but not in a way that matched how it actually sold. Data lived in three separate Pipedrive accounts, adoption was patchy, and leaders could not get a clean picture of the pipeline by region. optimate.me was brought in to fix the foundations, bring everything into one place, and lift the team's day-to-day use of the CRM.

3 → 1

Legacy Pipedrive accounts consolidated into a single master instance

2

Structured project phases, followed by an ongoing support partnership

3

Sales regions unified in one view: New Zealand, Asia Pacific and Latin America

THE CHALLENGE

- Three disconnected Pipedrive accounts with no single source of truth
- Inconsistent adoption across local and international sales teams
- No clean regional reporting for New Zealand versus overseas deals
- Leads and quotes handled over email rather than in the CRM

WHAT OPTIMATE.ME DELIVERED

- A new best-practice Pipedrive instance built around how they sell
- A staged migration that merged all three accounts into one
- Structured training for local and international sales reps
- Regional dashboards and an ongoing improvement partnership

Built for the shed, selling to the world.

Waikato Milking Systems designs and manufactures milking systems and dairy equipment from its base in the Waikato, and sells them both directly and through dealers. That mix shapes everything about the sales process. A single opportunity can run for six to twelve months or more, and in the early stages the conversation is often with a dealer rather than the farmer who will ultimately buy. Leads come in from the website, from referrals, and in bursts from industry events such as Fieldays.

The team is also spread across very different markets. New Zealand sales are split across regional territories, while offshore the business sells into Asia Pacific and a growing Latin America market. Each of those areas has its own rhythm, its own people, and its own reporting needs, which is exactly where the old setup started to strain.

SECTOR	Dairy technology & manufacturing	HEAD OFFICE	Waikato, New Zealand
SALES MODEL	Direct & dealer network	MARKETS	NZ · Asia Pacific · Latin America
SALES CYCLE	Typically 6–12+ months	CRM	Pipedrive (Premium)
LEAD SOURCES	Web, referrals, field days	BACK OFFICE	ERP for quoting & finance

Where it was breaking down

Three separate Pipedrive accounts had grown up over time, each holding a slice of the picture. There was no one place a manager could look to understand the whole pipeline. Usage varied widely between people and regions, so forecasts were only ever as good as the least-updated account. And because there was no tidy way to see New Zealand deals apart from Latin American ones, the leadership team could not answer a very basic question: how is each region actually tracking?

On top of that, a lot of the real sales activity, new leads and quotes, was still happening in inboxes rather than in the CRM. That made deals easy to lose, hard to follow up consistently, and almost impossible to report on with any confidence.

Fix the foundation first, then bring it together.



Rather than patch the existing accounts, optimize.me ran the work in clear phases: build one instance the right way, migrate everything into it, train the people who live in it every day, then keep improving it as the business grows.

PHASE

1

A new best-practice Pipedrive instance

FOUNDATION BUILD · 2025

optimize.me designed and configured a fresh Pipedrive environment around how Waikato Milking Systems actually sells, rather than forcing the team to bend to a generic setup. That meant defining the right pipeline stages, custom fields, user roles and permissions, setting up the automations that keep deals moving, and building the core reports and dashboards leaders needed. Existing contacts, organisations and deals were migrated in, cleansed and tested, and the team was trained and handed a clear "how-to" guide.

PHASE

2

Consolidating three accounts into one

MIGRATION & TRAINING · LATE 2025 – EARLY 2026

With the foundation proven, Phase Two tackled the fragmentation head-on. All three legacy Pipedrive accounts were merged into the new master instance using a careful, staged migration, then the sales team was trained across several structured sessions so the new way of working actually stuck.

THEN

3

An ongoing improvement partnership

CONTINUOUS · 2026 ONWARD

Once the platform was stable, the relationship shifted to steady, responsive improvement, on-demand configuration, new reporting, and coaching, delivered on a flexible time-and-materials basis so the team can ask for exactly what they need, when they need it.

Three CRMs into one, without losing a deal.

Merging live CRM accounts is where migrations usually go wrong. Do it carelessly and you lose history, break reporting, and destroy the team's trust in the system on day one. optimate.me used a staged approach designed to protect the data and keep everyone working the whole way through.

How the migration was run

- ✓ Extracted the data from each of the three legacy Pipedrive accounts
- ✓ Imported it into the consolidated instance using Pipedrive's native tooling
- ✓ Built temporary pipelines mirroring each legacy account so nothing was lost in transit
- ✓ Helped reps move their records from the temporary pipelines into the new production structure
- ✓ Validated the migrated data for completeness and accuracy
- ✓ Retired the temporary pipelines once everything was confirmed clean

"Phase One established a new best-practice Pipedrive instance. Phase Two brought the organisation's three existing accounts into one unified environment, with structured training for the whole sales team."

From the **Waikato Milking Systems** Phase Two Statement of Work

Training that made it stick

A clean system is only worth something if people use it well. optimate.me delivered a series of structured training sessions covering both the international and local sales representatives, then followed up in the new year to reinforce good habits and work through what the team had learned in practice. Sessions focused on navigating the unified environment, working within the new pipeline structure, managing activities, deals and contacts, and the everyday best practices that keep data consistent across a global team.

- ✓ Dedicated session for international sales representatives
- ✓ Dedicated session for local (New Zealand) sales representatives
- ✓ Follow-up reinforcement session early in the new year
- ✓ Final optimisation session to embed adoption

Turning a database into a daily habit.

Beyond the build, a big part of the work was coaching the team to use Pipedrive in a way that suits a long, dealer-led sales cycle, so deals stay visible and forecasts can be trusted.



An activity on every deal

The top habit optimate.me coached: always schedule the next step. It keeps deals from going stale and "rotting", gives managers instant visibility of what's coming next, and makes forecasting far more reliable, even when a deal is quietly progressing through a dealer over many months.



Automations that do the chasing

Follow-up reminders, stage-based nudges and handoff alerts were set up so the system prompts the right person at the right time, rather than relying on memory. This is especially valuable for enforcing fast response to fresh leads, where speed has an outsized effect on win rates.



The mobile app for reps on the road

Sales reps were moved onto the Pipedrive mobile app so calls, notes and activities are logged in real time, out on farm or at a field day, instead of piling up as end-of-day admin. Less paperwork, better data, captured while it is still fresh.



Leads and quotes inside the CRM

Lead capture and quoting were pulled out of the inbox and into Pipedrive, so every enquiry lands in one place, gets an owner, and can be followed up and reported on consistently, including leads gathered at events like Fieldays.

The result is a team that treats Pipedrive as the place the work happens, not a form to fill in after the fact. That single shift is what makes every downstream dashboard and forecast worth trusting.

Answering "how is each region tracking?"

A good example of the ongoing partnership is a piece of work delivered for the Asia Pacific and Latin America side of the business. Leadership wanted a clean split between New Zealand and Latin American deals so they could see each market clearly, something the old structure could not give them.

optimize.me started the right way, with a short discovery call to understand exactly how the salesperson worked day to day, then delivered a tidy, practical solution:



A region tag on every deal

A Region field lets each deal be tagged as New Zealand or Latin America, turning a messy reporting question into a simple, filterable field.



Instant regional pipeline views

Shared filters give the team and their manager one-click views of open New Zealand deals and open Latin America deals, no rebuilding a report every time someone asks.



A live performance dashboard

A dashboard brings it together: open deals by region, win/loss ratio, average sales cycle and deals by dealer, ready to drive one-on-ones instead of hours spent compiling numbers by hand.

optimize.me was also upfront about the trade-offs, flagging where a quick win met the immediate need and where a deeper reporting layer would pay off later. That honesty is a deliberate part of how the practice works: give the client the clearest picture, then let them choose.

"That gets you the New Zealand versus Latin America view you're after right now, and we can build on it as you grow."

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One platform the whole business can rely on.

The engagement moved Waikato Milking Systems from three scattered CRM accounts and inconsistent habits to a single, well-run Pipedrive environment that reflects how the business really sells.

A single source of truth

Three legacy accounts consolidated into one master instance, so the whole pipeline finally lives in one place.

Clear regional visibility

New Zealand, Asia Pacific and Latin America can each be seen on their own, and together, at the click of a filter.

Reporting leaders trust

Live dashboards for win/loss, sales cycle and pipeline by region replace hand-built spreadsheets before every meeting.

Stronger day-to-day adoption

Activities, automations and the mobile app keep deals current and visible across a long, dealer-led sales cycle.

Work captured, not lost

Leads and quotes now run through Pipedrive instead of inboxes, so nothing slips and follow-up is consistent.

A partner on tap

An ongoing time-and-materials relationship means new needs are turned around quickly, without waiting on a big project.

A relationship, not a project

What began as a configuration job has become a genuine working partnership. Waikato Milking Systems now sits among the clients [optimate.me](#) is proud to showcase, evidence that the right CRM foundation, delivered honestly and supported well, keeps paying off long after go-live.

OPTIMISE · AUTOMATE · GROW

Got a CRM that isn't pulling its weight?

optimize.me helps businesses get the most out of best-of-breed software, Pipedrive, SugarCRM, Zendesk and Act-On, so your systems work the way your team actually works. If your CRM is fragmented, underused, or just not giving you the picture you need, we can help.

Talk to the Pipedrive practice

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