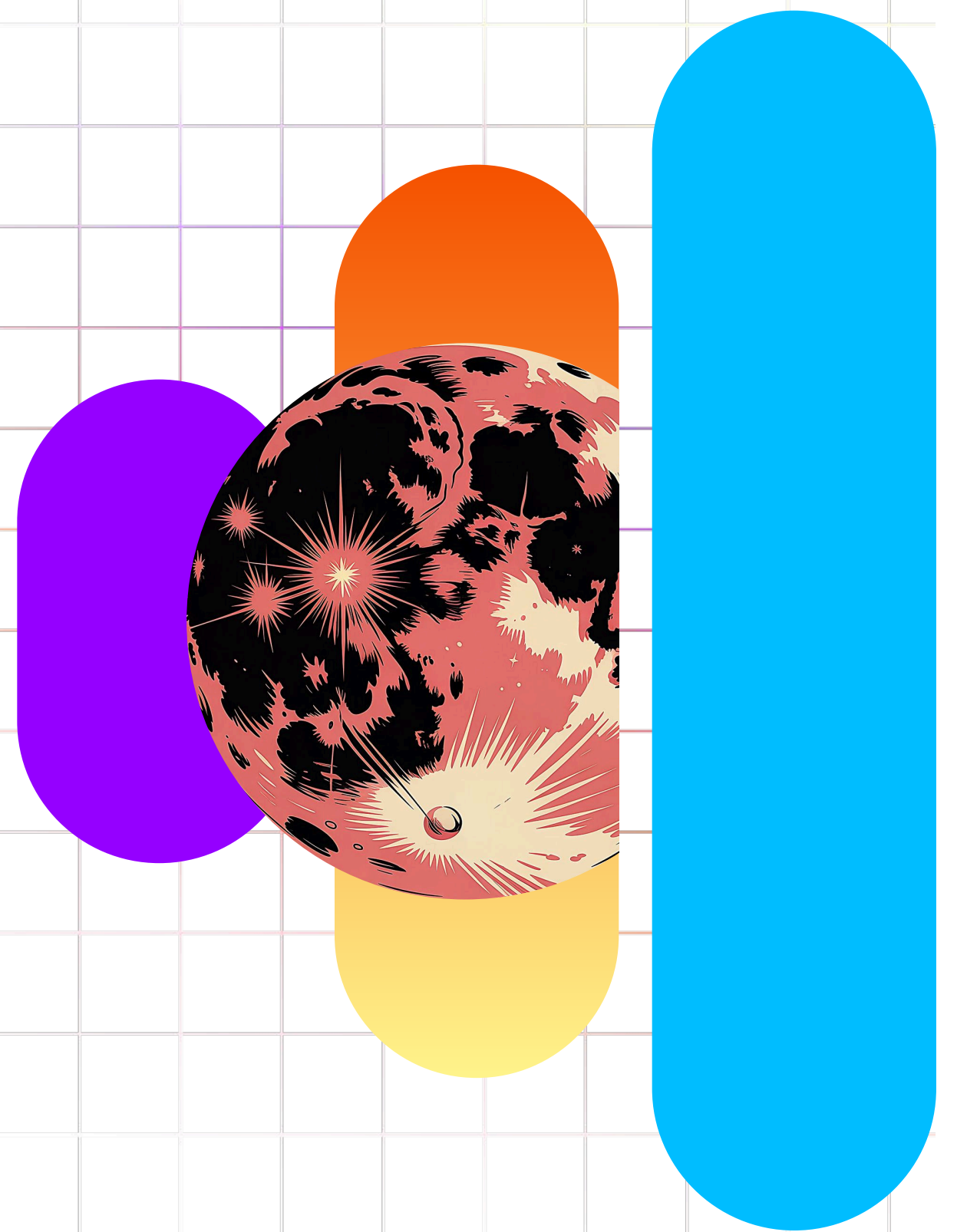


# Bluleadz Boosts Sales Productivity and Forecast Accuracy with Fathom

How a HubSpot Solutions Partner eliminated manual busywork, improved deal visibility, and scaled more confidently



## ✦ Overview

Bluleadz is a HubSpot Onboarding and Implementation agency that helps companies align marketing, sales, and operations. As their sales process grew more complex – especially through channel partnerships – the team needed a better way to capture insights, reduce admin work, and improve forecasting accuracy. With Fathom, Bluleadz streamlined their sales workflows while gaining deeper visibility into every deal.

## ✦ The Situation

As Bluleadz' business grew, so did the operational friction in their sales processes:

- **Excessive post-call administrative work** pulled reps away from revenue-generating selling time
- Fragmented call recordings across platforms **limited deal visibility**, especially in partner-led motions
- Incomplete and inconsistent deal context **weakened forecast accuracy and confidence**
- Reps were forced to **choose between note-taking and active listening**, reducing call effectiveness
- Sales-to-service handoffs relied on secondhand notes, **increasing risk and customer friction**
- Leadership lacked a **scalable way to capture customer insights automatically** without disrupting existing workflows

## ✦ The Solution

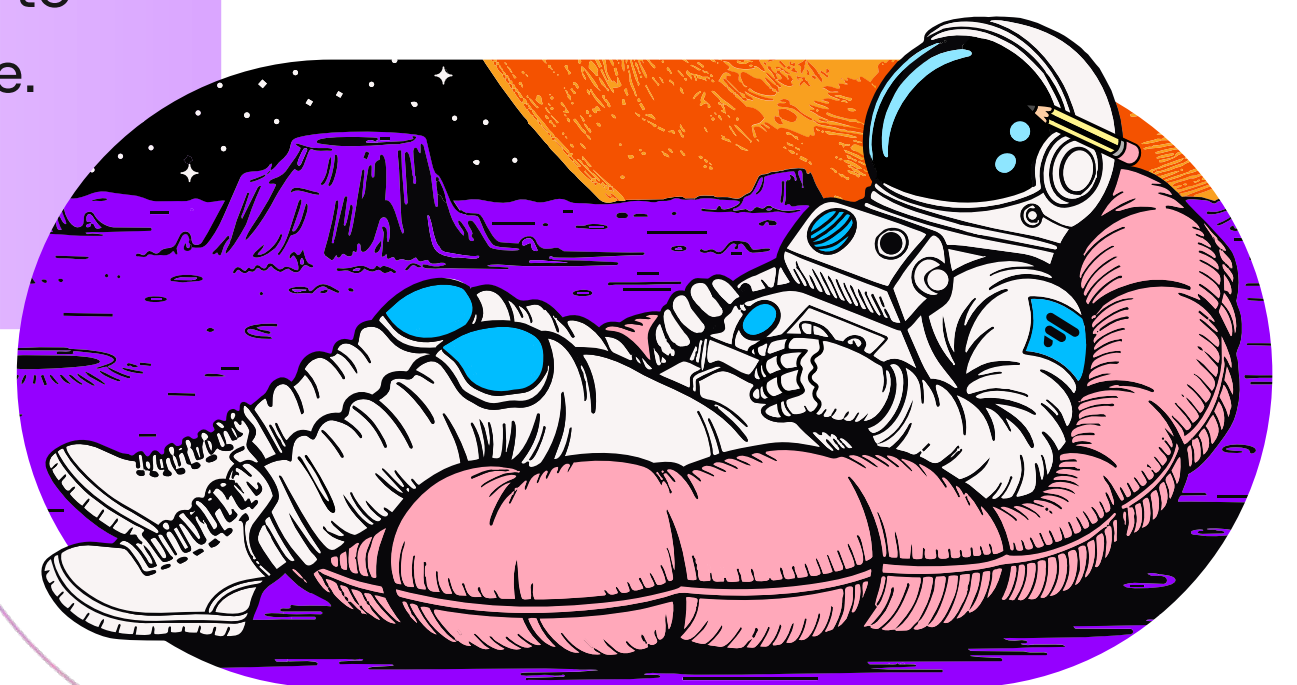
Bluleadz rolled out Fathom across its sales organization to automatically capture, organize, and surface insights from every customer conversation. Within days, the team benefited from:

- **Automated call capture across platforms**, ensuring every conversation is recorded, transcribed, and summarized in one place
- **Instant deal intelligence with Ask Fathom**, enabling reps and leaders to surface key details, risks, and follow-ups without rewatching calls
- **Centralized deal and account views**, giving leadership full visibility into multi-call sales cycles and improving forecast confidence
- **Seamless sales-to-service handoffs**, providing downstream teams direct access to customer language and expectations

After seeing the results internally, **Bluleadz became a Fathom Growth Partner**, helping their own clients implement Fathom to achieve the same gains in efficiency, visibility, and confidence.

**“Fathom is critical to how we support our sales team to win – and then keep – our largest, most complex deals.”**

**Will Polliard**, VP of Sales



## ✦ The Results

**7.5 hours**  
per week

saved per rep on note-taking and CRM updates

**30%**  
increase

in forecast accuracy through better deal visibility and insights

**\$19k**  
in time savings

across the 6-person sales team with streamlined workflows

Turn every customer conversation into insight **(and revenue)**

Book a personalized Fathom demo at [fathom.ai](https://fathom.ai)