

SECTOR: INDUSTRIAL MOTORS & CONTROLS / B2B DISTRIBUTION | SPONSOR: MIDDLE-MARKET PE
 THESIS: COMMERCIAL ENGINE MODERNIZATION | ENGAGEMENT: DIAGNOSTIC AUDIT

25_x

Paid acquisition volume opportunity identified, at 22% lower cost per acquisition. Plus a double-digit share of annual pipeline moved from spreadsheets into structured tracking.

Forecast built against current-state paid-search performance using SEMRush and Google Ads data. Quantified across the Claymore Partners OS (Tech Stack / BI / Marketing) and 4 digital channels. Audit delivered November 2025.

THE SITUATION

A PE-backed industrial motors and motor-controls manufacturer, selling through a multi-warehouse dealer-channel network, entered Claymore's engagement with strong operational fundamentals: best-in-category customer rating, same-day quote turnaround, fast fulfillment. Behind the operational strength sat a fragmented commercial engine: seven disconnected systems, two competing CRMs, zero attribution across acquisition channels, and a double-digit share of annual pipeline in custom-controls quotes living in spreadsheets outside any tracking system. Claymore was engaged to audit the foundation and quantify the commercial opportunity.

MONTHLY PAID ACQUISITION VOLUME: CURRENT STATE VS. AUDIT FORECAST

Forecast at 22% lower CPA, based on audit paid-media build-out



The business was running strong operations on a commercial engine a fraction of its size. The audit quantified the scale mismatch: 25x the paid acquisition volume at 22% lower CPA, and that is almost certainly a conservative read. Most of the opportunity sits in channels the business has not yet built.

DIAGNOSIS

01 The Excel Black Hole

A double-digit share of annual pipeline, in custom-controls quotes, managed in spreadsheets outside any CRM or pipeline system. No win/loss tracking, no structured follow-up, no conversion measurement. The highest-margin product category was also the least visible, leaving meaningful revenue on the table every month.

02 Seven disconnected systems, two competing CRMs

ERP, e-commerce, two CRMs, quote management, communications, and BI all running independently. Manual handoffs, broken data flow, zero end-to-end attribution. Customer intelligence lived in sales managers' heads rather than in actionable systems.

03 Strong operations, invisible commercial engine

Best-in-category customer rating, same-day quotes, and multi-warehouse fulfillment, paired with near-zero digital presence: minimal paid media, Domain Rating well below category leaders, organic keyword footprint one-fifth of competitors. A strong business, invisible to its own data.

RECOMMENDED TRANSFORMATION

01 Tech Stack: Foundation

Consolidate onto HubSpot as the central CRM and commercial data hub, with bidirectional integration to the P21 ERP. Retire redundant legacy CRMs. Full UTM tracking and attribution built into the data layer from anonymous visitor through product researcher to lead, quote, order, and repeat purchase.

02 Kill the Excel Black Hole

Move custom-controls quote management out of spreadsheets and into a structured pipeline. Full attribution on quote sources. Win/loss tracking by product, segment, and rep. Automated follow-up on unconverted quotes. The highest-margin product category becomes the most measurable.

03 BI: Visibility

Unified dashboards covering funnel performance, quote velocity, attribution, and category-level revenue. Role-based views for executive, sales, and marketing teams. Real-time insight into pipeline health, CAC, margins, and win/loss patterns by competitor and segment.

04 Marketing: Scale

Rebuild digital on a B2B industrial buying model. Paid Search and Pmax architecture engineered for the audit-quantified 25x scaling opportunity. SEO and content rebuild targeting the 5x keyword-footprint gap versus category leaders. AI-resilient content and backlink strategy to close the Domain Rating gap.

05 Operating Model

A commercial operating model built for the full B2B journey: anonymous visitor to product researcher to lead to quote to order to repeat purchase, with attribution at every step and dealer-channel visibility into end-buyer behavior. One integrated engine designed for category leadership and enterprise-value compounding.

25_x

PAID ACQUISITION VOLUME, CURRENT TO AUDIT FORECAST

-22%

CPA ON FORECAST SCALE VS. CURRENT STATE

5_x

ORGANIC KEYWORD FOOTPRINT GAP VS. CATEGORY LEADERS

7 > 1

DISPARATE SYSTEMS INTO ONE INTEGRATED COMMERCIAL STACK

DIAGNOSED USING THE CLAYMORE PARTNERS OS

01

Tech Stack

Foundation. Every touch tagged and tracked. Clean data, accurate attribution, confident budget decisions.

02

BI

Visibility. Single source of truth for funnel, CAC, LTV, ROI. Faster decisions, sharper accountability.

03

Marketing

Scale. Profitable demand generation. Optimization with clean attribution. Compounding gains via testing and CRO.

04

Applied

To a B2B industrial distributor: ERP-integrated CRM, structured pipeline for custom quotes, attribution across the full anonymous-to-repeat-purchase journey.