How Boundary Transformed Dozee's Offline Operations Into a Connected HubSpot Growth Engine

The Client

Dozee is India's leading contactless remote patient monitoring (RPM) company. With 200+ sales and customer success agents stationed in hospitals across the country, their teams managed demos, opportunities, and deals almost entirely offline. Data lived in spreadsheets, conversations in emails or notebooks, and product inventory inside their ERP. As Dozee scaled, this fragmented setup slowed growth and limited visibility across departments.

Boundary partnered with Dozee to design and implement a full-scale HubSpot solution integrated with their ERP, customised for their on-ground teams, and aligned with RevOps best practices.

The Goal

Unify all business functions inside HubSpot, enable mobile-first adoption for field teams, and build real-time visibility across the customer lifecycle.

The Challenges

Dozee's growth trajectory was strong, but their operational backbone wasn't keeping pace-

Sales & CS

No central place to log conversations, limited visibility into opportunity status, and limited visibility into device-level status that was managed in ERP, along with offline processes that couldn't scale.

Marketing

Lead capture and campaigns were tracked in Excel with no attribution or automation. The marketing-to-sales handover was not happening, which meant leads were getting missed

Customer Support & Product Tech

Support tickets were disconnected from customer and sales data, creating silos.

Operations

Inventory was managed exclusively in ERP, with no visibility into which products were deployed for demos.

Leadership

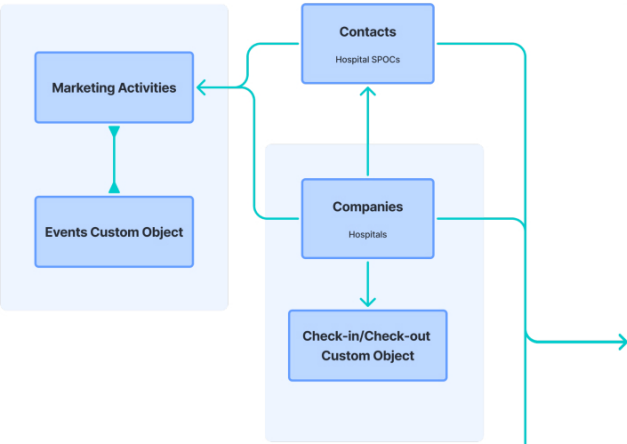Reporting was manual, inconsistent, and often outdated.

Dozee

needed a partner who could not only implement HubSpot but also rethink processes end-to-end, integrate systems, and design for scale.
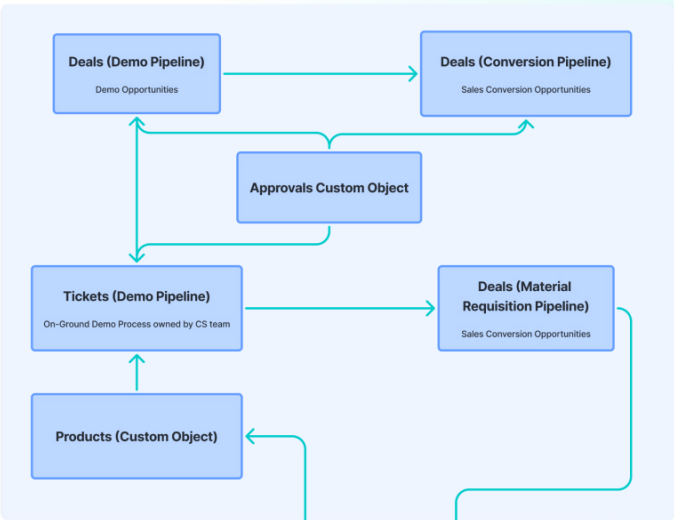
boundary's Solution

Our approach went beyond implementation—we redefined Dozee's go-to-market operations through HubSpot. Here's how each function was transformed:
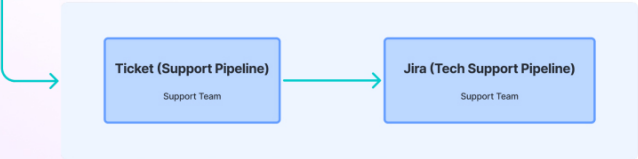
HubSpot Data Structure

Sales & Customer Success

Marketing Activities

Events Custom Object

Contacts
Hospital SPOCs

Companies
Hospitals

Check-in/Check-out Custom Object

Customer Support & Product Tech

Ticket (Support Pipeline)
Support Team

Jira (Tech Support Pipeline)
Support Team

Deals (Demo Pipeline)
Demo Opportunities

Deals (Conversion Pipeline)
Sales Conversion Opportunities

Approvals Custom Object

Tickets (Demo Pipeline)
On-Ground Demo Process owned by CS team

Deals (Material Requisition Pipeline)
Sales Conversion Opportunities

Products (Custom Object)

ERP

Product SKU inventory

Sales & Customer Success

The Challenges

200+ agents worked offline from hospitals, with no single source of truth for opportunities or product demos.

Solution

Migrated all opportunity, customer, and historical data into HubSpot CRM, creating a clean, structured foundation.

Defined opportunity stages around Dozee's real-world sales process: from demo scheduling to deal closure.

Implemented **HubSpot Mobile App enablement**, so field agents could log interactions, update opportunities, and scan QR-coded products directly from hospitals.

Built a **custom ERP-HubSpot integration** that synced inventory in real time, mapping demo units to specific opportunities. This allowed sales teams to track not just the opportunity pipeline, but also which product units were deployed at which hospital, along with the status of the license activation of the devices, delivery, and return—for both demo and final sold products.

Introduced automated reminders and activity tracking for follow-ups, **ensuring consistent engagement across long sales cycles.**

Marketing

The Challenges

Leads came in from multiple channels but were logged manually in Excel. Campaign impact was nearly impossible to measure.

Solution

Integrated all marketing channels, including website forms, social media platforms, Google Ads, partner referral programs, offline event leads, and email campaigns into HubSpot with automated capture, deduplication, and consistent tracking.

Designed and implemented **nurture workflows** to move leads from awareness to demo requests, with personalized email sequences.

Configured **campaign attribution dashboards**, allowing marketing to tie spend to pipeline creation.

Solution

Automated lead scoring based on engagement, ensuring sales focused on the most promising prospects.

Built a clean **marketing-to-sales handoff** process within HubSpot, reducing leakage and accelerating conversion from lead to opportunity.

Customer Support & Product Tech

The Challenges

Support tickets were being managed in Kapture, and while they were not disconnected from customers, there was no set process being followed. The team was not happy with the tool, and the configuration was poorly done.

CS teams were they were disconnected from sales and product data, and also from the tech team that handled technical fixes and new feature requests. Escalations to the tech team often lacked the full context needed for quick resolution.

Solution

Migrated support into HubSpot's Service Hub, unifying tickets with customer and opportunity records.

Designed **ticket pipelines** categorized by product and issue type, streamlining triage and resolution.

Linked support tickets with opportunities, giving CS visibility into commercial impact of open issues.

Enabled internal collaboration between support and the product tech team with automated escalations, SLA tracking, detailed activity logs, and a custom Jira integration with the HubSpot support pipeline to ensure seamless handling of technical fixes and feature requests.

Built feedback loops from tickets back to the sales and product teams, enabling faster product improvements and better customer experiences.

The Challenges

ERP managed product inventory, but there was no way to connect inventory with live opportunities and demos.
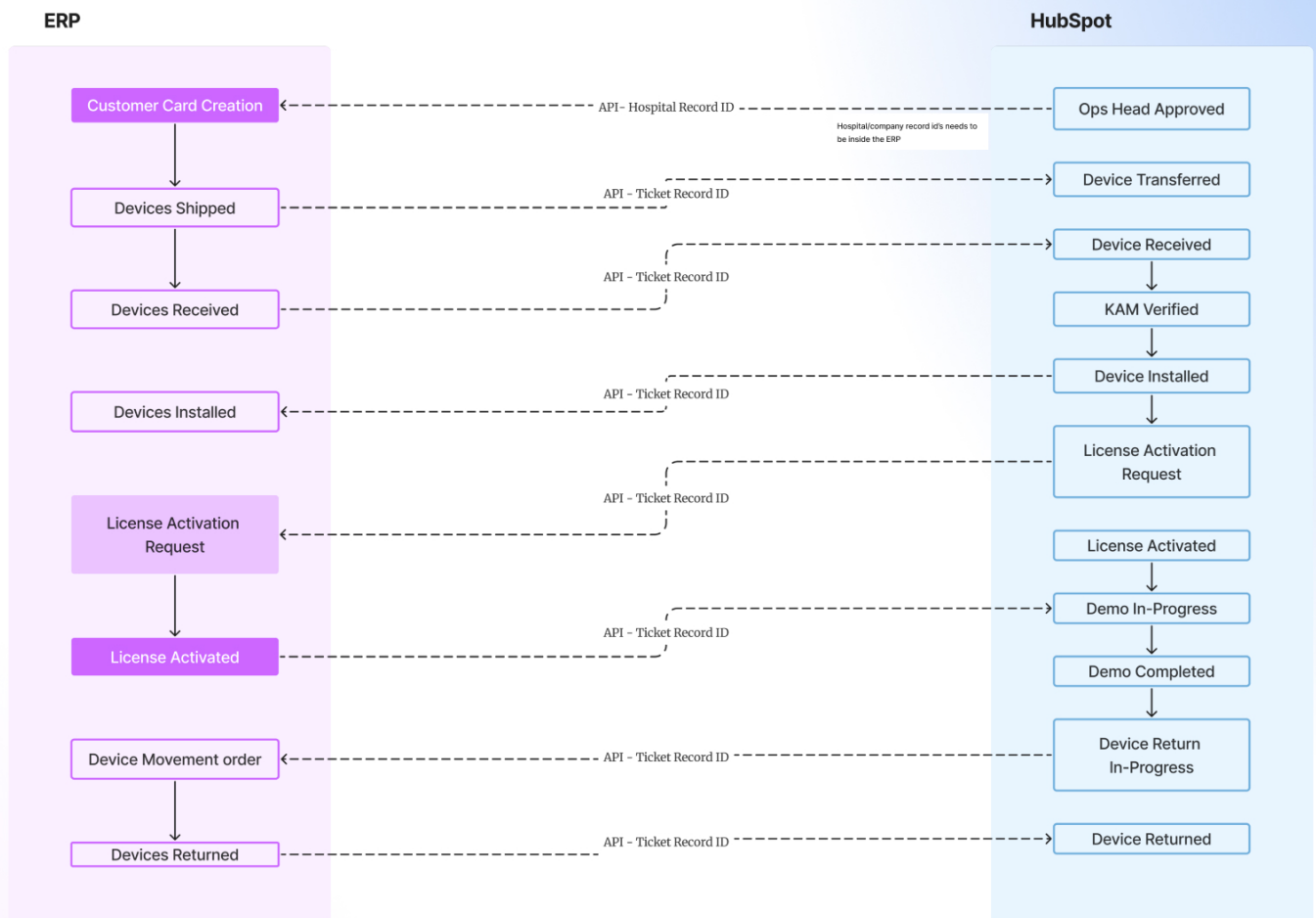
Solution

Designed a **custom integration between ERP and HubSpot**, syncing product master data, serial numbers, and availability into HubSpot.

Created a "Product Association" object within HubSpot that tied specific inventory units to opportunities.

Automated workflows to update product status (e.g., demo in progress, returned, available) as opportunities moved through stages.

Delivered dashboards showing **real-time demo unit utilization**, enabling operations to optimise stock deployment across hospitals.

ERP

HubSpot

Customer Card Creation

— — — — — — — API– Hospital Record ID — — — — — — — → Ops Head Approved

Hospital/company record id's needs to be inside the ERP

Devices Shipped

— — — — — — — API – Ticket Record ID — — — — — — — → Device Transferred

Devices Received

— — — — — — — API – Ticket Record ID — — — — — — — → Device Received

KAM Verified

Devices Installed

— — — — — — — API – Ticket Record ID — — — — — — — → Device Installed

License Activation Request

License Activation Request

— — — — — — — API – Ticket Record ID — — — — — — — → License Activated

License Activated

— — — — — — — API – Ticket Record ID — — — — — — — → Demo In-Progress

Demo Completed

Device Movement order

— — — — — — — API – Ticket Record ID — — — — — — — → Device Return In-Progress

Devices Returned

— — — — — — — API – Ticket Record ID — — — — — — — → Device Returned

Leadership & Reporting

The Challenges

Leaders lacked a consolidated view of performance across Marketing, Sales, Support, and Ops.

Solution

Built **RevOps-aligned dashboards in HubSpot**, covering pipeline velocity, opportunity-to-demo ratios, demo-to-close conversion, lead attribution, and support resolution times.
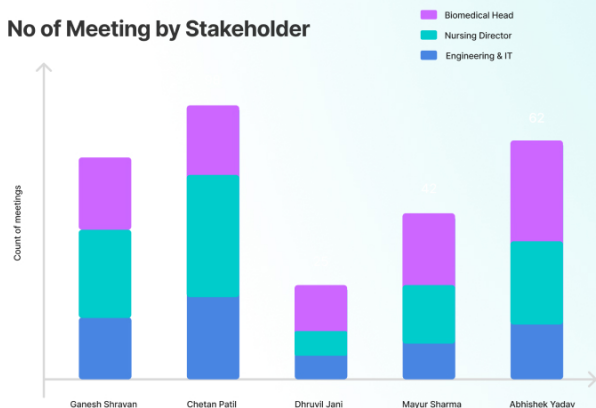
Delivered role-specific reporting: field agents accessed mobile dashboards for daily tasks, while leadership accessed high-level performance metrics.

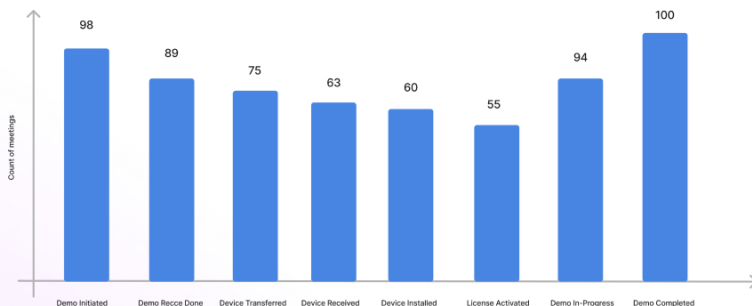Established data hygiene and governance rules inside HubSpot to ensure long-term reporting accuracy.

By Account Performance - Beds Sold/MSA

	Q1	Q2	Q3	Q4
Apollo Indraprastha	10	8	8	8
Max Super Speciality	23	12	12	12
Sarvodaya Hospital	3	1	1	1
Kailash Hospital	7	5	5	5
Neo Hospital	12	6	6	6
Total	55	32	32	32

No of Meeting by Stakeholder

Legend: Biomedical Head, Nursing Director, Engineering & IT

Stakeholders: Ganesh Shravan, Chetan Patil, Dhruvil Jani, Mayur Sharma, Abhishek Yadav

Demo Pipeline Status (Demos started in last 4 weeks)

Values: Demo Initiated 98, Demo Recce Done 89, Device Transferred 75, Device Received 63, Device Installed 60, License Activated 55, Demo In-Progress 94, Demo Completed 100

Funnel Report

Stage	Count of Deals
Demo Secured	98
Device Installed	42
Demo Completed	25
MSA & Proposal Signed	62
Closed Won	55

Boundary's solution transformed Dozee's operations:

200+ agents
now use the HubSpot mobile app to log conversations and update opportunities in real time.

End-to-end visibility
from marketing campaigns to demos, inventory, and customer support—all in one system.

ERP integration
unlocked live inventory tracking, allowing sales and ops to manage demo units seamlessly.

Marketing attribution
dashboard now connect spend to pipeline, enabling smarter decisions.

Support and product teams
support and product teams collaborate in HubSpot, resolving issues faster and improving customer satisfaction.

Leadership
has real-time RevOps dashboards, to track growth, efficiency, and bottlenecks.

Metrics	Before HubSpot Implementation	After HubSpot Implementation
Manual Steps in Processes	Teams followed 20–50 manual steps depending on the function. Processes were heavily spreadsheet- and email-driven.	90–95% of processes are now automated inside HubSpot. Manual intervention reduced to fewer than 10%.
Error Probability	High likelihood of errors (30–40%) due to manual handoffs and fragmented data.	Errors drastically reduced with automation and integrated workflows.
Process Timelines (CS Demo)	Customer success processes like demo activations took 10–15 days to complete.	Reduced to 2–3 days (48–72 hours) with automated workflows and ERP integration.
Inter-team Coordination	Coordination scores with Sales, ERP, CS, and Marketing teams averaged 5–8 out of 10, with frequent misalignment.	Most coordination now happens seamlessly within HubSpot. Teams report "no coordination required" for routine processes as everything is visible in one system.
Data Centralisation	Data was scattered across Excel, emails, and Power BI exports. Rated 2–3/10 by teams.	100% of customer, opportunity, and product data now centralised in HubSpot. Rated 10/10.
Reporting & Dashboards	Reporting to management was inconsistent, manual, and rated 5/10 by teams.	Reporting is automated and real-time via HubSpot dashboards. Managers have complete visibility.
Customer NPS Tracking	No standardised method for NPS; feedback collection was ad-hoc.	NPS collection fully automated inside HubSpot and aligned with customer lifecycle.
Product Usage Data	Accessed via Power BI and Excel exports, making it slow and inefficient.	Reporting is automated in HubSpot, with audit-level detail improving decision-making.

Boundary's solution transformed Dozee's operations:

By rethinking Dozee's go-to-market operations and implementing HubSpot as a connected growth engine, Boundary did more than digitize processes; we enabled Dozee to scale with clarity, agility, and control.

From a fragmented offline setup, Dozee now operates with a **single source of truth powering Sales, Marketing, Support, Ops, and Product**.

This is HubSpot, not just as a CRM, but as the backbone of revenue operations.