



Smarter, Safer, Scalable

Scaling Forex Sales: How Montelux Achieved Multi-Country Governance & Automation with HubSpot

CASE STUDY

Industry: Foreign Exchange

Period: Nov 2024 - Jan 2025

Technology Partners: Hubspot



INTRODUCTION

Montelux is a B2B foreign exchange company with a **multi-country commercial team** operating across Eastern Europe, France, and the United Kingdom. The organization follows a clearly defined sales structure, with junior team members focused on prospecting and senior management responsible for deal closure and client onboarding.

For Q4 2024, Montelux set a clear objective: to implement a fast and disciplined HubSpot setup that would introduce a **dedicated prospecting pipeline, enforce strict access controls, and establish essential automation** for operational efficiency and governance.

The challenge was to get HubSpot up and running quickly, without compromising on governance or data integrity.



MONTELUX



CHALLENGES

As Montelux prepared to scale its sales operations across multiple countries, four key challenges emerged:

1. Process Separation



The team needed a **clear distinction between Prospection and Sales/Onboarding** to keep each stage clear and prevent overlap.

2. Strict Segregation of Duties



To mitigate risk, junior reps required restricted views limited to prospecting data, ensuring sensitive closing data remained accessible only to senior management

3. Data consistency



Consistent **Contact–Company–Deal links** were essential to maintain data accuracy and prevent qualified accounts from being lost.

4. Audit-Ready Communication



Reliance on personal channels (WhatsApp) posed a **compliance risk**. A centralized log of all interactions was required for full operational visibility



SOLUTION

FROM CHAOS TO CONTROL

The OPTI team delivered a process-centered HubSpot setup focused on governance, automation, and data consistency.

1. Two Pipelines, Clear Roles

- ✓ OPTI set up two pipelines - **Prospection** for junior reps and **Sales/Onboarding** for management - ensuring focus and clean data flow.

2. Access Governance

- ✓ User permissions were configured through **Users, Teams and pipeline-level rules** so each member saw only their assigned records.

3. Structured Associations

- ✓ Standardized **Contact-Company-Deal** links and new association labels improved traceability across timelines and reports.

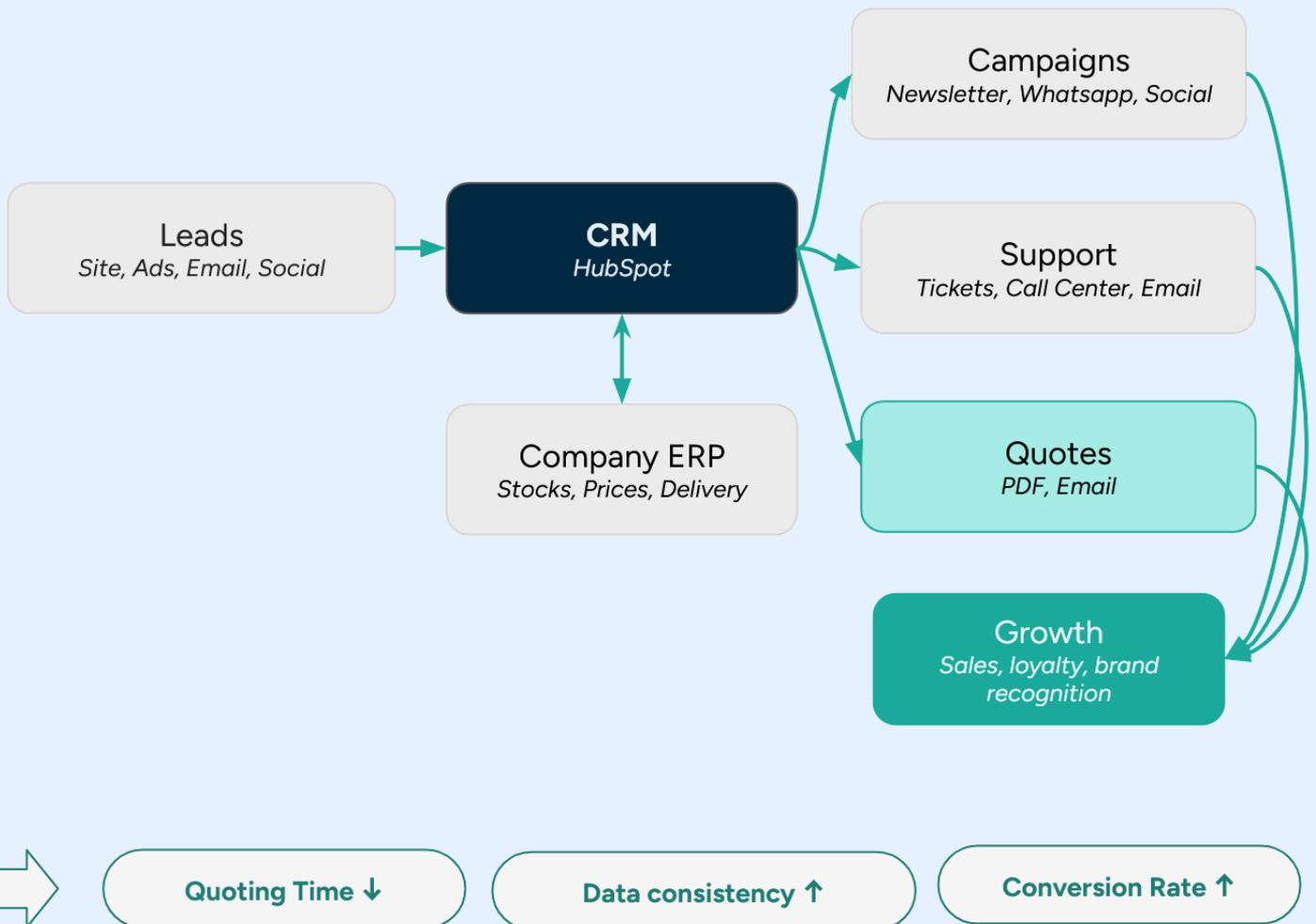
4. Automation & Email Logging

- ✓ A qualification workflow creates Deals automatically when leads meet criteria, while Outlook integration captures all communication directly in HubSpot.



CRM AS SINGLE SOURCE OF TRUTH

By unifying all client-related data into HubSpot, a strong value flow emerges. Leads are nurtured to Clients while ERP and support integration guarantees quality and client loyalty.



A WORD FROM THE TEAM



"This forex project was a pleasure, from the requirements to the training sessions where Montelux reviewed the implementation. The set up of Teams in HubSpot was particularly agile."

– Daniel Curculescu, Software Engineer



RESULTS (1-2 MONTHS AFTER GO-LIVE)



Operational HubSpot CRM

HubSpot is fully operational with separate pipelines and role-based permissions.



360° Visibility

Email logging enabled complete interaction tracking inside HubSpot.



Automated Workflows

Deals are created automatically at qualification, ensuring consistent follow-up.



100% Email Logging Compliance

Transitioned team from personal inboxes to fully tracked logging within weeks.

TESTIMONIAL



“Their attention to detail and focus on delivering a tailored HubSpot RevOp solution truly set them apart. We’ve seen a significant improvement in how we manage leads and sales processes. The project was completed within the agreed timeframe, with professional, seamless project management. Wonderful work.”

— François Dupouy, Head of Sales, Montelux

Does your sales team struggle with **data governance and overlapping pipelines?**

Schedule a **free architecture review** with our HubSpot Architects. [Let's talk.](#)

TECH AND METHODOLOGY

Services: CRM Implementation, RevOps, RBAC (Role-Based Access Control)

Tech: HubSpot, Microsoft Outlook.

Standards: ISO 9001 (quality), ISO 27001 (information security).



READ MORE

- ⇒ Read more [CRM and HubSpot case studies from OPTI](#) →
- ⇒ See [Infrastructure and Cybersecurity](#) →, for more certifications.
- ⇒ See [HubSpot services and CRM Integrations](#) →, for related services
- ⇒ See [Process Automation and AI Agents](#) →, for how we use AI to automate business processes

HUBSPOT SOLUTION PARTNER WITH WORLDWIDE PROJECTS



- ✓ HubSpot CRM
- ✓ HubSpot apps
- ✓ Migrate and merge accounts
- ✓ ERP Integrations
- ✓ HubSpot CMS
- ✓ Lead tracking integrations
- ✓ Salesforce, Zoho, Pipedrive
- ✓ Customize email portals
- ✓ FormAPI, HubDB and HubL

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OPTI Software

Intelligent Business Processes. Scalable Results.

OPTI builds software, AI agents, and HubSpot integrations on Google Cloud - with DevOps and ISO 27001 certifications.

Founded in 2005, OPTI has a team of senior analysts and programmers, is a HubSpot Solution Partner, Google Cloud Partner and certified in more technological stacks.

CERTIFICATIONS



KNOW-HOW

