

# When a Sales Rep Leaves, Will Your Business Survive It?

**1,000+**

Client accounts managed

**3**

Disconnected databases replaced

**0**

Clients lost at staff transition

## THE CHALLENGE

A fast-growing Ontario craft brewery had over 1,000 bar and restaurant clients — but no real CRM. Client data was scattered across three disconnected systems: Ekos (production), Google Sheets, and QuickBooks.

QuickBooks held financial records, but the same business often appeared under multiple names and contacts — making it impossible to know who the real buyer was. The owner had no visibility into the sales pipeline, and no way to identify accounts that had quietly stopped ordering.

The hidden risk: both sales reps were at a stage in life where starting a family was on the table. One departure — even temporary — would leave a single rep holding 1,000 accounts with no system beneath them.

## THE SOLUTION

AI Lead Furnace built a unified CRM inside HighLevel — a single source of truth for every client, contact, and sales touchpoint. All three databases were consolidated and cleaned. Duplicate records were resolved. Every account was mapped to the right contact.

The pipeline became fully visible to ownership for the first time. Automated triggers flagged accounts that had stopped ordering. The sales process moved from two people's heads into a system that anyone on the team could pick up and run.

## THE MOMENT IT PAID OFF

Six months after implementation, one of the sales reps gave her notice. Under the old system, this would have been a crisis — 500+ accounts in one person's head, relationships built over years, with no handover plan.

Instead, the owner opened the CRM. Every account was documented. Every contact was current. Every open opportunity was tracked. The transition was managed without a single client falling through the cracks.

*“Nathalie just gave her notice today so we are juggling that right now. We are using our HighLevel account to do the transition, so the CRM is WILDLY helpful this week.”*

— Brewery Owner, Ontario

## WHAT THIS MEANS FOR YOU

If one of your key people gave notice tomorrow — how confident are you that nothing would fall through the cracks?

AI Lead Furnace specializes in building sales pipeline systems for small businesses that are one resignation, one illness, or one busy season away from a client retention crisis.

## Book a Free 30-Minute Pipeline Vulnerability Assessment

We'll show you exactly where your sales pipeline is at risk — and what it would take to protect it.

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