

CUSTOMER STORY · PROFESSIONAL SERVICES

SellSide Group

3 motions

Sales, SellSide, and BuySide architected as separate pipelines

SellSide Group is a Dallas-based M&A advisory firm representing both sellers (SellSide mandates) and buyers (BuySide mandates) of lower- and middle-market businesses. Every mandate is confidential, every NDA is a contract that has to hold, and every registered buyer is a potential match for two or...

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

PARTNER TIER

Elite Solutions Partner

HubSpot's highest partner tier



HubSpot
Onboarding



Platform
Enablement



CRM Data Migration



Custom Integration



CRM Implementation

THE CHALLENGE

SellSide Group had built a successful relationship-led M&A practice across SellSide and BuySide mandates, supported by 35 Managing Directors and a Business Development team. As the firm grew, the practice ran into the operational ceiling that almost every relationship-led financial services firm eventually hits. There was no separation between Sales, SellSide, and BuySide pipelines. NDAs were customised per project...

WHAT INSIDEA BUILT

Sales, Marketing, Operations + DocuSign

✓ Three Pipelines, Three Motions

Sales, SellSide, and BuySide were architected as commercially distinct pipelines. Confidentiality is now a system rule rather than a Project Lead discretion. The same...

✓ NDA Workflow as Operating Contract

One project-aware workflow runs from website CTA through contact and company creation, deal creation in NDA Requested, Project Lead notification, DocuSign dispatch...

✓ Matchmaking as a Dashboard

Buyer investment criteria and seller company attributes are now parallel structured fields. The Project Lead can open the view, filter by a live mandate, and see every...

✓ Project-Specific Mandate Landing Pages

Every SellSide and BuySide mandate has its own landing page with a project-aware NDA form that creates the right deal in the right pipeline, assigned to the right...

✓ Client-Only Off-Market Portal

Off-market opportunities are surfaced behind a Google-authenticated login restricted to SellSide Group clients. Non-clients attempting to log in are routed to a sales...

✓ Marketing Subdomain, Operations Peace of Mind

Marketing outreach is now routed through a dedicated subdomain configured inside HubSpot. SEM campaigns, surveys, and outbound run without exposing the primary domain's...

MEASURABLE RESULTS

3

Dedicated pipelines architected for Sales, SellSide, and BuySide motions

8+

NDA lifecycle stages automated from request to Q&A follow-up

100%

Client-only portal access for off-market opportunities, gated by login

169

Active CRM users across 35 Sales Enterprise and 135 Core seats

Want results like these in your business?

A 30-minute strategy call to map your systems and goals. Fixed-fee proposal if we are a fit.

[Book a Strategy Call →](#)