INSIDEA

★ **4.99** across 500+ verified reviews · 1,500+ businesses · Elite HubSpot Partner

CUSTOMER STORY · FINTECH

Drip Capital

4 regions
Unified into one pipeline view

Drip Capital is a global trade finance fintech serving small and mid-sized exporters and importers in cross-border supply chains. They had 105,000+ buyer records inside a Custom Admin Portal, parallel data in a legacy CRM, Zapier flows from QuickMail, Webflow, and advertising platforms, and the...

PARTNER TIER

Elite Solutions Partner
HubSpot's highest partner tier

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

HubSpot Onboarding · Platform Enablement · CRM Data Migration · Custom Integration · CRM Implementation

THE CHALLENGE

Drip Capital walked into the engagement with 105,000+ buyer records inside a Custom Admin Portal, parallel versions in a legacy CRM, Zapier automations from QuickMail and Webflow, advertising platform leads flowing into multiple destinations, and the same buyer existing in three to five places. Sales reps were spending 15+ hours per week per regional team copying buyer information the firm already owned....

WHAT INSIDEA BUILT

Sales Hub Enterprise, Marketing Hub Enterprise, Operations Hub Enterprise, Custom API Integration

- ✓ **Admin Portal event**
  A buyer profile, transaction status, ownership rule, or lifecycle stage is created or updated within the authoritative system of record.
- ✓ **Secure API sync**
  A bi-directional API process picks up the event and pushes it to HubSpot in near real time using the CRM Custom Objects API (v3), CRM Deals API (v3), and CRM...
- ✓ **Buyer custom object update**
  Data lands in the HubSpot Buyer custom object. Every property is updated, and every prior association is preserved.
- ✓ **Business rule resolution**
  Defined rules determine whether the event creates a new Deal, updates an existing Deal, or progresses a pipeline stage.
- ✓ **Ownership orchestration**
  RM Owner, BDM Owner, and AM Owner are computed and assigned automatically based on region, lead type, and ownership policy.
- ✓ **Association preservation**
  Contacts, Companies, Notes, Calls, and Emails retain their relationships across Buyer and Deal records.

MEASURABLE RESULTS

105K+
Buyer records migrated with full association integrity through custom API...

44K+
Legacy deals migrated across regions, duplicates merged, activity history...

163
Active CRM users across Marketing, Operations, Finance, Servicing, Technology...

4
Operating regions unified into one pipeline view: US, India, Mexico, UAE

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 →