

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...

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

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 →