INSIDEA

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CUSTOMER STORY · PROFESSIONAL SERVICES

U.S. Law Firm

100%
Automated Lead-to-Case Handoff

A U.S. based law firm was managing leads in HubSpot and cases in a separate legal case management platform, with no native integration between the two systems. Every client conversion required staff to manually re-enter data, match existing records, and send legal documents by hand. INSIDEA...

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

The firm operated across two fundamentally separate software categories – a CRM for lead management and a purpose-built legal case management platform. No native integration existed between them. Every client conversion, record match, and document send depended entirely on staff taking manual action across both systems simultaneously, creating a bottleneck that scaled poorly with caseload growth.

WHAT INSIDEA BUILT

HubSpot Onboarding & CRM Integration

✓ **HubSpot Onboarding & Configuration**
Sales and Marketing Hub configured end-to-end with deal pipelines, contact properties, lead tracking, lifecycle automation, and dedicated team training, all tailored to...

✓ **Existing Client Logic & Two-Way Sync**
Before creating a new record, the automation checks for an existing match. Found: new case associated to existing record. Not found: new record and case created...

✓ **Lead-to-Case Integration via Zapier**
When a deal closes in HubSpot, Zapier fires immediately, retrieving the full contact record and creating the case in the legal platform with all data, notes, and deal...

✓ **Automated Legal Document Delivery**
The document delivery tool was integrated with HubSpot Workflows. When a deal or contact reaches a defined pipeline stage, the correct legal document is automatically...

MEASURABLE RESULTS

100%
Automated Lead-to-Case Handoff

Zero
Manual Steps in Document Delivery

2-way
HubSpot & Case Management Sync

Full
HubSpot Sales & Marketing Hub Onboarding

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.

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