

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...

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

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.

Book a Strategy Call →