INSIDEA

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CUSTOMER STORY · HEALTHCARE

U.S. Surgical Healthcare Provider

100%
Consent Workflow Automated

A U.S. healthcare provider specializing in surgical and aesthetic services needed to eliminate all manual steps from their patient consent process while keeping everything inside HubSpot. INSIDEA built a fully automated workflow using HubSpot Quotes, custom CRM properties, and a no-code automation...

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

A U.S. healthcare provider offering surgical and aesthetic services was managing patient consent documentation through a largely manual process. Staff were responsible for creating, distributing, and tracking surgical consent quotes individually for each patient, a time-consuming workflow that introduced operational delays and compliance risk. The organization wanted to move to a fully automated system but faced a...

WHAT INSIDEA BUILT

HubSpot Automation

✓ **Technical Foundation**
INSIDEA implemented the 0CodeTools Workflow Toolbox integration to extend HubSpot's native workflow capabilities, enabling automated quote creation, CRM association, and...

✓ **Quote Template Engineering**
Custom HTML-based quote templates were built using tokenized contact properties, enabling dynamic population of patient data each time a quote was generated. Custom CSS...

✓ **Workflow and Pipeline Design**
A dedicated "Surgical Consent" stage was added to the HubSpot Deals pipeline. When a patient required consent documentation, a new deal was automatically created in this...

✓ **Automated Delivery and Signature Capture**
Once published, the quote's public link was automatically saved to the patient's contact record and delivered via an automated email. The consent document included an...

MEASURABLE RESULTS

100%	100%	24/7	100%
Consent Workflow Automated	Manual Work Eliminated	Consent Tracking in HubSpot	Data Centralized in CRM

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 →