

CUSTOMER STORY · REAL ESTATE

Commercial Real Estate Firm

6

CRM Workflows Built

A Texas-based commercial real estate firm specializing in property leasing and investor relations was operating without a structured CRM system, leaving deals fragmented, qualification inconsistent, and follow-ups largely manual. INSIDEA delivered a fully custom HubSpot implementation, including a...

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

A Texas-based commercial real estate firm managing property leasing, investor relations, and tenant placement was operating without a coherent CRM structure. Property-level data was scattered across deals, contacts, and notes, making it nearly impossible to maintain accurate records or run consistent reporting. Sales reps were qualifying leads differently, follow-ups were handled manually, and there were no...

WHAT INSIDEA BUILT HubSpot CRM Implementation

✓ Custom Property Object and CRM Architecture

INSIDEA built a dedicated Property object inside HubSpot with structured fields covering suite number, unit size, property type, lease terms, tenant details, and listing...

✓ Automated Deal Routing and Investor Pipeline

A dedicated Investor Meeting Pipeline was built with stage-specific task automation that triggers actions such as gathering marketing materials, drafting contracts, and...

✓ BANT-Based Sales Playbooks and Conditional Logic

Structured qualification playbooks built around the BANT framework were implemented to standardize how reps conduct discovery calls and capture lead data. Conditional...

✓ Rep Activity Reporting Dashboard

A custom activity report was built to track calls and emails by rep over a rolling 30-day window. This gave managers real-time visibility into outreach volume, enabled...

MEASURABLE RESULTS

6

CRM Workflows Built

1

Custom Property Object

3

Automated Pipelines Configured

100%

Deal Stages Automated

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 →