

CUSTOMER STORY · PROFESSIONAL SERVICES

U.S. EdTech Company

100%

Conversation Visibility in CRM

A U.S. based EdTech company specializing in corporate learning was operating customer conversations in Intercom and sales workflows in HubSpot, with no connection between the two systems. INSIDEA implemented a structured two-way integration that synced contacts, logged conversation data as CRM...

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 U.S.-based EdTech company was using Intercom to manage all inbound customer conversations while running sales tracking and lifecycle management separately inside HubSpot. With no integration between the two platforms, critical engagement data was completely invisible to sales teams. Leads were falling through the gaps, follow-ups were delayed, and reporting gave leadership an incomplete picture of pipeline...

WHAT INSIDEA BUILT HubSpot and Intercom Integration

✓ Intercom to HubSpot Contact and Lead Sync

All new leads generated through Intercom were automatically created or updated as contacts in HubSpot. Key properties including email, company, lead source, and...

✓ Lifecycle Stage and Ownership Automation

Automated workflows were configured to assign contact owners based on conversation rules and update lifecycle stages from Lead to MQL to SQL based on Intercom engagement...

✓ Conversation Intelligence Mapping

All Intercom conversations were logged directly inside HubSpot as engagement activities. Sales teams gained full visibility into pre-sales discussions without switching...

✓ Follow-Up and Notification System

Internal notifications and task creation were automated to ensure timely follow-up by sales representatives. This reduced delays, improved response SLAs, and kept...

MEASURABLE RESULTS

100%

Conversation Visibility in CRM

Eliminated

Manual Lead Handling

Automated

Lifecycle Stage Progression

Unified

Sales and Support Operations

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 →