INSIDEA

★ 4.99 across 500+ verified reviews · 1,500+ businesses · Elite HubSpot Partner

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...

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.-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 →