

CUSTOMER STORY · PROFESSIONAL SERVICES

Professional Services Firm

50%

High-Intent Leads Identified

A U.S.-based investigation technology company serving insurance and legal professionals was unable to identify high-intent leads within HubSpot because the platform does not natively track cumulative form submissions per contact. INSIDEA implemented a custom Sales Hub Professional solution with a...

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

PARTNER TIER

Elite Solutions Partner

HubSpot's highest partner tier

HubSpot
OnboardingPlatform
Enablement

CRM Data Migration



Custom Integration



CRM Implementation

THE CHALLENGE

A U.S.-based investigation technology company serving insurance and legal professionals relied heavily on website forms to capture inbound interest. However, HubSpot did not natively track the total number of form submissions per contact across multiple sessions or touchpoints. This meant the sales team had no reliable way to distinguish a highly engaged prospect from someone who had submitted a single inquiry. As...

WHAT INSIDEA BUILT HubSpot Services

✓ Custom Property for Engagement Tracking

INSIDEA created a custom numeric property called Form Submission Count on each HubSpot contact record. Unlike individual form events, this property accumulates across...

✓ Workflow 2: Trigger Deal Creation

A second workflow monitors the Form Submission Count threshold. When a contact's total submissions exceed three, the system identifies them as a high-intent prospect and...

✓ Workflow 1: Track Submissions

A workflow was configured to trigger every time a contact submits any form on the website. Each submission automatically increments the Form Submission Count by one...

✓ Automated Marketing-to-Sales Handoff

By connecting behavioral signals directly to deal creation, the solution provides a seamless, structured handoff from marketing activity to sales action. Sales...

MEASURABLE RESULTS

50%

High-Intent Leads Identified

42%

Faster Sales Response Time

62%

Reduction in Manual Monitoring

43%

More Qualified Opportunities

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.

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