

CUSTOMER STORY · SAAS

U.S. Tech Company

100%

Marketing-to-sales data flow automated

A U.S. based asset tracking and identification company was running HubSpot for marketing and Salesforce for sales with no structured connection between the two. Marketing activity had no reliable path into Salesforce, and sales teams lacked visibility into live engagement data. INSIDEA implemented...

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 company in the asset tracking and identification space had built its operations around two best-in-class tools: HubSpot for marketing and Salesforce for sales. Both platforms were strong individually. The problem was that they operated in complete isolation. Marketing campaigns, form submissions, lifecycle stage changes, and engagement signals generated in HubSpot had no path into Salesforce. Sales reps...

WHAT INSIDEA BUILT HubSpot Services / CRM Integration

✓ Native HubSpot-Salesforce Integration Setup

INSIDEA implemented the native HubSpot-Salesforce connector, providing a stable and officially supported foundation. The integration was configured with precision...

✓ Automated Marketing Update Triggers

HubSpot Workflows were configured to automatically push property updates to Salesforce whenever a marketing-driven change occurred. When a contact filled out a form...

✓ Selective Two-Way Sync Configuration

A defined set of critical properties was scoped for synchronization. For each property, a source of truth was established: HubSpot owned and pushed marketing data...

✓ HubSpot Marketing Hub Onboarding and Ongoing Support

Alongside the integration, HubSpot Marketing Hub was fully onboarded and configured, including email campaigns, lead capture forms, nurturing workflows, and lifecycle...

MEASURABLE RESULTS

100%

Marketing-to-sales data flow automated

Zero

Manual data transfers between platforms

Real-time

Marketing updates visible in Salesforce

Ongoing

Active support and optimization engagement

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 →