

CUSTOMER STORY · MANUFACTURING

IPS Group

100%

Lead routing accuracy

IPS Group, a leader in innovative parking solutions, was running sales on Zoho, Word, and Google Docs. Leads were scattered, RFQs were manual, and Regional Sales Directors had no clean lane to work in. INSIDEA rolled up its sleeves and built a HubSpot Sales Hub ecosystem that turned chaos into...

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

IPS Group's sales motion was scattered across Zoho, Word, and Google Docs. Creating and managing documents, quotes, and leads felt like running in circles. Without integration, workflows lacked structure, and standardizing tasks across teams was difficult. From creating RFQs to managing leads, the team spent hours on repetitive, manual work that should have been automated. The process for assigning leads to Regional...

WHAT INSIDEA BUILT CRM & Platforms (HubSpot Sales Hub) + RevOps

✓ Lead routing rules

Auto-assignment to the right Regional Sales Director based on city or region. Every lead landed precisely where it needed to go, with no manual triage from leadership.

✓ Customized sales pipelines

Pipeline stages mapped to the actual IPS sales motion. Every opportunity tracked from first contact to closure, with full visibility for the team and leadership.

✓ Privacy-aware permissions

RSDs given access only to their assigned leads. Administrators retained complete oversight. The cross-region visibility issue solved at the role level.

✓ RFQ + quote automation

Custom properties powered tailored, professional documents in a single click. E-signatures eliminated the back-and-forth approval emails.

✓ Third-party lead integration

New leads flowed seamlessly into HubSpot from external sources. Automated workflows handled enrichment, assignment, and follow-up so reps could focus on closing.

✓ Real-time dashboards

Leadership view of tasks, calls, meetings, and pipeline health by day, week, month, and quarter. Decisions backed by live data instead of stitched-together spreadsheets.

MEASURABLE RESULTS

100%

Lead routing accuracy. Auto-assigned to RSDs by city or region

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Cross-region leakage. Privacy-aware permissions per RSD

Single click

RFQ generation. Custom properties + e-signatures

Real-time

Pipeline visibility. Daily, weekly, monthly, quarterly dashboards

"Leads flowed smoothly, tasks were manageable, and progress was measurable. Chaos turned into clarity."

IPS Group

Stack: HubSpot Sales Hub · Custom Properties · Workflows · E-signatures · Third-party Lead Integration · Custom Dashboards

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 →](#)