INSIDEA

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

CUSTOMER STORY · SAAS

Promptly

$29.41M
Pipeline on HubSpot Enterprise

Promptly was running marketing on Mailchimp and sales on Apptivo, with reporting stitched together by hand. The data was fragmented. The cost was high. The visibility wasn't there. INSIDEA migrated everything into HubSpot Enterprise Hubs. The result: $29.41M in deal pipeline value and 238% growth...

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

Promptly relied on Mailchimp for marketing and Apptivo for sales. Both worked in isolation. Operational costs climbed for redundant features and tools that didn't communicate. Marketing and sales lived in separate silos, making it hard to track leads or generate meaningful insight. Lead routing, deal assignments, and campaign segmentation were done manually. Reporting was poor, blinding teams to pipeline performance...

WHAT INSIDEA BUILT

CRM & Platforms (HubSpot Enterprise) + RevOps + Growth Marketing

- ✓ **Consolidation under HubSpot Enterprise**
  Mailchimp and Apptivo retired. Customer records, deals, and pipelines migrated into HubSpot Enterprise Hubs with no data loss or service disruption. Promptly managed...
- ✓ **Lead routing automation**
  Custom workflows automatically assigned leads to the correct sales director by region. Hours of manual triage saved every week, and lead response time tightened...
- ✓ **Data sync and dedup**
  Deals, contacts, and companies kept consistent automatically. Duplication eliminated. The team stopped reconciling records and started acting on them.
- ✓ **Lifecycle nurture sequences**
  Tailored sequences engaged prospects and kept them moving through the funnel. Marketing finally had infrastructure that matched the size of the audience it was talking...
- ✓ **Real-time custom dashboards**
  Pipeline performance, sales and marketing KPIs, and engagement metrics surfaced live. Instead of stitching reports across tools, teams accessed everything in one HubSpot...
- ✓ **Hands-on team enablement**
  Sequences, templates, snippets, and best practices delivered through structured training. The platform only delivers if the team uses it well, so we made sure they did.

MEASURABLE RESULTS

$29.41M
Deal pipeline value. Generated through unified HubSpot system

+238%
Email engagement growth. Across nurture and lifecycle campaigns

2
Tools retired. Mailchimp and Apptivo, with zero data loss

1
Source of truth. All hubs, all customer data, in HubSpot Enterprise

> "HubSpot Enterprise Hubs changed everything. We consolidated systems, automated the manual work, and finally made decisions on real data."
>
> Promptly

Stack: HubSpot Marketing Hub Enterprise · HubSpot Sales Hub Enterprise · HubSpot Service Hub Enterprise · Workflows · Lifecycle Sequences · 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 →