

# Syncing HubSpot + External Data for Insights and Marketing ROI

## The Challenge

Manually tracking key sales data made it difficult for the client to measure ROI accurately. They struggled with:

- **Time-consuming data entry** – Sales teams had to manually input tour and deal data into Google Sheets, adding unnecessary workload.
- **Inconsistent reporting** – Manually entered data led to errors and delays, making it harder to get an accurate view of performance.
- **Limited insight into marketing ROI** – Without automated tracking, the client couldn't easily tie sales activity to ad spend and other key metrics.

## The Solution

We automated the process of sending deal data from HubSpot to Google Sheets. Now, every time a deal is updated, it's pushed into Google Sheets, where formulas transform the data into a clear, structured report. The client can instantly see tours scheduled, tours attended, and deals won—filtered by location, membership type, and more—without manual work.

## The Impact

- Eliminated manual data entry, saving the team significant time
- Improved accuracy and consistency of reporting with real-time updates
- Provided clear insights into cost per tour, cost per member, and marketing ROI
- Enabled better decision-making by giving leadership instant access to sales performance data

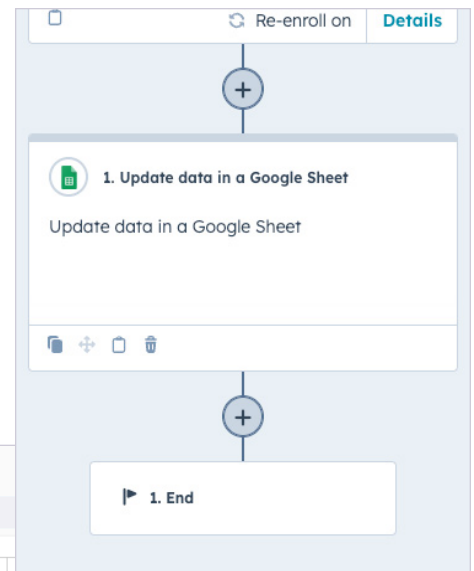
## The Details

**Industry:**  
Coworking & Office Space

**Business Area:**  
Sales and Reporting

**Tools Used:**

- Google Sheets
- Workflow Integration



		2023												Total/Avg.
		January	February	March	April	May	June	July	August	September	October	November	December	
Revenue (Previous Year)	Weight													\$
Target Revenue		\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
Actual Revenue														
Notes														
<b>New Leads (Total)</b>		0	0	0	0	0	0	0	160	137	115	96	56	564
Office Space		0	0	0	0	0	0	0	90	53	68	54	32	297
Dedicated		0	0	0	0	0	0	0	11	12	6	6	6	41
Open/Flex Desks		0	0	0	0	0	0	0	54	66	39	32	15	206
Event Space		0	0	0	0	0	0	0	2	2	1	2	1	8
Meeting Rooms		0	0	0	0	0	0	0	3	4	1	2	2	12
Virtual Mail		0	0	0	0	0	0	0	0	0	0	0	0	0
<b>New Deals (Total)</b>		0	0	0	0	0	0	0	121	95	83	56	42	397
Office Space		0	0	0	0	0	0	0	67	42	44	35	29	217
Dedicated		0	0	0	0	0	0	0	9	9	5	3	4	30
Open/Flex Desks		0	0	0	0	0	0	0	43	39	32	16	6	136
Event Space		0	0	0	0	0	0	0	0	2	1	1	0	4
Meeting Rooms		0	0	0	0	0	0	0	0	0	0	0	0	0

