Simple Strat

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
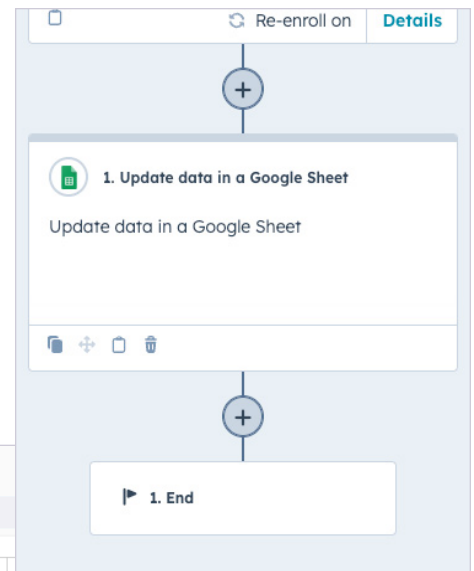- Enabled better decision-making by giving leadership instant access to sales performance data

The Details

Industry:
Coworking & Office Space

Business Area:
Sales and Reporting

Tools Used:
- Google Sheets
  Workflow Integration