Simple Strat

Quoting Automation in HubSpot

The Challenge

The client's existing quote process was a severe bottleneck. Manually creating quotes in Word, uploading them to DocuSign, and forwarding them to clients wasn't just slow—it was a liability.

- Inconsistent quotes
- Delayed responses to customers
- Lack of internal visibility

These problems put deals at risk, threatened revenue, and jeopardized client trust. If the company didn't fix this, they risked losing business.

The Solution

We created a dedicated "quote builder" section in the Overview tab of the deal record, allowing the sales team to input the necessary properties before generating the quote. We then built a custom quote template that populates based on the values of these properties.

- Significantly accelerated quote creation and management directly within HubSpot
- Eliminated reliance on external tools like Word and DocuSign
- Created full visibility for all internal stakeholders throughout the quote process
- Improved consistency and accuracy in the sales process

The Details

Industry:
Marketing Services

Business Area:
Sales

Tools Used:
- HubSpot Quotes
- Overview Tab