

LEAD SHARING SYSTEM RESULTS IN 70 CLOSED DEALS OVER 6 MONTHS —

# Lead Sharing System Across HubSpot Accounts

## The Challenge

The client needed a seamless way to transfer referral leads between two HubSpot portals for partner companies, without duplicating efforts or missing key information. They faced:

- Inefficient manual data entry when sharing leads between portals, leading to wasted time and potential errors
- Disorganized tracking and communication of shared leads, creating confusion between partners
- · Delays in engaging referred leads, slowing down the sales process for both parties

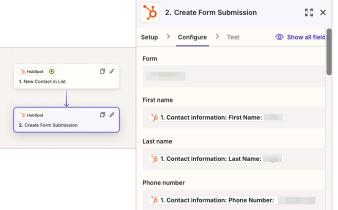
### The Solution

We set up an automated referral system that made lead sharing between partners fast and simple. Using HubSpot and Zapier, we created a way to flag referral leads and automatically send them over to the partner's portal without anyone having to lift a finger. As soon as the lead lands in the partner's system, follow-up workflows kick in, instantly notifying the team so they can jump on it right away. This cuts out all the back-and-forth and keeps both sides focused on closing deals, not managing data.

# The Impact

The client can now:

- Transfer lead information effortlessly from one HubSpot portal to another, requiring only one property update
- Capture, share, and track referral leads with no manual steps, reducing human error
- Drive faster responses from the receiving partner, contributing to 70 closed deals from 164 referrals in just 6 months



# The Details Industry: Legal Services Business Area: Sales Enablement Tools Used: • Zapier • HubSpot Form

Active Lists

Enroll contacts when they meet these filter

**(+)** 

• + ∩ ÷

Custom Properties



