

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
 - Custom Properties

