

# Tracking Referrals in Hubspot: Centralized Management and Reporting

## The Challenge

The client wanted to better understand the performance of their referral program but struggled with static data from their existing platform, Referral Rock. They faced:

- Lack of visibility into referral partner performance, making it difficult to identify top contributors.
- Inability to track the revenue and outcomes tied to specific referral partners.
- A fragmented process, requiring external tools to analyze referral data and communicate with partners.

## The Solution

We built a dynamic referral tracking system within HubSpot. This connected referral partner records with the users they referred, enabling visual cues on contact records and aggregated data on partner performance. Reporting and partner communications now happen seamlessly within HubSpot.

## The Impact

Thanks to this custom referral setup, the client can now:

- Clearly see which referral partners drive the most referrals, trials, and revenue.
- Run accurate, data-driven reports to evaluate program success without relying on external platforms.
- Centralize all referral reporting and partner communications within HubSpot, reducing complexity and manual effort.

### The Details

**Industry:**  
SaaS

**Business Area:**  
Sales and Partnerships

**Tools Used:**

- Rollup Properties
- Association Steps in Workflows

First Time: Number of Referrals Given by Top Referrer				
RECORD ID - CONTACTS (REFERRED BY)	REFERRALS GIVEN	REFERRALS GIVEN THAT ARE IN TRIAL	REFERRALS GIVEN THAT BECAME PAYING CUSTOMERS	REFERRAL REVENUE
John	1	0	1	149
Amy	1	0	1	149
Travis	1	0	1	149
Jessica				
Matthew				
Kurt				
Kim				

  

Recurring: Number of Referrals Given by Top Referrer				
RECORD ID - CONTACTS	REFERRALS GIVEN	REFERRALS GIVEN THAT ARE IN TRIAL	REFERRALS GIVEN THAT BECAME PAYING CUSTOMERS	REFERRAL REVENUE
Anish	29	1	0	(No value)
Ramiro	17	0	0	(No value)
Jude	12	0	0	(No value)
Mike	7	0	0	(No value)

