

How a Property Tech Company Fixed HubSpot to Increase Adoption and Streamline Sales

Many organizations face operational challenges as they grow on the HubSpot platform. For property tech platform HomeViews, these challenges were beginning to affect their ability to execute, communication around goals, and ultimately grow their results.

They were seeking a HubSpot Services Provider and team that could help them remedy these issues and get their HubSpot to work harder for them.

The Problems:

- Disorganized sales pipeline
- Difficulties in segmenting contacts for targeted marketing
- Low internal adoption of the technology
- Not getting the full ROI of a tool they'd already paid for

These issues ultimately hindered accurate reporting and efficient marketing campaigns, leading to manual, error-prone processes.

The Solution:

- HomeViews partnered with Simple Strat for the "Fix My HubSpot" service. This included a HubSpot portal audit, a Buyer's Journey Workshop, and the implementation of specific recommendations.

The Results:

- ✓ Corrected lifecycle stages
- ✓ Buy-in around a documented buyer journey and data structure
- ✓ Clear contact segmentation practices
- ✓ Improved content distribution efficiency
- ✓ Enhanced and clean reporting for data-driven decisions
- ✓ Increased team engagement and adoption of HubSpot



CLIENT

HomeViews | homeviews.com

HomeViews is a property technology platform that empowers consumers and developers to make more informed home purchase decisions through resident reviews. They aim to revolutionize the way people choose their new-build homes by providing transparent and reliable resident feedback from people who live there.

INDUSTRY

Property Tech

SERVICES UTILIZED

Fix My HubSpot

- HubSpot Portal Audit
- Buyer's Journey Workshop
- Portal Work and Updates

METRICS

- ▼ **89% Decrease in Duplicate Contacts After the Audit**
- ▼ **66% Less Stale Deals (Deals with No Activity in the Last 30 Days)**

A Deeper Look

HomeViews was not new to HubSpot, but they were facing operational inefficiencies that were creating challenges for their business.

For example, their pipeline was in disarray. Many HubSpot automations had been set up without following best practices of the platform. This lack of control over deals made it nearly impossible to generate accurate reports, affecting strategic decision-making.

Additionally, they had difficulty segmenting contacts for targeted marketing. This bottleneck made it a huge task to get the right content to the right people, leading to inefficiencies in their marketing campaigns.

Because of these challenges and the complexity of the current setup, team members were hesitant to utilize this tool they were already investing in, leading to wasted resources and slowed organizational growth.

Why HomeViews Chose Simple Strat

HomeViews decided to partner with Simple Strat for the **“Fix My HubSpot”** service, which includes an all-in-one package with three key components: an audit of the HubSpot portal, a Buyer’s Journey Workshop, and a set of implementation hours dedicated to acting on the findings and recommendations. They were eager to take advantage of the depth Simple Strat’s expertise and their flexible approach to problem-solving.

From the client’s perspective, Tolley appreciated Simple Strat’s flexibility, with options for *“getting the advice we needed and doing things ourselves, or just having them fix it for us.”*

From the outset, Simple Strat spotted significant opportunities to make improvements. ***“The first win for us was actually identifying that we had lifecycle stages completely wrong,” says Tolley.*** This immediately boosted HomeViews’ confidence in the firm.

The partnership significantly increased efficiency in content distribution too, solving a major bottleneck. *“We’re now quicker to get content out to the right people,”* adds Tolley. The collaboration improved overall processes and reporting, enabling data-driven decision-making. Moreover, it turned HomeViews team members into HubSpot advocates as they began to get more value from it.

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Trying to create a subscriber list or a lead list was virtually impossible.

We couldn’t properly communicate with our prospects without having a handle on who they were and what stage of the lifecycle they were in. It became very manual, which was really time consuming and led to errors.

– Grace Tolley

“

Our deals were out of control.

We really couldn’t get a handle on what was going on in our pipeline.

– Grace Tolley

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I really enjoyed the Buyer’s Journey Workshop; that was a real highlight for me.

It was great to create a piece of documentation and get an understanding that we can now circulate around the team. It has changed our company’s approach to sales and marketing, so that’s really been fundamental.

– Grace Tolley

Looking at What's Next

HomeViews plans to continue their partnership with Simple Strat to further optimize operations. With a more organized pipeline, the team is keen to set up dashboards that will provide actionable insights for more confident decision-making. They aim to optimize their landing pages to improve user experience and conversion rates and refine their workflows. This ongoing collaboration aims to scale their newly streamlined operations, driving further efficiency and growth.

The Client Perspective

"Simple Strat is an all-around advisor on HubSpot, so they're someone you want when you need fully fledged advice: like figuring out where to start when you need strategy and implementation. On the other hand, they can also just be a friendly help if you have a quick question and you don't want to break something. So, they offer both in-depth assistance for fundamentally transforming your use of HubSpot, and quick, reassuring support for minor questions."

HomeViews highly recommends Simple Strat for its transformative Buyer's Journey Workshop and flexible implementation options.

"Simple Strat has been really great to work with. We look forward to our calls with them," says Tolley.

She advises potential clients to discuss their challenges openly, emphasizing that solutions can be incremental and don't have to be massive overhauls. *"If you're struggling with HubSpot, there are definitely answers out there,"* she adds. Grace credits Simple Strat with making HubSpot exciting for her team and delivering real results through an effective process.

"It's a formulated process and you get real results from it, I highly recommend it."



Grace Tolley

Director of Product, HomeViews

Whether you're looking for Fix My HubSpot services, purchasing assistance, onboarding guidance, or custom consulting, Simple Strat is here to help.