

AWIDLY | APAC

Professional Services Case Study

Building Growth for Professional Services Firms



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Our Expertise

Building Growth for Professional Services Firms

Across Australia and New Zealand, professional services firms- legal, accounting, consulting, engineering, and advisory practices- face a familiar challenge. They have deep expertise and hard-won client trust, but decentralised information, complex client lifecycles, and growing pressure on tech, marketing, and client services teams to prove value with data.

We've supported a broad mix of firms in this space, from mid-sized advisory practices and accounting groups to legal and engineering firms, helping them modernise their client-acquisition, conversion, and retention.

What unites these organisations is the complexity of how trust translates into growth. Referrals and reputation still drive much of the pipeline. Still, partners and consultants are stretched thin, knowledge lives in inboxes and individual heads rather than shared systems, and marketing is often seen as a support function rather than a growth lever.

At Avidly APAC, we help professional services organisations strengthen their digital foundations, protect institutional client knowledge, and connect business development, client service, and delivery teams into a single, measurable growth engine.

The Challenge

For professional services firms, new business is rarely won on the strength of a single pitch. It depends on having the right systems, knowledge management, and reporting in place to support long, relationship-led client journeys and competitive bid processes.

Organisations in this industry face the following hurdles:

Marketing Challenges

- **Market Intelligence Capture:** Difficulty capturing and leveraging market intelligence to sharpen competitive positioning and stay ahead of evolving client needs and industry trends.
- **Decision-Making Visibility:** A lack of integrated, real-time reporting and analytics, making it harder for leadership to make fast, informed strategic decisions.
- **Consistent Client Experience:** Maintaining a consistent approach to client relationships across every location and sector, so every department adheres to the same high standards.

Client Services Challenges

- **Decentralised Customer Information:** Client and prospect information scattered across practice areas, locations, and disconnected systems, with no single source of truth.
- **Complex Selling Cycles & Bid Criteria:** Long, multi-stakeholder pursuits governed by detailed bid and tender criteria that are difficult to track and easy to lose visibility of.
- **Relationship Knowledge Continuity:** Critical client relationship knowledge often sits with individual partners or consultants, putting continuity at risk whenever personnel changes.



Operational & Technological Challenges

- **Manual Process Overload:** Heavy reliance on manual effort across multiple disparate systems, wasting time and increasing the risk of errors.
- **Large-Scale Document Management:** Large volumes of complex documents, contracts, proposals, and reports that are time-consuming to produce and prone to manual error.
- **Data Security & Continuity:** Securing critical client data to protect the continuity and integrity of relationship knowledge, even as personnel and teams change.
- **Siloed, Disconnected Systems:** Multiple disparate platforms that duplicate effort and obscure the full picture of a client relationship or engagement.

For firms managing complex client relationships, competitive bid processes, or large-scale advisory engagements, the need for clarity, consistency, and control is even greater.



The resulting customer experience

When all these challenges are present, clients don't see the internal cause of any of them; they just feel the effect. From the outside, all these challenges add up to, at best, an inconsistent experience.

They get a different quality of service depending on who they happen to be dealing with, and they find themselves repeating things they've already explained, sometimes more than once, depending on who picks up the conversation.

Files, documentation of key decisions, and other key information are hard to get hold of when they need them, often meaning a request back to the firm just to find something that should already be in their hands.

It's not clear where time is being spent or what they're actually paying for, and progress on their own work is often just as unclear, they're left guessing at where things stand rather than seeing it for themselves.

On top of that, marketing or customer service communications land at inopportune times, out of step with where they actually are in the relationship or the work.

The result: a relationship that feels harder to see into and keep track of than it should, no matter how long they've been a client.



The industry work we've done

The following section is where we'll showcase how we've helped professional services firms, legal, accounting, consulting, engineering, and advisory businesses overcome fragmented systems and manual processes to build scalable, relationship-led growth engines.

Critical Insight: For relationship-led industries, the most significant impact comes from moving beyond basic contact management. Our focus is on building a "single source of truth" ecosystem that protects institutional client knowledge, automates manual admin, and gives leadership real-time visibility across every engagement.

Leading National Law Firm: From Fragmented Systems To A Single Source of Truth

The Goal:

Deliver a single, unified platform to support the firm across Business Development, Marketing, Events, and Practitioner engagement, enhancing visibility, relationships, and firm reputation.

The Challenge:

Data fragmentation and a siloed, legacy environment relying on a legacy relationship-management CRM, a separate marketing engagement platform, and an array of spreadsheets and shared drives to manage bids.

The Solution & Impact:

Replaced disparate legacy platforms with a centralised HubSpot hub. Key deliverables included:

- **Centralised CRM:** A single system of record for contacts, relationship intelligence, and pipeline management across the firm.
- **Custom Object Architectures:** Surfaced view-only practice-management data by building custom HubSpot objects for client and matter records to automatically resolve company and client associations.
- **Relationship Intelligence & Scoring:** Deployed a custom "Relationship Score" object triggered by contact association labels to track cross-firm connection strength based on interaction volume.
- **CMS Events App:** Replaced a legacy events platform with a flexible, CMS-based event management system supporting personalised event invitations sent on behalf of Partners.

This digital transformation focused on massive architectural consolidation, simplifying technology workflows to enable faster speed to market, enhanced business intelligence, and a 360-degree view of prospect and client activity. The rollout scaled user enablement across two primary phases, successfully moving the core Clients & Markets teams onto full seats while equipping hundreds of partners and lawyers with tailored access for seamless, scale-based email and relationship tracking.



Law Firm: Scaling Claimant Communications With AI-Enabled Triage

The Goal:

Deliver a scalable, high-velocity inbound enquiry management system for a class actions department to protect strict duty-of-care obligations, expand paralegal bandwidth, and manage surging volumes of claimant emails securely.

The Challenge:

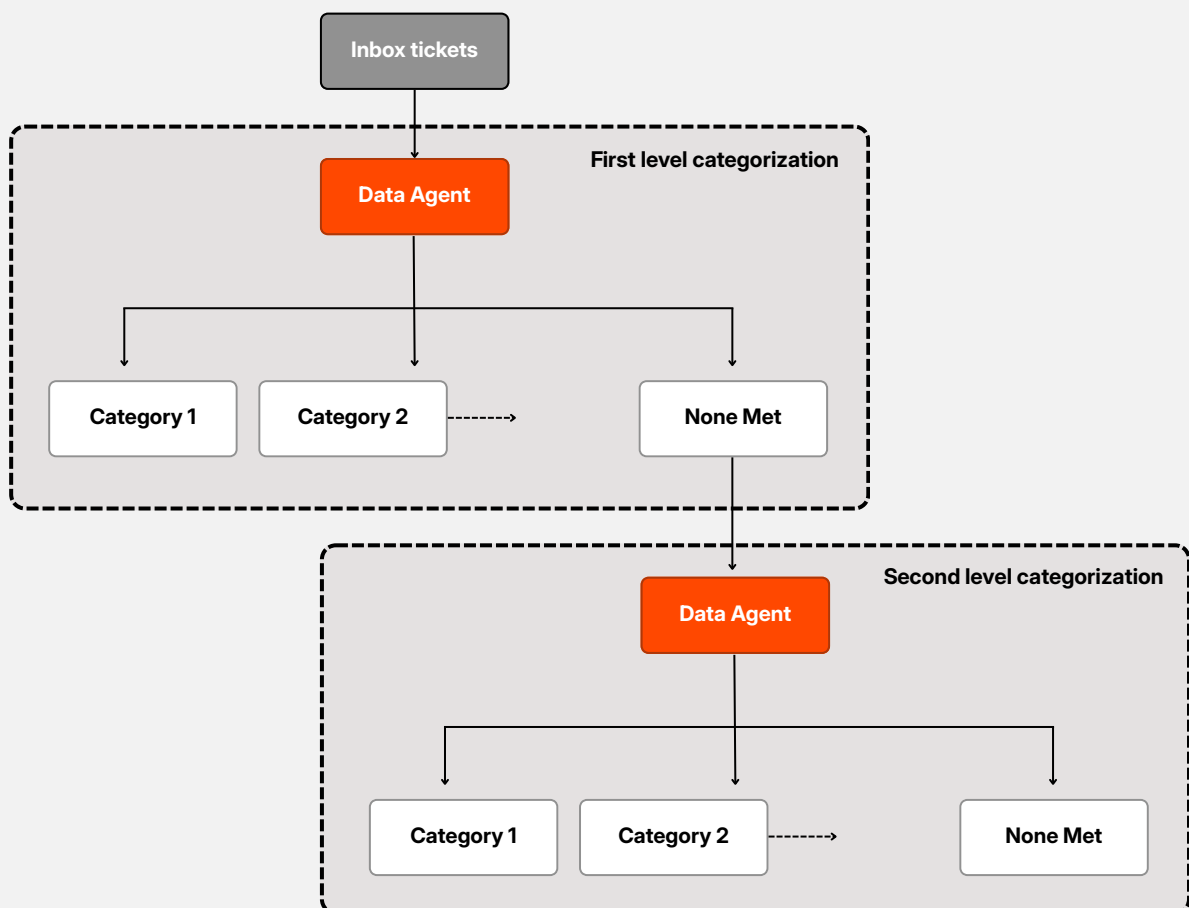
Critical claimant communications were trapped in a flat, unstructured Outlook inbox, overwhelming a 20-person legal team. The legacy process required up to an hour daily per staff member just for manual folder sorting, with response times varying from minutes for routine updates to 10+ minutes for complex enquiries requiring backend data checks and custom drafting.

The Solution & Impact:

Migrated the client's high-volume Outlook inbox directly into a centralised HubSpot Help Desk environment, establishing a secure ingestion layer. Key deliverables included:

- **Multi-Tier Waterfall Orchestration:** Engineered a cascading workflow powered by specialised AI data agents, dynamically evaluating incoming tickets against a comprehensive, machine-readable prompt hierarchy to extract critical parameters and contextualise highly variable legal correspondence.
- **Tri-Track Routing Logic:** Programmed a structured delivery funnel directing incoming messages into three distinct execution paths: Auto-Response for standard administrative queries, Human-in-the-Loop (HITL) tracks for AI-drafted recommendations requiring paralegal approval, or immediate Human-Only priority overrides for sensitive disclosures.

- **Validation & Data Integrity:** Normalised and aligned over 2,100 historical tickets to a new custom category model, introducing backend sync logic that automatically updates overarching "Super Category" groupings when manual adjustments are made by the legal team.
- **Controlled Risk:** Maintained strict legal compliance by strictly separating high-confidence automated categorisation from complex edge cases, achieving a verified accuracy rate of 68.72% across initial AI categorisations through rigorous automated testing.
- **Frontline Empowerment:** The legal department shifted from reactive administrative triage to proactive client advocacy, allowing legal professionals to focus on high-value casework rather than manual data entry.



This digital transformation effectively doubled the operational bandwidth of the paralegal team while ensuring high-risk crisis disclosures are surfaced immediately. By replacing reactive administrative sorting with automated Service Ops architecture, the firm has achieved sustainable scalability to absorb massive, multi-active class actions without expanding headcount.

National Recruitment Consultants: Seamless Website Launch & Domain Migration

The Goal:

Support the client with launching its new website smoothly, managing domain and DNS updates, and resolving HubSpot-related questions.

The Challenge:

The project involved technical coordination across website domains, DNS records, redirects, and post-launch issues. The client needed support navigating launch timing, validating infrastructure changes, and understanding unexpected front-end behaviour such as a HubSpot icon appearing on the site and temporary non-secure warnings.

The Solution & Impact:

Delivered practical launch and post-launch support to help the client complete its website transition and troubleshoot follow-up issues. Key deliverables included:

- **Domain Cutover Coordination:** Worked with the client and external technical partners to plan and coordinate the timing of the website go-live and domain transition.
- **DNS & Redirect Management:** Provided the required DNS record details for hosting and redirects, then supported validation once the public DNS changes were made.
- **Launch Assurance & Technical Validation:** Investigated DNS-related concerns, confirmed when no further action was needed, and helped the client close out the project with confidence once the site was looking correct.

- **Front-End Troubleshooting:** Resolved questions around a platform icon appearing on the home page by explaining that it was only visible to authenticated portal users, and that the temporary non-secure warning should resolve after propagation.
- **Ongoing Technical Triage:** Responded to a later request involving a domain redirect to an external platform, clarified the limits of platform-side support, and directed the client toward the appropriate external IT partner.



This engagement focused on website launch support, DNS coordination, and platform-adjacent troubleshooting rather than a full CRM transformation. The visible outcome was a completed go-live process, resolved client concerns, and a project that moved through launch support into follow-up assistance.

Media & PR Platform: HubSpot CRM, CMS & Service Hub Transformation

The Goal:

Deliver an integrated, scalable systems ecosystem that aligns sales, service, and marketing infrastructure while dramatically enhancing the brand and customer experience through a highly optimised web and CRM platform.

The Challenge:

The organisation required a comprehensive digital transformation to move away from disconnected legacy models. Operational workflows needed stronger internal process efficiencies, structured customer journey tracking, and a robust platform capable of handling multi-region tool management across two countries.

The Solution & Impact:

Consolidated disparate, fragmented operations into a centralised, high-performance HubSpot architecture across multiple targeted project phases. Key deliverables included:

- **CMS Web Replatforming:** Migrated and rebuilt the core digital presence onto HubSpot CMS, implementing an advanced custom API integration to handle live, high-volume data feeds from a third-party news distribution service.
- **Automated Subscription Synchronisation:** Engineered a dedicated, custom one-way billing data integration with a subscription billing platform, constructing automated line-item mapping, robust back-end error handling, and sandbox-to-production deployment pipelines.

- **Service Hub & Data Cleanse Architecture:** Implemented full HubSpot Service Hub toolsets to empower teams with structured customer service pipelines, alongside a targeted automated data cleanse campaign featuring automated lead capture and sequential workflow routing.
- **Advanced Reporting & Control Frameworks:** Deployed comprehensive business intelligence structures, including multiple macro dashboards and dozens of custom reports to monitor live subscription analytics and customer engagement metrics.



This digital transformation has successfully eliminated reactive administrative siloes, replacing them with automated RevOps structures and integrated data streams. By replacing fragmented configurations with a clean, unified HubSpot ecosystem, the organisation has achieved the sustainable scalability required to optimise internal bandwidth and elevate the customer experience.

Large National Architecture Practice: Protecting Institutional Knowledge & Unifying Client Relationships

The Goal:

Deliver a multi-channel Sales & Marketing platform providing a unified view of the firm's clients and automating manual processes, while establishing a scalable digital ecosystem to support continuous optimisation, long-term business expansion, and standardised relationship management across all regional offices and sectors.

The Challenge:

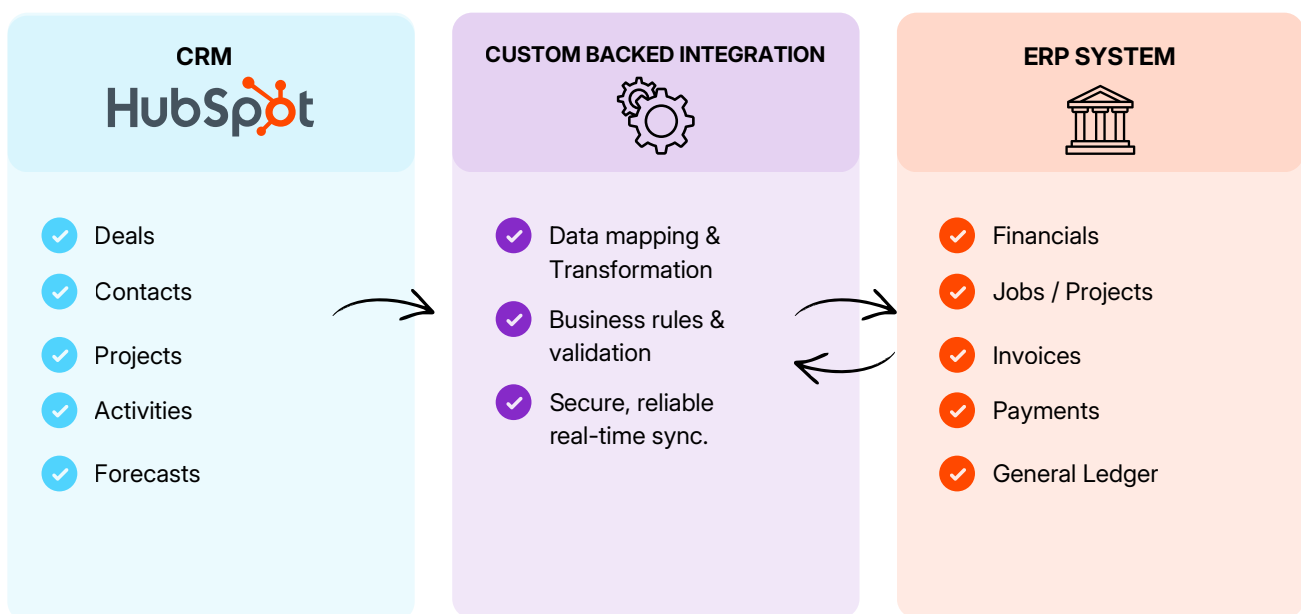
The firm faced disparate data silos and fragmented tracking of strategic pursuits across a legacy CRM, an ERP platform, and offline spreadsheets. Crucial relationship intelligence remained isolated in individual senior staff members' personal records, creating a significant risk of intellectual property loss during personnel transitions. The lack of standardised client engagement tools across distinct business divisions also led to operational inefficiencies and inconsistent practices between studios.

The Solution & Impact:

Consolidated siloed communications and business operations into a high-performance HubSpot ecosystem across multiple strategic workstreams. Key deliverables included:

- **HubSpot CRM & Core Platform Setup:** Tailored the master HubSpot configuration across multiple modules, connecting core communication channels, setting up advanced lead-capture automations, and implementing tracking frameworks to unify business unit setups.
- **Workflow Reliability & Deal Logic:** Resolved sub-deal creation issues, refined numbering logic, and validated workflow behaviour for specialised deal variations to ensure more dependable operational execution.

- **ERP System Integration:** Engineered a custom backend integration linking the CRM with the firm's ERP system, eliminating repetitive manual administrative tasks and establishing centralised data handling for real-time forecasting and financial reporting.
- **Panel Reporting & Notification Architecture:** Advanced requirements for panel arrangement tracking, sector-leader workflow updates, discipline-based deal notifications, and reporting visibility across key relationship structures.
- **Enterprise Data Migration:** Conducted structured data discovery and execution to securely transition historical client relationship databases and contact matrices from legacy systems into the new CRM.



This engagement demonstrates how a complex professional services environment can be strengthened through workflow engineering, CRM architecture, governance, and systems integration rather than isolated support fixes. By replacing fragmented configurations with a unified CRM ecosystem, the firm achieved the sustainable scalability required to optimise internal bandwidth, protect institutional knowledge, and elevate the client experience.

Professional Services Firm: One Platform Across The Full Customer Lifecycle

The Goal:

Deliver a single, unified platform to support the firm across Sales, Service, Marketing, and Operations, enhancing customer visibility, business intelligence, and growth alignment.

The Challenge:

Data fragmentation and a siloed, legacy environment relying on a legacy CRM, an accounting platform, and an internal product database for customer data, with fragmented form and website workflows and attribution gaps between a legacy content management platform and the new CRM.

The Solution & Impact:

Replaced disparate legacy platforms with a centralised HubSpot hub. Key deliverables included:

- **Centralised CRM:** A single system of record for contacts, pipeline, service cases, and marketing activity across the firm.
- **Telemetry & Custom Event Tracking:** Built custom event tracking to log product telemetry and feature usage directly against contacts and companies for reporting.
- **Predictive Lead & Opportunity Scoring:** Deployed AI-powered scoring models at the contact and deal level to automatically gauge close probability based on historical data.

- **CMS Migration:** Replaced the legacy content management platform's sign-up experience with a native HubSpot CMS build, streamlining forms and improving integration with the marketing toolset.
- **Production Support & Controlled Release Management:** Resolved a critical sign-up form issue by coordinating a fix across sandbox and production environments, validating in test, deploying to live, and confirming successful closure.



This digital transformation focused on architectural consolidation across the full customer lifecycle, from Awareness through Loyalty, simplifying technology workflows to enable faster speed to market, enhanced business intelligence, and a 360-degree view of customer activity. The rollout scaled user enablement through a phased deployment, using "Train the Trainer" programs and cutover optimisation to ensure data alignment and long-term system stability.

Technology Services Firm: Building A Scalable Foundation For Acquisition-Led Growth

The Goal:

Modernise sales, marketing, and service operations through HubSpot, establishing it as the front-end system of engagement to provide a unified platform, improved visibility, and reduced manual effort.

The Challenge:

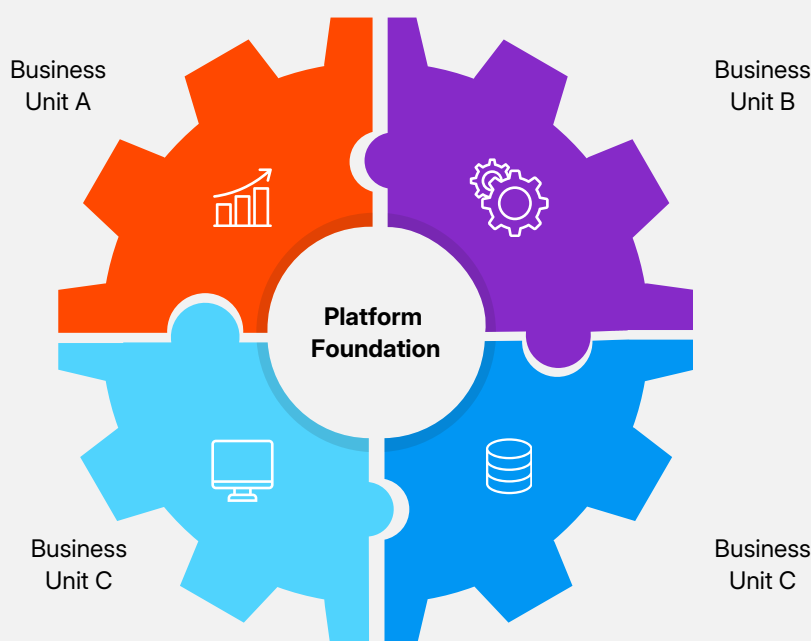
Significant operational complexity, multiple customer relationships, and inconsistent commercial processes resulting from rapid, acquisition-led growth across numerous business units, compounded by fragmented sales and marketing handoffs, manual lead routing, limited attribution visibility, and rigid pipeline structures in the legacy ERP system.

The Solution & Impact:

Established a robust, phased HubSpot foundation designed to deliver early speed-to-value while carefully managing data integration and quoting complexity. Key deliverables included:

- **Centralised CRM Enablement:** Deployed a production-ready HubSpot Sales and Service hub with configured properties, tailored pipelines, automations, and reporting to drive immediate sales adoption.
- **ERP Integration Architecture:** Implemented an integration between HubSpot and the legacy ERP system, eliminating manual data entry while protecting the ERP as the financial system of record and pricing authority.
- **Marketing-to-Sales Handoff Architecture:** Designed an end-to-end lead-to-close workflow with automated routing, task creation, internal notifications, and clearer ownership across marketing and sales.

- **Pipeline & Methodology Enablement:** Structured the solution around stronger qualification gates, sales-methodology-aligned process controls, and more disciplined deal progression to improve forecast accuracy and consistency.
- **CPQ & Quoting Validation:** Restructured the commercial process via a discovery-led delivery allowance to validate product catalogues and approvals, reducing quoting friction across services, managed services, and hardware sales.



This commercial transformation replaced operational silos with high platform adoption and a single customer view. The phased rollout ensured that crucial baseline CRM, marketing governance, and services quoting were established first, creating a repeatable foundation to smoothly onboard future acquisitions and layer in advanced pricing sophistication.

Government Services Provider: Strengthening Pipeline Visibility & Digital Trust

The Goal:

Empower the business with a single, unified platform to support CRM migration, sales qualification, reporting, website experience, and content engagement, streamlining opportunity qualification, strengthening pipeline visibility, and building digital trust with a specialist, trust-led audience.

The Challenge:

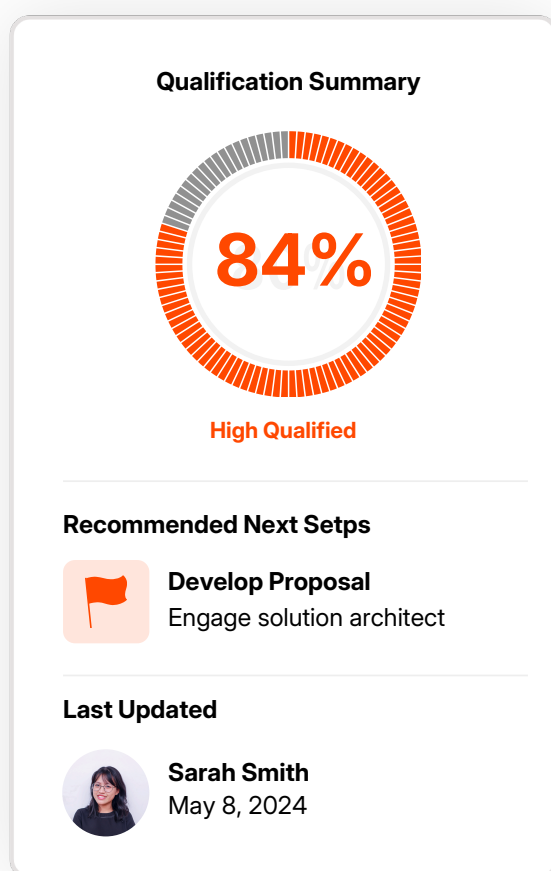
Significant relationship data fragmentation, with critical account information siloed across a legacy CRM, emails, call logs, and individual account managers' own records, making it difficult to track conference interactions and account management activity outside the traditional sales pipeline. The business also needed a digital experience better suited to a government-focused audience, long sales cycles, and trust-led buying journeys, alongside an existing website in need of a strategic refresh rather than a full rebuild.

The Solution & Impact:

Successfully retired the legacy CRM by migrating data and activities into a centralised HubSpot hub. Key deliverables included:

- **Centralised CRM Migration:** Scoped and executed the migration of custom legacy sales processes into HubSpot, including field mapping, data synchronisation, and a refined flagship deal pipeline to support more accurate opportunity qualification.
- **Records Customisation:** Replicated key legacy record configurations directly inside HubSpot to preserve operational familiarity for the sales team during transition.

- **Qualification Assessment Tool:** Rebuilt the sales qualification assessment tool within the CRM environment to standardise deal evaluation.
- **Reporting & Dashboard Frameworks:** Designed tailored dashboards across Overall, Sales Leader, and Sales Rep views to automate activity reporting, improve pipeline visibility, and monitor tool adoption.
- **Website Refresh Strategy:** Scoped a strategic refresh of the existing website focused on modernising design, UX, and content presentation without requiring a full rebuild.



This digital transformation focused on strengthening both the internal CRM operating model and the external digital experience. By aligning legacy-to-HubSpot migration, sales process design, reporting visibility, and a more modern web and content framework, the business gained a clearer path toward better pipeline discipline, stronger sales enablement, and a more compelling digital presence in a specialist, trust-led market.

Our Approach

Our work with professional services clients is centred on building a more connected growth engine inside HubSpot. Depending on the business, that can include:

- HubSpot implementation and optimisation
- Client lifecycle and pipeline management
- Marketing automation
- Bid, tender and proposal support
- Reporting and real-time visibility
- Account management and strategic support
- Knowledge base & document management
- Client & partner portals
- Event & Event Management
- Document Generation

In our client base, many in this segment utilise retained services such as account management, monthly WIPs, and flexi-support, reinforcing that this is not one-size-fits-all delivery but ongoing, practical growth support aligned to business needs.





The Impact & Why It Matters

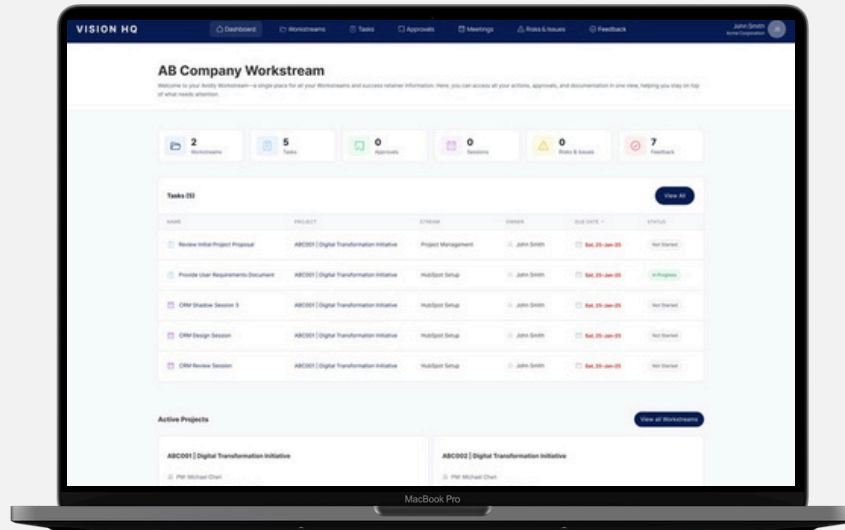
While each client's goals are different, the broader pattern is clear: professional services firms benefit when business development, client service, and operational visibility are brought together in one system. That means helping teams respond faster to opportunities, nurture long relationship cycles effectively, and create a stronger connection between market intelligence and commercial outcomes.

Professional services firms don't just need more contacts; they need protected relationship knowledge and systems that support growth over time.

Whether the client is a private individual, a corporate account, or a government body, the experience has to feel consistent from the first conversation through to delivery.

From legal and accounting practices to consulting and engineering firms, we've seen how the right HubSpot strategy can help professional services leaders modernise their approach without losing the trusted, relationship-led nature of their business.

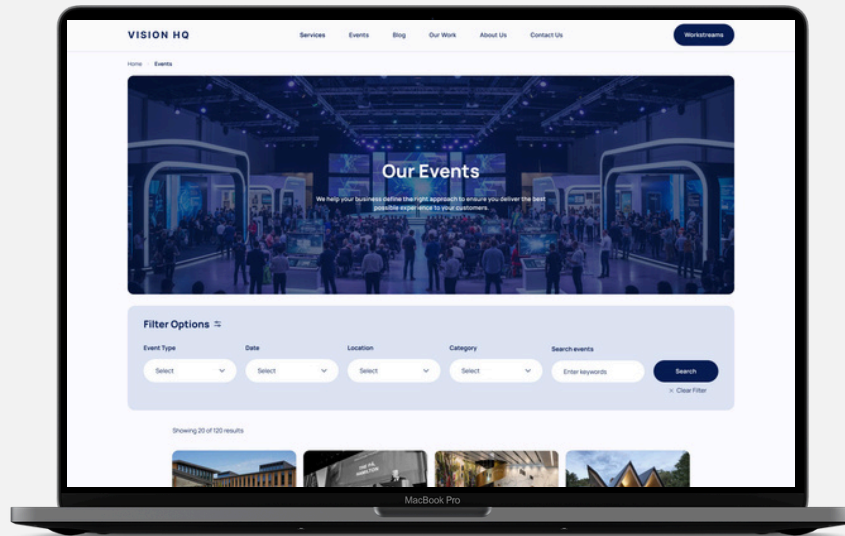
The Solutions We Commonly Use



Client & Partner Portals

A dedicated portal for every active engagement, replacing scattered emails, shared drives, and status-update calls with one place clients go to see exactly where things stand.

- Basic project dashboard (approvals, QA, sign-off stages) move through clear stages, so both your team and the client can see where a piece of work actually sits without chasing an update
- Ongoing maintenance and support requests sit in their own pipeline, separate from active project work, so a quick support ask doesn't get buried behind a longer engagement
- Clients get visibility of upcoming meetings and sessions, so they always know what's next without needing to ask
- Project updates and activity are visible as they happen, cutting down the "just checking in" emails and calls
- Issues and feedback can be logged directly through the portal, giving clients a clear channel instead of a scattered email thread
- Project documentation and information sit in one accessible place, so clients aren't hunting through inboxes for the latest version of something
- Because it's linked to the engagement from the moment a deal closes, the portal reflects real project activity, not a manually maintained status page someone has to remember to update

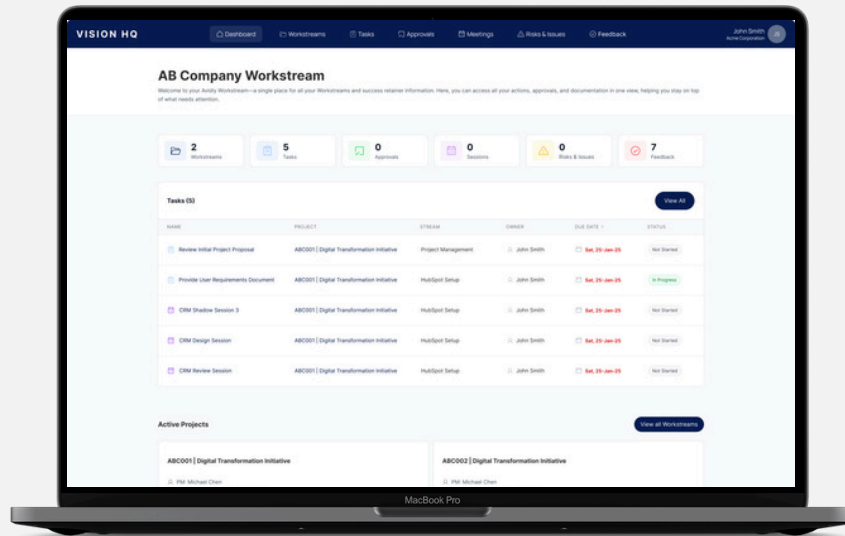


Events

Turns conferences, webinars, lunch & learns, and client evenings into a native part of the CRM instead of a bolt-on tool no one else can see into.

Turns in-person events into a native part of the CRM, instead of a separate tool no one else can see into.

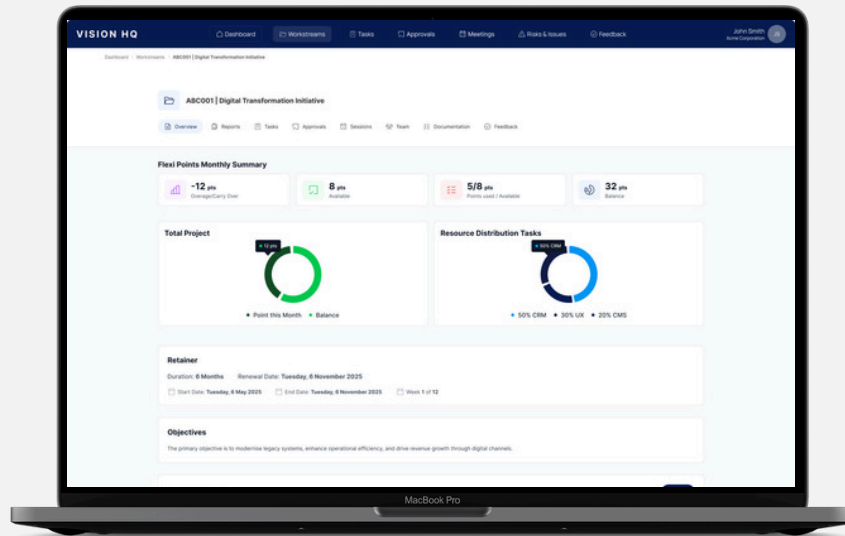
- A fully branded events page and individual event pages, automatically populated with all the details, no manual page-building for every event
- Registration, attendee records, emails, and assets are all centrally managed in one place, not scattered across a separate platform
- Supports ticketed, multi-session, or multi-day events, paid or free, publicly bookable or by exclusive invitation
- No need for a separate events management tool or integrations; it's all handled natively in the CRM



Document Generation

Removes the manual handling between "client said yes" and "engagement actually starts."

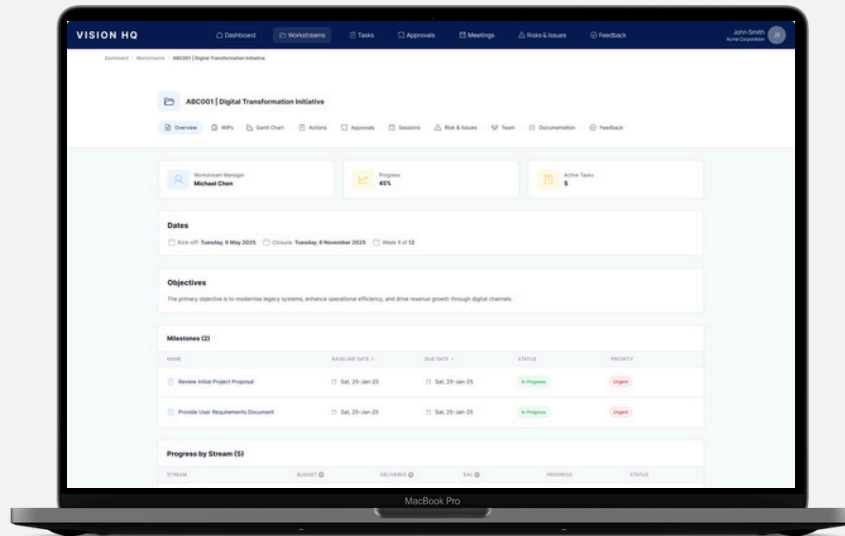
- Sales-side documents, Statements of Work (SoW), proposals, generate automatically the moment a deal reaches the right stage, pre-populated with client and engagement details instead of built from scratch each time
- Onboarding kicks off automatically once a contract's signed: initial meeting booked, kickoff sequence triggered, so there's no gap between "deal won" and "work started" where a client is left wondering what happens next
- Routes straight through DocuSign for signing, no printing, chasing, or manually tracking who's signed and who hasn't
- Reduces the manual re-typing of the same engagement details across the proposal, the SoW, and the kickoff brief, cutting the errors that can come with copying key information every time a document is needed



Recruitment & Operations

Manages recruitment and internal operations processes end to end, so HR isn't stitching together job boards, spreadsheets, and email threads to run something as routine as hiring.

- Post a role once, and it updates across your careers site, job boards, and any connected platforms- no retyping the same ad into three systems every time a requirement changes
- Applications route straight into a recruitment pipeline, so "applied" becomes a tracked, followed-up record within minutes, not a resume sitting in an inbox
- Recruiters get a single pipeline view of stage, interview status, and next action, instead of a spreadsheet next to an inbox next to a job board dashboard
- A new hire's onboarding: parking, local info, company values, what to expect on day one, kicks off automatically the moment they're hired, not crammed into their first morning
- The same structure extends beyond hiring, leave requests, ICT provisioning, and offboarding, to any internal process that currently lives across forms, emails, and someone's memory



Office Check-in

Replaces the sign-in sheet and the "who are they here to see" with a smoother, self-service arrival experience.

- A scheduled meeting in the office automatically triggers an email with parking info, WiFi details, and a unique access link, so the visitor arrives informed and ready for their meeting
- A QR code at each office location lets a visitor check in, or check in someone else, without needing a staff member to register them
- The system remembers your details for next time (name, email, phone, rego); meaning future visits are even easier
- Every check-in creates a ticket in the CRM automatically, so reception, facilities, and the person they're visiting all see the same record instead of a paper log or inbox only individuals can access
- Sign-in info can be sent to a printer to provide your visitors a guest pass if needed
- The host is notified the moment their visitor checks in, removing the "someone's at reception for you" phone call
- Checkout is one tap from the confirmation page, or handled manually at the front desk if the visitor's already left the building



Engage With The Experts

The projects in this case study didn't happen because these businesses had the biggest budgets or the most time. They happened because the right questions were asked early about what the business actually needed, where the friction was, and what a connected system could look like in practice.

Whether you're managing a fragmented tech stack, running manual processes that have outgrown your team, or about to scale and wanting to get the foundations right before you do, that's exactly where we do our best work.

At Avidly APAC, our diverse team brings expertise across every area of the implementation process, from project management, CRM and integrations, all the way to marketing and custom solutions. As HubSpot's 6x APAC Partner of the Year, we've helped over 400 businesses achieve stronger and more efficient ways of working.

We work with businesses that understand the value a well-built CRM can bring, and who are ready to commit to the changes needed to get ahead. If anything in this document reflects where your business is right now, we'd love to have a conversation.

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**Are you ready to make
this your competitive
advantage?**

Let's talk!