

How The Rent Company Streamlined Their Quoting Process and Reduced Costs by Leveraging HubSpot

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The Rent Company is a leading company in digital education that relies on HubSpot as its central CRM system in four different countries. While most of their commercial processes were managed within HubSpot, their quoting and contract creation still depended on PandaDoc. This led to additional steps, a less streamlined workflow, and extra licensing costs.

To improve efficiency, The Rent Company partnered with us as their HubSpot implementation expert. We successfully replicated their entire quoting process within HubSpot, allowing them to eliminate PandaDoc and achieve a fully integrated, more efficient workflow, all of that in about 1 month of time.

Before implementing this solution, The Rent Company used Pandadoc for generating quotes and contracts. Although integrated with HubSpot, this setup posed several challenges:

- ✔ The quoting process was not fully embedded within HubSpot, resulting in duplicated efforts.
- ✔ Customizing quotes required manual input, making the process error-prone and time-consuming.
- ✔ The design and customization options within HubSpot's native quoting tool were limited.
- ✔ Maintaining a separate Pandadoc license incurred unnecessary costs.

The Rent Company needed a solution that would fully integrate their quoting process into HubSpot without sacrificing flexibility or functionality. The quotes tool did not allow for this process to be simply copied and pasted onto HubSpot.

Our team successfully rebuilt the entire quoting and contract workflow within HubSpot, ensuring seamless integration and an improved user experience.

Key improvements included:

- ✓ A fully functional HubSpot-based quoting system, including digital signing capabilities.
- ✓ Advanced configurations using product-line items and custom properties, enabling easy quote customization.
- ✓ Overcoming HubSpot's design limitations with custom-developed solutions.
- ✓ Integration of a dynamic form, allowing team members to input required changes that are represented in the quote.
- ✓ A multi-user approval process, ensuring multiple stakeholders can review and edit the form before final approval and signing.

As a result, The Rent Company now has a fully HubSpot-native quoting process without the constraints of Pandadoc.

“Thanks to the HubSpot solution implemented by Deeply Digital, our quoting process is now more efficient and structured than ever. We save both time and money while offering a better experience to our clients and colleagues.”

Stijn van Heck,
Business Application Manager

The Impact & Results

Transitioning to a HubSpot-based quoting system has delivered significant benefits:

- ✓ **Cost Savings** – Eliminating Pandadoc licenses has reduced operational expenses.
- ✓ **Increased Efficiency** – Quotes are now created, customized, and signed directly within HubSpot.
- ✓ **Improved Collaboration** – Multiple stakeholders can review and contribute before finalizing quotes.
- ✓ **Unified Dashboarding** – By having all of the process in HubSpot, reporting has become easier and more precise.
- ✓ **Enhanced Customer Experience** – Clients can sign quotes digitally in a seamless and user-friendly manner.

Conclusion

By fully integrating their quoting process within HubSpot, The Rent Company has achieved both cost savings and process optimization. This transformation enhances internal efficiency while providing an improved experience for their customers.

Interested in optimizing your sales and quoting processes? Contact us today to explore the possibilities!

[Get in touch](#)

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