



CASE STUDY:

How Integrated Realty Associates Streamlined Real Estate Contract Management with HubSpot and PandaDoc Integration



INDUSTRY

Real Estate

COMPANY PROFILE

Integrated Realty Associates is a Florida-based commercial real estate firm specializing in brokerage and property management, focused on efficient deal execution, managing complex lease agreements, and delivering streamlined, relationship-driven service.

Integrated Realty Associates partnered with Vonazon to implement a **HubSpot and PandaDoc integration** that reduced manual contract work and improved contract accuracy across their real estate operations.

By connecting HubSpot deal data directly to PandaDoc for document generation and e-signature, IRA created a more efficient contract workflow that supported faster deal progression and reduced administrative overhead.





The Situation

Integrated Realty Associates operates in a real estate environment where contract timing and data accuracy directly affect deal velocity and client experience. As a Florida-based brokerage and property management firm, the team relies on consistent execution to move opportunities from negotiation to signed agreement without delay.

HubSpot already supported IRA's sales pipeline, giving visibility into contacts, deals, and activity. However, contract creation and execution existed outside that system.



The team had to move between tools to generate agreements, send documents, and track signatures, which created unnecessary friction in a process that needed to be precise and fast.

As deal activity increased, the disconnect between **HubSpot and PandaDoc workflows** became more visible. Contract data had to be re-entered, verified, and aligned across systems. This introduced risk at a critical stage of the deal lifecycle, where errors or delays could directly impact closing timelines.

THE CHALLENGE

Fragmented Contract Workflow

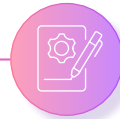
IRA's contract process required information to move manually between systems. Buyer and seller details, lease terms, pricing, and property data all had to be entered and validated multiple times.

This created a workflow where:



01

Data could become inconsistent across systems



02

Contract generation slowed down deal progression



03

Administrative effort increased as deal volume grew

THE CHALLENGE

Accuracy vs Speed Tradeoff

The team was forced to choose between moving quickly and ensuring accuracy. Manual checks were required before contracts could be sent, which slowed execution at the exact moment when momentum mattered most.

Expectation of Full Automation

The goal was not incremental improvement. IRA wanted a workflow where **HubSpot and PandaDoc operated as a connected system**, not separate tools.

“We want PandaDoc to work directly with HubSpot, pulling in all the relevant deal information automatically. No more manual entries or double-checking data.”

Achieving that required aligning how data was structured, stored, and activated across both platforms.

THE SOLUTION

01

Defining the System
of Record

02

Structuring HubSpot
for Contract Data

03

HubSpot to
PandaDoc Data
Mapping

04

Workflow
Alignment with
Deal Progression

01

Defining the System of Record

Vonazon established **HubSpot as the single source of truth** for all deal and contract data. PandaDoc was positioned as the execution layer for document generation and e-signature.

This eliminated ambiguity about where data should live and how it should be used.

02

Structuring HubSpot for Contract Data

HubSpot was configured to capture the specific data required for real estate contracts, including:

- ✓ Lease terms and pricing structures
- ✓ Property details
- ✓ Buyer and seller information

This ensured that deal records were not just tracking progress but storing the exact inputs needed for contract generation.



03

HubSpot to PandaDoc Data Mapping

Vonazon built the connection between **HubSpot deal records and PandaDoc templates** using custom field mapping. This allowed PandaDoc to pull accurate, real-time data directly from HubSpot without requiring duplicate entry.

The result was a workflow where contract documents reflected the latest deal information automatically.



04

Workflow Alignment with Deal Progression

The integration was designed around how deals actually move through HubSpot. As data was entered and updated, it became immediately usable for PandaDoc document creation.

This turned contract generation into a natural extension of the sales process rather than a separate administrative task.

THE RESULTS:

The **HubSpot and PandaDoc integration** enabled Integrated Realty Associates to reduce manual contract work and improve contract accuracy by generating agreements directly from HubSpot deal data and executing them through PandaDoc e-signature workflows.

Operational Efficiency Gains

By removing duplicate data entry and manual validation steps, IRA created a more streamlined contract workflow. The team could move from deal progression to contract execution without switching systems or re-entering information.

Improved Data Accuracy

With **HubSpot and PandaDoc integration**, contract documents are now generated using consistent, centralized data. This reduced discrepancies and ensured that agreements reflect the most current deal details.

Faster Deal Progression

Contract creation no longer slows down the sales process. The team can maintain momentum through closing by generating and sending documents directly from HubSpot.

Scalable Contract Workflow

The integration created a more repeatable process that supports growth. As deal volume increases, IRA can manage contracts without adding proportional administrative overhead.



“If HubSpot can handle the contract creation and signing through PandaDoc, we can significantly reduce the time it takes to close deals.”

Looking to streamline your integrations and reduce contract workflow risk?



Let's map the right HubSpot
and PandaDoc integration
strategy together.



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