

AWIDLY | APAC

Building Scalable Growth for Financial Services Leaders Across APAC

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Building Scalable Growth for Financial Services Leaders Across APAC

Across Australia and New Zealand, financial services institutions, from major mortgage aggregators to specialist strata lenders, face a critical strategic challenge: maintaining deep market trust while being burdened by manual, fragmented operations. While these organisations excel in professional reliability, their growth is often hindered by legacy systems, siloed client data, and the increasing pressure to provide the seamless, digital-first experience that modern clients expect.

At Avidly APAC, we specialise in helping financial services firms modernise their digital foundations. We transform disconnected operations into unified growth engines, ensuring the same level of care found in your financial advice is mirrored in your digital client experience.



The Challenge in Financial Services

For financial institutions, growth rarely comes from a single campaign. It requires a sophisticated ecosystem of systems, automation, and reporting to support a high-stakes, consultative buying journey. Building sustainable growth in this sector requires overcoming a unique set of high-friction hurdles that span the entire client lifecycle.

Marketing & Intake Challenges

- **Qualified Enquiry Conversion:** Difficulty turning high-volume website traffic into high-value, qualified enquiries for lending, investment, insurance, or advisory products.
- **Lead Distribution Complexity:** Managing and routing leads across multiple regions, business lines, specialist teams, and third-party referral or broker networks.
- **Revenue Attribution:** A lack of visibility into which specific marketing channels or educational campaigns are actually driving commercial revenue.
- **Digital Modernisation vs. Trust:** The challenge of modernising the digital experience without compromising the trust built through long-standing offline reputations.

Sales & Service Challenges

- **Siloed Processes and Knowledge:** Critical operational "IP" is often held by only a few power users, advisers, brokers, or relationship managers, creating significant risk and bottlenecks.
- **Funnel Alignment:** Misalignment between advisory, marketing, and client service teams, often lacking a clear funnel with agreed-upon handoffs.
- **Fragmented Customer Data:** Disconnected tech stacks lead to a lack of a single source of truth for client history, balances, policies, and product performance.
- **Lifecycle Tracking:** Difficulty tracking engagement over long lifecycles, making proactive relationship management hit-or-miss.

Operational & Technological Challenges

- **Tangled Legacy Systems:** Many institutions are burdened by over-engineered legacy technology spread across various business units.
- **High Administrative Friction:** Teams spend excessive time reconciling information manually rather than acting on it, such as re-entering data from manual application or claims forms.
- **Specialist Dependency:** A heavy reliance on external developers just to maintain basic platform functions.
- **Document Management Hurdles:** Large requirements for managing and generating complex, compliant documents such as contracts, facility agreements, policy documentation, and Statements of Advice.

The Industry Work We've Done

The following examples demonstrate how we have helped financial services brands across Australia and New Zealand to overcome technical debt and fragmented operations to build scalable growth engines.

Critical Insight

For high-consideration financial products, the most significant impact comes from moving beyond basic lead capture. Our focus is on building a "single source of truth" ecosystem that automates manual admin, resolves information silos, and provides real-time visibility into the entire client lifecycle.

1. Major Australian Mortgage Aggregator

The Goal

Transition from legacy, fragmented systems toward a scalable, data-driven operating model for over 2,500 brokers.

The Challenge

Reliance on manual spreadsheets and siloed tools created high key-person risk and a lack of visibility into the broker lifecycle.

The Solution & Impact

We re-architected HubSpot as an "operating layer" to manage the broker lifecycle and compliance automation. Key deliverables included:

- **Standardised Broker Lifecycle:** Built structured, automated pipelines for Broker Onboarding and Lead Generation.
- **Compliance Automation:** Transitioned from manual registers to auditable HubSpot workflows for Conflict of Interest verifications and Breach/Conduct tracking.
- **Unified Data Architecture:** Established a single broker record aggregating sales, service, and compliance history for a 360-degree view.

This digital transformation replaced manual administrative overhead with a high-performance environment engineered to support complex financial operations. The project delivered a future-proof design that achieved a structured, timestamped audit trail for critical processes, significantly reducing administrative overhead during regulatory reviews.



2. Australia's Leading Strata Lender

The Goal

Build a more scalable digital service model to support complex lending operations and future service innovation.

The Challenge

High-touch, manual processes for loan proposals and facility agreements led to excessive administrative overhead and disconnected client data across multiple platforms.

The Solution & Impact

We shaped HubSpot into a central operating layer connecting marketing, sales, service, and operations. Key deliverables included:

- **Centralised Digital Portal:** Developed a secure, branded Customer Portal allowing clients to track applications and upload documents 24/7.
- **Automated Lending Journeys:** Built end-to-end automation for Funding Proposals and Facility Agreements, including dynamic document generation and DocuSign routing.
- **Tech Stack Consolidation:** Integrated disparate systems like Capital and MYOB into a single CRM record.

This client gained a unified view of their customers across all business units, underpinned by a highly tailored platform experience. This transformation allowed them to manage complex lending processes with greater consistency and less administrative overhead, positioning them as a digital-first partner in the strata sector.



3. Nationwide Lending Specialist

The Goal

Modernise operational infrastructure to gain deeper visibility into customer conversion pathways across a unified growth engine.

The Challenge

Fragmented marketing and sales processes made it difficult to capture key conversion data throughout the customer journey.

The Solution & Impact

We implemented a comprehensive HubSpot platform to deliver a single customer view. Key deliverables included:

- **Unified Marketing & Sales Platform:** Integrated all customer interactions from initial enquiry through to successful lending.
- **Data Visibility Framework:** Established core reporting to optimise conversion pathways and drive measurable growth in lending operations.

This client now possesses the core platform and data visibility required to optimise its marketing and sales processes, driving measurable growth in its lending operations.



4. Specialised Financial Services Group

The Goal

Resolve significant CRM clutter and fragmented workflows to establish a foundation for reliable, integrated growth.

The Challenge

Broken automations and misaligned Borrower and Investor pipelines hindered reporting accuracy and operational efficiency.

The Solution & Impact

We prioritised CRM hygiene and data cohesion as the primary build phase. Key deliverables included:

- Pipeline Alignment: Harmonised Borrower and Investor pipelines to ensure accurate Deal-Ticket tracking.
- Operational Integration: Linked HubSpot with core operational systems like Sprint for real-time reporting.
- Enhanced Application Flows: Rolled out improved application forms to streamline data capture at the start of the journey.

This client now operates on a stable, data-rich platform, establishing a foundation for reliable, integrated growth and reporting.



5. New Zealand Payments Provider

The Goal

Build a consistent marketing engine connecting strategy, campaign execution, paid media, PR, reporting and HubSpot optimisation to increase awareness, generate demand and support product launches.

The Challenge

This client needed to coordinate multiple marketing channels, campaigns and customer journeys while continually adapting to changing product, sales and operational requirements.

The Solution & Impact

We established an ongoing marketing and HubSpot partnership combining strategic planning, campaign execution and conversion optimisation. Key deliverables included:

- **Integrated Campaign Management:** Delivered annual marketing planning, lead-generation campaigns, paid media, creative optimisation and ongoing performance reviews.
- **Product Launch & PR Support:** Coordinated campaigns and PR around major product launches, extending momentum across earned and paid channels.
- **HubSpot & Conversion Optimisation:** Improved quoting journeys, pricing logic, customer communications and conversion pathways, including work contributing to a 51.1% post-quote acceptance conversion rate.

This partnership gave the client a flexible marketing capability spanning strategy, execution, reporting and CRM optimisation, creating a more connected journey from brand awareness through to customer action and sales enablement.



6. Global Payments Group

The Goal

Strengthen HubSpot marketing operations to improve lead quality, marketing-to-sales alignment, reporting and readiness for a planned NetSuite CRM migration.

The Challenge

Fragmented systems, legacy data and inconsistent lead qualification made it difficult to reliably identify sales-ready leads or connect marketing activity with pipeline and revenue outcomes.

The Solution & Impact

We combined HubSpot optimisation, process design, enablement and migration planning to create a stronger marketing operations foundation. Key deliverables included:

- **Lead Qualification & Handoff:** Reviewed lifecycle stages, lead scoring, MQL and SQL criteria and workflow logic to create a clearer marketing-to-sales handoff.
- **CRM Migration Readiness:** Defined how HubSpot Marketing Hub could operate alongside NetSuite, including lifecycle, synchronisation, automation and attribution requirements.
- **Reporting & Marketing Enablement:** Improved pipeline and campaign reporting while providing training and ongoing guidance to increase internal HubSpot capability.

This work helped position the client's CRM migration as a broader revenue operations initiative, creating a more reliable foundation for demand generation, sales enablement and data-driven growth.



7. Specialist Finance Provider

The Goal

Create a connected CRM and marketing environment supporting deposit and lending journeys, customer onboarding, campaign performance and future integration with core banking systems.

The Challenge

HubSpot and Lentune operated across different parts of the customer lifecycle, creating challenges around data connectivity, onboarding, sensitive information and consistent CRM adoption.

The Solution & Impact

We combined CRM implementation, optimisation, campaign support and integration planning to establish a scalable customer-management foundation. Key deliverables included:

- **CRM Implementation & Adoption:** Supported HubSpot design, configuration, cutover, training and post-launch coaching to embed the platform into day-to-day operations.
- **Customer & Data Architecture:** Designed the strategic integration approach between HubSpot and Lentune across deposits, lending, brokers, KYC and customer onboarding.
- **Marketing & Performance Management:** Supported campaign planning, paid media and reporting to connect marketing activity more closely with CRM and customer-journey outcomes.

This client gained a practical framework for improving CRM adoption, customer onboarding, campaign performance and data connectivity, establishing a scalable foundation for a more unified financial-services customer experience.

Our Approach

Our work with financial services institutions is centred on building a more connected growth engine inside HubSpot. Depending on the business, this can include:

HubSpot Implementation and Optimisation

Tailoring the platform to handle the nuances of regulated financial cycles.

Onboarding and KYC Automation

Streamlining data capture and integrating with verification tools to ensure compliance.

Lead and Referral Management:

Tracking every opportunity from website or partner portal enquiry through to conversion.

Compliance and Risk Oversight

Automating communication logging and restricting access through robust user-level permissions.

Reporting and Insights

Creating real-time dashboards for onboarding time, referral volume, and revenue per client.

Custom Solutions and Integrations

Building bespoke functionality and connecting core systems, banking platforms, document generation tools, e-signature and verification providers, where an off-the-shelf HubSpot feature doesn't cover a specific regulatory or operational need.



The Impact & Why It Matters

While each client's goals are different, the broader pattern is clear: financial services benefit when marketing, sales, and operational visibility are brought together in one system. This allows teams to respond faster to demand, nurture longer buying journeys effectively, and create a stronger connection between digital activity and commercial outcomes.

Financial institutions don't just need leads; they need the right systems to support growth and compliance over time. Whether the end customer is a borrower, an investor, or a broker, the experience must feel connected and human from the first interaction through to settlement.

Engage with the Experts

The projects in this case study didn't happen by accident. They were the result of asking the right questions early about what the business actually needed and where the operational friction lay.

As HubSpot's 6x APAC Partner of the Year, Avidly APAC has helped over 400 businesses achieve stronger ways of working. We have the multi-disciplinary expertise to technically execute complex integrations while ensuring your people are brought along on the journey.



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

Let's talk!