

CUSTOMER STORY

Medicat finds Success with Custom HubSpot Integration

By automating their contract management processes and integrating with HubSpot, Medicat transforms operations and sees record renewal success.



Meet **Medicat**



LEAH MULCAHEY

Business Analyst

INDUSTRY

Software

LOCATION

Atlanta, Georgia

Medicat, based in Atlanta, Georgia, is the leading provider of electronic health records software for colleges and universities. Known for streamlining healthcare administration and improving operational efficiency for its clients, Medicat faced its own internal challenge: outdated contract management processes that hampered growth and operational efficiency.

With a growing client base of more than 400 customers, Medicat needed a contract lifecycle management (CLM) solution to organize contract data, streamline renewal processes, and provide real-time insights for its leadership team. The company also required seamless integration with HubSpot, their customer relationship management tool (CRM), to ensure easy access to contract data across the organization. LinkSquares Analyze proved to be the ideal fit, with its functionality enhanced by a custom integration developed by the LinkSquares Technical Services team.

From Static Spreadsheets to Dynamic Solutions

Without a dedicated legal team, Leah Mulcahey, Business Analyst, is responsible for overseeing contract management and renewals at Medicat. When she joined the company, contracts were stored in individual folders, limiting visibility into critical details like renewal dates and contract values. Leah compiled a master spreadsheet of all contract data, but the sheet would quickly become outdated, making it difficult to answer simple yet crucial questions.



“Our CEO would ask: ‘In the next six months, how many contracts are up for renewal and what’s their value?’ It would take days to gather the information, and by the next week, it was already out of date.”

LEAH MULCAHEY Business Analyst



This inefficiency became a significant obstacle. Without clear visibility into contract terms, the Sales team struggled to proactively manage renewals.

“It was hard to keep track of contract terms and when renewals were due; it was like a guessing game,”

said Leah.

With most of its business operations—particularly Sales—revolving around HubSpot, Medicat needed a tool that could seamlessly integrate contract data with the CRM. However, few solutions offered a direct integration with HubSpot. While APIs were an option, the Medicat team lacked available bandwidth to build the integration themselves.

A Game-Changing Integration with HubSpot

The first step was to centralize all existing contracts in LinkSquares Analyze and extract critical contract data for easy search and reporting.

“Being able to show our leadership team the progress that we’ve made with the contracts has been super helpful,”

said Leah.

Next, the team partnered with LinkSquares Technical Services, a dedicated group of experts with extensive experience building integrations with third-party applications, to scope and build the custom integration. And, with this partnership, they will continue to receive support and guidance from the Technical Services team to ensure continued success.

The goal was to make HubSpot the single source of truth for everything customer-related. Medicat outlined their needs and system specifications, and the Technical Services team set to work to bring the integration to life. The connection allows contract data from LinkSquares – such as start and end date, and even Medicat’s custom fields like user licenses and subscription modules – to sync directly to the HubSpot customer record. This ensures key stakeholders have real-time access to critical customer information.



“Now, anytime a contract is uploaded into LinkSquares, I link it to the HubSpot record ID. Then I just update the contract information and it syncs into HubSpot, showing on the customer record page. Everyone has what they need.”

LEAH MULCAHEY Business Analyst



With this visibility, the team can proactively manage renewals or even intervene earlier if a customer is considered high risk. Reflecting on the roll out and partnering with experts, Leah stated, “I don’t think we could have done it alone.”

Delivering Results and Driving Growth

By implementing LinkSquares Analyze and a custom HubSpot integration, Medicat has revolutionized its contract management processes. With centralized contract data and seamless integration, Medicat can proactively manage renewals, reduce administrative burdens, and focus on strategic growth. For Medicat, LinkSquares is more than a tool—it’s a catalyst for success.

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