

How HeyMarvin transformed their lead generation with Reform


CASE STUDY

A Reform Custom Form implemented by FunnelEnvy


"It's been a game-changer for us. Reform helps us streamline the lead handoff from marketing to sales. Not only has it improved our internal processes, it's also created a smoother, more effective buying experience for our customers."



KEY OUTCOMES



Enabled multi-step forms and smart routing without requiring a HubSpot plan upgrade



Automated lead assignment to the correct Account Executive (AE)



Seamless HubSpot integration for accurate lead tracking & attribution

SUMMARY

HeyMarvin, a user research platform, **needed a better solution for lead capture and routing.**

Their existing HubSpot form lacked key features such as multi-step functionality and logic-based routing, which were only available with a higher-tier HubSpot plan.

FunnelEnvy implemented a Reform custom form that provided these capabilities while **integrating seamlessly with HubSpot.** This allowed HeyMarvin to streamline their lead process without incurring additional software costs.

ABOUT HEYMARVIN



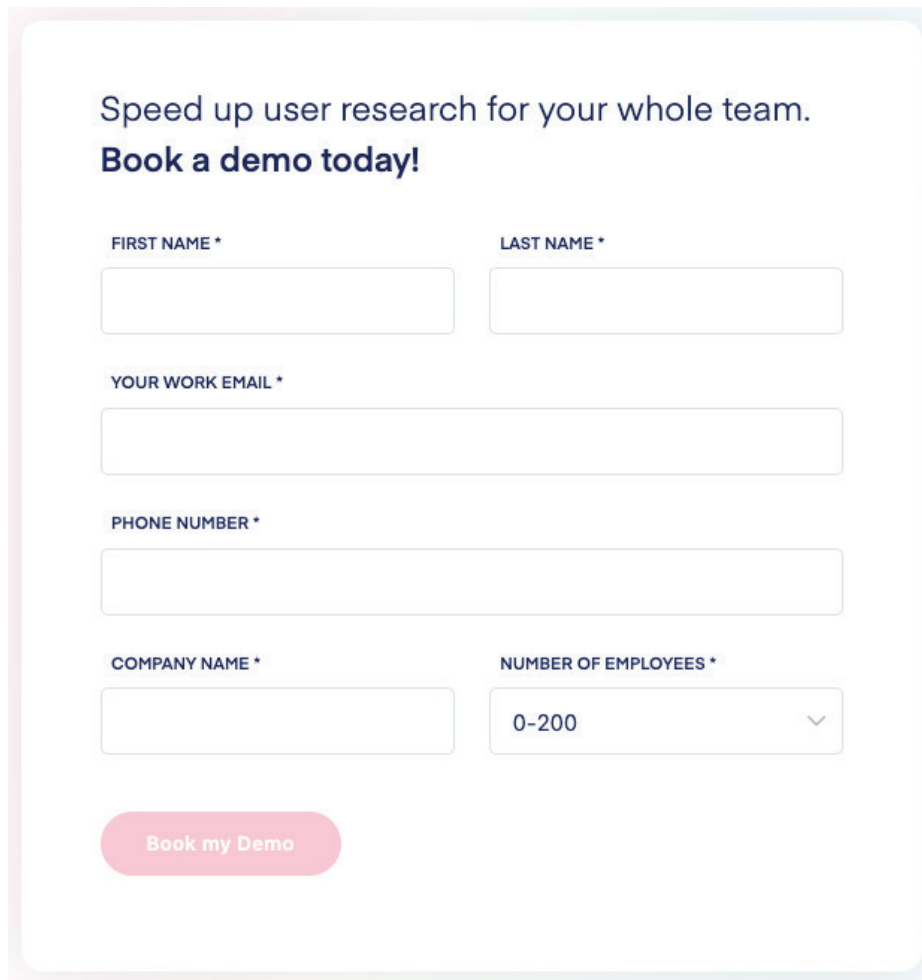
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- **Industry:** SaaS
- **Product/Service:** AI-powered qualitative research platform
- **Use Case:** Enable user-centric teams to collect, analyze, and share user research and insights, streamlining the discovery of customer needs and preferences.
- **Region:** Global
- **Website:** heymarvin.com

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CHALLENGES

- HeyMarvin struggled with **lead capture**.
- Their existing HubSpot form was too basic. It couldn't support **multi-step progression** or **smart routing**.
- Leads weren't automatically assigned to the right AE.
- Sales reps had to do it manually, delaying response times.
- Tracking was non-existent, making it impossible to measure form performance.



The screenshot shows a HubSpot form with the following fields and layout:

- Header: "Speed up user research for your whole team. Book a demo today!"
- Fields: "FIRST NAME *" and "LAST NAME *" (two separate input boxes).
- Field: "YOUR WORK EMAIL *" (one wide input box).
- Field: "PHONE NUMBER *" (one wide input box).
- Fields: "COMPANY NAME *" and "NUMBER OF EMPLOYEES *" (two separate input boxes).
- Field: "NUMBER OF EMPLOYEES *" is a dropdown menu with "0-200" selected.
- Button: "Book my Demo" (pink button).

Control form experience – prior to optimization

1. Inefficient Lead Routing

HeyMarvin's previous form lacked logic-based routing, meaning leads were not consistently assigned to the correct AE based on company size. This led to slower response times and an inefficient qualification process.

2. Suboptimal Form Conversion Rates

Their lead capture form wasn't optimized for engagement, resulting in lower-than-expected conversion rates and fewer high-quality leads.

3. Sales Process Delays

Because leads weren't immediately connected with the right AE, the sales process required extra manual intervention, slowing down pipeline velocity.

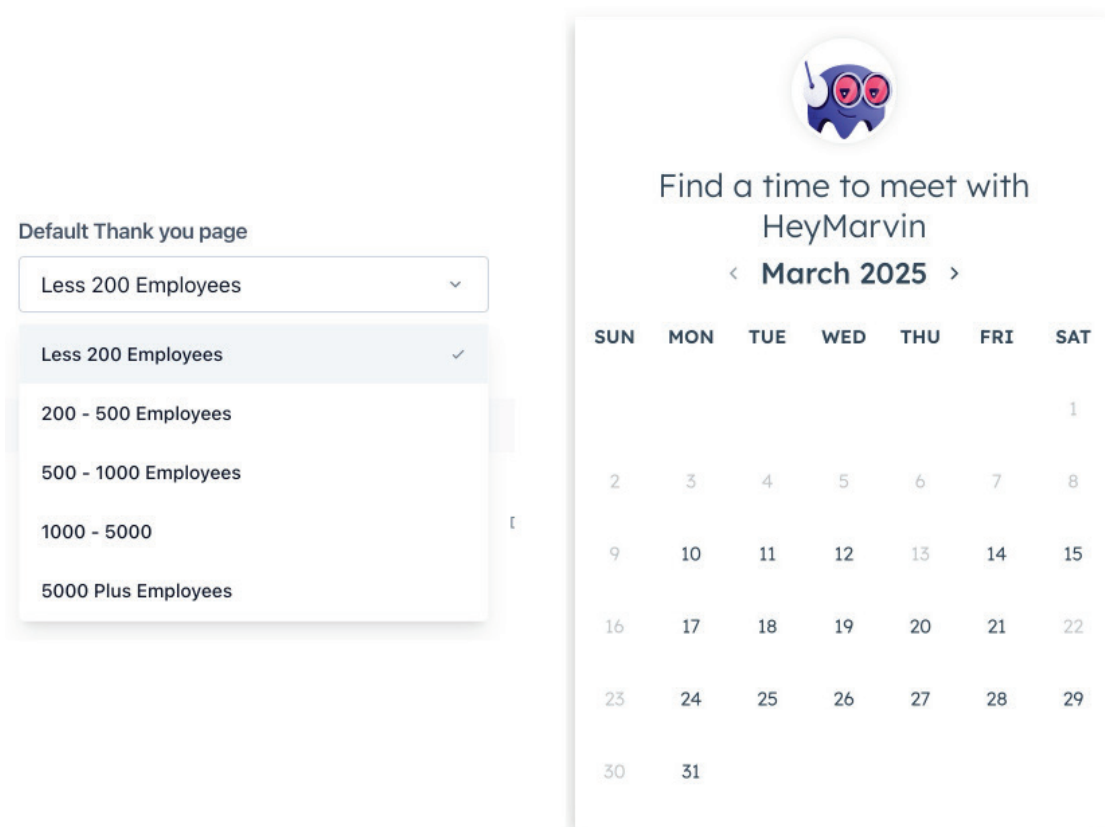
THE SOLUTION

FunnelEnvy implemented a custom Reform form to address these challenges.

Step 1: Smart Post-Submit Routing via HubSpot

- After submission, leads were automatically routed to the appropriate AE's HubSpot calendar based on company size.
- Eliminated manual assignment or round robin, allowing AEs to engage leads faster.

Route leads to the appropriate AE's calendar depending on company size



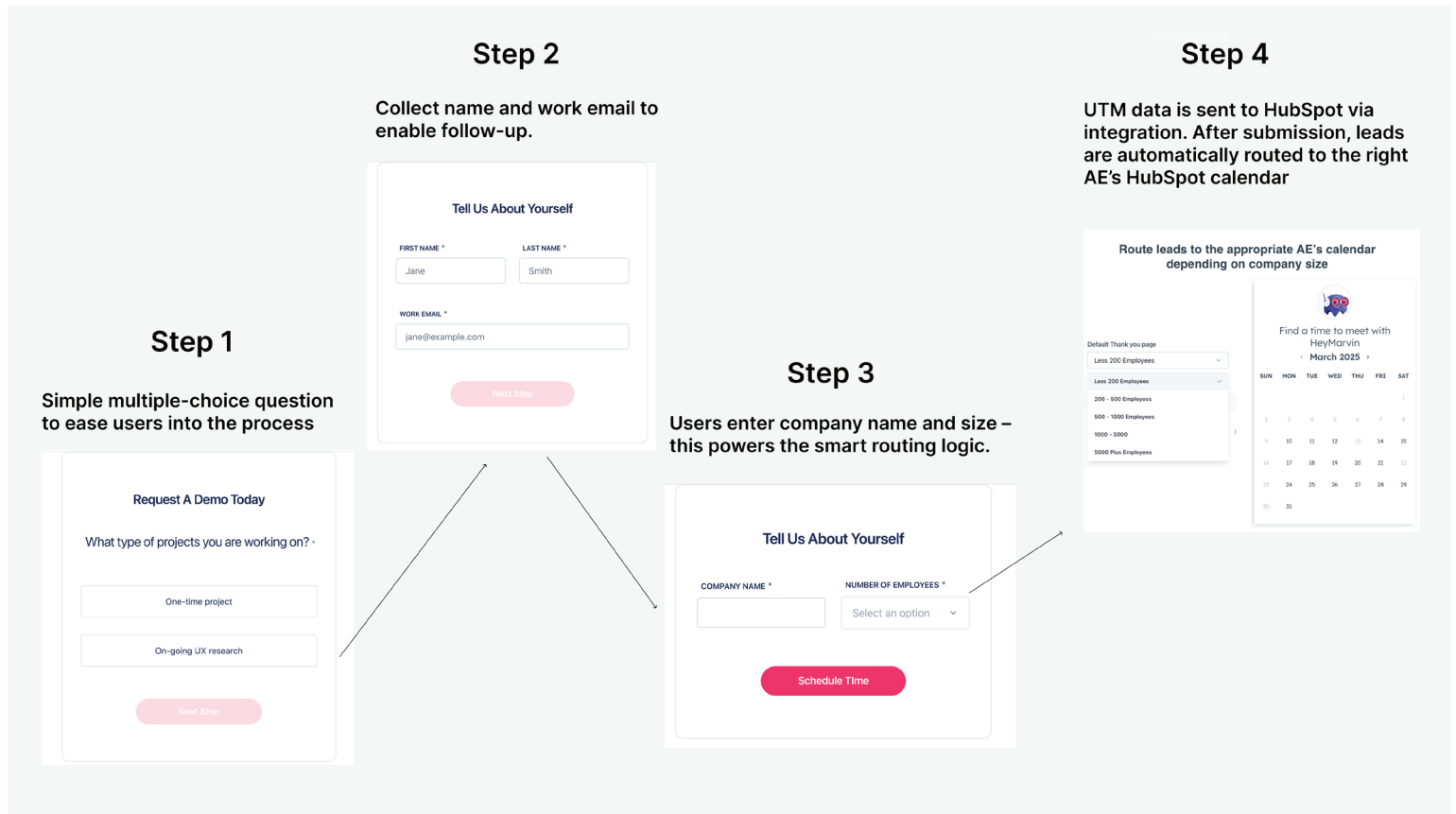
The image shows a HubSpot form titled "Default Thank you page" with a dropdown menu for company size. The dropdown is open, showing options: "Less 200 Employees" (selected), "200 - 500 Employees", "500 - 1000 Employees", "1000 - 5000", and "5000 Plus Employees". To the right is a calendar interface for "HeyMarvin" showing the month of March 2025. The calendar has days of the week as headers and dates 1 through 31. The calendar is currently empty, indicating no appointments are scheduled.

SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Dynamic calendar routing based on lead quality

Step 2: Interactive Multi-Step Form for Engagement

- Introduced a **multi-step experience** with **non-PII multiple-choice** questions at the start of the form.
- Made the form feel more intuitive and user-friendly, reducing friction and increasing completion rates.



Multi-step form experience

Step 3: Seamless HubSpot Integration with UTM Tracking

- Fully integrated with HubSpot to **capture UTM parameters and source data**, ensuring accurate lead attribution.
- Allowed marketing to measure performance, optimize campaigns, and improve ROI tracking.



Reform block

HubSpot property

WORK EMAIL	Email
FIRST NAME	First Name
LAST NAME	Last Name
COMPANY NAME	Company Name
NUMBER OF EMPLOYEES	Number of Employees
What type of projects you are worki...	Research Project Type
	Research Persona Type
utm_source	UTM Source
utm_medium	UTM Medium
utm_campaign	UTM Campaign
utm_term	UTM Term
utm_content	UTM Content

Reform handles UTM tracking and field mapping

RESULTS

Precise conversion rate improvements could not be measured due to previous tracking limitations. However, HeyMarvin saw immediate operational benefits.

- Smart lead routing without upgrading HubSpot
- Less manual work for sales reps
- A more engaging form flow

"Reform has helped us stabilize and optimize our entire inbound lead workflow—and it continues to power key parts of our growth engine."

Tim McMinn,
Director of Growth and Operations



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Interested in Reform Custom Forms by FunnelEnvy?

Whether you're using HubSpot, Salesforce, Marketo, or another CRM or marketing automation platform, Reform Custom Forms help you get more out of your tech stack.

With advanced logic, multi-step experiences, and seamless integrations, our forms help you capture the right data, route leads instantly, and power a smoother buying journey.

Let's build smarter forms that drive real growth.

Talk to us about how Reform Custom Forms by FunnelEnvy can help streamline your inbound process and turn more interest into meetings.

[Get Started Now](#)