

Marketing Technology Operation Management and Optimization



Client Background

Envase Technology is a diversified organization with multiple sub-units and business segments. They were facing operational issues because of the marketing and sales automation tools they had in use. The company has deployed HubSpot, which is set up for marketing across the different segments in a disjointed setup. It caused inefficiencies with huge operational issues.

Services we provided

Saleforce Hubspot Marketo

Problem Statement

Envase Technology came across the three major problems of integration of HubSpot and Salesforce.

- The company has a big problem with duplicate records in both HubSpot and Salesforce that makes the data redundant and confusing.
- Most of the time, the associations among the records from HubSpot and Salesforce are wrong, which makes the data integrity and reporting flawed.

Failure in Workflow Triggers

The problem with workflow triggers in Salesforce made them not work appropriately, thereby contributing to the operational challenge and customer engagement.

Project Objective

Optimize the integration and operation of HubSpot and Salesforce within the Envase Technology ecosystem to harmonize processes, improve data accuracy, and allow increased overall business results. Approach and Solution: The entire project was started off with an elaborate discovery call, which was aimed at understanding the critical integration points and data flows between HubSpot and Salesforce. It was clear that this resulted in suboptimal configurations, therefore calling for the need to re-architect the whole system. Some of the most important steps of solution that were taken included:

- Re-architecting Integration:** New architecture for the system was designed with several discussions with the stakeholders of the team in the identification of critical data flows and integration points.
- Consolidation of Salesforce Instances:** Multiple instances of Salesforce were made into a single instance for reduction of complexity and enhancement of data cohesion.
- Better Integration of Third-party Tools:** Third-party tools, for example, Vonage and Intercom, were included in such a manner that they do not have overlap with the service desk features of HubSpot.
- Workflow Optimization:** All existing workflows were studied and optimized in terms of having more exactly triggering actions and better handling of data.

Result

Re-architecting and optimization resulted in a sizable improvement in operation and business handling for Envase Technology.

- 15% post-implementation** more business generation has been facilitated because of better and effective marketing and sales operation.
- There was a marked reduction in the response time from support, bringing about a significant improvement in the levels of customer satisfaction.
- Increase in Customer Lifetime Value:** Proper customer service and involvement, triggered by precise data and seamless workflows, had an increased lifetime value for the customer.

Conclusion

The optimization of HubSpot and Salesforce integration for Envase Technology not only resolved the initial challenges but also provided a robust platform for future growth. This case study exemplifies how strategic technology management and optimization can drive substantial business benefits.