

CASE STUDY

STRATEGIZING **EFFECTIVE** **MIGRATIONS** FROM MARKETO TO HUBSPOT



INTRODUCTION

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An enterprise customer who offers professional cloud services approached us to migrate their Marketo infrastructure and CRM data to the HubSpot Marketing Hub.

They were excited to onboard but didn't know where to start. The customer learned about Vonazon's Elite partnership onboarding team from their HubSpot onboarding specialist, who explained they would have **hands-on consulting services to guide them through the entire account setup process to ensure their platform was ready by the time their Marketo contract expired.**

Let us dive deep into the details of the customer challenges, migration process, proposed solutions, and outcomes.



A DISCONNECT IN SALES & MARKETING

The customer had used Marketo with Salesforce for several years. When the company switched CRMs, the integration was broken. **Marketo did not have a native integration with their new CRM.** They had to invest in a third-party solution to stitch the two systems together. Essentially, they lost integration to sales data, losing reporting capabilities and valuable ROI information. Marketing had a limited ability to share marketing engagement data with sales. Sales had limited ability to share lead status and sales engagement with marketing.

Communication between the two systems of record was stymied by the access breakdown between these important data fields due to the limited integration. Company record fields could not pass directly to Marketo. They needed to be duplicated on the Contact records and then passed to Marketo.


Due to the complexity of their systems, Marketo was never fully integrated with their CRM. It required a commitment of significant resources in both cost and labor to manage the existing tech stack.

For example, the marketing team had to routinely process records in both systems to keep their database in sync. This was a huge headache and **painfully manual averaging about 11 hours of extra work per week.** Untangling this overly customized relationship between the CRM and the marketing platform required expert knowledge of HubSpot native integration to their CRM and best practices and expertise with their systems. **They needed someone to remove the duct tape and show them how to use the HubSpot tools so they could maximize their internal processes.**

A NON-INTEGRATED TECH STACK CAUSED:

✗  LACK OF ROI TIED TO SALES & MARKETING

✗  NO REPORTING CAPABILITIES

✗  INVESTED IN THIRD PARTY TO "STITCH" SYSTEMS TOGETHER

WHY VONAZON

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Vonazon listened to the client and their marketing teams to help them outline priorities, and give an unbiased perspective on their CRM and how to simplify their integration with the HubSpot Marketing Hub. The biggest differentiator was Vonazon's expertise in both their current Marketo CRM and HubSpot. They dug deep to really understand the complexity and how to untangle it. They strove to understand the context.

Ultimately, the customer chose Vonazon because of their Elite Partnership status and their onboarding strategy. They wanted a team with highly specialized experience with their CRM and certified in HubSpot with proven solutions. They also wanted a team who could speed up the learning curve for their in-house marketing team.



THE MIGRATION

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Vonazon sprang into action to meet a fixed 90-day deadline when their Marketo contract ended and marketing programs needed to be turned on in HubSpot.

Unfortunately, the customer couldn't integrate all their data in the initial sync with HubSpot due to some API limitations of the CRM, requiring Vonazon to work closely with HubSpot to import all their CRM data through a manual upload tool—adding another layer of complexity to the implementation.

Despite these additional challenges and tight timelines, the implementation went well. They had a transition period where both platforms were live, allowing the Vonazon team to rebuild Marketo programs and Smart Campaigns into streamlined HubSpot workflows.

By the second month, four Marketo lead nurture campaigns were converted to a single lead nurture workflow that triggered their team internally, automated data cleanup, and triggered notifications to their sales team. This workflow targeted leads who had engaged with their brand on social media platforms. It sent follow-up emails with additional social content, exclusive offers, and invitations to join relevant communities.

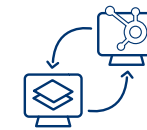
It was helpful for the customer to have this transition period as a training period for their internal team to be able to translate the way they used to use Marketo to how it worked in HubSpot. This allowed them to go between the two platforms to ensure the Vonazon team captured all the capabilities their team was used to, as well as helped them to discover newly available HubSpot Marketing Hub capabilities.



Syncing # of contacts
322,054



Syncing # of company records
30,124



Syncing # of data values
9,484,117



COST SAVINGS & ALIGNMENT OF SALES & MARKETING



Vonazon's team reduced the number of customized fields by 50% and mapped them to native HubSpot properties. Company data no longer needed to be duplicated on contact records.

This allowed the team to use template workflows from HubSpot, **adding much-needed automation and increasing the communication between sales and marketing for maximized alignment.**

Today, the customer has 25 Sales users and several Marketing Hub users. They were able to do their own training because the teams quickly became comfortable with the HubSpot CRM platform, completing 22 certifications while Vonazon did the heavy lifting.



783

Hours saved per year



\$30,000+

Saved by eliminating third party vendors because of HubSpot's built-in capabilities



ROI

Capabilities now tied back to the now aligned sales and marketing teams

CONTACT US

CONTACT VONAZON

LET'S WORK TOGETHER

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