

# Tegria

CASE STUDY:

## **From Fragmented Systems to Scalable Growth: Rebuilding Tegria's Marketing Infrastructure**



## INDUSTRY

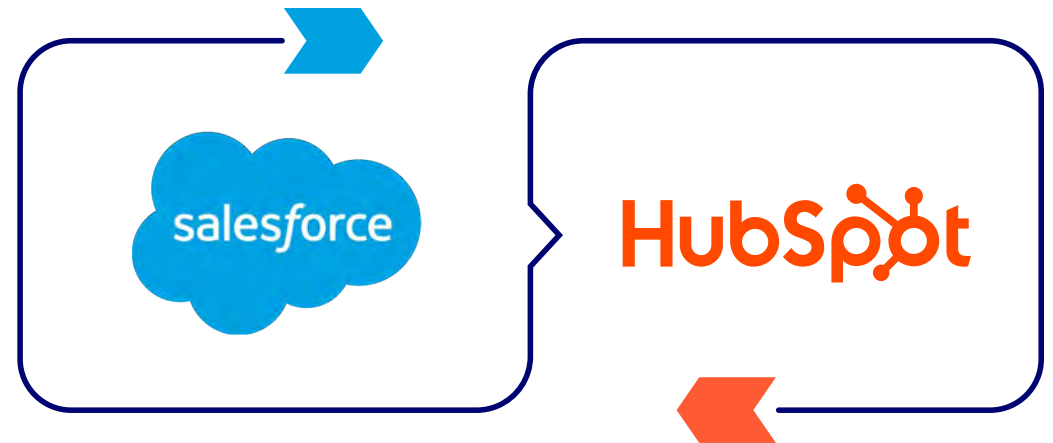
Healthcare

## COMPANY PROFILE

Tegria is a healthcare consulting and technology firm delivering strategic, operational, and digital solutions to providers and payers across the United States.

# Tegria

Tegria reached a critical inflection point. With Salesforce established as the system of record and increasing pressure to activate modern marketing strategies, the organization needed a fully aligned, scalable HubSpot environment without compromising data integrity.



**Vonazon led a high-risk integration and transformation initiative**, consolidating complex data structures, enabling real-time synchronization across systems, and establishing a governed, scalable marketing infrastructure. The result was a platform capable of **supporting immediate campaign execution** while laying the foundation for **long-term visibility, operational efficiency, and growth**.

## The Business Context

Tegria operates within a complex, multi-service healthcare consulting environment, engaging enterprise stakeholders across diverse service lines. As marketing initiatives expanded, the organization required a platform capable of supporting segmentation, lifecycle management, and cross-channel attribution at scale.

Salesforce remained the authoritative system. However, marketing execution required speed, flexibility, and visibility that existing processes could not support. HubSpot was introduced as a strategic activation layer, designed to work in parallel with Salesforce while enabling modern marketing capabilities.

# THE CHALLENGE

This was not a standard implementation. It was a high-stakes system alignment under active business pressure.



**Fragmented Data and Limited Visibility**



**Unclear Attribution Models**



**Over-engineered Salesforce Structures**



**Inconsistent Ownership Logic**



**Manual Lead Routing and Campaign Tracking**

## Tegria faced:



### **Fragmented data and limited visibility**

across marketing and CRM systems



**Over-engineered Salesforce structures**, with hundreds of custom fields reducing usability



**Manual lead routing and campaign tracking**, limiting scalability



**Unclear attribution models**, restricting performance insight



**Inconsistent ownership logic**, creating gaps in reporting and accountability

Internal alignment proved equally complex. Teams were balancing data governance, campaign urgency, and system dependencies simultaneously.

### **As one stakeholder summarized:**

*"We need Salesforce to be the source of truth, but we still need enough in HubSpot to actually make decisions."*

### **At the same time, execution timelines could not pause.**

*"We need to launch tomorrow, so we have to figure out tracking now."*

The margin for error was minimal, if existent at all. A misaligned integration could result in data loss, reporting inconsistencies, and long-term operational risk.

## VONAZON'S APPROACH

Vonazon positioned the engagement as a strategic infrastructure transformation, not a tool implementation.

01

Simplifying a  
Complex Data  
Environment

02

Executing a  
Controlled, High-Risk  
Integration

03

Activating Campaign  
Infrastructure Under  
Time Pressure

04

Resolving Cross-  
System Ownership  
and Lifecycle  
Complexity

05

Building a Scalable  
Marketing  
Foundation

## Simplifying a Complex Data Environment

The initial integration exposed hundreds of custom Salesforce properties, many of which added noise rather than value.

Vonazon worked with Tegria to identify decision-critical data, removing approximately 247 deal-level properties and dramatically simplifying the model.



### This shift enabled:

Improved system usability and adoption



Clearer reporting structures



A foundation for scalable segmentation and automation

02

## Executing a Controlled, High-Risk Integration

Rather than enabling a full sync prematurely, Vonazon implemented a phased, controlled integration strategy.

This included: \_\_\_\_\_



Pre-validation of mappings before activation



Defined source-of-truth rules between Salesforce and HubSpot



Structured sync across **contacts, companies, and deals**



Manual and bulk resync processes to **mitigate data risk**



This approach reduced the likelihood of data corruption, duplication, and misalignment, while maintaining forward progress toward activation.

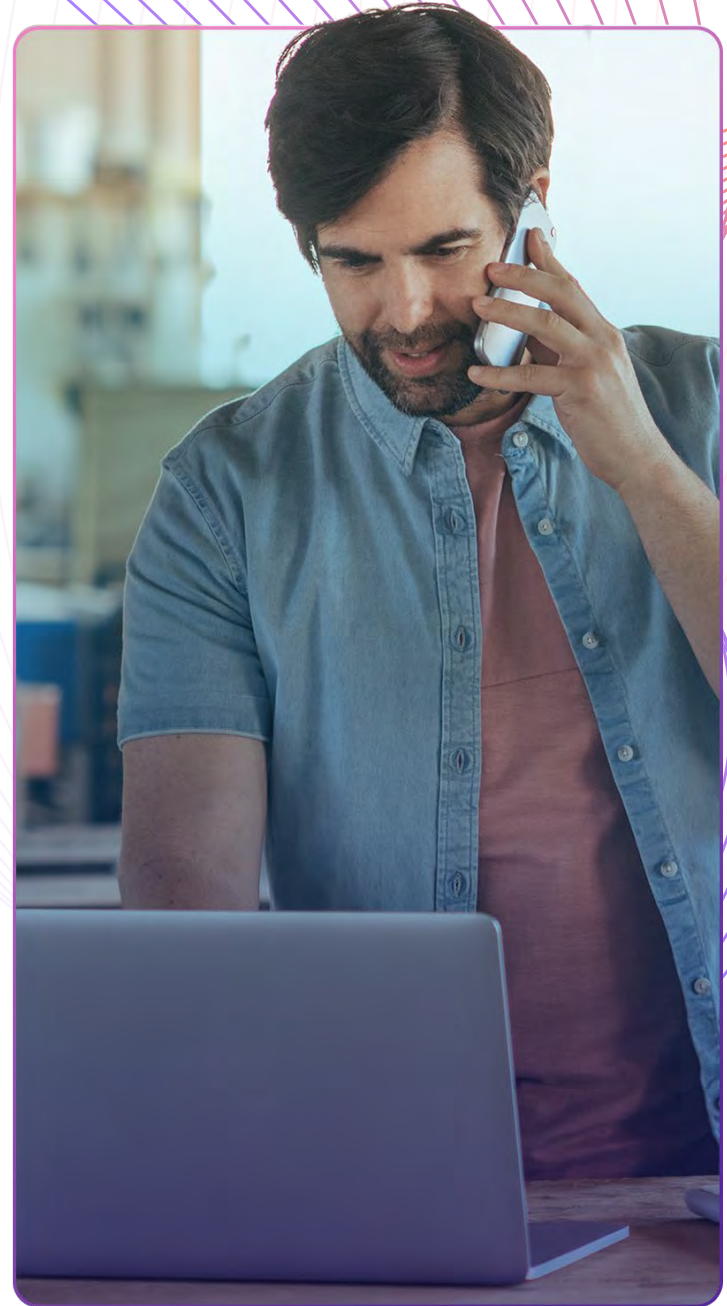
## Activating Campaign Infrastructure Under Time Pressure

With campaigns already in motion, Vonazon prioritized operational readiness alongside system buildout.

### Key initiatives included:

- Rebuilding and standardizing **core conversion forms**
- Implementing **tracking infrastructure across web and campaigns**
- Enabling **baseline attribution and reporting visibility**
- Automating **lead notifications and lifecycle progression**

This allowed Tegria to move from delayed execution to real-time campaign activation, even as the system continued to evolve.



## Resolving Cross-System Ownership and Lifecycle Complexity

Ownership misalignment between Salesforce and HubSpot introduced significant reporting risk.

**Vonazon established logic to:**

- Align **account and contact ownership across systems**
- Standardize **lifecycle stage definitions and transitions**
- Prepare for **automated routing, scoring, and handoff processes**

This created a consistent, governed framework for accountability and reporting across marketing and sales.



05

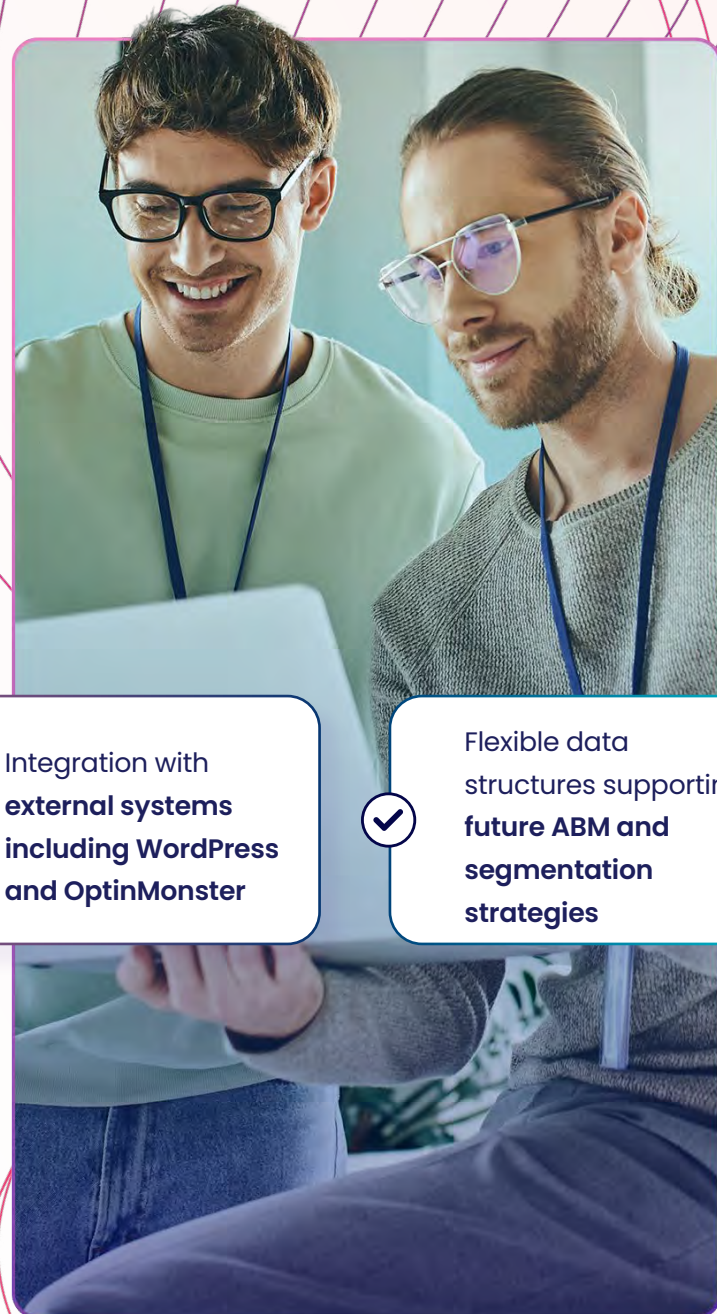
## Building a Scalable Marketing Foundation

Beyond immediate activation, Vonazon architected a system designed for long-term growth and adaptability.

### This included:

- ✓ Lifecycle and lead scoring frameworks
- ✓ Unified **campaign tracking across channels**
- ✓ Integration with **external systems including WordPress and OptimMonster**
- ✓ Flexible data structures supporting **future ABM and segmentation strategies**

The result was not just a functional platform, but a scalable marketing infrastructure aligned to Tegria's business model.



# THE RESULTS:

Tegria transitioned from fragmented processes to a centralized, insight-driven marketing ecosystem.

## Key outcomes included:

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Substantial reduction in **data complexity**, improving usability and operational clarity



Successful synchronization of **60,000+ contact records**, enabling unified visibility across systems



Establishment of **clear governance between Salesforce and HubSpot**, reducing long-term risk



Transition from **manual lead handling to automated workflows**, improving speed and consistency



Immediate activation of **campaign tracking and attribution**, supporting real-time decision making

While initial performance metrics were still developing, the impact was clear. Tegria moved from uncertainty to **operational confidence** in its marketing infrastructure.

Following activation, the system was no longer theoretical. **It became a reliable foundation for execution and growth.**

## LOOKING AHEAD

With core infrastructure established, Tegria is positioned to evolve from system alignment to performance optimization.

### Next phase priorities include:

- Refining **lifecycle automation and lead scoring models**
- Advancing **attribution and revenue reporting capabilities**
- Expanding **campaign orchestration across channels**
- Deepening **segmentation and account-based strategies**

What began as a complex integration effort has become a strategic platform for scalable, data-driven growth.

# Looking to streamline your integrations and reduce risk?



**Let's build a plan together.**



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