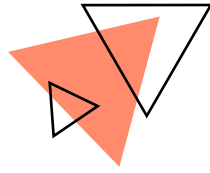




HubSpot to Marketo Migration = **42% Boost** in Lead-to-Customer Conversion

A B2B SaaS Marketing Success Story





Navigating the Challenges of **Digital Marketing** for a Growing Business

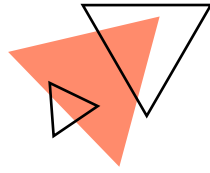
Our client, with a substantial audience of over **80,000 contacts and 30,000 company records within HubSpot**, recognized the potential for explosive business growth through tapping into their engaged audience. In order to realize this potential, they needed to upgrade their marketing strategy.

They decided to switch to the more robust and powerful digital marketing automation platforms, Marketo and Salesforce, with the aim of driving better visibility through **cutting-edge automation** capabilities. However, this transition was not without its challenges, as ongoing inefficiencies in the current platform posed significant setbacks.



Outcomes Achieved by Adopting a **Robust Digital Marketing Strategy**





Mitigating Risks & Ensuring Seamless Transition in Digital Transformation

The main challenge facing our client was the potential for disruption during the replacement of their existing solution. They were committed to implementing new workflows without any adverse effects on their **critical data** and were willing to take comprehensive measures to ensure a **smooth transition**. This was a critical consideration for the client, as the success of the transition could have a significant impact on the overall operation.

To address these obstacles and revolutionize the client's digital marketing strategy, our marketing automation experts intervened.

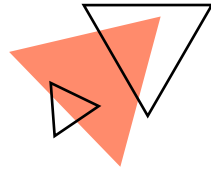
This case highlights the significance of a **robust digital marketing strategy** and the benefits of switching to advanced automation platforms in realizing business growth potential.



Improved Collaboration, Streamlined Processes, and Increased Visibility Drive Lead-to-Customer Conversion, Sales, and ROI

MarTech experts at Xgrid helped our client and its marketing and sales teams with smooth migration services from Hubspot. The following tech tools were utilized:





Our team analyzed the client's Hubspot setup, identified relevant data fields to transfer to Salesforce, including custom fields, and mapped the fields. We scrubbed the data using a combination of manual and automated methods to eliminate duplicates, correct errors, and standardize formats using machine learning and manual checks. We also assessed data quality to meet client standards. This resulted in a clean and accurate migration.

Our approach retained data history and context by creating **custom Salesforce fields** to store Hubspot IDs, providing easy reference to original data in Hubspot for data consistency, integrity, and analysis. Bi-directional sync between Marketo and Salesforce automated data transfer, reducing manual data entry errors and streamlining sales and marketing processes.

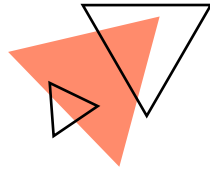


We set up SPF and DKIM to authenticate our client's emails, **increasing deliverability**, reducing spam marking, ensuring inbox delivery, protecting the domain from phishing/spoofing, and maintaining audience trust. To gain valuable insights into our client's audience, we implemented Munchkin tracking to track website visitor behavior and **gather data on leads**.



We integrated LinkedIn ad mapping, which allowed us to track the performance of LinkedIn ads within Marketo and increase the **visibility on LinkedIn by 55%**. We also configured Sales Insight to provide sales with a real-time dashboard of their best leads and opportunities, prioritized by quality and urgency, resulting in a **37% increase in sales**.

Our team implemented TAM and Revenue Cycle in Marketo to target the right audience, resulting in a **42% increase in lead-to-customer conversion** rate.



Our **comprehensive training program** ensured users effectively used Marketo and Salesforce. It included hands-on training in data management, program management, and analytics reporting tailored to the client's needs and delivered by experienced experts. Hands-on training increased the chances of a successful adoption.

Successful Migration Boosts Lead Conversion, Sales, and ROI

Our team delivered a successful migration for the client, resulting in a **45% increase in lead conversion** and a **37% increase in sales**.

Technical benefits included improved collaboration and streamlined processes, leading to a **42% increase in lead-to-customer conversion** and **20% increase in marketing efficiency**. Our

marketing automation services also delivered increased visibility and reporting, leading to a **50% increase in ROI**.



Did You Know?

This migration brought many technical benefits, including user access to more team members, which ignited collaboration and innovation within the marketing team. The **robust** automation capabilities allowed for **faster decision-making** and streamlined marketing processes, unlocking new possibilities for the client. Our marketing automation services also resulted in measurable results, with increased **visibility** and **attribution** reporting. The team captured historical data to track the buyer's journey carefully, considering potential roadblocks, and implemented data standardization for effortless sorting. They fine-tuned smart campaigns, automated setup, and notified the Sales owners of Marketing qualified leads resulting in a **50% increase in ROI**.

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