

FORECAST *Sunny*

CASE STUDY



MINI CASE STUDY SERIES:

Lead & Contact Management

Solutions for List Clean Up and Contact Segmentation Using the HubSpot CRM



Introduction



Data is the key to better serving and managing your business' most valuable assets: **your customers**. Keeping your customer data organized, up-to-date and easily accessible is imperative to your marketing, sales, and growth efforts. When organized and tracked, customer data provides invaluable business insights and can play a major role in the success of your company. The best way to manage customer & business data is investing in a CRM software.

What is a CRM?

A CRM is a “business growth management platform”, or more commonly known as a Customer or Contact Relationship Management tool. A CRM not only manages your customer data records (i.e., contacts), but also assists in managing other marketing and sales efforts such as: sales, pipeline, digital marketing and lead nurture campaigns.

A good CRM software will allow your business to streamline and automate processes, standardize workflows by setting up automation, integrate marketing, improve sales efficiency and keep the customer experience of your company consistent. As a result, your business can better manage and understand customer interactions, provide more personalized communication and support, and maintain the customer relationship through the entire marketing and sales process.

The bottom line is there are countless benefits to using CRM software for your business. You will be able to measure your marketing efforts, improve sales performance, and increase profitability. With a robust and properly-managed CRM in place, you will be able to direct your business with efficiency and tactical decision-making instead of always wondering what you are getting out of your marketing and sales efforts.

Let's examine 3 scenarios in which 3 of our recent B2B business customers realized they needed to organize their customer data. Each scenario had a unique challenge which resulted in a custom solution. All three had a very positive outcome and were able to create a plan to solve their data organization problem.

With a CRM you will be able to **measure your marketing efforts, improve sales performance, and increase profitability.**

Client 1 aka In Need of Integration (INI)

Integrating Marketing & Sales

Connecting marketing and sales to get a clear view of campaign return on investment and future sales opportunities.

The Challenge:

INI is a leading manufacturer of wastewater screening equipment. They built a reputation in their industry over decades through primarily face-to-face sales and/or referrals. Beginning in 2020, they realized that there might be an opportunity for business growth via digital marketing efforts. They had been allocating significant budget toward digital advertising, but weren't sure what they were getting in return nor where to focus their efforts.

The Solution:

INI hired Forecast Sunny to analyze and reconfigure their digital marketing strategy. It was clear that the company needed a robust CRM platform that could help them communicate better with existing customers and better understand where valuable customers were coming from. By importing sales data into their CRM, Forecast Sunny was able to give clarity on which digital marketing channels and efforts lead to potential sales as well as closed deals. Having data that demonstrated where qualified leads

were coming from allowed us to make short-term changes to ads via targeting and also to more precisely plan advertising budgets and content over the long-term.

The Outcome:

In the first year of implementing the new CRM, Forecast Sunny increased the number of people who contacted INI through the website by 756%. From 64 the previous year to 488. 377 were marketing qualified leads, 64 sales qualified, 17 became deals (\$4.9 Million in potential sales), and 2 deals were closed (\$448,550 in sales). Due to the length of the average sales cycle (2+ years), we fully expect that more of these initial marketing qualified leads will convert to deals in the future. Until then, the powerful CRM will allow INI to keep in touch with these potential customers to stay top-of-mind, educate on benefits, and inform of relevant company news/product developments.



Client 2 aka Messy Records (MR)

In-House Proprietary System Integration with HubSpot

Needed Data Cleanup (outdated records with multiple tags that no longer have meaning), Integration of Data from in-house system to HubSpot for dynamic updating, HubSpot - Organize contacts and create List Segmentation for Personalized Correspondence

The Challenge:

MR has an existing in-house proprietary system that holds all their internal customer data and important forms, contracts, agreements, educational materials and other important documents. This system did not have an administrator and over the years, customer data records have been altered with tags that do not necessarily describe the relationship with the customer. The descriptions and tags were not kept consistent and the accuracy of customer data is weak.

The second challenge was that the proprietary system was not necessarily used as the source of truth for customer records. HubSpot was put into place for email communication purposes and lists from the internal system were placed in HubSpot. There was no real process for keeping customer records updated in both systems, it was a manual process. Therefore, the client is not confident either list is the most up-to-date as it could be.

The Solution:

After meeting with MR and performing an extensive discovery meeting, we were able to prioritize their goals, needs and create a plan to assist them in meeting their goals.

- Created a plan to update their internal contact record tagging system and map the tags to lists in HubSpot so it is clear which contacts should be placed on which list once it's moved from their internal system into HubSpot.
- Worked with their in-house development team to build an integration to HubSpot so contact records stay updated on a regular basis and remain organized once they are uploaded into HubSpot.
- Designed a plan for list segmentation and a campaign strategy to help MR begin more meaningful and engaging conversations with their existing and potential customers.
- Created a plan to automate repeated tasks to save time and resources that would otherwise manually be performed

We were able to **prioritize their goals, needs and create a plan** to assist them in meeting their goals.

Client 2 aka Messy Records (MR) Continued...

In-House Proprietary System Integration with HubSpot

The Outcome:

MR now has a plan and direction on how to clean up their existing contacts and an understanding of their source of truth and the direction in which they are managing their customer data. Their customer information is now being updated in both systems.

Each contact record now has consistent tagging and is updated in both systems on a regular basis so the data is always accurate.

There are meaningful segmented lists in HubSpot that can be used for communication and marketing purposes that now allow for personalized conversations.

The client is better able to understand who their customers and prospects are so they can now focus on growing the business.

The client is better able to understand which marketing & communication efforts are creating engagement with their customers and prospects and which ones need improved or eliminated.

Implementing marketing campaigns that cater to their existing customer base and another for prospects is the next phase in the path to growth for this business!



Client 3 aka The Spinoff

Import an Existing List from Sister Company

Transfer of Data from in-house system to HubSpot - Contact Record Cleanup, List Segmentation and Email Campaign Launch

The Challenge:

The Spinoff is a financial services start-up that had a list of relevant, opted-in contacts from the law firm that it spun off of. Forecast Sunny knew that this contact list could be utilized since there was established trust and brand recognition. The challenge would be to educate existing contacts on the features and benefits of this new financial service.

The Solution:

Forecast Sunny dug into fully understanding the company's value proposition and customer personas. We then developed content that was relevant and educational. By building out a content strategy that would move contacts from identifying a problem (known in marketing as the Awareness Stage) to searching for a solution (Consideration Stage) to considering our client as the solution (Decision Stage), we were able to create-via HubSpot's CRM-a system of automated marketing emails and informative content that would be delivered at the right time to the right people.

The Outcome:

In the first 90 days, 87 contacts downloaded the awareness stage content, 37 filled out a comprehensive survey in the consideration stage, and 21 converted in the decision stage by scheduling a meeting with the company.



Summary

CRM software is one of the most beneficial tools you can invest in for the growth of your business. If you want to improve profits and create more revenue, invest in your most important assets, your customers.

A CRM is the tool that will give you the ability to focus on the four most important things for your business growth: develop/improve customer relationships, increase customer retention, shorten your sales cycle, and bottom line—sell more to improve profits.

Organizing your customer data and investing in a CRM platform could mean the difference between making it to your intended business destination next year or staying exactly where you are today!



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Our mission is to be a thought leader **guiding businesses to grow intentionally** with modern profit-centric strategies.

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