

PR:PEREXPRESSION

How HubSpot
Enterprise
Onboarding
Created
Company-Wide
Transparency &
Alignment



“They are professional and easy to work with, very responsive to questions and made the project run really smoothly.

We recently engaged with ProperExpression to migrate our CRM and Marketing Automation to HubSpot. This was a fairly complicated project, involving many years' worth of data from disparate sources, incomplete data, and complicated workflow processes on our previous CRM. The team at PE really took the time to understand our needs, provide guidance on the best solutions, and implement them in a way that made sense for our business.”

- Meredith Bagdazian
Vice President of Marketing

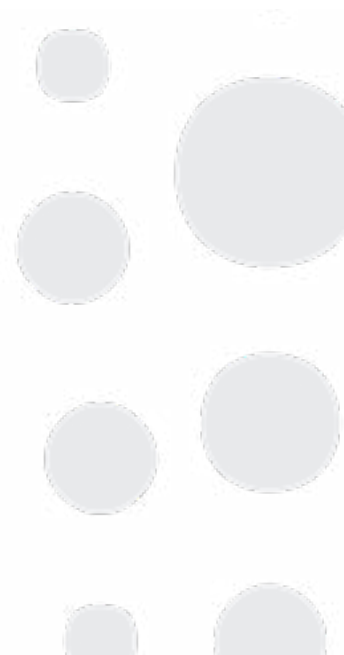


About PX



PX's Lead Quantification platform helps some of the country's biggest companies find the right leads for the right price, every time.

PX began with a mission to deliver best-in-class customer acquisition solutions to marketers and bring an arcane industry into the 21st century. Over the past decade, the company has grown rapidly and saw that the future of the industry lay in bringing efficient, intuitive technology solutions to marketers, giving them the tools and insights they need to reach their goals.

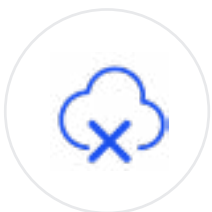


The Challenge



Limited by Manual Marketing & Sales Processes

With few established processes and automations in the CRM, the Marketing and Sales team could not make processes scalable or repeatable.



Clumsy and Disconnected Tech Stack

The existing tech stack consisted of several platforms that did not integrate, creating limitations in PX's ability to track KPIs and accurately report on revenue.



Limited Visibility into the Pipeline

With limited visibility into the Marketing and Sales pipelines, the Sales team could not convert sales-ready leads into customers.

The Solution

→ Migration to HubSpot Marketing and Sales Enterprise

ProperExpression cleaned and migrated the existing Zoho database of over 10k records to HubSpot. During migration, ProperExpression created custom properties, assigned proper lifecycle stages, implemented lead scoring, and developed relevant reports and dashboards to monitor the sales funnel accurately.

→ Implementation of Powerful Automation & CRM Best Practices

The ProperExpression team created full funnel automation to ensure leads moved through the funnel accurately and efficiently. With powerful workflows to route the right leads to the PX Sales team at the right time, the database was set up to drive increased revenue.

→ In-Depth Training for Marketing & Sales Alignment

Along with extensive documentation of processes, ProperExpression conducted live trainings with the Marketing and Sales teams on creating marketing materials, following up on Sales leads, opening and working deals in the Sales Hub, using playbooks and sequences and more.

The Results

→ Provided visibility into lead gen and revenue gen channels, including best-performing channels for creating new leads and deals

→ Created visibility into campaign performance and revenue influence by centralizing all data and creating in-depth, custom reporting dashboards for marketing and sales

→ Aligned the marketing and sales teams on processes to efficiently and accurately move the right leads through the funnel at the right time, improving the likelihood of closing

PR  PEREXPRESSION

Start Growing Revenue Today

Get a FREE Consultation

ProperExpression is an integrated growth marketing agency. Our marketing strategists bring a deep understanding of all aspects of marketing, helping clients implement integrated marketing strategies, create synergies, and take advantage of opportunities while demonstrating strong alignment with business goals. Our expert technicians bring years of experience in crafting, implementing, and optimizing all components of well-executed campaigns.

www.properexpression.com