VERISYS

Verisys
CASE STUDY
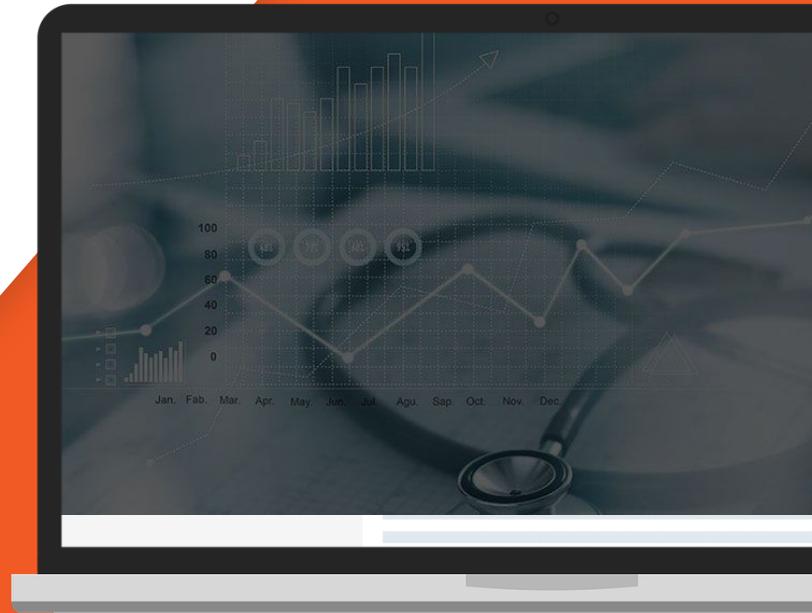
The **Client**

Verisys is the leading provider of the most comprehensive health care data, which empowers healthcare organizations to easily screen, verify, monitor credentialing, and hire individuals and entities in the health care sector. Their mission is to deliver critical, accurate information in order to ensure regulatory compliance and minimize legal and reputational risk, with the goal of ultimately improving the quality of healthcare in the United States.

The **Problem**

When Verisys approached Marketing Automation Canada (MAC), they had recently acquired Aperture Health, and were preparing to merge the two organizations. They were looking for expert guidance as they began to consolidate the two distinct marketing and sales strategies along with their respective Marketing Automation and CRM platforms. On the marketing side, this meant adopting Aperture's Hubspot as their Marketing Automation Platform, and migrating Verisys' content, leads and engagement data in from Pardot. On the sales side, this meant merging the two Salesforce instances together in a way which supports the long term consolidation and collaboration of the two companies.

Verisys was looking for a partner that was well versed in all 3 platforms (Hubspot, Pardot, and Salesforce) as they needed guidance to set up their systems in accordance to best practices and in alignment with their organizational needs. As part of the migration, they wanted to re-work and optimize their sales funnel - and simultaneously, they needed support in building various assets for a new website they were launching.

The **Solution**

No system migration is the same, so the ability to understand the business is crucial to avoiding roadblocks and costly misconfigurations. MAC began the migration with an in-depth investigation of the existing platforms, processes and business needs. During the discovery phase of the project, we were able to understand both Aperture and Verisys' goals and existing challenges, and get a view of their current marketing and sales processes. This revealed areas that needed to be optimized and issues to be addressed when migrating to a new platform, such as making changes to the existing lead scoring model and lead sources.

Once the scope was created, we put together an action plan to tackle priority items in time for the website launch. MAC's Hubspot, Pardot and Salesforce experts worked in tandem to ensure all systems were speaking to each other efficiently. Weekly syncs with the Verisys team were scheduled in order to identify and resolve roadblocks, and to work through any unaddressed business requirements, to ensure the new system was architected optimally for their needs. MAC was there to consult on best practices, identify areas for optimization, and to execute the set up.

MAC successfully completed the data migration from Pardot to Hubspot with minimum data loss while our Salesforce team worked on merging the two Salesforce instances together. A combination of lists and workflows were created to allow the sales and marketing teams to validate leads efficiently. We also worked with the Verisys team to create and embed new Hubspot forms onto the soon-to-be live website to allow for smoother automation moving forward. To empower efficient and professional email marketing, branded drag and drop email templates were developed. MAC also identified and set-up lead sources, as well as a lead scoring model to improve the quality of the leads that were passed onto the sales team.

During "go live" of their website, we continued to act as an extension of the Verisys team and joined them to conduct final testing and troubleshoot any hiccups.

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The **Outcome**

With the help of MAC, Verisys was able to successfully merge the two companies into one unified instance of Hubspot and Salesforce before the deadline. Along with increased process efficiency, combining the databases helped Verisys cut costs by canceling the Pardot subscription and one of the Salesforce subscriptions. They are also able to more effectively cross sell their products, by sharing one master database.

After MAC's training, the sales and marketing teams have been empowered to successfully use HubSpot's automation capabilities to follow up with prospects and convert them into opportunities - as well as to use the reporting tools to analyse campaigns and ROI. By creating a library of reusable templates, the Verisys team can quickly create emails and personalize them to the campaign needs. Today, we continue to work with Verisys—mainly to provide advice to turn a complicated idea into reality!

Marketing Automation Canada offers expert Marketo consultant services. We can assist with Marketo design by using Marketo certified experts. We also offer expert Pardot consultants, and Pardot implementations by Pardot certified consultants.

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