

Optimizing HubSpot for Improved Sales Engagement and Simplified Segmentation

Sales and marketing teams often find themselves having to make use of a software that was never fully implemented. Whether that's the result of a team member change or lack of proper training, this setup and expertise gap leads to a number of inefficiencies and frustrations. After an acquisition, MarTech firm RAZR recognized an opportunity to optimize their HubSpot usage to enhance marketing across their four divisions, so they turned to Simple Strat to help.

The Challenges:

- Underutilization of HubSpot capabilities
- Lack of internal HubSpot expertise for optimization
- Desire to better segment contacts for content delivery

RAZR identified an opportunity to refine targeting and amplify campaign effectiveness in the process.

The Solution:

RAZR partnered with Simple Strat for their deep HubSpot expertise and customized strategic approach. The partnership involved a comprehensive Buyer Journey Workshop and flexible consultation hours, focusing on segment-specific strategies and team education.

The Results:

- ✓ Successful segmentation of contacts across divisions and lifecycle stages
- ✓ Development of tailored email workflows
- ✓ High user adoption and better transparency with sales team
- ✓ Enhanced reporting capabilities and more reliable data utilization
- ✓ More effective and sophisticated internal reporting across all business areas

RAZR

CLIENT

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RAZR is a marketing technology company that leverages behavioral science to influence consumer decisions. Their proprietary technology platform, Fibonacci™, powers engagement programs in the financial services, healthcare, and Consumer Packaged Goods (CPG) industries, while their full-service strategy and creative team provide marketing services.

INDUSTRY

Marketing Technology

SERVICES UTILIZED

- Buyer Journey Workshop
- Email workflow development
- Lifecycle Stage setup and optimization
- Reporting and data analysis enhancement
- Ongoing consultation and strategic guidance

CLIENT PERSPECTIVE

"If you are considering working with Simple Strat, it's a very simple yes. The team provides incredible value in harnessing the power of HubSpot. Every hour that you spend with your Simple Strat representative gives you back countless hours of productivity and efficiency."

Brigid Ling

VP of Sales and Marketing at RAZR

A Deeper Look

Following a recent acquisition, RAZR was ready to optimize their HubSpot instance to better serve their four divisions. This optimization process would be critical, as the VP of Sales and Marketing, Brigid Ling, recognized: *"We wanted to better understand the buyer's lifecycle stages to enable our sales team to be more effective. We knew we were underutilizing the platform, but we didn't have the internal expertise to optimize it."*

Without this optimization and the efficiencies of automation at work, RAZR wasn't using HubSpot to its fullest extent. *"Without a clean HubSpot instance, it was difficult to reach customers and prospects to deliver timely and relevant content. It was important for our overall marketing strategy that we optimize our HubSpot environment."*

Why RAZR Chose Simple Strat

Finding the right help was tricky, as any partner would need deep HubSpot knowledge and the ability to customize strategies to RAZR's unique structure. After comparing several competitors, the company chose Simple Strat for their demonstrated commitment to mastering their craft and the commitment to being a partner in the process.

The partnership began with a comprehensive Buyer Journey Workshop. *"The workshop afforded us the opportunity to set up our buyers' journey in a way that made sense for our particular buyers," says Ling. "Our HubSpot specialist helped us dig into how we could establish the right buyer's journey for our particular segments of the business."*

RAZR quickly hit new milestones in their ability to leverage HubSpot. After setting up lifecycle stages and triggering events, they could properly segment their contacts. From there, the team helped build email workflows and buyer journeys from scratch, marking a pivotal point in their optimization process.

Looking at What's Next

Today, RAZR's HubSpot setup is running smoothly, with higher user adoption, enhanced visibility into their business, and newfound internal expertise. They've expanded their partnership with Simple Strat substantially over the past year.

"We have this inside joke here, whenever we have a complex problem we want to see if we can stump Will [DePeri], but here we are nearly a year down the road, and we haven't been able to do that yet."

"We're at a point where our reports can become more and more complex and multilayered... It's been really fun to take our data and see how we can apply it to the more complex strategies," says Ling. "Simple Strat has been instrumental in helping us strengthen our reporting throughout the company."

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Our consultant at Simple Strat, Will DePeri, has exceptional knowledge and expertise within HubSpot, and he's just a nice guy too! Choosing to work with Will was an easy choice.

— Brigid Ling

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*We were incredibly productive in our first couple of months, and what we got done in that time **really set us up for future success.***

— Brigid Ling

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HubSpot reporting and dashboarding has grown across all areas of our business.

Whether it's sales, marketing, account-based marketing — we're using the enhanced reporting that HubSpot offers on a daily basis.

— Brigid Ling

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Working with Will to optimize our HubSpot instance has helped create more effective targeting.

— Brigid Ling



 **Simple Strat**

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The Client Perspective

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— Brigid Ling, VP of Sales and Marketing at RAZR

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Don't let HubSpot's complexities slow you down.

Improve your sales and marketing effectiveness with expert HubSpot guidance — talk to Simple Strat today.



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