

# Salesforce to HubSpot: DriveSure's Upgrade to a Holistic CRM

Like so many organizations, DriveSure encountered obstacles with Salesforce and Pardot, finding these tools limited in delivering essential data, which hindering their team's performance. Opting for a strategic shift, DriveSure collaborated with trusted partner Simple Strat to transition to HubSpot, aiming to streamline their operations and improve visibility of customer journeys.

## The Problems:

- Complex CRM limiting report generation
- Hindered marketing and sales communications
- Low adoption due to CRM complexity
- Pardot integration issues with Salesforce

These issues collectively led to suboptimal marketing and sales operations, with difficulties in reporting and content delivery. This hampered DriveSure's ability to communicate effectively with customers and utilize the full potential of their CRM.

## The Solution:

- DriveSure partnered with Simple Strat for a **HubSpot migration**, relying on their expertise for a strategic transition. This included guidance on content transfer, data import processes, and a clear migration plan, ensuring a smooth transition with minimal disruption.

## The Results:

- ✓ Improved customer relationship tracking
- ✓ Seamless integration of marketing and sales
- ✓ Increased productivity
- ✓ Enhanced inbound marketing strategy
- ✓ Streamlined lead management



## CLIENT

DriveSure | [drivesure.com](https://drivesure.com)

For the past 20 years of its 75-year history, DriveSure has helped new-car dealerships offer unbeatable maintenance and remain the go-to provider for service, tires, and unplanned repairs.

## INDUSTRY

Automotive

## SERVICES UTILIZED

- Comprehensive Salesforce to HubSpot Migration
- CRM Optimization
- Strategy Development for Sales and Marketing

## METRICS

### ▲ 23% More Leads

In their first year of using HubSpot, DriveSure generated 23% more total leads and 11% more qualified leads than the average of the last two years prior to using HubSpot.

### ▲ 30 Point Increase in Lead Source Tracking

The percentage of leads without a trackable source dropped by 30 percentage points (from 43% of leads having an unknown source to just 13%) in their first year of using HubSpot.

# A Deeper Look

DriveSure faced significant challenges with their existing Salesforce CRM, which was complex and lacked the intuitive functionality needed for efficient operation. Their struggle with Salesforce's intricate setup and the specialized technical knowledge it required for customization led to difficulties in generating accurate reports. This not only impeded their ability to deliver timely and relevant content to their contacts but also significantly affected their marketing and sales communication efforts. The integration issues with Pardot further complicated the situation, making it difficult to access cohesive marketing and sales reports.

**Because of these challenges and the platform's limitations, DriveSure experienced inhibited business operations, leading to reduced effectiveness in marketing and sales strategies and a diminished return on their CRM investment.**

## Why DriveSure Chose Simple Strat

DriveSure's decision to partner with Simple Strat for their 'HubSpot migration' was influenced by a combination of factors. Firstly, their pre-existing relationship and positive experiences with Simple Strat, as highlighted by CEO Bill Springer. This familiarity and proven track record played a significant role in their choice.

Secondly, Simple Strat's expertise in HubSpot was a crucial factor. ***"Once we'd made the decision to switch to the HubSpot environment, we knew there was a lot of value to be added by working with Simple Strat," Springer says. "Simple Strat [helped] us have a clear understanding of 'here's what the lift is going to be, here's how heavy it's going to be, here's what we can help you with.'"***

The migration with Simple Strat provided easier usability and streamlined processes, which significantly enhanced DriveSure's customer relationship management and improved their operational efficiency. As Springer remarks, *"The strategy of having the long view from a marketing communications perspective has helped us create a brand awareness and brand image in the marketplace, and that has been very helpful and positive."*

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***The integration [across teams] is much easier in HubSpot.***

*There doesn't seem to be any walls between marketing and sales. It's just a more holistic alternative.*

– Bill Springer

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***Having a strategy for communicating with vehicle owners has been instrumental...***

*You'll see that reflected in our website, where we have two clear paths for visitors to go to (whether they're a dealership, or a customer of a dealership) and our marketing messages and content are organized appropriately."*

– Bill Springer

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***Having the long view from a marketing communications perspective has helped us create a brand awareness and brand image in the marketplace***

*and that has been very helpful and positive.*

– Bill Springer

## Looking at What's Next

Bill Springer remarks how DriveSure now has not only a robust inbound marketing strategy, but a well-designed HubSpot setup to track the impact of that marketing, to get the right information to the right leads at the right time. With HubSpot now giving him a clear understanding of how customers build a relationship with DriveSure, he's able to confidently take a long term view. DriveSure continues to grow their partnership with Simple Strat for HubSpot and content strategy.

## The Client Perspective

For others considering a similar migration, DriveSure recommends partnering with Simple Strat. They appreciate that Simple Strat provides not just the marketing strategy perspective that businesses need, but the expertise into the technology to apply it. *"When you combine a really good deadly marketing strategist along with the [right] technology, that's a great combination."*

*"I would say my favorite thing about working with the team is everyone just knows their stuff. Everybody at Simple Strat has been great to work with. Everybody does what they say they're going to do. They honor their word, and are just really easy to work with."*

*"If you're considering using Simple Strat for HubSpot implementation, I'm not aware of anyone else out there who's got the breadth and depth of knowledge with respect to HubSpot implementation that they do. It was pretty clear to us that there was a lot of value-add by partnering with a Simple Strat, in terms of that," Springer adds. "And we're certainly glad we did."*



**Bill Springer**  
CEO of DriveSure

**Ready to streamline your lead management and increase productivity with HubSpot?**