Case Study

# RISA's Strategic Shift to HubSpot-Led Customer Nurture and Acquisition

## The Challenge

In the fall of 2022, RISA, a developer of cutting-edge structural design and optimization software for structural and civil engineering firms, identified several key hurdles impeding expansion within the building market. Contracting Orange Marketing to help, Ben Follett, Director of Sales and Marketing, enumerated the marketing challenges they faced:

**Effective ROI Measurement:** Linking advertising campaigns with e-commerce and event results was problematic, impairing accurate ROI understanding.

**Automation:** Email workflows to engage customers throughout their buying stages with adaptable and contextually relevant communication were extremely manual.

**Understanding Customer Intent:** The prevailing method of customer outreach provided little insight into their audience's interest or readiness to purchase.

**Consolidating Customer Information:** The disjoined existence of customer data across platforms like Segment, NetSuite, Mailchimp, and the RISA proprietary Customer Portal made it impossible to form a holistic view of history and interactions.

## The Solution

### Planning

RISA's engineering team, who carried out demos and arranged software trial offers, struggled with manual follow-ups, and their customer retention team grappled with a labor-intensive, manual process for managing software expirations and renewals via Google Sheets and emails. Both groups required streamlined, automated operational solutions to enhance lead conversion and renewal management.

The initial solution seemed straightforward – set these teams up to use HubSpot sequences, templates, snippets, and tasks to manage follow-ups. However, orchestrating specific triggers required serious thought, with three potential solutions considered:

1. Use deals for each contract, allowing multiple deals for a single customer, did present several downsides.
2. Use Marketing Enterprise for custom event triggers, a solution the client had already explored, but the actual events were already in the proprietary software management platform.
3. A third option was to set up a custom object solution and API integration that would provide a comprehensive picture of customer activity by tracking both their "Licenses" and "Transactions" - the two objects that covered the trial and paid software.

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## Implementation

The final solution consisted of:

- **HubSpot Sales Hub Enterprise:** Providing needed sales communication automation utilizing sequences and templates and custom objects.
- **Custom Objects:** Two custom objects with association labels, integrated via API with RISA's core software platform and managed by third-party tool Associ8 from hapily.
- **Marketing Automation:** Automated workflows and trigger sequences for nuanced and personalized communication were set up based on specific contact data and event triggers such as software tour (demo), trial expiration, and contract renewal.
- **Marketing Emails:** Marketing emails were transitioned to HubSpot from Mailchimp.
- **Blog** - The RISA blog was imported into HubSpot with its interface and menus improved.
- **Website & Behavioral Tracking:** The teams could now analyze user website interactions to inform sales strategies and automate communication through HubSpot's tools including workflows and sequences.

With the solution in place, we undertook several test runs to identify and correct edge cases and refined the process until zero issues surfaced.

# Results

Ultimately, together with RISA, we created a fully automated workflow covering their primary use cases, freeing them to focus on creating new campaigns and optimizing their top-of-the-funnel approach.

## Data Migration

Using Native Import Tools, Marketplace APP Associ8, and Custom APIs, we synchronized five source/legacy systems to HubSpot:

- RISA Customer Portal
- Netsuite
- Segment Data Warehouse
- Craft Mysql Database
- Mailchimp

Using three standard and two custom objects, we successfully migrated their contacts, transactions, licensees, companies, and deals into HubSpot.

**Number of total records**
- >100,000 Contacts
- > 100,000 Transactions
- > 25,000 Licenses
- > 15,000 Companies
- > 2,000 Deals

**Number of objects migrated**
- 3 Core Standard Objects (Contact, Company, Deal)
- 2 Custom Objects (Transactions, Licenses)

**Engagement start date**
11/15/2022

**Engagement end date**
5/11/2023

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## Impact and Transformation

RISA's outcome included a transformation in their sales and marketing approach, and they realized benefits in the following areas:

- **Improved Return on Investment Tracking:** RISA can now accurately measure the effectiveness of its advertising campaigns, allowing for smarter, data-informed decisions.
- **Enhanced Email Communication:** We've implemented an automated system that delivers emails relevant to each customer, ensuring they get the right information at the right time.
- **Unified Customer Insights:** RISA now offers a comprehensive snapshot of every customer, encompassing all interactions, history, and preferences in one place.
- **Targeted Sales Approach:** Thanks to leveraging detailed web and behavior analytics, RISA's sales tactics are now more focused, strategic, and tailored to individual customer needs.
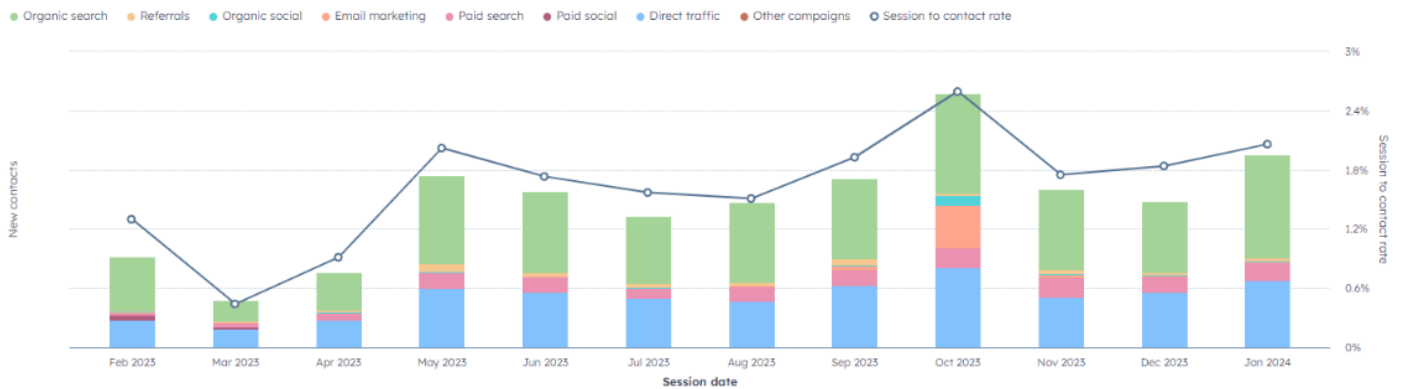
## Multifamily Housing
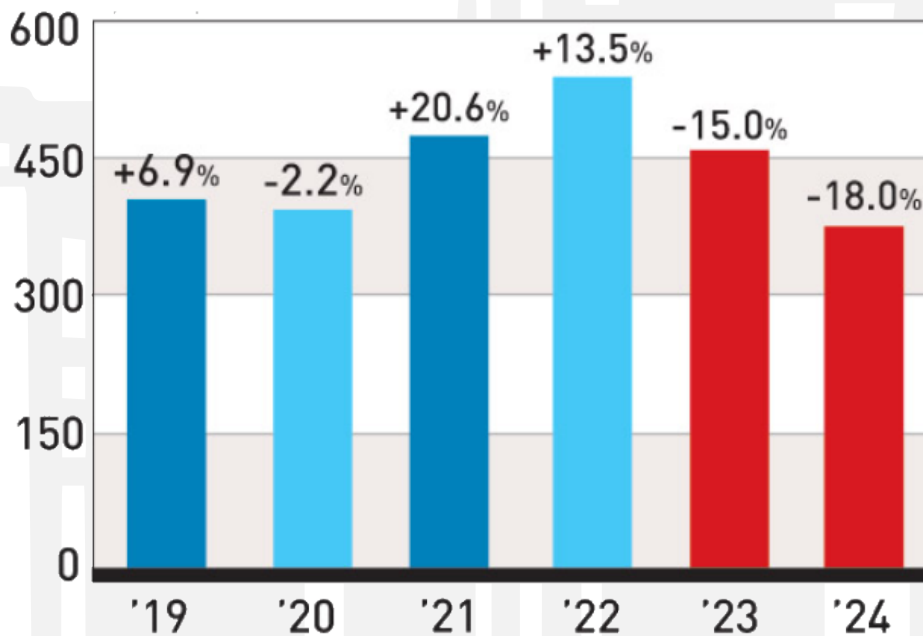
Data are averages of seasonally adjusted quarterly data and may not match annual
**SOURCE:** NAHB/Housing Economics.

During 2023, the year after implementation, RISA experienced a slowdown in the construction industry with residential and commercial property builds. RISA believes their competitive edge has been significantly enhanced by consolidating multiple data sources into HubSpot, which optimized and improved their systems. This integration has enabled them to effectively mine existing customer information and capture previously lost data from advertising and marketing campaigns.

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RISA now captures 2X the contacts, doubling its previous website conversion rates. It also converts these contacts to deals at a faster rate.



**New contacts** ▾ and **Session to contact rate** ▾

FROM 2/1/2023 TO 1/30/2024 | MONTH

● Organic search  ● Referrals  ● Organic social  ● Email marketing  ● Paid search  ● Paid social  ● Direct traffic  ● Other campaigns  ○ Session to contact rate

## Future Success

In 2024, RISA plans to strengthen its year-long partnership with HubSpot by integrating further systems to streamline purchases, including a paid learning management system for training, enhancing their customer journey management.

RISA also aims to broaden its outreach by refining its outbound sales strategy to optimize HubSpot for targeted lead engagement and efficient customer acquisition. This strategy uses HubSpot's tools for data analysis, automation, and lead scoring to target ideal customer profiles effectively.

*"Orange Marketing quickly became our HubSpot "Sherpa", guiding us through the initial setup and helping us integrate our complex custom data sources. They provided us with marketing content, including an ebook and blog articles that helped get our revised content marketing strategy up and running and have been an essential source of information/insight during our implementation phase... we certainly could not have accomplished our goals or timeline without them."*

**- Ben Follett**, Director of Sales and Marketing, RISA

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In this video, Follett discusses how HubSpot has provided significant visibility into its sales and marketing efforts. He praises the integration of HubSpot with their custom-built e-commerce platform and portal, explaining it has enhanced their ability to leverage intent data, manage customer interactions based on licensing triggers, and automate communication workflows.

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**RISA** A NEMETSCHEK COMPANY

Ben Follett
Director of Sales and Marketing, RISA Tech, Inc.

**CLICK HERE TO WATCH VIDEO**

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# HubSpot Diamond Partner Laser-Focused On B2B SMB

## About Orange Marketing

Orange Marketing helps B2B companies succeed with HubSpot by offering implementation, optimization, and operational support across all Hubs: Sales, Marketing, Service (Help Desk), and CMS (Website).

## Achievements & Recognition

- 🏆 93+ 5-Star HubSpot Reviews
- 🏆 Women-owned business (WBENC certified)
- 🏆 HubSpot Data Migration Accredited
- 🏆 HubSpot Onboarding Accredited
- 🏆 HubSpot Marketing Impact Award winner
- 🏆 Hold all 42 HubSpot certifications

## Expertise

- ⭐ **Marketing Services** — Email marketing, content creation, customer marketing, full inbound and outbound marketing services, SEO, social media, conversational marketing, landing pages
- ⭐ **Paid Media Management** — Google, Bing, Linkedin
- ⭐ **Sales Services** — Sales coaching & training, CRM migration, sales and marketing alignment, CRM implementation, sales enablement
- ⭐ **Website Services** — Quick and easy HubSpot CMS website migrations, builds & updates
- ⭐ **Customer Success Services** — Ticketing system implementation, knowledge base development, customer success training, help desk implementation

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