



Case Study: Improve Sales Enablement & Integrate Content Into the Buyer's Journey Using App Data Room and HubSpot

Sales enablement is the technology, processes, and content that empower sales teams to sell efficiently at a higher velocity. This is critical in today's fast-moving and continuously interconnected business environment. Whether you are selling to consumers or businesses, sales enablement is critical to your success as an aligned marketing team and a sales team working in tandem toward a common goal.

The following showcases how you can leverage the HubSpot Connect integration, App Data Room, to help share, present and track interactive sales media and content to further enable the sales team and align with marketing efforts.

App Data Room is the leading enterprise sales enablement platform assisting sales and marketing teams to organize, store, share, present, and track interactive sales media and content. App Data Room allows companies to collect data about in-person interactions that can be incorporated into the marketing and sales process. Optimized for global organizations, App Data Room puts the right content in the hands of the sales rep and the prospect, wherever they need that content to help streamline the sales process.



Challenge:

The healthcare company leveraging HubSpot and AppDataRoom had three primary challenges they were looking to overcome with the App Data Room and HubSpot integration.

- 1. Streamline:** Maintaining sales collateral and ensuring sales reps are truly using the most updated and approved material can be a daunting task. With the number of verticals that most healthcare companies specialize in from patients to providers and insurance companies, this was a challenge.
- 2. Content Interactivity:** There is always a need to build interactivity into content to make it more tangible for the receiver of the content, and an easier delivery for the sales rep. Interactive content helps engage the reader and promote increased engagement in the content and with the overall brand.
- 3. Analytics:** Tracking the metrics of content is critical. As marketing teams continue to produce more and more content, it becomes increasingly important to know what content is working and what content isn't so you can focus on the right content that is converting prospects into customers.

Solution:

The marketing team for this healthcare company supports sales assets in all 50 states across a variety of verticals and specialties. This makes it critical to leverage digital content for sales reps in a personal, efficient, and engaging way. This team uses App Data Room to:

- Streamline the content distribution process.
- Make marketing and sales material more interactive.
- Integrate field activities with their HubSpot and Salesforce instances.
- Track and report Key Performance Indicators (KPI's) to gain a better understanding of which content is being used by field-based sales teams.
- Ensure regulatory control of material and to safeguard against outdated material being viewed by customers.
- Segment prospects into the appropriate Buyer Persona, Lifecycle Stage and Vertical to market to them most effectively based on where they are in the buyer's journey.

HubSpot Usage:

Some integrations only allow you to sync contact properties to the HubSpot instance, but with App Data Room, this healthcare company is able to leverage the following HubSpot tools to customize the journey for each contact that comes through the App Data Room integration:

- Smart Lists
- Workflows
- Email
- Lead Scoring
- Custom Contact Properties

This allows them to automate the process to further engage prospects and move them through the buyer's journey. **Here's an example of how their usage of the integration is unique and how the integration helps to further the sales enablement process for their sales team.**

1. Leads generated on the App Data Room platform from face-to-face conversations between sales reps and prospects are automatically synced to their HubSpot instance.
2. If the contact record did not previously exist, it is created with no manual data entry required by the sales rep.
3. Contacts are appropriately and automatically segmented into workflows based on their vertical and specialty of interest.
4. From there, individuals are added to ongoing email campaigns, which increases the critical volume of monthly touchpoints to high-value customers and prospects.
5. In addition, those contacts are assigned a Lead Score to move them to another Lifecycle Stage in their journey to ensure they are receiving the most relevant information. In addition, the appropriate Buyer Persona is tied to the contact record to segment the database.

Results & Impact:

There have been a variety of quantifiable results, cost savings results and process improvement results utilizing the App Data Room and HubSpot integration.

Lead Generation to Date: There have been **238 new leads** generated in the first 3 months of using this integrated strategy.

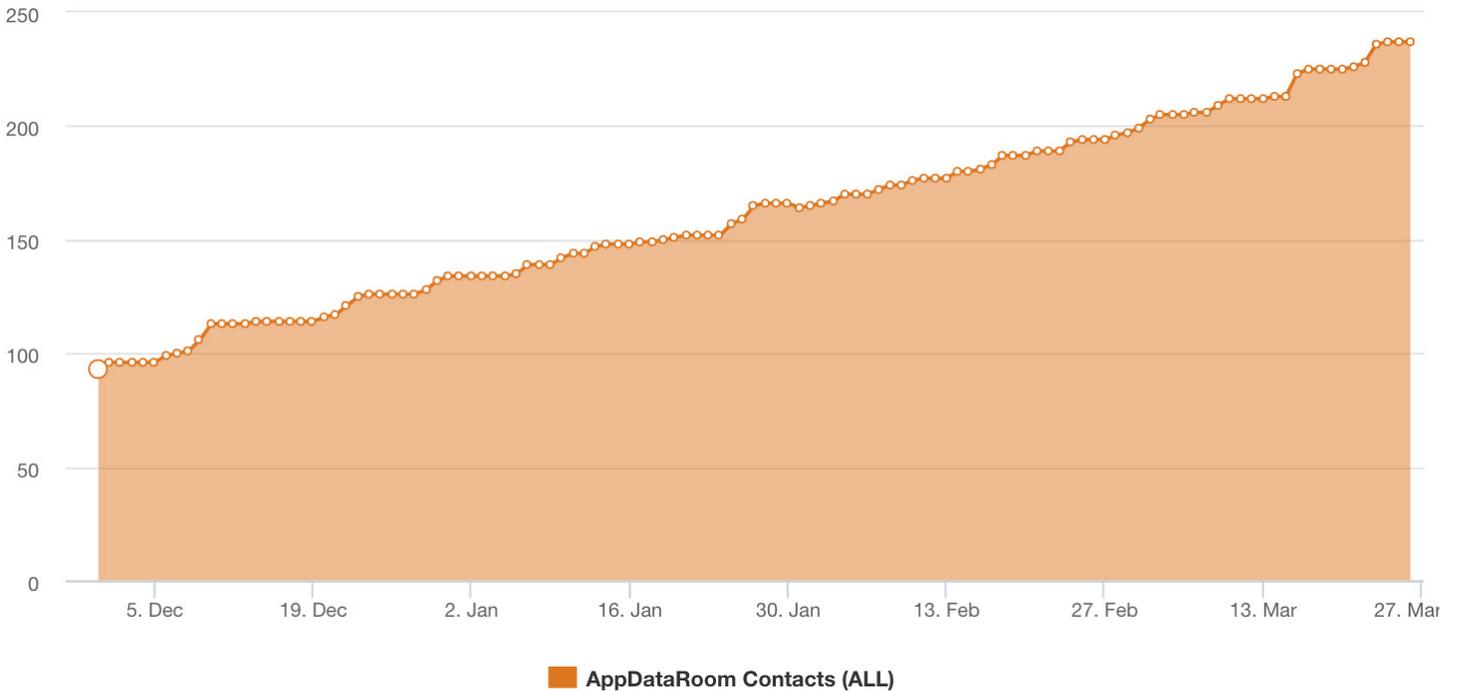
Total Customers Acquired: There have been **75 customers acquired in a 6 month period.**

Percentage of MQL's to Customers: They have seen a **31.5% conversion rate** of marketing qualified leads to new customers.

Average Email Open Rate: For these contacts, the average **email open rate is 48%** for the workflow follow-up emails triggered by the HubSpot and App Data Room integration.

Average Email Click-Through-Rate: For these contacts, the average **email click-through-rate is 15%** for the workflow follow-up emails triggered by the HubSpot and App Data Room integration.

The chart below shows the contacts created by App Data Room since the beginning of the integration with HubSpot:



Other Notable Results & Impact Quotes:

Marketing Content Usage: With line-of-sight to the most popular and most-used marketing material, the healthcare company can analyze hundreds of pieces of collateral, understand what is valued by Sales and customers, and focus efforts on the types of content being leveraged. This allows them to positively reinforce and gain insights from the Sales assets that are actively using the tool as well as follow-up with those not using the tool to uncover and resolve challenges.

Reduced Costs & Increased Speed: The App Data Room platform has also increased the marketing team's speed to market with new content, and has reduced costs in printing.

As you can see, the App Data Room and HubSpot integration provides tremendous value to companies that are looking to improve sales and marketing processes and improve sales enablement. Incorporating technology, processes and content allows the sales team to focus on selling. They know their marketing team has a clear understanding of their goals and process, and has dynamic marketing in place to help nurture their contacts over time to become customers. Over time, the company expects usage and adoption, cost per media use, amount and quality of creative elements, the volume of follow-ups, and more, to improve even further.

Prism Global Marketing Solutions is a digital marketing agency, HubSpot Platinum Partner and HubSpot Accredited Trainer providing strategic online and inbound marketing consulting and support to organizations around the globe. Prism Global Marketing Solutions understands the constraints of marketing time and budgets, and finds the most unique and effective solutions for their clients to achieve the greatest return on investment from their marketing strategy.

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Please Note: Company name is not mentioned in this case study for confidentiality purposes.



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