

Transforming Marketing Operations: Migration to Salesforce Marketing Cloud

Transition of a leading energy services provider from HubSpot to Salesforce Marketing Cloud (SFMC), ensuring seamless integration with Salesforce Sales Cloud and empowering the client with enhanced marketing capabilities and insights.

Overview

QBurst executed a smooth, high-stakes migration to Salesforce Marketing Cloud, integrating marketing and sales data to unlock campaign potential.

- **Seamless Migration:** Successfully transferred all relevant assets, campaigns, data sets, and contacts from HubSpot to SFMC, ensuring data integrity and business continuity.
- **Integrated Data Strategy:** Ensured real-time data synchronization between Sales Cloud and Marketing Cloud, leveraging customer data for personalized marketing.
- **Operational Efficiency:** Automated key customer journeys and campaign processes, providing clearer insights into performance metrics.



Client

Leading provider of energy services, program management, customer outreach, and field services across various utility sectors in the United States.

Challenges

- **HubSpot Disconnection:** The lack of integration between HubSpot and internal systems prevented accurate measurement of campaign success and customer journey tracking.
- **License Expiration Deadline:** The impending expiration of HubSpot licenses necessitated a fast and seamless migration to avoid operational disruption and unnecessary costs.
- **Data Integrity:** Ensuring the secure and accurate transfer of existing contact information, preferences, and historical data from HubSpot to the new SFMC environment was paramount.

- **Lack of Automation:** Inadequate insights into campaign performance limited the effectiveness of marketing initiatives and prevented the automation of personalized customer journeys.

QBurst Solution: SFMC Migration

We implemented Salesforce Marketing Cloud (SFMC), managing a smooth and seamless transition from HubSpot. The migration process included a meticulous transfer of relevant assets, campaigns, data sets, and contacts, ensuring data integrity and business continuity.

Key Solution Components

- **Seamless Integration:** Integrated Salesforce Marketing Cloud with Salesforce Sales Cloud to ensure real-time data synchronization and consistency, enabling the use of sales data for targeted marketing.
- **SFMC Configuration:** Customized SFMC by setting up user permissions, business units, and data extensions. Implemented the Sender Authentication Package (SAP) to enhance email deliverability and domain authentication.
- **Journey Automation:** Developed custom templates and frameworks within Journey Builder to capture and automate customer journeys, allowing for targeted messaging based on defined behaviors.
- **Reporting and Training:** Provided comprehensive documentation, training, and detailed reporting capabilities (leveraging Salesforce Marketing Cloud Intelligence) to fully equip the marketing team to manage and execute campaigns effectively.

Technical Highlights

- **Core Platform:** Migration and configuration of Salesforce Marketing Cloud, Sales Cloud, and Experience Cloud to create a unified ecosystem.
- **Authentication:** Implemented the Sender Authentication Package (SAP), a necessary setup for enhancing email deliverability and ensuring domain authentication.

- **Custom Assets:** Used HTML/CSS, JavaScript, SQL, and AMPscript to create custom, reusable templates for campaigns and marketing materials.
- **Data Integrity:** The migration process focused on ensuring a seamless transfer of information, ensuring data integrity and business continuity throughout the transition.

Impact

- **Increased Campaign Effectiveness:** Campaigns could be tailored and adjusted based on real-time feedback, leading to a 60% increase in marketing effectiveness.
- **Improved Efficiency and Cost Savings:** The seamless integration allowed the marketing team to streamline processes and reduced the overhead of maintaining legacy licenses, achieving an estimated 40% increase in efficiency.
- **Enhanced Engagement and Data-Driven Marketing:** The ability to define and automate customer journeys improved customer engagement, leveraging customer data from Sales Cloud for highly targeted strategies.
- **Faster Time-to-Market:** The custom templates and automation resulted in efficient campaign management and execution, ensuring streamlined and rapid marketing rollouts.
- **Strategic Alignment:** Migration to Salesforce Marketing Cloud provided a future-ready, integrated platform, ensuring cost savings by avoiding additional HubSpot license costs.