Case Study

Client: Yarra Ranges Tourism

Overview

Yarra Ranges Tourism are well versed in Hubspot's software, although needed a data cleanse and to revamp their internal processes. We conducted an audit to increase efficiency and implement Hubspot best practices.

Key Takeaways

| HubSpot portal audit | Refine processes & change managment | Improve data management |

Goals

1. Improve data reliability and clean up data
2. Ensure internal processes run seamlessly across departments to manage data integrity
3. Update staff on new best practices

The Challenge

Yarra Ranges Tourism wanted to ensure they had consistency in their data management and improve their data reliability. They wanted to refine the way they used Hubspot's software and ensure it aligned with their internal processes.

Their main focus was to ensure their data was clean and reliable, and to update staff on the new best practices.

The Solution

We provided a detailed portal audit of Yarra Ranges HubSpot implementation, which served as a basis for identifying critical issues and deployment of a project plan.

We redesigned their deal pipelines to ensure they synced seamlessly to their website and were clear, precise and easy for their team to use.

We facilitated a 4-hour on-site workshop covering sales and marketing processes to help with change management. This process included implementing HubSpot best practices to ensure all staff were competent and confident in using HubSpot's software.