

Accomplishing applicant efficiencies in HubSpot CRM through data integration

#### THE BRIEF

Since its establishment, John Wood
Community College has served students in
Quincy, Illinois to further their education "by
providing accessible educational
opportunities and services at an exceptional
value. The college's goals included
continued enrollment growth and stability."

Growth. Stability.
Two things an organization can't have without organized data.



### THE PROBLEM

John Wood Community College needed an integration for their HubSpot Marketing and Banner solutions. The goal was to take appropriate lists of applicants from Banner and synchronize them with HubSpot based on where the applicant was in the application and registration process.

The customer was performing manual data validation and import to HubSpot Contacts from Banner Applicants/Registrations using their Argos reporting tool. This process involved complexities such as matching and consolidating applicant data against existing HubSpot contacts. Additionally, the current college term needed to revolve based on the next term of registration.

### THE PROBLEM

For example, an applicant started their application in Banner using their parent's email but previously used their own email when completing a HubSpot Webform. This undertaking made it difficult to accurately identify students and analyze ROI with respect to John Wood's marketing efforts.



### THE IMPACT

Manual processing and importing of Banner data to HubSpot was extremely time-consuming. The client was unable to complete the job as often as it required or include all the data needed to improve marketing capabilities. As a result, John Wood was not able to obtain a full view of ROI due to the inability to track each Application/Registration status details in HubSpot.



## THE SOLUTION

# IntegrateHQ

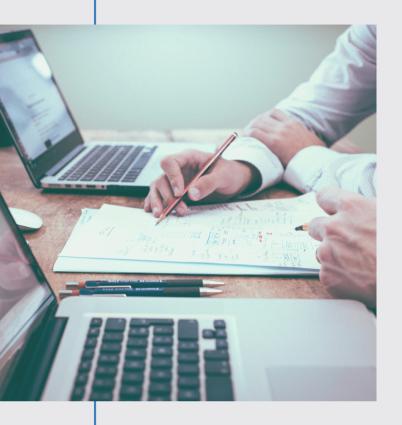
In spring 2017, Trujay designed an integration using a middleware solution to convey data between Banner, Box, and HubSpot.

While this integration was in operation, development was also underway for Trujay's more advanced middleware IntegrateHQ, as the only platform engineered specifically for HubSpot optimization.

Upon John Wood alerting Trujay that data syncs were failing, it was determined that access to Box had expired causing a break in the integration. Having this pause and considering IntegrateHQ had launched to the market in the fall of 2018, John Wood and Trujay were able to assess that a better solution would be to move the logic to IntegrateHQ.







The biggest
challenge was to
ensure we matched
Banner Applicants
with existing
HubSpot contacts
without the ability to
ask the contacts for
verification based on
an external ID,
birthdate, or other
data points.

### **HOW IT WORKED**

Trujay designed an integration using IntegrateHQ middleware where daily automated Argos export data were sent as CSV files to an IntegrateHQ email account. The CSV files were then processed, manipulated, and synchronized appropriately to HubSpot.

With the power of IntegrateHQ, John Wood was also able to add date fields structured to recognize the college term along with the correct date format.

## THE RESULT



The integration automatically processes daily exports from Banner into HubSpot. Simultaneously, the integration accurately matched the majority of records between systems and notifies the client of conflicting match results in a daily Progress Report. This reduces manual involvement, allowing the client to focus and achieve their marketing goals.

The integration includes additional, usable data on each contact, allowing the client to track applicants from the beginning stages of applying and registering, all the way to full enrollment. John Wood Community College now effectively uses all of HubSpot's features and has a perfect view of its ROI.



# **PROBLEM SOLVED**



2.5X Improvement in ROI



3 Months to Deliver



**42% Efficiency Gains** 

Our integration
solution achieved 95%
matching of records
and sophisticatedly
captures the
remaining 5% of
uncertain matches for
human intervention.

## **Testimonial**

66

[Trujay's IntegrateHQ solution] is a workhorse that just runs in the background. Not noticing it means that it is working and making me happy."

99

- Kristen Ritterbusch Director of Admissions





Trujay is the leading CRM data-expert company. We connect marketing and sales automation systems quickly and securely by delivering superior technical savviness and expertise.

Founded in 2016, Trujay applies the best software practices for sales and marketing management. Trujay's consultative approach is custom to each client's unique environment and knows that one size does not fit all.

IntegrateHQ is the first middleware built to connect any data or system to HubSpot directly, something no other company has ever done before. IntegrateHQ fits every kind of user, as it adapts to all levels of technical experience. Having years of experience with multiple middleware solutions, Trujay has the ultimate HubSpot success factor with IntegrateHQ

Headquartered in Austin, Texas with offices in the US, Europe, and APAC, Trujay is a global organization serving customers around the world.