

## CASE STUDY

### FRANK, RIMERMANN + CO. LLP

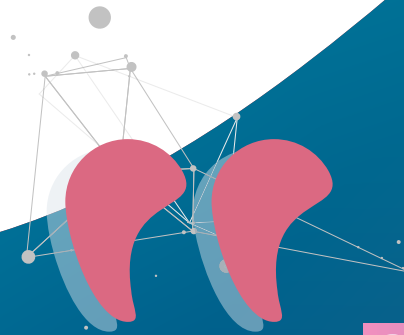
# HOW VONAZON EXECUTED A PARDOT TO HUBSPOT MIGRATION **IN JUST 2 WEEKS**



## COMPANY BACKGROUND

Frank Rimerman + Co.'s story began when father and son team Frank W. Rimerman and Thomas W. Rimerman founded the company in 1949. The duo opened their first office in San Carlos, entering the tax-based industry and **starting a proud 70-year global history of offering the best competitive client-centered solutions in the business.** Since then, they've repositioned themselves with a new office in Silicon Valley, adapting early on to the rise of new technologies and business opportunities. FRC has expanded their services to tax consulting and planning, audit and financial reporting, investment advisory services, accounting support, and ERP and CPM software consulting.

Today Frank Rimerman + Co. has climbed its way into the top 50 certified public accounting firms with expert financial options tailored for business and individual client needs.



**FRC is proud to be ranked among the top 20 firms in the nation by Vault Career Intelligence.** As testimony to FRC's culture of going above and beyond for their staff and customers, Silicon Valley Business Journal has consistently ranked them as "One of the best places to work."

**ONE OF THE BEST  
PLACES TO WORK.**

-Silicon Valley Business Journal

# CHALLENGE / OPPORTUNITY

## THE CHALLENGE

Before migrating to HubSpot, FRC primarily used the cloud marketing app Pardot. FRC began their journey with Vonazon requiring simple assistance and implementation with Pardot. However, due to the notorious service quality of Pardot, the FRC marketing team was met with several setbacks.

Vonazon chose to view Frank Rimerman + Co.'s struggles as an opportunity to impart a better solution. As a team, we helped trace the root causes back to how poorly Pardot is structured for marketing. Notably, Pardot has a surprising lack of user resources. Pardot does not have a WYSIWYG (what you see is what you get) editor so building emails was difficult.

**Our analysis team found Pardot's reporting system failed to provide relevant data that FRC needed within the deadlines required for client marketing events.**

We identified this as FRC's #1 pain point, which has plagued Pardot's users thanks to poor customer accessibility.



Pardot claims to give value through high-level landing pages, emails, and introductory user analytics rates on one page. **However, when put to the test Pardot's performance issues overly complicated our client's reporting processes.** Having all those options on one page meant FRC had to sift through everything one at a time before obtaining stats or launching campaigns costing them valuable time.

## OUR SOLUTION

Our goal for FRC was two-fold. First, we wanted FRC to understand they were limiting their success by using Pardot. Second, we discussed a reliable long-term solution around HubSpot's ability to offer better lead generation using granular list segmentation. Addressing this issue mattered because we knew FRC would continue struggling to launch campaigns or landing pages without the proper marketing tool at its disposal.

We began by demonstrating that shifting from Pardot to HubSpot would create more value. We showed FRC they could achieve greater freedom and create content faster than Pardot with significantly less grief.

**The results spoke for themselves, showing traceable improvement in FRC's efficiency, reducing spam, creating fewer bounces, more successful open rates, and greater visibility in marketing campaigns.**

We aligned with FRC's culture of going above and beyond for their clients by offering more support past the single HubSpot implementation request. Vonazon asked to take on the responsibilities of onboarding and tech support for FRC instead of going through the primary HubSpot support team. **As a HubSpot Elite partner, we knew we could give more time and commitment to problem solving than other agencies.**

After hearing our proposal, FRC began to understand that a "hands-off" stress-free option for managing sales was possible. We highlighted ourselves as a full-service implementing agency, produced solutions for FRC's critical wants and needs, and supplied strategic direction for FRC's future success.

## BENEFITS OF HUBSPOT VS PARDOT



- Intuitive campaign building tools
- Insightful and meaningful reporting
- Lead generation improved using granular segmentation
- HubSpot's knowledgeable support base

## THE RESULTS

- Less bounce backs from their lists
- List quickly cleaned, easing maintenance setup
- Improved lists using unmatched granular segmentation
- Increased leads & sales using targeted segments
- World-class campaign reporting

## CONTACT US TODAY

**TONY HERRERA**  
Account Executive  
**Vonazon Inc.**

 (805) 791-5474 | D  
(800) 600-7007  
 sales@vonazon.com