CASE STUDY

CLARION MEDICAL TECHNOLOGIES

HOW VONAZON HELPED A LEADING MEDICAL EQUIPMENT COMPANY **SUPERCHARGE SALES GROWTH, MAXIMIZE EFFICIENCY,** AND **OPTIMIZE THEIR ROI**

vonazon

INTRODUCTION

Clarion Medical Technologies (Clarion) is a prominent leader in the Canadian medical and aesthetics equipment industry, managing over $100 million in revenue with 161 employees across various locations. Clarion serves a diverse clientele, including healthcare providers, clinics, and aesthetic professionals, offering a wide range of advanced medical and aesthetic equipment solutions.

Prior to partnering with Vonazon, Clarion faced significant operational challenges due to their reliance on outdated and siloed systems, such as Great Plains for financial management and Constant Contact for marketing. These disconnected systems resulted in inefficiencies, including:

Lack of Integration:
Financial and customer data were not synchronized, leading to inaccurate financial reporting and limited visibility into key business metrics.

Manual Processes:
The absence of automation led to time-consuming manual processes, reducing productivity and increasing the risk of errors.

Ineffective Sales and Marketing Coordination:
Disparate systems made it difficult for sales and marketing teams to collaborate effectively, resulting in issed opportunities and suboptimal lead management.

These challenges hindered Clarion's ability to achieve meaningful sales growth and maximize their productivity. Recognizing the need for a comprehensive solution, Clarion sought an **integration strategy that would enhance operational efficiency and enable data-driven decision-making.**

CLARION®
MEDICAL TECHNOLOGIES

Clarion chose Vonazon as their partner due to their HubSpot Elite Partner status and extensive track record of helping companies of all sizes and industries reach new levels of success. Vonazon's expertise in complex automation and integration projects made them the ideal choice to address Clarion's needs.

SUPPORTING CLARION'S GOALS WITH **INNOVATIVE SOFTWARE**

Clarion's primary goals were to streamline their sales processes, improve financial reporting accuracy, enable real-time visibility into key metrics, and automate their quoting process. The plan involved integrating HubSpot CRM with Great Plains for financial management, while utilizing GleanQuote for quoting.

The custom-built, bi-directional HubSpot integration was designed to ensure streamlined data flow, enhance reporting accuracy, and improve operational efficiency by providing:

| Seamless Data Synchronization	Automated Workflows	Enhanced Analytics Capabilities

Enhanced Sales and Marketing Capabilities with HubSpot

The integration of HubSpot Sales Enterprise served as the backbone of the solution, replacing NetSuite to provide advanced sales automation and pipeline management capabilities for Clarion. HubSpot's superior automation features initiated a more efficient sales process, enabling faster deal closures through enhanced visibility into customer interactions.

Additionally, Clarion transitioned from Constant Contact to **HubSpot Marketing Hub Enterprise**, significantly upgrading their marketing capabilities. HubSpot Marketing Hub played a crucial role in the integration by offering powerful tools for:
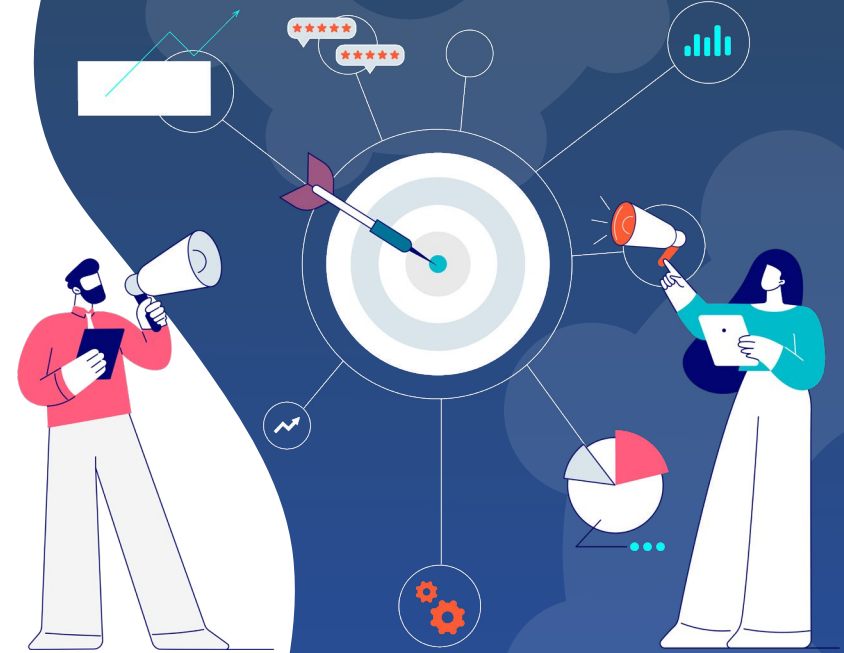
Inbound Marketing

Inbound Marketing

Inbound Marketing

HubSpot Marketing Hub's advanced automation capabilities also enabled more precise targeting, resulting in more effective marketing campaigns.
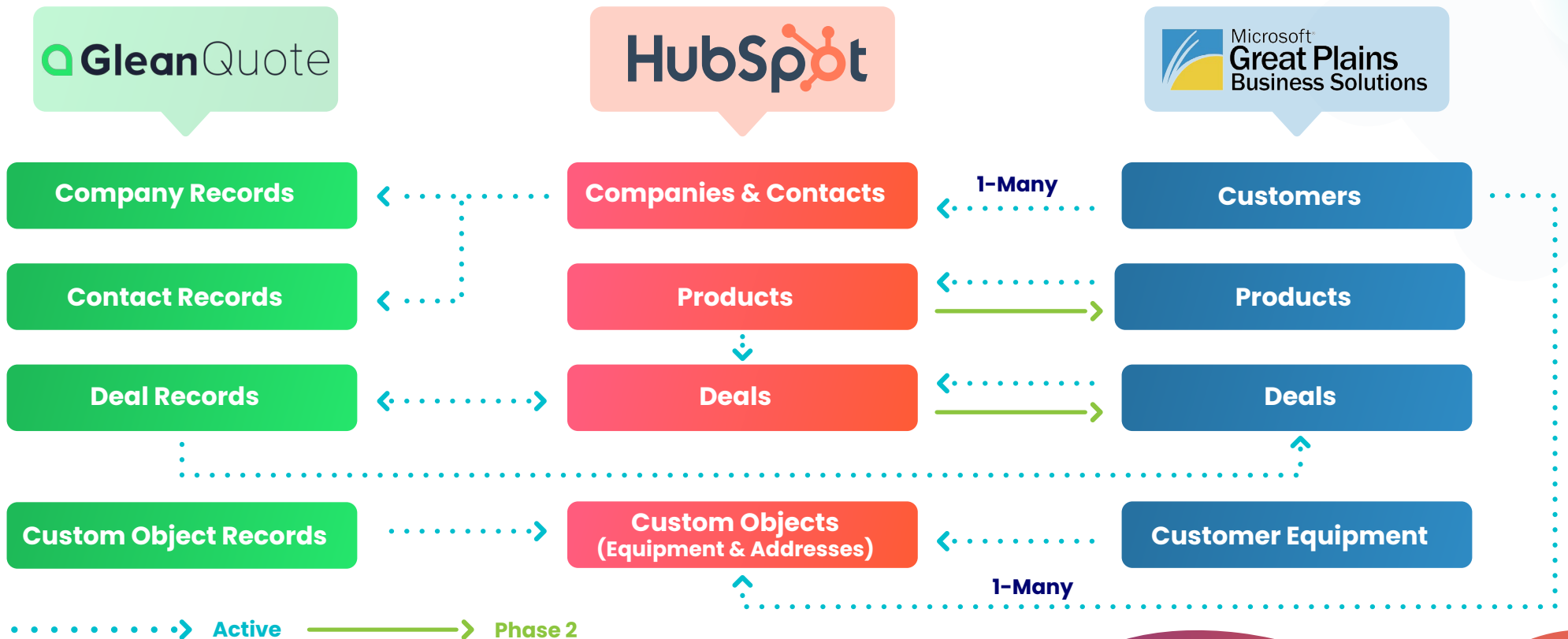
MORE TOOLS

Streamlining Quoting with GleanQuote

GleanQuote was integral to the integration solution, providing advanced quoting capabilities that complemented and expanded the functionality of HubSpot Sales Hub. Its specialized toolset **empowered Clarion to generate and manage quotes more efficiently**, while its seamless integration with HubSpot Sales Hub ensured that quote details were automatically synced with deal records.

Integrating Financial Management with Great Plains

Great Plains serves as the foundation for Clarion's financial management system. Integrating Great Plains with HubSpot was a crucial component of the solution, ensuring that **financial data such as invoices, payments, and account information were synchronized in real-time with the CRM**.

GleanQuote	HubSpot	1-Many	Great Plains Business Solutions
Company Records	Companies & Contacts		Customers
Contact Records	Products		Products
Deal Records	Deals		Deals
Custom Object Records	Custom Objects (Equipment & Addresses)	1-Many	Customer Equipment

Active ......▶ ──────▶ **Phase 2**

EXECUTING THE **INTEGRATION SOLUTION**

The integration solution for Clarion involved a **custom-built, multi-object**, and **bi-directional integration between HubSpot, Great Plains,** and **GleanQuote**. This solution was meticulously designed to provide a swift and significant return on investment by leveraging the synergy between HubSpot CRM, Great Plains, and GleanQuote to deliver immediate value. A phased rollout strategy was employed, prioritizing high-impact areas to secure early wins and maintain momentum throughout the onboarding process.

Innovative Methodologies

Vonazon's approach stands out due to its innovative, client-centric methodology. During the discovery phase, proprietary tools and methodologies were utilized to map out Clarion's existing workflows and data structures. This detailed mapping allowed for a seamless transition to the new system, minimizing disruptions to operations.

Vonazon's integration architecture ensured real-time data synchronization between HubSpot and Great Plains, crucial for maintaining data integrity and operational efficiency.

Additionally, advanced automation techniques were employed to streamline lead management processes, significantly reducing manual efforts and enhancing productivity.

Vonazon's expertise in leveraging data enrichment capabilities provided Clarion with a competitive edge by delivering highly personalized marketing and sales campaigns.

Automated Workflows

Automated workflows in HubSpot were designed to trigger actions based on financial information, thereby streamlining the sales process. The real-time updating of customer and product information in HubSpot ensured that sales and marketing teams always had access to current data. **These automated workflows also aimed to achieve several additional goals to further streamline Clarion's business operations.**

Enhancing the Transition from Marketing to Sales

The integration was designed to improve lead nurturing and conversion processes by ensuring seamless data flow between marketing and sales tools within HubSpot.

Increasing the Use of Sales Automation Tools

The integration leveraged HubSpot's automation capabilities to further streamline sales activities such as follow-ups, task assignments, and deal updates.

Ensuring Comprehensive Understanding and Utilization of HubSpot Reporting

By integrating financial and quoting data into HubSpot, the integration empowered Clarion users with enhanced, more insightful, and data-driven reporting capabilities.

Data Mapping

Ensuring accurate synchronization was paramount to the success of the integration solution. To achieve total precision, detailed data mappings were developed, clearly defining the relationships between source data and destination fields in HubSpot. These mappings covered company records, contact records, deal records, and custom object records, ensuring that all relevant data was properly transferred and utilized within the CRM.

Historical Actuals Pipelines

Specific mappings were established for financial data to ensure seamless synchronization between Great Plains and HubSpot. A core component of this process involved linking Great Plains' invoices to corresponding fields in HubSpot deals, such as Deal Amount, Invoice Data, and Payment Status. Real-time updates to financial metrics and synchronization of payment statuses directly supported the objectives of improving financial reporting accuracy and enhancing cash flow management.

Quoting Process Automation

The integration between GleanQuote and HubSpot was established to automate the generation, tracking, and management of quotes within the CRM. This process included mapping quote details from GleanQuote to corresponding fields in HubSpot deals, ensuring accurate and efficient quote-to-deal conversion.

Error Handling and Data Integrity

Robust error-handling mechanisms were implemented to manage any discrepancies or issues during data synchronization. These mechanisms ensured perfect data integrity across all systems, quickly identifying and addressing any errors.

Product and Customer Data Synchronization

Mappings were developed to synchronize product and customer data between Great Plains and HubSpot, including product details, pricing information, and customer contact details. This synchronization ensured that the sales and marketing teams had access to accurate and up-to-date information, facilitating targeted marketing campaigns and personalized sales interactions.

RESULTS & IMPACT

KEY COMPONENTS OF OUR SOUTION

Connecting Marketing and Sales
Seamless HubSpot and GleanQuote integration bridged the gap between marketing and sales to significantly improve lead management.

Improved Financial Insights
Real-time financial data integration with Great Plains empowered more accurate and timely financial decision-making.

Comprehensive Customer Insights
The connection of data across all platforms provided a 360-degree view of the customer, empowering more personalized and effective customer engagement strategies.

Scalability
Our solution was built with scalability in mind, with the ability to accommodate future business expansions and evolving technological needs.

Clear ROI Tracking
We included embedded mechanisms to measure the impact of our solution and provide clarity on return on investment, demonstrating the value realized well within the initial 90-day period.

RESULTS

"HubSpot's capabilities allowed us to streamline our sales processes and significantly improve our efficiency. The automation and real-time data synchronization have been game-changers for our team."

– Cameron Dell,
COO of Clarion Medical Technologies

32%
Year-over-Year Sales Growth

Our integration contributed to a **32% increase in sales** within the division utilizing HubSpot the most.

Increased
Operational Efficiency

The integration of automated workflows and data synchronization **improved overall operational efficiency** and **cash flow management**.

Enhanced
Marketing ROI

A unified platform for tracking marketing leads from inception to final sale **improved the effectiveness of marketing** activities and aligned sales and marketing efforts.

Reduced
Manual Effort

Automation streamlined processes, significantly reducing manual tasks and enhancing operational efficiency.

Improved
Financial Reporting Accuracy

Real-time synchronization of financial data led to more accurate and timely financial reports.

CONCLUSION

Vonazon's collaboration with Clarion showcases our commitment to delivering innovative, tailored solutions that drive real results. Faced with fragmented systems and inefficiencies, Clarion turned to Vonazon for a transformative integration strategy. **Our bespoke, bi-directional integration between HubSpot, Great Plains, and GleanQuote not only addressed these challenges but also propelled Clarion to new heights of operational efficiency and sales growth.**

Transform Your Business with Vonazon

If your organization is dealing with disconnected systems and manual processes, Vonazon is here to help. As a HubSpot Elite Partner, we have the expertise to streamline operations, enhance productivity, and achieve significant ROI.

CONTACT VONAZON

READY TO TRANSFORM YOUR BUSINESS?

Discover how Vonazon can help you achieve remarkable sales growth, operational efficiency, and marketing ROI through our innovative integration solutions. Join the ranks of successful businesses like Clarion Medical Technologies and unlock your company's full potential.

Contact Us Today!

Tony Herrera, Regional Sales Manager, Vonazon Inc.
(805) 791-5474 | (800) 600-7007
sales@vonazon.com

vonazon

HubSpot
Elite
SOLUTIONS PARTNER PROGRAM