

## CASE STUDY

MEDICAL TRANSPORTATION MANAGEMENT INC.

# SOLVING DATA FRAGMENTATION AND BOOSTING SALES

How Vonazon's HubSpot  
Integration Transformed  
MTM's Operations



# INTRODUCTION



Medical Transportation Management Inc. (MTM) cater to a diverse clientele, including state and local governments, managed care organizations, and healthcare providers. With a large volume of operations and a complex customer base, MTM faced significant challenges in maintaining consistent and efficient communication and data management.

Prior to partnering with Vonazon, MTM's marketing and sales teams operated in silos using disparate systems, which led to inconsistencies in customer data and hindered collaboration. This fragmented approach resulted in missed opportunities, inefficiencies in lead management, and difficulties in tracking and reporting on marketing and sales activities.



**Specific challenges included a lack of centralized data management, gaps in lead intelligence, and inconsistent lead scoring.**

## 20M+ TRIPS MANAGED

MTM is a prominent provider of healthcare transportation solutions, managing over 20 million trips annually across the United States.



# INTRODUCTION CONT.



These issues severely impacted their ability to deliver personalized and effective marketing campaigns, prioritize leads accurately, and streamline their operations. The disjointed systems made it **difficult for MTM to have a unified view of customer interactions**, leading to suboptimal decision-making and reduced operational efficiency.

To address these challenges, MTM **embarked on a strategic initiative to transition to a unified platform**. HubSpot was selected as the ideal solution to centralize their marketing and sales processes, enhance lead capture and conversion rates, and optimize automation and reporting capabilities.

VONAZON DESIGNED A COMPREHENSIVE INTEGRATION PLAN TO **SEAMLESSLY CONNECT HUBSPOT WITH SALESFORCE**, THEIR PRIMARY CRM, AND **ENRICH THEIR DATA WITH ZOOMINFO**.

# ADDRESSING MTM'S ESSENTIAL BUSINESS NEEDS



## CENTRALIZED DATA MANAGEMENT

**The first major objective for MTM was to centralize their data management.** MTM's marketing and sales teams were working in silos due to the disjointed nature of their existing systems. Their lack of seamless integration resulted in inconsistencies in customer data and lead information, which significantly hurt their collaboration and decision-making abilities.



## ENHANCED LEAD INTELLIGENCE

The sales team at MTM was suffering from a significant gap in their understanding of lead activities and behaviors. They were not receiving any insights into interactions such as email engagement, form submissions, and website visits, which caused the sales team to struggle to deliver personalized, meaningful outreach or follow-up strategies.

**Vonazon solved this problem by including the automation of lead intelligence transfer in their integration strategy from Salesforce to HubSpot.** This provided their sales team with a comprehensive view of every lead's engagement history, enabling more informed, targeted, and tailored outreach efforts.



## CONSISTENT LEAD PRIORITIZATION

Inconsistencies in lead scoring between Pardot and Salesforce were causing confusion among MTM's sales team. They were struggling to determine what leads to prioritize, which was hurting their sales numbers and conversion rates.

We addressed this by **establishing a unified lead scoring system that incorporated both demographic and behavioral criteria.** By synchronizing lead scores between HubSpot and Salesforce our integration ensured consistent lead prioritization, facilitated more focused and effective sales outreach, and improved conversion rates.

# HubSpot



salesforce

The HubSpot integrations Vonazon set up were designed to create a centralized data management system, allowing for a completely seamless synchronization process with Salesforce. This integration ensured that both their marketing and sales had access to accurate, up-to-date information, which optimized the alignment and collaboration between the two teams.

## HUBSPOT TO SALESFORCE

The integration strategy was designed to specifically address MTM's unique business requirements and concerns. The integration of HubSpot was a key step towards gaining a more streamlined and efficient marketing and sales process.

What sets Vonazon apart is their innovative, client-centric approach. During the discovery phase, Vonazon utilized proprietary tools and methodologies to map out MTM's existing workflows and data structures. This detailed mapping allowed for a seamless transition to the new system, minimizing disruptions to MTM's operations.

Vonazon's unique integration architecture ensured real-time data synchronization between HubSpot and Salesforce, which was crucial for maintaining data integrity and operational efficiency.

Additionally, Vonazon's team employed advanced automation techniques to streamline lead management processes, significantly reducing manual efforts and enhancing productivity. Their expertise in leveraging ZoomInfo's data enrichment capabilities provided MTM with a competitive edge by delivering highly personalized marketing and sales campaigns.



### By leveraging the capabilities of HubSpot and Salesforce, Vonazon helped MTM

- ensure data consistency
- provide actionable lead insights
- maintain alignment in lead prioritization
- enhance operational efficiency

and ultimately gain a competitive edge in the competitive healthcare transportation industry.

# INTEGRATIONS

## HUBSPOT TO SALESFORCE (CONT.)



### Real-Time Data Synchronization

We enabled bidirectional synchronization between HubSpot and Salesforce to ensure that all updates in one system were immediately reflected in the other. This allowed MTM to maintain consistency in customer and lead data across marketing and sales teams.



### Automated Lead Intelligence Transfer

Lead activities such as email opens, click-throughs, form submissions and website visits were automatically transferred from HubSpot to Salesforce. This provided MTM's sales team with comprehensive insights into lead engagement to improve their outreach personalization and conversion rates.



### Unified Lead Scoring and Prioritization

Our integration seamlessly synchronized lead scores between HubSpot and Salesforce, allowing sales and marketing teams to work with a consistent set of lead qualification data. By perfectly aligning these two systems we were able to streamline lead management processes for MTM, enabling more efficient lead prioritization and nurturing.

# INTEGRATIONS CONT.

## ZOOMINFO

To deliver even more value to our solution, we integrated ZoomInfo, a comprehensive platform that provides access to a vast database of company and contact information, facilitating sales and marketing efforts for businesses. By integrating ZoomInfo, we aimed to empower MTM sales and marketing teams with accurate, up-to-date information and insights to help them to effectively identify and engage with their target audience.

HubSpot



### DATA ENRICHMENT

ZoomInfo extended HubSpot's capabilities by enriching lead and contact records with valuable information such as job title, company size, and industry data. This provided MTM with a deeper understanding of their leads, enabling more targeted audience segmentation and personalized marketing efforts.



### LEAD GENERATION AND PROSPECTING

By integrating ZoomInfo with HubSpot, MTM was able to access a vast database of contacts and companies directly within their HubSpot platform. This led to a more efficient lead generation and prospecting process, helping MTM expand their reach and identify new opportunities.



### SEAMLESS WORKFLOW INTEGRATION

We seamlessly integrated ZoomInfo into MTM's HubSpot workflows to enable the automatic enrichment of new leads as they were captured. By setting up this connector, we ensured that MTM's marketing and sales teams always had access to current and comprehensive lead information.

# IMPACT OF INTEGRATIONS

MTM immediately began enjoying a more streamlined, centralized, and simplified marketing and sales process after our seamless integration of HubSpot, Salesforce, and ZoomInfo. HubSpot serves as their central hub for marketing activities, lead captures, and engagement tracking while Salesforce is their primary CRM system responsible for managing sale processes, opportunities, and customer data.



**“ZoomInfo has significantly enhanced our lead and contact records, providing valuable insights that help us deliver more personalized and effective marketing and sales campaigns.”**

—JEFFREY TOOK, MANAGER OF PROCUREMENT

Since setting up this connection and migrating 10,000 contacts, marketing lists, and historical analytics data from Salesforce to HubSpot MTM has experienced several benefits:

- **Streamlined lead management** processes.
- **Accurate tracking of revenue generated** from marketing campaigns, enabling better financial insights.
- **Enhanced personalization abilities**, improving email engagement rates and lead nurturing.
- Creation of **real-time dashboards** for key performance indicators (KPIs), facilitating data-driven decision-making.
- Improved **synchronization of lead and customer data**, reducing inconsistencies and fostering better collaboration between marketing and sales teams.



HubSpot

salesforce



zoominfo

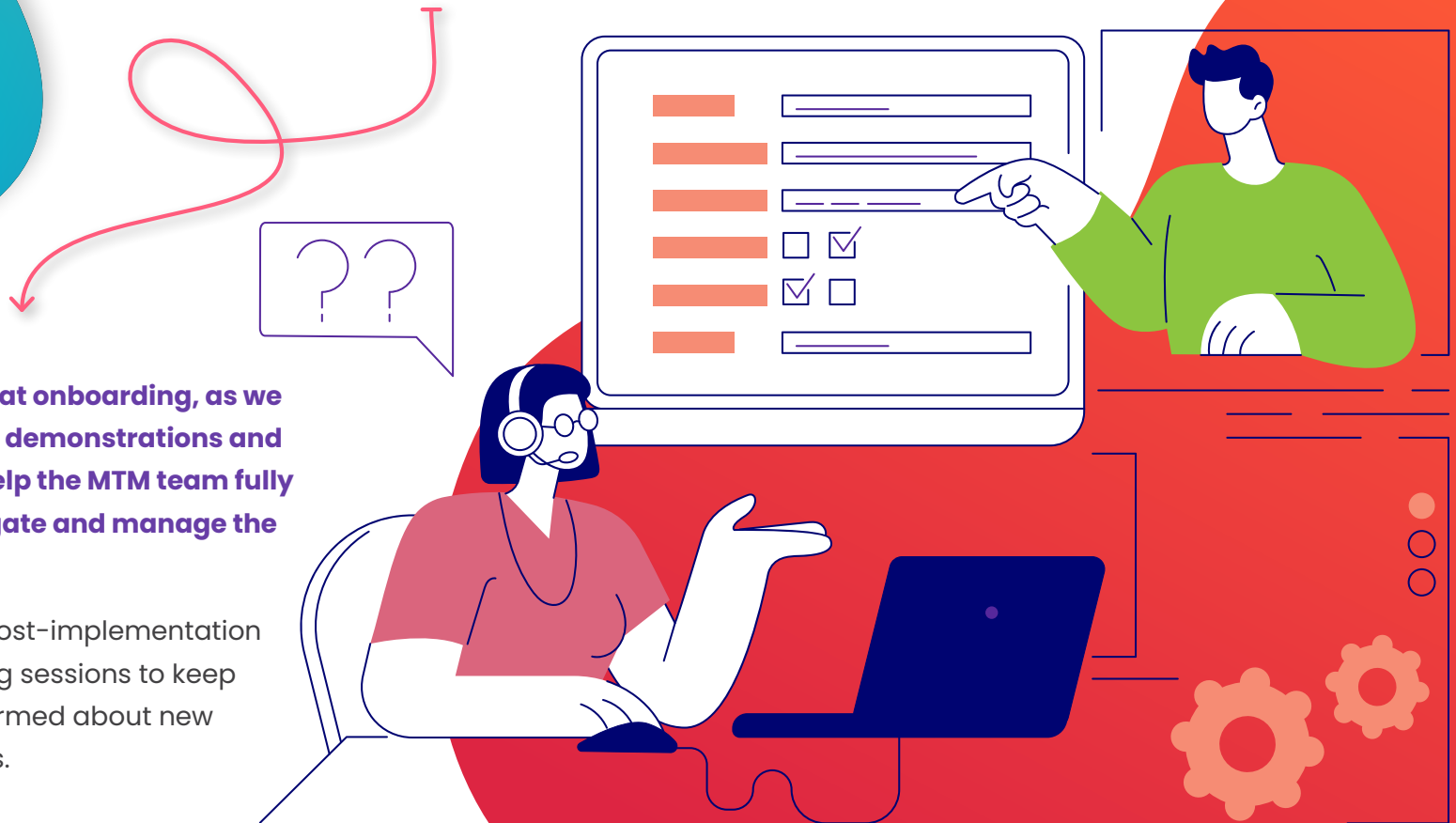


# TRAINING & ADOPTION

Vonazon provided MTM with a comprehensive HubSpot onboarding process to ensure a smooth introduction to the platform for their sales and marketing team. The onboarding sessions included in-depth training on the technical aspects of the HubSpot Salesforce integration. Our onboarding covered how data is synchronized between the two systems, how lead intelligence is transferred and utilized, and how lead scores are calculated and synced.

**Our training did not stop at onboarding, as we also performed practical demonstrations and hands-on exercises to help the MTM team fully understand how to navigate and manage the connected systems.**

Additionally, we provided post-implementation support and regular training sessions to keep both teams constantly informed about new features and best practices.



# CONCLUSION

**The integration of HubSpot, Salesforce, and ZoomInfo has significantly transformed MTM's marketing and sales processes.**

The centralization of their data management, enrichment of their lead intelligence, and streamlining of workflows helped MTM achieve a far more efficient and effective approach to customer engagement. With our comprehensive training and adoption strategy, MTM ensured a smooth transition and maximized the future growth potential of their integrated system. MTM is now well-positioned to drive business growth, continue to improve conversion rates, and strengthen their competitive edge in the healthcare transportation industry.

## READY TO TRANSFORM YOUR BUSINESS?

If you're looking to **elevate your marketing and sales processes** and **achieve unparalleled operational efficiency**, Vonazon is here to help.

**DON'T WAIT TO TAKE YOUR BUSINESS TO THE NEXT LEVEL.**



## LET'S WORK TOGETHER!

Contact our expert team today to **schedule a free consultation** and discover how we can **tailor a solution that meets your unique needs**.

**TONY HERRERA**  
Account Executive  
Vonazon Inc.



(805) 791-5474 | D

(800) 600-7007



[sales@vonazon.com](mailto:sales@vonazon.com)

