

CASE STUDY:

Modernizing Support Operations Without Disrupting Revenue



INDUSTRY

Marketing

COMPANY PROFILE

Butler/Till is a women-owned, employee-owned marketing agency that delivers data-driven media, analytics, and content solutions designed to create measurable business impact.

As Butler/Till, an independent, women-owned, and 100% employee-owned marketing agency, entered its first full year on HubSpot, they reached an inflection point. Headcount had nearly doubled. Service operations were still anchored in legacy systems. Executive leadership was actively monitoring **85 percent gross revenue retention targets** and contribution benchmarks tied to **67,000 MRR growth objectives**.

Operational complexity was rising. Visibility was not.

Vonazon led a phased transformation to **migrate two years of Zendesk history**, re-architect Service Hub, and engineer a sophisticated Aircall integration. The outcome was a **unified CRM and communications infrastructure designed to protect revenue, enforce accountability, and scale with growth**.



HubSpot



The Business Context

Butler/Till is a purpose-driven, employee-owned agency known for measurable client impact. Rapid growth, however, introduced structural strain. Support tickets lived in Zendesk. Calls flowed through Aircall. HubSpot was partially implemented but not operationally authoritative.

This was not simply a platform consolidation. It was a broader initiative focused on

- Operational accountability
- Executive visibility
- Scalable client service delivery

Fragmented systems created blind spots. Ticket stages were inconsistent. Calls were not intelligently aligned with CRM ownership. Reporting accuracy was compromised.

Leadership needed clarity. Service teams needed structure. The business needed continuity.

THE CHALLENGE

Two high-risk initiatives had to move forward simultaneously.

1ST INITIATIVE

Butler/Till needed a HubSpot migration that included **two full years of Zendesk tickets, email engagements, and custom field data** into HubSpot Service Hub. Native integrations could not support complete email history transfer, requiring custom export and API-driven HubSpot migration. Any misstep risked broken associations, inaccurate reporting, or lost institutional knowledge.

2ND INITIATIVE

The agency's primary 844 hotline required modernization. Calls needed to route based on HubSpot Contact Ownership while preserving direct lines, marketing attribution tracking, and fallback logic. Aircall's Ring-to API required middleware to parse area codes, match CRM owners, and orchestrate multi-layer routing paths.



At the same time, tickets appearing in HubSpot were not actively managed there, creating reporting discrepancies and operational confusion.

The risk profile was clear:



Executive dashboards
had to reflect reality



Revenue retention benchmarks
were under scrutiny



Client communications
could not be interrupted

Why It Mattered

An **85 percent gross revenue retention target** leaves little room for operational ambiguity. Contribution benchmarks tied to **67,000 MRR** required reliable attribution and defensible reporting.

- If historical support data migrated incorrectly, executive visibility would suffer.
- If routing logic failed, client experience would erode.
- If ticket pipelines were misaligned, SLA tracking and accountability would break down.

This engagement centered around **risk mitigation at the revenue layer of the business**, instead of just system configuration.

VONAZON'S STRATEGIC APPROACH

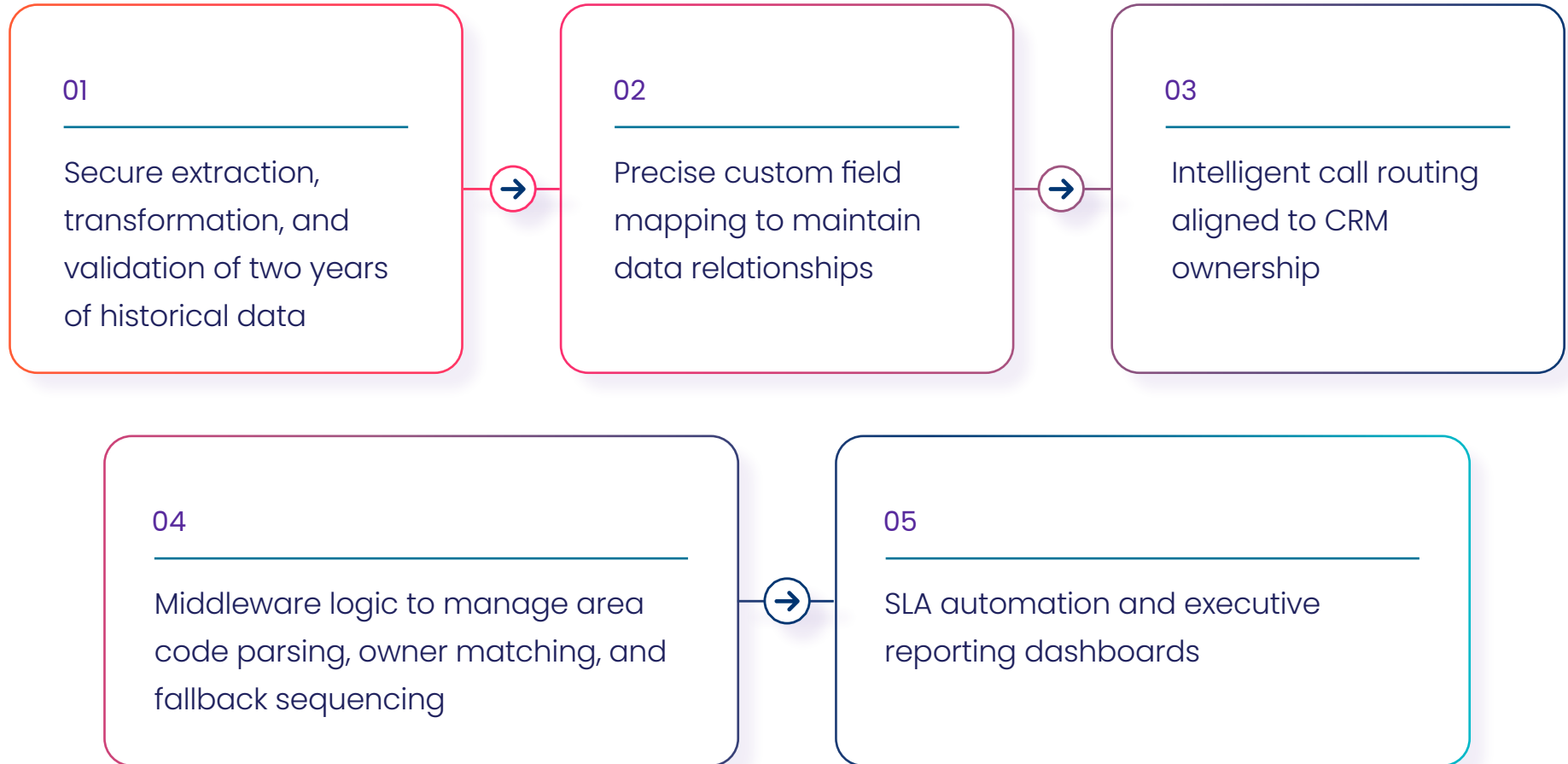
Vonazon structured the engagement around a core principle: **protect data integrity before optimizing workflows.**

Rather than immediately redesign processes, Vonazon mirrored Zendesk ticket stages inside HubSpot to preserve continuity and reduce team disruption. This stabilized operations during the HubSpot migration. Once decoupled, modernization could occur safely.



RECOMMENDED PATH

In parallel, Vonazon designed a layered integration architecture to support:



The strategy balanced transformation with operational continuity.

Execution and Integration Complexity

This HubSpot migration required disciplined orchestration across APIs, exports, property builds, and validation checkpoints.



Because native integrations could not migrate historical email engagements, Vonazon executed a structured export and API-based push, ensuring emails were correctly associated with the appropriate contacts and tickets. Data cleansing and transformation aligned legacy structures with HubSpot architecture before import, reducing the risk of misclassification.

Simultaneously, **Vonazon engineered a middleware layer** to overcome Aircall's routing limitations. Aircall could transmit full phone numbers but could not independently interpret area codes for regional assignment. **Vonazon built logic to normalize inbound numbers, identify known contacts within HubSpot, and route unknown callers based on predefined regional Pod structures.**

Failover architecture ensured business continuity:



Known callers routed to assigned Contact Owners



If unavailable, calls transferred to Pod Admins



If unavailable, round robin to available team members



Final fallback to voicemail with automated task creation

End-to-end validation addressed API dependencies, timeout thresholds, voicemail capture, and after-hours routing scenarios.

Five Pod Admins were onboarded into Service Hub Enterprise with aligned permissions and defined processes for call handling and task follow-up.



The objective was clear: **zero disruption to live client communications during transformation.**

THE RESULTS

The transformation delivered structural and measurable impact:

- Two years of historical tickets and email engagements consolidated into HubSpot with preserved associations
- Ticket pipelines aligned to legacy workflows, eliminating reporting inconsistencies
- Intelligent routing tied inbound calls directly to CRM ownership, increasing accountability
- Automated voicemail capture with task creation improved follow-up discipline
- Enhanced SLA visibility and executive reporting clarity



While specific performance deltas were not publicly disclosed, the new infrastructure directly supported Butler/Till's **85 percent revenue retention objective** and contribution benchmarks tied to sourced growth.

Most critically, leadership gained **accurate, executive-ready reporting visibility**, reducing operational risk tied to fragmented systems.



Organizational Impact

Beyond systems, the engagement redefined accountability:

- Support operations shifted from reactive ticket management to structured, owner-aligned workflows.
- Contact ownership became central to routing and escalation logic.
- Data governance became deliberate rather than incidental. Internal friction around ticket statuses and property definitions was resolved through architectural clarity.
- Cost sensitivity was addressed through a phased retainer model, enabling flexibility without compromising scope integrity.

The organization emerged with a support function aligned around **visibility, ownership, and measurable performance.**

LOOKING AHEAD

Today, Butler/Till operates within a cohesive CRM and communications ecosystem:

- Historical data is preserved, searchable, and actionable
- Inbound calls route intelligently based on CRM ownership
- Unknown callers are assigned regionally with automated fallback logic
- SLA workflows provide real-time accountability
- Executive dashboards reflect operational reality



By consolidating legacy systems and engineering intelligent integrations, Vonazon transformed a fragmented service environment into a **scalable infrastructure built to protect revenue and enable growth.**

The result was not simply modernization. It was **operational stabilization at a critical growth stage**, positioning Butler/Till for sustained expansion with confidence.

PLANNING A COMPLEX HUBSPOT MIGRATION OR PLATFORM CONSOLIDATION?



Let's map it out together.



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