



CASE STUDY:

Building a Unified Revenue Engine with Salesforce and HubSpot



INDUSTRY

Science
Technology

COMPANY PROFILE

PerkinElmer is a global leader in diagnostics and life sciences, delivering technologies that improve health outcomes, ensure food safety, and advance innovation.

PerkinElmer needed more than a system connection. It needed a **reliable revenue infrastructure** that could align marketing and sales, preserve business continuity, and give leadership a clearer view into campaign performance, pipeline influence, and ROI.

As a global organization operating across diagnostics, life sciences, and applied markets, PerkinElmer was navigating a broader digital transformation while managing the realities of a complex Salesforce environment, legacy data structures, and disconnected reporting. Marketing activity lived in HubSpot. Revenue and opportunity data lived in Salesforce. But the connection between the two was fragmented, making it difficult to prove marketing's contribution to revenue, maintain clean handoffs between teams, or trust the data informing business decisions.

Vonazon partnered with PerkinElmer to architect and implement a **high-complexity Salesforce and HubSpot integration** designed to do more than sync records. The engagement focused on **aligning systems, cleaning up legacy CRM complexity, reducing sync risk, improving data governance, and enabling multi-touch revenue attribution**. The result was a more connected, scalable foundation for sales and marketing, one that positioned PerkinElmer to make faster, smarter decisions with greater confidence.

The Business Context

PerkinElmer was operating in an environment familiar to many enterprise organizations. Growth had increased the importance of data quality, cross-functional visibility, and system alignment, but the underlying infrastructure had not kept pace.

HubSpot played a central role in marketing execution, campaign activity, and form capture. Salesforce remained the operational system for opportunities, revenue movement, and downstream sales workflows. On paper, the architecture was sound. In practice, the two platforms were not delivering the kind of **unified source of truth** the business needed.

That gap had real consequences.

PerkinElmer's team was trying to understand which marketing efforts influenced pipeline and revenue across a **long, multi-touch buying cycle**, but their existing model only captured the final conversion point. That meant early-stage influence, especially from campaigns, events, and nurturing motions, was often invisible in reporting. Marketing lacked the clarity to fully demonstrate impact. Sales and marketing lacked a shared view of performance. Leadership lacked the level of attribution visibility needed to make more confident investment decisions.

At the same time, the business was managing a broader Salesforce transition shaped by legacy configurations, inherited objects, and historical data that no longer aligned with the company's future-state operating model. The result was not simply a reporting problem. It was a **go-to-market alignment problem, a data trust problem, and increasingly, a scalability problem.**

THE CHALLENGE



**Fragmented
Systems**



**Limited Revenue
Visibility**

Fragmented Systems and Limited Revenue Visibility

PerkinElmer's challenge was not simply connecting HubSpot and Salesforce. It was integrating two mission-critical systems within a CRM environment shaped by **legacy complexity, inconsistent data structures, and evolving business requirements**, all while protecting ongoing operations.

At the center of the challenge was a Salesforce architecture built around a legacy **Interaction object** that no longer aligned with how the business needed to track, qualify, and convert demand. Rather than supporting a clean lifecycle model, this structure introduced friction into how data was captured, mapped, and interpreted across systems.

This misalignment created a compounding set of challenges.

Data could not be consistently trusted. Redundant values, inconsistent field definitions, and sync mismatches meant that records did not always move cleanly between HubSpot and Salesforce. For an organization attempting to connect marketing activity to pipeline and revenue, this undermined the credibility of reporting and limited executive confidence in the data.

At the same time, attribution remained fundamentally constrained. The existing **last-touch model** placed disproportionate weight on the final conversion event, obscuring the broader sequence of campaigns, touchpoints, and interactions that influenced the deal. Marketing's contribution to revenue was visible in fragments, but not in a way that reflected the full customer journey.



These issues were further intensified by the inherent risk of integration at scale. Connecting HubSpot and Salesforce required careful decisions around **field mappings, sync rules, source-of-truth ownership, and data governance**. In an environment already shaped by historical CRM debt, even small inconsistencies had the potential to create downstream errors, disrupt reporting, or introduce operational inefficiencies.

Overlaying all of this was a clear organizational pressure to move forward. The business needed progress, but not at the expense of stability. Advancing too quickly risked compounding existing issues. Moving too slowly risked delaying critical improvements in visibility and alignment.

**This tension defined
the moment:**

*“We need to make the right decision and do the extra legwork,
knowing it’ll really pay off in the long term.”*

THE SOLUTION: A CONNECTED REVENUE INFRASTRUCTURE

PerkinElmer needed more than implementation support. It needed a partner capable of navigating **Salesforce complexity, HubSpot architecture, integration risk, and cross-platform governance**, while maintaining a clear focus on business outcomes.

Vonazon approached the engagement as a **revenue systems architecture initiative**, grounded in deep expertise across both Salesforce and HubSpot.

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Establishing a Revenue-Focused Integration Strategy

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Navigating Salesforce Complexity with Precision

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Eliminating CRM Debt to Protect Data Integrity

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Enabling Multi-Touch Revenue Attribution

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Strengthening Governance for Long-Term Stability

Establishing a Revenue-Focused Integration Strategy

Vonazon reframed the engagement around a central objective: **aligning sales and marketing through a shared, trusted data foundation.**



The integration was designed to:



enable cleaner lead handoffs between marketing and sales



preserve campaign and lifecycle data across both systems



connect marketing engagement to opportunity and revenue outcomes



reduce manual processes and operational friction



support more reliable, revenue-level reporting

This ensured the integration functioned as a **core component of the go-to-market system**, not just a technical connector.

Navigating Salesforce Complexity with Precision

PerkinElmer's Salesforce environment required a nuanced, experience-driven approach.

Vonazon worked within a structure that included: _____



✓ legacy object models and nonstandard relationships

✓ inherited field dependencies and configurations

✓ sync sensitivity across objects and properties

✓ data volume and system limit considerations

Leveraging deep Salesforce expertise, Vonazon ensured that **field mappings, sync logic, and source-of-truth decisions** reflected how the business actually operated, rather than forcing a rigid or oversimplified model.

This approach balanced **current-state constraints with future-state scalability**, allowing PerkinElmer to improve system performance without disrupting active workflows.

Eliminating CRM Debt to Protect Data Integrity

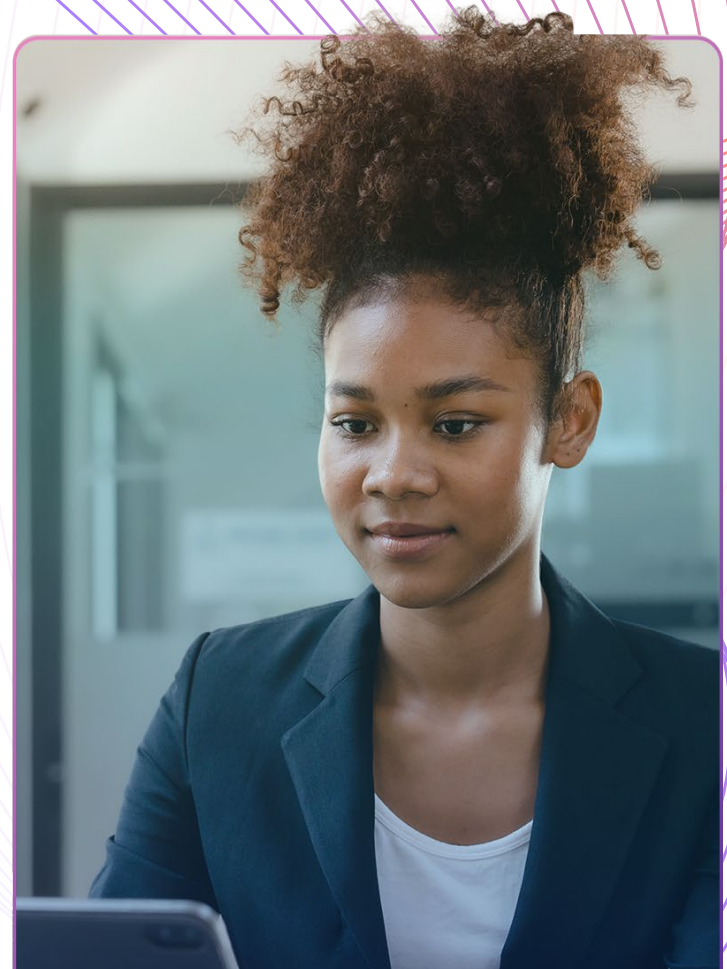
A critical component of the solution was addressing accumulated CRM debt.

Rather than continuing to carry forward outdated values and structures, PerkinElmer made a deliberate shift toward simplification and accuracy.

Vonazon supported this effort by:

- removing redundant and conflicting values
- reducing sync error exposure
- simplifying mapping dependencies
- improving overall data quality and consistency

This created a more **reliable and trustworthy data environment**, essential for both reporting and operational execution.



"We've been accumulating this tech debt for long enough. At some point, we need to make smart decisions and stop porting over junk into new systems."

04

Enabling Multi-Touch Revenue Attribution

Vonazon improved how campaign, interaction, and opportunity data moved between systems, enabling a stronger foundation for **multi-touch revenue attribution**.

This allowed PerkinElmer to:

- better understand how campaigns influence pipeline over time
- connect marketing activity to revenue outcomes more effectively
- support more informed budget and strategy decisions

The result was a more accurate representation of how marketing contributes to growth.



05

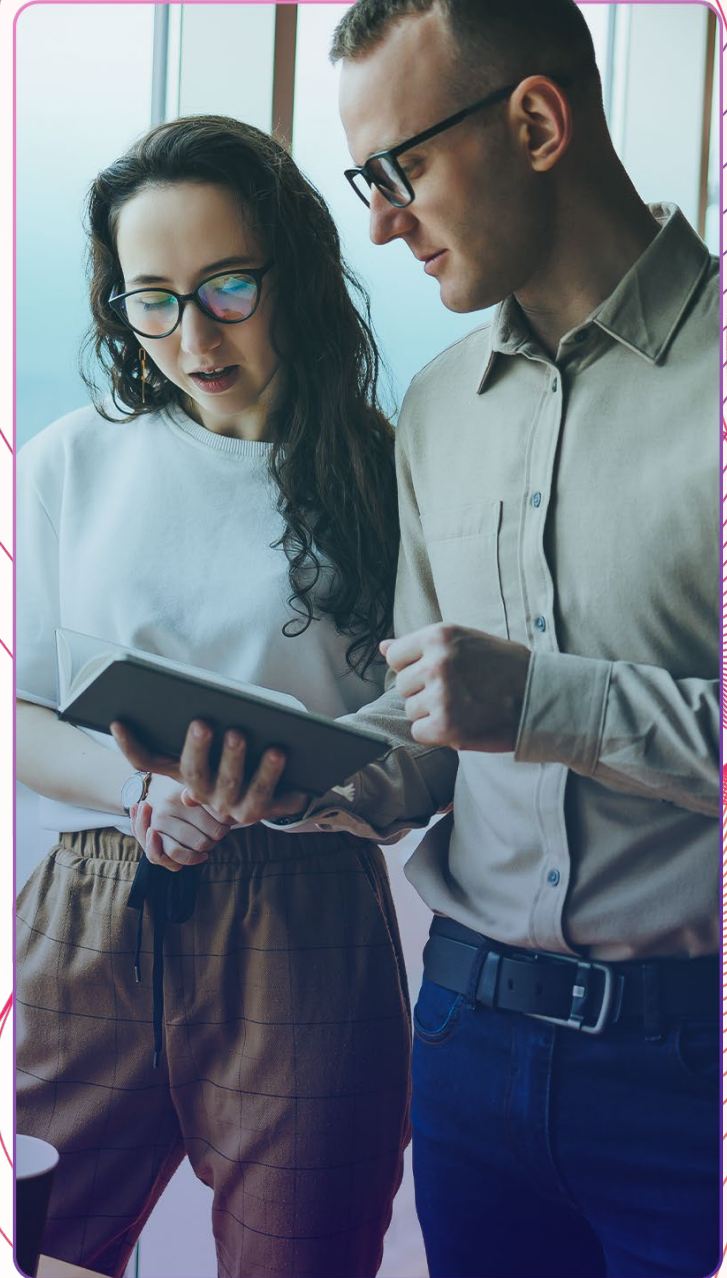
Strengthening Governance for Long-Term Stability

To ensure sustainability, Vonazon helped establish clearer **integration governance**.

This included:

- defining sync behavior and ownership rules
- reducing unnecessary or high-risk mappings
- improving visibility into integration health
- supporting more structured change management

The integration evolved from a point solution into a **managed, scalable operational asset**.



THE RESULTS:

From Fragmented Data to Revenue Clarity

The outcome was not simply a successful integration. It was a transition toward a more **connected, trusted, and strategically valuable revenue system.**



A more unified source of truth across sales and marketing

PerkinElmer aligned sales and marketing around a shared view of pipeline and revenue, creating a more connected understanding of how marketing activity influences sales outcomes.



Improved ability to demonstrate marketing's impact on revenue

With stronger attribution infrastructure, the business can more credibly connect campaign influence to pipeline and revenue, improving confidence in budget allocation and growth strategy.



Reduced operational friction and manual effort

Automation replaced manual reconciliation processes, reducing operational lag between marketing engagement and sales action, and enabling teams to focus on execution, optimization, and growth initiatives.

THE RESULTS:

From Fragmented Data to Revenue Clarity



Lower integration risk and stronger system stability

By addressing legacy complexity and improving governance, the organization reduced ongoing sync risk and established a more stable, scalable platform for future growth and system evolution.



Greater confidence in executive decision-making

Leadership now operates with greater confidence in reporting, attribution, and pipeline visibility, enabling more informed and timely strategic decisions.

LOOKING AHEAD

PerkinElmer's transformation was not about connecting two platforms. It was about building the infrastructure required for a more mature, aligned, and scalable revenue operation.

With a stronger Salesforce and HubSpot foundation in place, the organization is positioned to:

- refine attribution and performance measurement
- enhance sales and marketing collaboration
- expand automation and personalization efforts
- manage system evolution with greater control

As the business continues to grow, this foundation supports **greater scalability, stronger governance, and more actionable revenue intelligence.**

Looking to streamline your Salesforce and HubSpot integration while improving revenue visibility?



Let's build a plan together.



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