



Sherman

WEALTH MANAGEMENT

FROM UNCERTAINTY TO ADOPTION:
Making HubSpot Work
in the Real World



 **vonazon**

INDUSTRY

Finance

COMPANY PROFILE

Financial advisory firm providing wealth management and financial planning services, helping clients grow, protect, and manage their assets for long-term success.

EXECUTIVE SUMMARY

A financial advisory firm invested in HubSpot to establish a more scalable marketing foundation, but early friction around data, integrations, and usability quickly put adoption at risk. **Vonazon restructured the onboarding experience around clear goals, early wins, and practical execution**, transforming HubSpot into a system the team could actually use, trust, and build on.





WORDPRESS

powered
their content



brings structure
and scalability



Wealthbox

system of record for
client data

THE BUSINESS CONTEXT

Like many growing firms, the client's marketing efforts were spread across a mix of tools that had evolved over time. WordPress powered their content, Wealthbox remained the system of record for client data, and a combination of email and scheduling tools supported outreach.

HubSpot was introduced with a clear intention, to bring structure and scalability to marketing without disrupting what was already working. The goal was not to replace their ecosystem, but to create a layer that could unify it.

While the platform had been implemented, its role within the broader tech stack and day-to-day marketing execution had not yet been clearly defined.

At a high level, success was straightforward. Marketing needed to become easier to execute, not harder. Campaigns needed to be repeatable. Content needed to travel further. And for the first time, the team wanted visibility into what was actually working.

THE CHALLENGE

That vision met resistance almost immediately.

Instead of simplifying execution, HubSpot initially introduced a new layer of complexity. Tasks that were expected to become faster began to feel more manual. Lists were harder to build. Campaigns required more preparation. Even routine execution started to slow down.



“A lot of it seemed very manual... I don’t think that’s time saving.”

The issue wasn’t the platform itself. It was the gap between how the business operated and what the system required to function effectively.

Contact data lacked the structure needed for segmentation. Integrations between WordPress, scheduling tools, and HubSpot were either incomplete or unclear. There was no clear system for where marketing execution should actually live.

This created internal tension that extended beyond operations. It became a strategic question.

- Should HubSpot replace existing systems, or support them?
- How much of the platform should actually be used?
- Was the added complexity justified?

That uncertainty surfaced quickly at the leadership level.

“We knew HubSpot had value, but we needed a clear path to making it work for our team.”

At that point, the engagement entered a critical window. The team needed to see real progress, not long-term potential.

“We need to get this off the ground.”

THE SOLUTION

Vonazon shifted the focus away from platform configuration and toward **real-world usability and immediate value.**



THE ENGAGEMENT WAS ANCHORED AROUND A SMALL SET OF CLEAR, OPERATIONAL GOALS:

- Reduce the time required to execute campaigns
- Enable consistent newsletter and content distribution
- Structure contact data for usable segmentation
- Create visibility into marketing performance

These goals created alignment and ensured that progress could be measured in practical terms, not theoretical capability.

THE SOLUTION (CONT.)

This resulted in the activation of 200+ contacts into usable marketing audiences, transforming static data into something actionable.

Those early wins changed the trajectory of the engagement. HubSpot moved from being something the team was trying to figure out into something they could actually use.

Behind the scenes, the engagement progressed in structured phases, from foundational setup through lead capture, nurturing, and early automation, ensuring each stage delivered usable value before expanding further.

At the same time, the underlying system was stabilized. Integrations were clarified so that content could move predictably from WordPress into campaigns. Data was incrementally structured to support segmentation without slowing execution.



200+

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THE SOLUTION (CONT.)

Segmentation itself was simplified. Instead of building for complexity, it was designed around real use cases, real audiences, and real campaigns, making it easier to execute and easier to scale. This also established a clearer foundation for lead capture and lifecycle progression, enabling contacts to move more consistently from initial engagement through ongoing nurturing.

As execution became more consistent, reporting was introduced in a way that matched how the team worked. Instead of overwhelming dashboards, the focus was on clarity.

This created a **centralized view of marketing performance**, replacing fragmented insights across multiple tools and **enabling more informed decision-making**.

- Which campaigns are active
- What content is driving engagement
- Where audience interaction is coming from

THE RESULTS

The transformation was not defined by a single metric, but by a shift in how marketing actually functioned.

What had been fragmented became structured. What had been manual became repeatable. What had been unclear became visible.

Early campaign execution validated the platform, accelerating internal adoption and confidence. The team was no longer questioning whether HubSpot would work. They were using it.

THAT SHIFT WAS SUPPORTED BY CLEAR, TANGIBLE OUTCOMES:

- Marketing contacts activated and structured for targeted outreach
- Reduced manual effort required to build and execute campaigns
- Repeatable workflows established for newsletters and email campaigns
- Centralized visibility into campaign engagement and content performance



Marketing execution became **faster, more consistent, and less dependent on manual coordination across systems.**

Perhaps more importantly, the perception of the platform changed. What initially felt like added complexity became recognized as infrastructure, something that supports growth rather than slowing it down.

LOOKING AHEAD

With the foundation in place, the focus has shifted from activation to expansion.

Segmentation will become more precise. Automation will further reduce manual effort. AI-driven content workflows will extend the reach of every asset the team creates. Reporting will continue to evolve, connecting marketing activity more directly to business outcomes.

What began as an uncertain investment is now positioned as a system that can scale with the business, not by replacing what already works, but by connecting it.

THE DIRECTION IS CLEAR.

A marketing operation that produces more, moves faster, and requires less effort to sustain.



PLANNING A HUBSPOT ONBOARDING BUT CONCERNED ABOUT ADOPTION?



Let's build a system
your team will
actually use.



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