

Tegria

CASE STUDY:

From Fragmented Systems to Scalable Growth: Rebuilding Tegria's Marketing Infrastructure



INDUSTRY

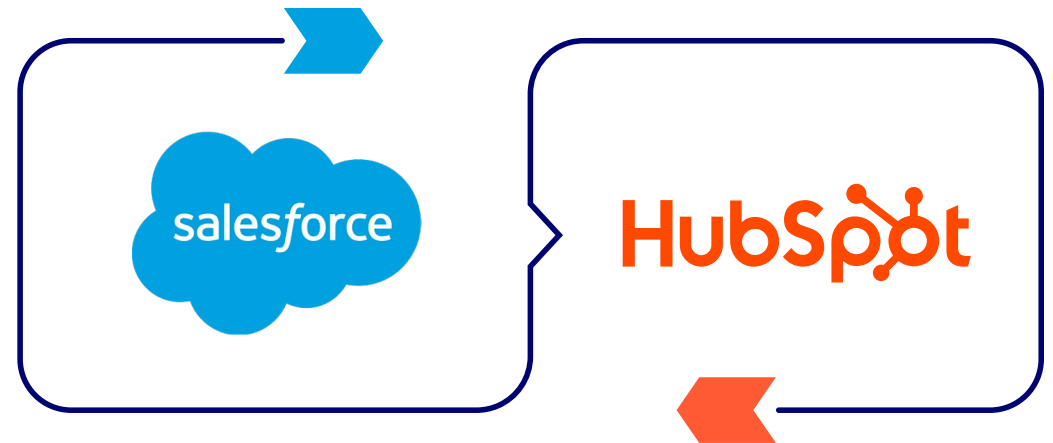
Healthcare

COMPANY PROFILE

Tegria is a healthcare consulting and technology firm delivering strategic, operational, and digital solutions to providers and payers across the United States.

Tegria

Tegria reached a critical inflection point. With Salesforce established as the system of record and increasing pressure to activate modern marketing strategies, the organization needed a fully aligned, scalable HubSpot environment without compromising data integrity.



Vonazon led a high-risk integration and transformation initiative, consolidating complex data structures, enabling real-time synchronization across systems, and establishing a governed, scalable marketing infrastructure. The result was a platform capable of **supporting immediate campaign execution** while laying the foundation for **long-term visibility, operational efficiency, and growth.**

The Business Context

Tegria operates within a complex, multi-service healthcare consulting environment, engaging enterprise stakeholders across diverse service lines. As marketing initiatives expanded, the organization required a platform capable of supporting segmentation, lifecycle management, and cross-channel attribution at scale.

Salesforce remained the authoritative system. However, marketing execution required speed, flexibility, and visibility that existing processes could not support. HubSpot was introduced as a strategic activation layer, designed to work in parallel with Salesforce while enabling modern marketing capabilities.

THE CHALLENGE

This was not a standard implementation. It was a high-stakes system alignment under active business pressure.



Fragmented Data and Limited Visibility



Unclear Attribution Models



Over-engineered Salesforce Structures



Inconsistent Ownership Logic



Manual Lead Routing and Campaign Tracking

Tegria faced:



Fragmented data and limited visibility

across marketing and CRM systems



Over-engineered Salesforce structures, with hundreds of custom fields reducing usability



Manual lead routing and campaign tracking, limiting scalability



Unclear attribution models, restricting performance insight



Inconsistent ownership logic, creating gaps in reporting and accountability

Internal alignment proved equally complex. Teams were balancing data governance, campaign urgency, and system dependencies simultaneously.

As one stakeholder summarized:

"We need Salesforce to be the source of truth, but we still need enough in HubSpot to actually make decisions."

At the same time, execution timelines could not pause.

"We need to launch tomorrow, so we have to figure out tracking now."

The margin for error was minimal, if existent at all. A misaligned integration could result in data loss, reporting inconsistencies, and long-term operational risk.

VONAZON'S APPROACH

Vonazon positioned the engagement as a strategic infrastructure transformation, not a tool implementation.

01

Simplifying a
Complex Data
Environment

02

Executing a
Controlled, High-Risk
Integration

03

Activating Campaign
Infrastructure Under
Time Pressure

04

Resolving Cross-
System Ownership
and Lifecycle
Complexity

05

Building a Scalable
Marketing
Foundation

Simplifying a Complex Data Environment

The initial integration exposed hundreds of custom Salesforce properties, many of which added noise rather than value.

Vonazon worked with Tegria to identify decision-critical data, removing approximately 247 deal-level properties and dramatically simplifying the model.



This shift enabled:

Improved system usability and adoption



Clearer reporting structures



A foundation for scalable segmentation and automation

02

Executing a Controlled, High-Risk Integration

Rather than enabling a full sync prematurely, Vonazon implemented a phased, controlled integration strategy.

This included: _____



Pre-validation of mappings before activation



Defined source-of-truth rules between Salesforce and HubSpot



Structured sync across **contacts, companies, and deals**



Manual and bulk resync processes to **mitigate data risk**



This approach reduced the likelihood of data corruption, duplication, and misalignment, while maintaining forward progress toward activation.

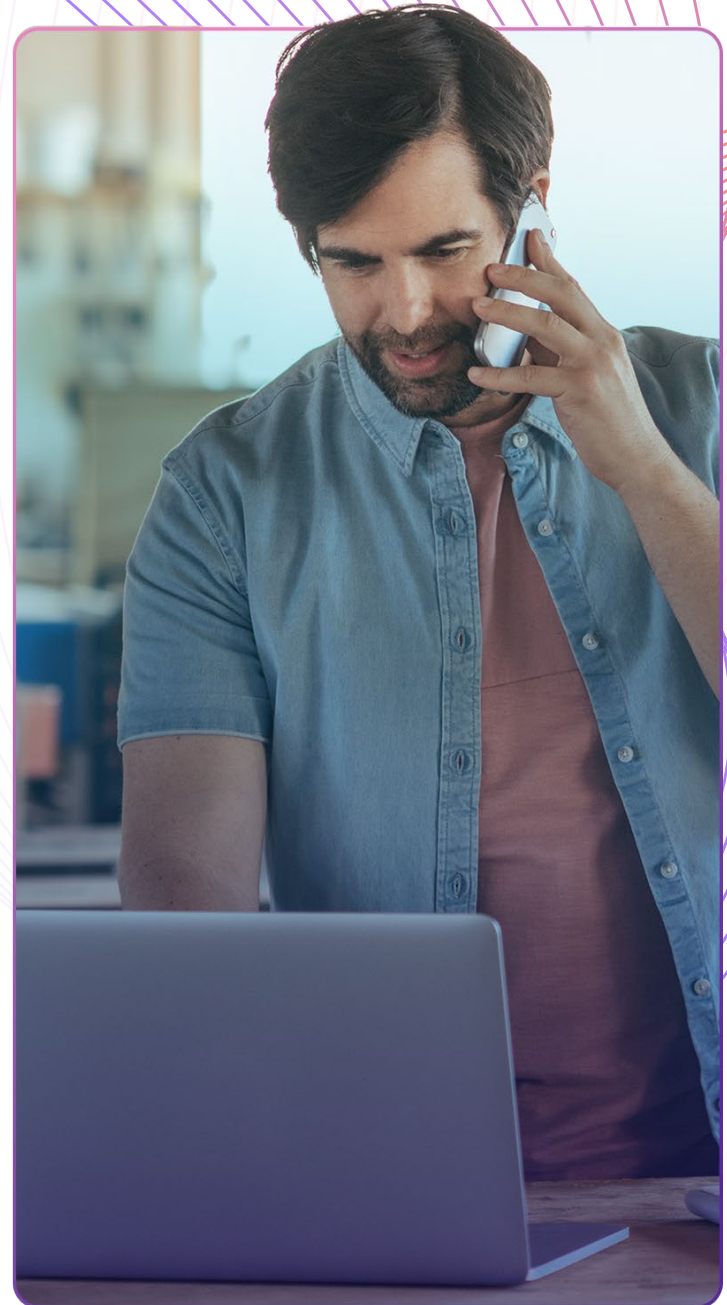
Activating Campaign Infrastructure Under Time Pressure

With campaigns already in motion, Vonazon prioritized operational readiness alongside system buildout.

Key initiatives included:

- Rebuilding and standardizing **core conversion forms**
- Implementing **tracking infrastructure across web and campaigns**
- Enabling **baseline attribution and reporting visibility**
- Automating **lead notifications and lifecycle progression**

This allowed Tegria to move from delayed execution to real-time campaign activation, even as the system continued to evolve.



Resolving Cross-System Ownership and Lifecycle Complexity

Ownership misalignment between Salesforce and HubSpot introduced significant reporting risk.

Vonazon established logic to:

- Align **account and contact ownership across systems**
- Standardize **lifecycle stage definitions and transitions**
- Prepare for **automated routing, scoring, and handoff processes**

This created a consistent, governed framework for accountability and reporting across marketing and sales.



05

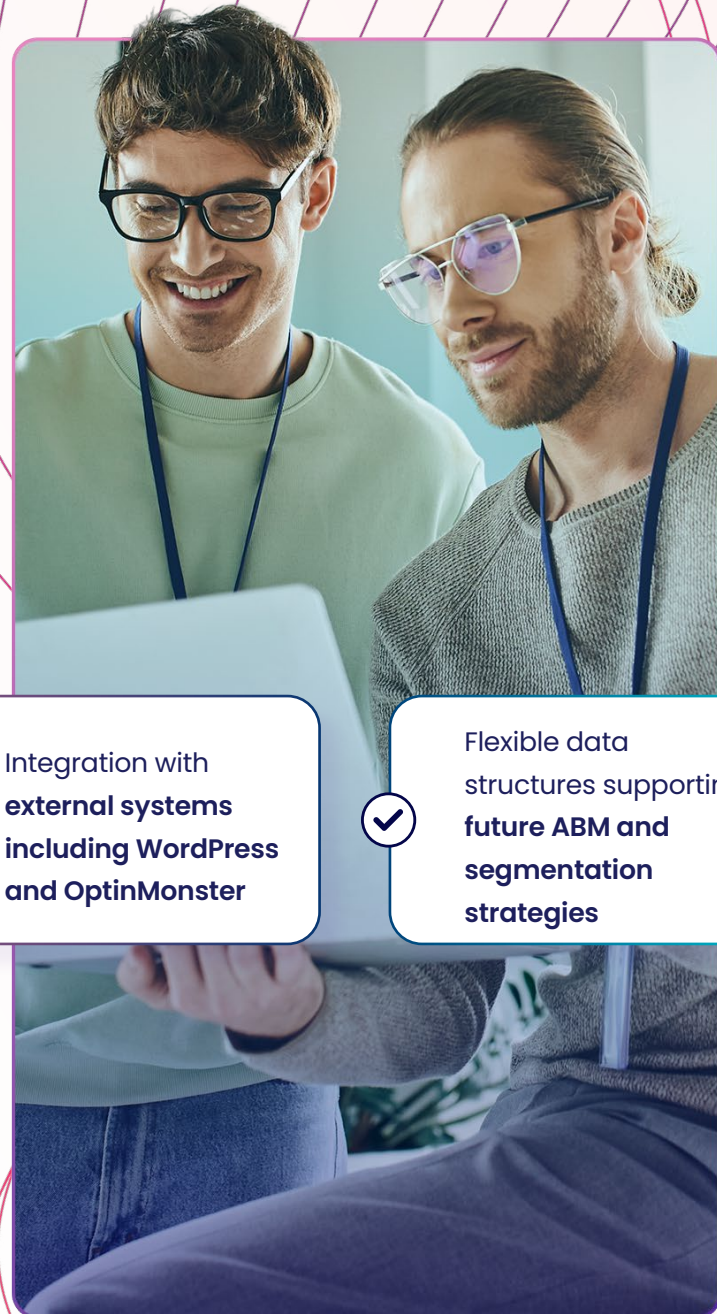
Building a Scalable Marketing Foundation

Beyond immediate activation, Vonazon architected a system designed for long-term growth and adaptability.

This included:

- ✓ Lifecycle and lead scoring frameworks
- ✓ Unified **campaign tracking across channels**
- ✓ Integration with **external systems including WordPress and OptimMonster**
- ✓ Flexible data structures supporting **future ABM and segmentation strategies**

The result was not just a functional platform, but a scalable marketing infrastructure aligned to Tegria's business model.



THE RESULTS:

Tegria transitioned from fragmented processes to a centralized, insight-driven marketing ecosystem.

Key outcomes included:



Substantial reduction in **data complexity**, improving usability and operational clarity



Successful synchronization of **60,000+ contact records**, enabling unified visibility across systems



Establishment of **clear governance between Salesforce and HubSpot**, reducing long-term risk



Transition from **manual lead handling to automated workflows**, improving speed and consistency



Immediate activation of **campaign tracking and attribution**, supporting real-time decision making

While initial performance metrics were still developing, the impact was clear. Tegria moved from uncertainty to **operational confidence** in its marketing infrastructure.

Following activation, the system was no longer theoretical. **It became a reliable foundation for execution and growth.**

LOOKING AHEAD

With core infrastructure established, Tegria is positioned to evolve from system alignment to performance optimization.

Next phase priorities include:

- Refining **lifecycle automation and lead scoring models**
- Advancing **attribution and revenue reporting capabilities**
- Expanding **campaign orchestration across channels**
- Deepening **segmentation and account-based strategies**

What began as a complex integration effort has become a strategic platform for scalable, data-driven growth.

Looking to streamline your integrations and reduce risk?



Let's build a plan together.



Tony Herrera

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