

# From Frustration to Functionality: The Shift from Salesforce to HubSpot Sales Hub

How an ICHRA solution provider saw enhanced collaboration and full visibility in sales activity by switching its CRM



## The Client

An Individual Coverage Health Reimbursement Arrangement (ICHRA) solution provider with:

- ✓ 23 Sales Representatives
- ✓ 5.5k+ Enrolled Members
- ✓ 42 States with Enrollment



## The Problem

The client struggled with Salesforce due to poor data management and limited actionable insights, impacting the sales process and team efficiency. Fundamental issues with the portal resulted in an inability to solve problems effectively, and leadership had minimal visibility on producer performance and revenue.



## The Solution

Actively utilizing Marketing Hub as its marketing platform, the client was already satisfied with HubSpot's ease of use, enhanced functionality, and support from the Ocozzio in-house automation team.

The decision was made to move from Salesforce to HubSpot Sales Hub Pro with Ocozzio as the implementation partner to ultimately achieve:

- Reduced friction for its sales team
- Real-time visibility into sales activity
- Curated sales processes and management
- More accurate, real-time revenue reporting
- Better relationship management with producers
- Shared sales assets (templates, sequences, documents)
- A single source of truth

Within the tailored implementation package, the client received hands-on support, guidance, and execution for:

- ✓ An extensive sales discovery and defined standardized sales process
- ✓ Pipeline automation for streamlined sales
- ✓ Extensive data cleanup and import
- ✓ Complete sales strategy
- ✓ KPI reporting and custom dashboards
- ✓ Lead management
- ✓ Comprehensive leadership and team training
- ✓ And more!

## Results

The Sales Hub Pro implementation, onboarding, and training sessions were completed in just 3 months. Since fully adopting Sales Hub, the client has experienced:

- + Improved visibility for leadership in sales team activity
- + More streamlined outreach processes
- + Over 8,000 sales activities tracked in the CRM
- + Shared sales team CRM adoption from all 13 active sales team members
- + Increased relationship management with automated recurring activity tasks
- + 43 won deals within 3 months of implementation

## Next Steps and Opportunities for Enhancement

With the team now fully implemented and seeing value, the next step is to optimize and further establish HubSpot as their source of truth by:

- ✓ Migrating and replacing the CSA spreadsheet (quoting) process into HubSpot
- ✓ Custom integration between HubSpot and their data acquisition tool Accupoint
- ✓ Managing renewals and onboarding their customer service team
- ✓ RevOps for operational support and continual team enablement



## Unlock Your Revenue Growth with HubSpot and Ocozzio

With in-house, HubSpot experts and a deep knowledge of the self-funded industry, Ocozzio has the expertise and proven success to implement and fully optimize HubSpot to meet your goals.

Whether you're just starting your HubSpot journey or seeking to optimize your existing portal, we have the perfect solution for you.

## Ready to Get Started?



Let's connect to assess your goals and tailor a HubSpot solution that addresses your challenges and boosts growth.