

CASE STUDY

HubSpot



CLIENT: RIF TRUST

RESIDENCY & CITIZENSHIP

SECTOR: RESIDENCY AND CITIZENSHIP

BACKGROUND STORY

RIF Trust is a prominent advisory firm for residency and citizenship in the Middle East and Africa, while Latitude offers exceptional residency and citizenship solutions to successful individuals in Europe.

Both business units required a streamlined sales and marketing process and decided to move from Salesforce to HubSpot.

The NEXA team facilitated the transition and ensured that every crucial aspect of the business was captured, making the process as seamless as possible.

OBJECTIVES

- Transfer all Salesforce data to HubSpot with complete accuracy during the transition.
- Start working on their marketing campaigns and have all the data in one platform.

CHALLENGES

- The amount of data was significant.
- The data was unorganized and needed extensive cleaning.
- Configuring two units under a single HubSpot license.
- It was crucial to maintain a high level of organization and structure for both units.
- Various teams managed diverse program types across multiple regions, and we had to synchronize the entire sales and finance process.

SOLUTIONS

- We migrated data in batches.
- To maintain organization, we separated our work by building email templates, forms, landing pages, and workflows in different folders.
- We developed a strategy to synchronize three processes: sales, processing, and finance, with no interdependencies, and built the entire process on automation.
- We connected all their ads and social accounts with HubSpot to get all the leads inside HubSpot where they can track and nurture them

RESULTS

13,881 Forms were submitted a year

13,755 Deals were created from the forms submitted

The client benefits from the system, as they can view reports that track the number of deals won, who manages the most deals, and the time it takes to close particular deals, making their life easier