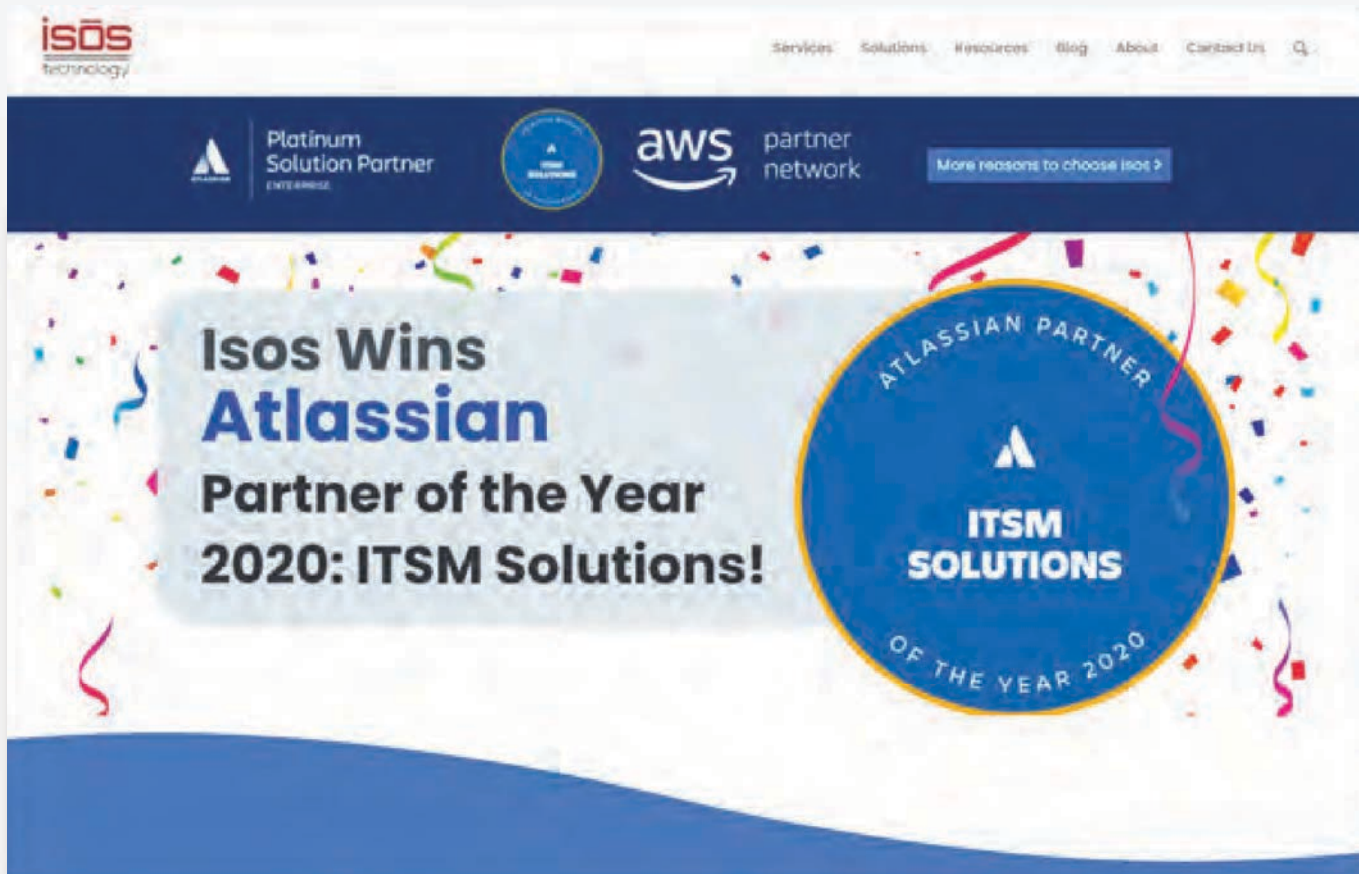


# Case Study: Isos Technology Sales & Marketing Tech Stack Consolidation to HubSpot Sets Stage for Long-Term Growth

How an Atlassian Platinum Solution Partner consolidated their complex sales & marketing stack to one integrated HubSpot solution driving growth in 2020 and beyond.





## INTRODUCTION

In late 2019, Isos Technology, a top Atlassian Solution Partner, realized they had a problem. No matter how hard they tried, they had topped out in net-new revenue growth. And even though Isos seemed to have a handle on all things marketing and sales, and had talented sales and marketing teams engaging on all cylinders, they struggled to align on core initiatives and further, had little visibility into the results of these initiatives.

Enter **Sharon Spooler**, a fractional CMO with **Chief Outsiders** who performed a comprehensive assessment of Isos' go-to-market strategy and identified strategic challenges holding Isos back. One significant item she targeted upfront was the awe-inspiring amount of marketing tech tools Isos had implemented. Data was successfully passed back and forth using popsicle sticks, duct tape, and Zapier, but when Sharon requested, "Show me your marketing leads to sales opportunities to closed-won deal data," it was challenging to assemble these pivotal metrics. And, the CEO of Isos, Thad West, was the talented geek who had concocted the set of tools and integrations and was maintaining it as an increasingly demanding side gig (in addition to his day job as CEO).

Sharon recommended the consolidation of 100% of the Isos Sales & Marketing tool stack to HubSpot and recommended **Orange Marketing** to work alongside Chief Outsiders and the Isos Technology marketers to make this transition happen.



## THE CHALLENGE

Isos Technologies appeared to be doing the right things from a sales and marketing perspective. Their extensive lead generation suite of tools included:

- WordPress Blog and Website: 2 blogs, 500+ posts and 300+ website pages
- Unbounce: 15+ landing pages
- ActiveCampaign - Marketing CRM and email tool
- Salesforce - Sales CRM
- Google Analytics - Metrics & Analysis
- Jira - Sales activity and pipeline management
- HootSuite - Social media
- Zapier and PieSync - data support and integrations
- GeckoBoard - Dashboards

The challenge was multi-pronged:

- Isos Marketing was driving activities rapidly, so much so that they didn't know if they were coming or going. And marketing had no comprehensive way to analyze which channels were driving the best leads for sales and where marketing should spend more money.
- Paid media spend was significant, but conversions to opportunities were difficult to ascertain and seemed minimal.
- The company blog was extensive, covering everything from Atlassian tools to employee job satisfaction. Their blog generated lots of traffic, but not necessarily traffic that converted to revenue.
- Tradeshows and events were critical in the marketing mix. This reliance on face-to-face events proved to be a significant but unanticipated challenge in March 2020 (hello COVID).
- Sales lacked a systematic methodology for culling through marketing leads to discover prospects in the substantial pile generated every month.
- The technology infrastructure supporting Isos was becoming increasingly fragile and difficult to maintain. And the only person who understood the entire stack was the hard-working CEO.



## THE SOLUTION

In early 2020, Isos Technology purchased HubSpot Sales Pro, Marketing Pro, and CMS Pro. Even though March 2020 quickly brought uncertainty regarding future revenue prospects, Isos stayed the course with its investment and game plan to consolidate its sales and marketing tech stack onto HubSpot. Thad West, CEO, commented that the timing was perfect as far as he was concerned, as the cancellation of face-to-face events gave sales and marketing time to retool properly.

Both Chief Outsiders and Orange Marketing were impressed with the Isos Marketing team. Varied marketing tactics over a long period resulted in high organic traffic. But, marketing efforts firing on all cylinders layered without time to plan had also resulted in complex marketing operations processes. In addition, Isos had a direct sales team with an active inside sales function—no disruption to the sales team was required during a sales & marketing technology lift and shift during the uncertainty of 2Q 2020.

We jointly agreed on our migration goals:

- Get everything in one place
- Keep robust, organic traffic intact
- Decrease systems maintenance
- Increase sales team productivity
- Increase marketing conversions to closed/won deals

We recommended a phased approach over three months to:

- Mitigate systems risk
- Allow for change management in the Isos organization
- And ensure minimal sales disruption



## MONTH ONE: MARKETING BLOG, SOCIAL MEDIA, AND EMAIL

We tackled the ActiveCampaign CRM and Email system first because it was the most straightforward and isolated of the three systems. And, the marketing team had much to gain by utilizing a HubSpot blog to automate manual social media posting and automating a weekly newsletter. The team had been hand-curating monthly newsletters featuring their extensive blog content.

The new newsletter, generated from the latest blog posts, is as polished and professional as the former newsletter, but now runs itself!

A banner for a recorded DevOps webinar titled 'SRE as a Service: Transforming DevOps from Build to Run'. The banner features an illustration of a blue infinity loop with people running on it. Logos for isos technology, NOBL, and dynatrace are displayed. A 'Watch Now!' button with a right arrow is at the bottom right. Text includes 'RECORDED DevOps Webinar', 'isos technology', 'Platinum Solution Partner', 'NOBL', 'dynatrace', and 'Watch Now! >'.

RECORDED **DevOps** Webinar

### SRE as a Service

Transforming DevOps from Build to Run

**isos**  
technology

Platinum  
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**NOBL**

**dynatrace**

**Watch Now!** >

# isōs [insider]

## The Inside Scoop

Direct from Your Atlassian Partner



## New Webinar: How & Why to Engage Leadership in the Agile Transformation Journey

By Isos Technology, Nov 8, 2021

### Engaging Leadership Throughout the \_\_\_\_\_ Agile Transformation Journey

December 08 @ 10:00 AM PT



Platinum  
Solution Partner



Register Now! >



UPCOMING  
**Agile**  
Webinar

Agile transformation requires an entire company to become laser-focused on delivering customer value and satisfaction, which means there are multiple places an agile transformation can stall. The 15th State of Agile Report specifies more than a dozen reasons for failed transformations, but two stand out: 41% of survey respondents identified absence of leadership participation as one of the most significant barriers to agile adoption, while 42% of respondents identified inadequate management support and sponsorship as a similar barrier. These numbers underscore just how critical C-suite participation is to the success of agile transformation.

[Read more »](#)

**SAMPLE NEWSLETTER**

## MONTH 2: SALESFORCE & JIRA INTEGRATION

The next lift was trickier. The highly-technical Isos Technology sales team had integrated Salesforce to Jira which gave them a pipe-based (think Trello board) prospecting task management system. In the end, we settled on a multiple pipeline approach in HubSpot, and built the deal stages to mimic what Isos had on their Jira board.

The team also took extensive advantage of workflow automation available in HubSpot to create follow-up tasks and assignments.

And, finally, the Isos sales team loved the automated Sequences available in HubSpot (a series of emails and tasks strung together and kicked off with a target list). The sales crew quickly saw the benefit of automating lead follow-ups based on the marketing offer.

We shut down Salesforce and moved the whole deal board over in one afternoon.



# MONTH 3: BLOG AND WEBSITE

The last stop was the Isos website. Ahead of the HubSpot CMS migration, we analyzed every page, blog post, and landing page.

The team decided to archive and redirect 30+ website pages and 300+ blog posts. Imagine having so much content that you could pick and choose!

An essential part of the website and blog conversion was inserting CTAs into every blog post retained. We added landing pages in front of the white papers to encourage more conversions. We put a banner on the front of the site to push offers at people who wandered by. And, finally, we added pop-ups all over the website to convert traffic once visitors discovered the isostech.com website.

**How to Migrate to Atlassian Cloud in 8 Steps**

This whitepaper will guide you through the high-level steps an organization will need to take to plan for, prepare for, and migrate to Atlassian Cloud. Walking through the 8 steps of this process, we explore common concerns and highlight points at which critical decisions will need to be made.

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Ever since my adventure at Isos Technology began back in April, I've wanted a better solution for asset tracking. In IT, we all love .CSV files, but as organizations grow and hardware gets upgraded, it becomes an...  
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The last critical improvement for the website was implementing a Resources Library housing the extensive Isos Technology content, easily accessed by prospects and also drive enormous SEO:

- [Blog](#)
- [Whitepapers](#)
- [Guides \(Pillar Pages\)](#)
- [Case Studies](#)
- [Webinars](#)
- [Videos](#)

Whew. We did it. And nobody died.



# RESULT

Isos Technology measures marketing results by closed/won deals associated with an MQL. Since our total marketing pivot, we have seen positive results impacting the bottom line and directly attributable to marketing efforts:

## Over the Past 5 Quarters from Q3 2020 to Q3 2021, Revenue Increased!

- Deals Closed Won Associated with an MQL went up 30%
- Closed Won Revenue Associated with an MQL went up 38%

## Marketing Qualified Leads and Sales Qualified Leads went up as well!

- MQLs went up 19%
- SQLs went up 15%

# IMPACT

- Revenue growth has continued at Isos throughout 2020 and into 2021 with excellent projections for 2022.
- Closed won deal revenue associated with MQLs has grown 38%.
- The Sales team has a distinct process for nurturing MQLs and the team is seeing reactivated MQLs increasing every month (MQLs interacting with additional nurture content).
- Using HubSpot dashboards, Marketing reviews results weekly and adjusts their strategy proactively rather than reactively, taking into account the most successful initiatives.
- And, the Isos Technology CEO no longer manages the marketing stack (yay)

*“Orange Marketing has taken us on an unbelievable, transformational journey. Our first milestone was to consolidate a bunch of disparate tools (Salesforce, Active Campaign, WordPress...just to name a few) and move years’ worth of data into HubSpot. Orange Marketing owned this entire shift and not only ensured that all of our data, artifacts and design made it over, but also that all of our teams were trained on how to use HubSpot.*

*From there we have moved into a long-term relationship where they have become our core marketing partner. We work together to set a strategy and let the Orange Marketing team run the execution. The team is very metrics-driven and provides us a lot of visibility into what’s working and where we have opportunities to try different tactics. We are a professional services company and know what good service should look like...the team from Orange Marketing consistently exceeds our expectations!”*



**Thad West**

CEO, Isos Technology

## About Isos Technology

Isos Technology helps the companies that are changing the world. As a premier Atlassian Platinum and Enterprise Solution Partner, we make organizations' Atlassian tools work more efficiently and effectively for them, with the least amount of disruption, so that they can focus on their business priorities. Since 2005, our Atlassian-certified team has tackled some of the toughest problems companies face across ITSM, Scaled Agile, DevOps, migrations, and integrations, and helped hundreds of organizations in both the private and public sector get the most value out of their technology investment. Headquartered in Tempe, Arizona, and with offices across the U.S., Isos Technology has been recognized as an Atlassian Partner of the Year in both the ITSM and Enterprise categories, an Inc. 5000 Fastest Growing Private Company, and a CIOReview Most Promising Agile Consulting Company. For more information, visit [www.isostech.com](http://www.isostech.com).

## About Orange Marketing

Orange Marketing, a Diamond HubSpot Solutions Partner, provides B2B SaaS and technology companies with sales and marketing services. We support startups in early funding and help established SaaS and technology companies jump-start results. We begin with understanding your customers and setting up your website to generate leads right away. Your HubSpot setup will get done right because we've implemented HubSpot dozens of times, and we will ensure your sales reps make the most of state-of-the-art automation to get deals moving quickly. We get your content development underway so that you can generate inbound leads from white papers, landing pages, case studies, blog posts, emails, and more. We also test the most effective advertising channels to get results while you wait for your inbound marketing efforts to kick in. We are laser-focused on generating sales leads, which convert to revenue because we know that marketing without sales enablement is simply a waste of time. We like to help. Please reach out, and we would be happy to discuss your B2B SaaS sales and marketing challenge [www.orangemarketing.com/contact-us](http://www.orangemarketing.com/contact-us).

