

CASE

STUDY

Software Integration: Microsoft Dynamics and HubSpot

At a glance

Faced with challenges in effectively integrating Microsoft Dynamics and HubSpot due to internal resource limitations and technical complexities, a U.S. dental conglomerate decided to outsource the integration process to Opibility. Leveraging Opibility's expertise in CRM and marketing automation integrations, they were able to achieve a seamless integration, enhancing their operational efficiency and data synchronization capabilities.

Key metrics

The four-month project allowed for gains in lead conversion rates, marketing ROI, and email campaign performance. The client also realized a reduction in customer acquisition costs and sales cycle length.



**MARKETING
ROI**



**CONVERSION
RATE**

OPIBILITY



Marketing Optimized



www.opibility.com



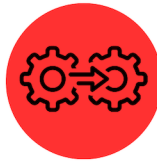
Indianapolis, IN

CHALLENGES

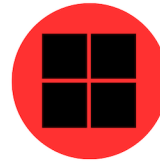


A U.S. dental conglomerate faced significant challenges due to the lack of integration between Microsoft Dynamics and HubSpot. The primary issue was that the data was siloed, which hindered the ability to have a unified view of customer interactions. This, in turn, led to inefficiencies in sales, marketing, and customer service operations. Without integration, manual data entry and duplication became necessary, which increased the risk of errors and reduced overall operational efficiency. As a result, it was difficult for teams to collaborate effectively and leverage insights for strategic decisions.

SOLUTIONS



**Custom
Integration**



**Microsoft
Dynamics**



HubSpot

BENEFITS



1

Enhanced Data Harmony and Visibility

Integrating Microsoft Dynamics and HubSpot eliminated data silos, synchronized customer information across the organization, and provided a unified view that empowered sales, marketing, and customer service teams to make informed decisions, personalize interactions, and enhance customer satisfaction.

2

Streamlined Operations and Efficiency

Connecting Microsoft Dynamics and HubSpot reduced manual data entry and duplication, streamlined operations by automating data flow, and allowed employees to focus on strategic tasks, leading to faster sales cycles, improved marketing efforts, and enhanced customer service.

3

Collaboration and Strategic Insights

Integrated systems fostered collaboration across the organization, enabled seamless lead transfer, feedback loops between departments, and shared insights that, along with combined analytics, enhanced strategic decision-making and uncovered growth opportunities, and investment priorities.