neostella

Customer Success Story

Fin

About Fin

San Francisco, California based Fin provides cross-application and enterprise data insights for Customer Experience and operations teams. In a digital-first age where meaningful customer experiences trump all else, Fin helps rapidly growing CX teams navigate the applications needed to optimize processes and improve agent training.

FIN

Industry: Software development

Headquarters: San Francisco, CA

Company Size: 30+ employees

Website: http://fin.com/

Solutions: Workato recipes

The Challenge: Enable Communication Between Sales And Marketing Platforms

Fin's sales and marketing teams use Hubspot for their marketing and CRM and Outreach.io for sales execution. While Hubspot integrates with many different applications, this was unfortunately not the case for Outreach.io, causing Fin's small team to perform a highly redundant and manual process just to synchronize prospect data between the two platforms. As a result, Fin chose to work with Neostella to develop a Workato solution that would:

➤ Allow Hubspot and Outreach.io to integrate for the exchange of prospect details.

➤ Free up employees to focus more on execution and conversion opportunities.

➤ Reduce redundancy of work across sales and marketing teams.

The solution: Automate, Sync, And Streamline Sales Outreach

Prior to automation, Fin's sales and marketing teams had to match prospect data between Hubspot and Outreach.io through a series of imports, exports, and manual updates. Each employee had their own system for doing so, which created a vacuum for inefficiencies to develop as well as potentially missed sales opportunities. Adding to the complexity was the need to navigate the different information tables and data mapping of the respective Hubspot and Outreach.io platforms. Fin partnered with Neostella to:

➤ Create several Workato recipes featuring bidirectional syncs between Hubspot and Outreach.io.

➤ Automate data synchronization from one platform to another, so there is no overlap and outreach can be appropriately prioritized and delegated between sales and marketing teams.

➤ Automate data syncing of properties both at the contact and company level, such as lead status, life cycle stage, lead source, LinkedIn URL, and other custom properties.

The results: empower sales and marketing teams

After just two weeks of live deployment, with dual support from Neostella and Workato, Fin is already experiencing:

- A less than 0.4% contact error rate.
- Time savings of 10 hours a week.
- Sales and marketing teams now have more confidence in the accuracy of prospect data, enabling more informed decision-making.

"From the very first moment of being introduced to Neostella and jumping on the call, they understood my need. It felt very customized and personal to our experience and also everyone was very empathic about our situation, and they really wanted to help us. Everyone was very communicative and we really liked the dual support between Workato and Neostella."

Hannah Coleman
Business Operations Manager | FIN

About Neostella

Neostella is a global enterprise software and solutions company that empowers organizations with the technology resources they need to exceed goals and push the boundaries of what is possible. Offerings include Legal Solutions, Work-Relay process and workflow solutions for Salesforce, Robotic Process Automation, and Application Integration. In addition to technology solutions, Neostella provides a wide range of professional services designed to help customers reap maximum ROI from their technology investments. With offices in four countries around the globe, the Neostella team is committed to providing exceptional customer support 24/7.