

Simplifying the Complex: Crafting Tecton's Data-Driven Journey to Growth

Tecton partnered with Crawford Group to optimize marketing operations, streamline lead management, and launch new paid media strategies, driving growth through data-driven insights and automation.

Executive Summary

Tecton, pioneers of the machine learning feature platform, partnered with Crawford Group to boost operational efficiency and improve marketing effectiveness. Crawford Group integrated seamlessly into Tecton's team, restructuring their lead management process by revamping lead scoring and consolidating data from multiple tools into HubSpot. They introduced paid media strategies, implemented marketing attribution tracking, and automated CRM processes to improve data health.



Customer Situation:

Tecton's marketing team faced some challenges: their lead scoring system required updates to improve lead tracking and qualification. Lead processes were not fully optimized, impacting the maintenance of CRM data across Salesforce and HubSpot. The absence of tracking and automation tools and limited resources created a resource gap in their marketing operations framework.

Crawford Group's Approach

Crawford Group collaborated with Tecton's VP of Marketing to address technical gaps in their marketing operations, optimize processes in Salesforce and HubSpot, and introduce paid media strategies. They developed a lead scoring system, improved automation between HubSpot and Salesforce, and enhanced CRM data health. In addition to stabilizing operations during resource gaps, Crawford Group implemented long-term improvements, including dashboards for demand generation and lead quality, process automation, and a structured change management plan for sustained efficiency.

Pain Points

- Outdated Lead Scoring
- Fragmented CRM
- Lack of Tracking and Automation
- Operational Inefficiencies
- Resource Gaps in Marketing

Measure of Success (ROI)

The partnership between Crawford Group and Tecton brought rapid operational improvements by automating marketing processes and enhancing CRM data health, reducing manual tasks, and boosting productivity. The new lead scoring system and integrated CRM improved lead prioritization and follow-up.

Dashboards provided data-driven insights, refining messaging and optimizing paid media efforts. Key takeaways include the importance of aligning sales and marketing, maintaining clean CRM data, and leveraging multi-channel marketing with performance tracking. HubSpot's tracking and automation also gave clear visibility into lead origins and quality, enabling seamless handoffs to sales.



Results

Crawford Group quickly streamlined Tecton's operations by consolidating data into HubSpot, implementing a lead scoring system, and resolving workflow issues with Salesforce. They introduced marketing attribution, launched paid media strategies, set up UTM tracking, and developed dashboards to optimize workflows.

By improving CRM data health in both Salesforce and HubSpot, they enhanced lead management and efficiency. Crawford Group also aligned the Tecton team with Asana for better transparency and streamlined pre-event campaigns in HubSpot with seamless Goldcast integration and improved reporting.

