



TruStage Financial Group

CLIENT

Insurance / Financial Services

INDUSTRY

3,300

EMPLOYEES

20

HUBSPOT USERS

IMPLEMENTATION SUMMARY

Objectives

- Leverage marketing data for sales
- Create a unified customer experience
- Provide a more responsive CRM
- Enhance operational flexibility

Configuration

- HubSpot Sales Hub Enterprise
- HubSpot Marketing Hub Enterprise
- HubSpot Operations Hub Enterprise

Technical

- Complex business processes
- Multiple use case customizations
- Industry-specific compliance standards
- CRM system mergers through M&A

IMPACT

62%INCREASE IN
CRM ADOPTION

TRUSTAGE FINANCIAL

Making HubSpot the Centerpiece of a CRM Strategy

Founded in 1937 as CUNA Mutual Group, the award-winning team at **TruStage** has redefined what it means to be an insurance and investments provider in the 21st century. By centering their CRM strategy on the power of HubSpot, the company is creating a unified platform for growth.

Selection

Like many large enterprises, **TruStage financial** (formerly CUNA Mutual Group) had historically relied upon Salesforce as their core CRM platform. As the company grew through both organic expansion and strategic acquisition, it started to become clear that merging and unifying multiple business units into a single CRM environment would be critical to the firm's strategic vision and customer experience roadmap. The marketing department had long relied upon HubSpot Marketing Hub and the firm recognized that it was time to seriously consider standardizing on Hubspot Sales Hub for CRM.

Implementation

An essential element in the company's growth strategy was developing and delivering on a clear, unified information technology roadmap. Scott Harvey, Operations Lead for Information Technology was tasked with making this happen and worked closely with Wendt Partners to create this model, with HubSpot as a core enterprise component and 'source of truth'. Wendt Partners then performed system assessment of the existing HubSpot account; created plans and processes to merge other divisions into a single platform; and expand the reach of HubSpot across the larger organization.

Success

Between the power of Hubspot's configuration and customization capabilities and the disciplined scoping, planning and delivery model provided by Wendt Partners, the team at TruStage was able to see high adoption and wide-ranging success by making HubSpot the centerpiece of their strategy.opportunities more plentiful and more profitable.

Testimonial

"Working with Wendt Partners enabled us to create and execute a strategy for making HubSpot a powerful resource across the organization. They enabled us to assess, plan, implement and optimize HubSpot across multiple teams, business units and stakeholder groups – and these are mission-critical priorities in a large enterprise such as TruStage."

SCOTT HARVEY

OPERATIONS LEAD, TRUSTAGE FINANCIAL GROUP



Begin Your HubSpot Implementation Journey Today

Contact Doug Wendt, Senior Partner at **718-841-7169** or via email to doug@wendtpartners.com.