

CriticalRiver Unifies Sales & Marketing Data for Real-Time Revenue Insights



The Customer

CriticalRiver, a leading technology consulting company, was leveraging Salesforce for CRM, HubSpot for email marketing, and Demandbase for account intelligence. However, they faced challenges in managing fragmented data across these platforms, impacting collaboration and efficiency between their sales and marketing teams.

Impact Delivered

- 99% data accuracy
- 30% increased team collaboration
- 20% boost in productivity
- 15% higher ROI from marketing campaigns

The Challenge

CriticalRiver's use of multiple platforms resulted in inconsistent and fragmented data, creating inefficiencies in their operations. The major challenges included:

- **Inconsistent Data Sources:** The data was spread across Salesforce, HubSpot, and Demandbase, leading to conflicting information and making it difficult for teams to access accurate, real-time data.
- **Inefficient Workflow:** The lack of a unified platform caused delays in retrieving important information, hindering timely, data-driven decisions.
- **Misalignment Between Sales and Marketing:** Without a centralized source of truth, sales and marketing teams often operated in silos, which affected campaign execution and revenue attribution.

Solution Components

- Salesforce (CRM)
- HubSpot (Email Marketing)
- Demandbase (Account Intelligence)

The Solution

CriticalRiver developed an integration solution that ensured Salesforce would become the primary source of truth for all customer and prospect data. The key aspects of the solution were:

- **Seamless Platform Integration:** APIs and middleware solutions were used to create an automatic data flow between Salesforce, HubSpot, and Demandbase, enabling real-time data updates across platforms.
- **Data Synchronization & Standardization:** Automated workflows were introduced to synchronize data, ensuring consistency and accuracy while eliminating duplicates and incomplete entries.
- **Unified Reporting & Dashboards:** The integration provided a single dashboard in Salesforce, offering real-time insights into lead generation, customer interactions, and sales performance.
- **User Training for Adoption:** Comprehensive training sessions were conducted for the sales and marketing teams to ensure seamless adoption and effective use of the new integrated system.

The Results

With the successful integration of Salesforce by CriticalRiver, the company is now well-positioned to enhance operational efficiency and drive strategic initiatives. They have transformed their data management and team collaboration, ensuring improved decision-making, increased productivity, and a future focused on continued growth and innovation.