

A better, future-proof data model

How Integrev's HubSpot expertise transformed Fundraise Up's customer success operations

SITUATION

Fundraise Up believes that nonprofits deserve better technology, and it operates with the mission to unlock the generosity potential of supporters by optimizing how they give. That's why the Fundraise Up team built a platform that provides nonprofits with tools to increase conversion, enable modern payment methods, and personalize the giving experience for every donor.

When Ajay Chidrawar arrived as the Chief Customer Officer, he found team members had overlapping responsibilities. His first task was to separate sales functions from customer success functions so that the same people weren't selling and providing customer services simultaneously.

Next, Ajay sought to streamline customer success workflows. Since its founding in 2017, Fundraise Up's customer success team had grown organically and adopted best practices brought to the company by the executives it recruited. Unfortunately, even

though they were using HubSpot, there was a lot of room to codify. Even though all team members were good at their jobs and familiar with HubSpot, there was no repeatable playbook for the customer success team to follow or train new managers.

This situation placed Ajay in the position of finding a technology partner that could customize the company's customer success operations within the HubSpot platform.

"We had some complex requirements," said Ajay. "For instance, one of those requirements involved implementing a seamless process that spanned BDRs, account executives, solution engineers, and customer success managers, where the onboarding team becomes involved after certain sales stages. This necessitated embedding specific pages and defining essential additional fields within the system."

Upon receiving a verified referral, Fundraise Up brought in Integrev to provide the solution it needed.



"The Integrev team is great. They are **excellent partners**. They listened to our requirements and came up with **quality solutions**."

AJAY CHIDRAWAR, Chief Customer Officer of Fundraise Up

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SOLUTION

The Integrev team helps companies grow their business using best practices in scaling systems, processes, and teams by bridging the gap between strategy and technology. For Fundraise Up, that meant architecting HubSpot to create a better, future-proof data model.

To accomplish this objective, the Integrev team deployed its technical advisory and implementation services. Ultimately, Integrev's solution included a combination of custom objects, fields, and automations designed to eliminate the administrative burden on the team so they could focus on their customers. All of this was precisely what Ajay was looking to accomplish.

"The Integrev team had a solid knowledge base regarding HubSpot," said Ajay. "We had a lot of tricky things that needed to be addressed. They presented us with the pros and cons of options for a direction or decision, then we chose what we wanted to do. They performed their consulting role perfectly."

A look at the results

SMOOTH IMPLEMENTATION

"Implementation went smoothly," said Ajay. "The Integrev team brought expertise to the table from architectural and technical perspectives. They listened to our requirements and goals and came back with ideas and designs we approved."

PROCESS CONSISTENCY

"Once we split sales from customer success into separate organizations, we needed processes in HubSpot to flow smoothly from the sales side to the customer success side," said Ajay. "The Integrev team helped us achieve that process consistency."

INCREASED EFFICIENCY

"Customer success is quite a bit more efficient in terms of how the team manages its day-to-day operations," said Ajay. "There is a significant time savings. For instance, customer service managers no longer use complex spreadsheets to track activities such as quarterly account reviews. Now, they simply tag an account in HubSpot, and a standard report will give them the status of all their accounts."