



## CUSTOMER SUCCESS STORY

HOW PERKUTO & UBERFLIP MIGRATED  
FROM HUBSPOT TO MARKETO IN  
THREE WEEKS



# CHALLENGE

Uberflip is a platform for marketers to create, manage, and optimize content experiences, so that content can be fully leveraged by all company stakeholders at every stage of the buyer journey. By providing marketers with the tools they need to boost engagement, generate leads, and fuel demand generation, they can better leverage content to meet their goals.

Several years ago, Uberflip had selected Hubspot as their marketing automation platform. HubSpot was a great tool to start building processes for campaigns, but as Uberflip marketing got more complex, certain limitations were hit. These limits prevented the Uberflip team from being able to execute their marketing vision fully in the system. It also decreased their efficiency and ability to rapidly deploy campaigns as they scaled the volume of marketing initiatives.



- **Had outgrown Hubspot**
- **Needed more customization**
- **Desired a deeper integration with Salesforce**
- **Needed scalability to meet the needs of a growing company**

# SOLUTION

After a competitive selection process involving both Marketo and Pardot, Marketo was chosen as Uberflip's new marketing automation platform. With 90,000 records in the contact database, a marketing team of four, and the Hubspot license expiring in a month, it was clear that migration help would be needed.



## WHY PERKUTO

- **Long-standing partnership**
- **Experience with multiple migrations**
- **Expertise (Multiple MCSAs, MCEs and Marketo Champions on staff)**
- **Commitment to deliver project within near-impossible timeline**

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We recruited Perkuto to help us manage the project and minimize team disruption, since our team still had our regular demand generation programs to run,” said Shannon Dougall, VP Marketing at Uberflip.

“ With a project of this scale, we had to ensure the business and operations kept running while we slowly switched things over on the back end.

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# RESULTS

Migration kicked off with a discovery session between Uberflip and Perkuto, walking through the operational workflows, scoring models, landing page templates, email templates, hand-off processes, data schema, sales processes, and general business roles in Salesforce and HubSpot.

Based on discovery, the Perkuto team put together a Technical Design Document (TDD) that served as the bible for the migration. The TDD acted as a project management document, and also detailed a strategy of Minimum Viable Project (MVP): the minimum to migrate for normal functionality while hitting the deadline. The MVP scope included migrating the database, campaign templates, and operational workflows. Full funnel nurtures, more templates, and in-depth scoring models would come later.

Usually migrations of this scale take a few months to complete, but with Perkuto's strategic guidance and extra hands, along with the MVP strategy and team dedication, Uberflip was up and running in three weeks. As Kamil Ali Rextin, Growth & Demand Generation at Uberflip, recounts, **“I still remember Perkuto saying, “Typically a migration takes months, three weeks is unheard of!”**

## PERKUTO SERVICES PROVIDED

- **Hubspot to Marketo Migration**
- **Marketo Strategy**
- **Technical Documentation**
- **Project Management**
- **Extra Marketo Expertise**



# ABOUT PERKUTO

For marketing leaders wrestling with revenue growth and proving impact of marketing, Perkuto provides services that map revenue goals to marketing strategy and executes on initiatives that increase marketing and sales team productivity.

As a **MARKETO PLATINUM PARTNER**, we excel at implementing and integrating MarTech systems into your processes with a high level of expertise and a deep bench of certified consultants.



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