

Capacity Interactive automates forecasting with Workday/Hubspot CRM Integration

The Client

Capacity Interactive is a digital marketing consulting firm that partners with leading arts and cultural organizations to engage audiences, build communities, and market smarter. Practice areas include digital advertising, website analytics, search engine marketing and search engine optimization, and content creation.

The Problem

Capacity Interactive was utilizing various disconnected applications to manage their financial forecasting data. Some information was in spreadsheets, some lived in documents, and some was being pushed out to another cloud-based data management system. This disconnect required that all of the pipeline and forecasting data - manipulation, analysis, reporting, and financial forecasting and capacity planning - be completed manually by the Head of Finance.

Needless to say, this was not ideal and each hour that was lost to this cumbersome process translated to hundreds of dollars of employee value that could never be recovered. Capacity Interactive was looking for a way to connect their systems and report on their data with automation, efficiency, and power.

The Solution

We began by identifying Capacity Interactive's goals for how they wanted to maximize the effectiveness of their financial data. As a leading partner in the HubSpot ecosystem, we were already familiar with the capabilities of their data management system, which was something they wanted to retain use of. Our challenge was to turn HubSpot into a single source of truth so that the appropriate data could be collected in HubSpot and then pushed out to the original data management system, unloading a significant amount of burden owned by the Head of Finance.

We created automation that first sorted through deals whose properties met particular stage criteria and then exported those deals to two different locations in the company's external financial data management system. This not only lightened the load on the Head

of Finance, allowing for more powerful and effective use of their time, but it also provided real-time data for more accurate and useful forecasting.

An unexpected barrier that we encountered was the complexity surrounding the communication between HubSpot and the external data management system. They didn't speak the same language, and we needed to create a solution that was both time and cost effective. We accomplished this with custom coded actions that avoided potential disasters in terms of complicated and time consuming workarounds.

Additionally, we created custom forms and fields that saved time for the Sales Reps and allowed for the automation of record management behind the scenes.

The Outcome

As a result of these solutions, the Head of Finance of Capacity Interactive was able to save an estimated one hour a day of data manipulation and could reinvest that time into more meaningful work that is better aligned with their talents and skills. Let's do some fun math with some easy numbers to bring this improvement perspective.

If the Head of Finance were to be paid a \$100,000 salary based on an average of a 38-hour work week, that would come to an hourly wage of \$50 an hour. Over the course of just one year, that would result in 260 hours and \$13,000 of company resources that were previously lost to unnecessary data management.*

*Disclaimer: This is fun "tax-exempt" math. We are assuming most of us don't think taxes are fun. But if you're a potential client who makes a living from taxes or thinks taxes are the bee's knees, we honor and respect you as well.

Imagine the strides this highly valued employee will make towards real movement for the business after conquering this obstacle!

Why Aptitude 8?

Capacity Interactive chose Aptitude 8 because they were familiar with our name due to their history of working with HubSpot. They recognized that we would have the capabilities to help them discover solutions to their data management challenges and save time and money in the process.

Aptitude 8 specializes in building custom HubSpot automations that resolve challenges with data, such as the ones Capacity Interactive faced. Not only do we have a plethora of strategies that we've developed over time, but our talented professionals continue to learn and grow, adding more skills to our knowledge base, by solutioning new problems with creativity and enthusiasm.