University of Chicago integrates sales and marketing systems, showing marketing ROI for the first time

The Client

The University of Chicago Institute for Translational Medicine connects researchers and community organizations with funding, education and resources to find effective ways to prevent and treat disease in real-world settings. ITM works with a consortium of 60 institutions toward advancing medicine in innovative ways, and its mission is to develop, test, and implement the most effective personalized therapies.

The Problem

Since ITM serves many segments of the medical community, including researchers, educational leaders and the general public, it became a challenge to efficiently capture and categorize varying user data sets as they scaled. Because of this, they were spending too much time manually editing information and segmenting their CRM and marketing automation platform.

Finally, they were preparing for the launch of a separate research campaign, which included a new website as well as additional use cases for contact interaction.

The Solution

We completed an audit of the historical data within ITM's Salesforce and Pardot platforms and evaluated the current process related to their form submissions and list management. Additionally, we conducted collaborative work sessions so that we fully comprehended ITM's unique audience along with the ways in which they could be categorized.

Using that knowledge, we mapped out a new data architecture and pragmatically updated and tested ITM's Salesforce and Pardot fields, values and sync settings, along with creating new Pardot automations and rules. Leveraging the new framework, we executed a series of data migration exercises to correct outdated historical data and put in measures to align with future campaigns and activities.

The Outcome

The work allowed us to bring clarity towards ITM's database and process for segmented future communication. Using the new structure, ITM was now able to deliver unique content for specific user needs, and have a greater line of sight towards how those users were engaging with their resources.

Why Aptitude 8?

ITM tasked Aptitude 8 with this project because of our vast knowledge with leading platforms like Pardot and Salesforce, as well as our experience in dealing with large data sets and data architectures.

"The whole Aptitude 8 team was incredibly patient and helpful as they walked us through Salesforce and the plan of action. Our awesome consultant Bryan made Salesforce usable for us, and was so great at executing and communicating deliverables and teaching us how to use the platform effectively."

- Kathleen Ferraro, Senior Science Communications Specialist