

# getMTE generates 900 trials for new product launch using HubSpot/Shopify integration automation

## *The Client*

MTE was founded in 2022 and is a company offering a daily feel-good shot that supports smooth energy, relaxed mood, calm focus and stress resilience. Their target audience is health and wellness conscious consumers.

## *The Problem*

MTE wanted to utilize HubSpot and Shopify to communicate with their e-commerce customers. But, their portal was new and only partially set up with existing contact data incomplete or not formatted for the HubSpot + Shopify integration to work correctly.

MTE's Shopify store had been built with one product that had multiple variants and was not integrated with HubSpot. It had forms creating sync errors for contacts that had been imported into HubSpot. Additionally, initial email designs were not optimized for email deliverability or HubSpot functionality.

Further adding to the challenge, the project was on a tight deadline to soft launch a free trial of product for friends and family. The MTE team needed to manage these orders within Shopify so their 3PL partner could process shipments and maintain correct inventory data, while also syncing fulfillment data into HubSpot. They wanted to use HubSpot to track "purchase" data and fulfillment statuses and trigger nurture workflows to recipients, including a survey to collect feedback to shape product development.

## *The Solution*

The Aptitude 8 team started by integrating HubSpot with Shopify using the native integration and working with MTE to have their products restructured to support data syncing. The team completed their Hubspot configuration, adding custom properties to manage the free trial campaign and structuring their existing lists into import-ready formats. Shopify forms were also swapped out for embedded HubSpot forms to address sync errors.

Aptitude 8 liaised with MTE's 3PL partner and the Shopify team to install an app that allowed them to import free trial orders into Shopify that would not sync to the 3PL until the go-live date. These orders would then sync back to HubSpot with relevant details about the recipient (contact record) and the order (deal record) and enroll them in the correct nurture workflow. Additionally, since timing and budget were a concern, Aptitude 8 created a survey within HubSpot rather than adding a third-party tool or upgrading to Service Hub.

From there, Aptitude 8 developed and built automation to power six nurture workflows, two drip campaigns, three utility workflows, three forms and ten data backup workflows. This included automation to compensate for a lack of functionality in the Shopify integration.

They also designed, developed and built 50 marketing emails for use in the workflows and or marketing email sends that could be sent to their database. The email templates were designed to better utilize HubSpot functionality, reducing template production costs. The first set included modular, user-friendly templates that MTE can easily adapt for future campaigns. A second set focused on longer form, educational content that emphasized ingredients and highlighted reviews.

### *The Outcome*

In just eight weeks, Aptitude 8 launched the initial campaign for their soft rollout to friends and family. MTE fulfilled 895 free trials orders and received 136 orders from paying customers prior to the store being officially launched to the public.

The initial campaign allowed MTE to conduct an end-to-end test of their fulfillment and marketing systems. The feedback from the friends and family survey was invaluable and allowed MTE to make adjustments to their formula before a larger, more public rollout.

Additional emails, workflows and reports were also developed after the friends and family campaign. This equipped MTE with the right tools and data structure as they look to launch the product more broadly in early 2023.

### *Why Aptitude 8?*

MTE's launch was a cross-discipline effort and needed a firm with expertise across WebOps, RevOps, and MOPs. They were also on a very tight deadline and needed a team that matched their "let's get it done" attitude. Aptitude 8 met those needs.

Aptitude 8's technical consultants have extensive knowledge and their curiosity drives them to find innovative solutions to tough problems. Whether you need a complete system overhaul or a small, custom-built integration, we can find a way to make HubSpot work for you and your team.