Palo Alto University integrates Shopify, Thinkific, and HubSpot to achieve systems orchestration bliss

The Client

A private university in Palo Alto, California, Palo Alto University was founded in 1975 as the Pacific Graduate School of Psychology. To this day, Palo Alto University's academic programs focus exclusively on Psychology, offering students the opportunity to earn bachelor's degrees, master's degrees, and doctoral degrees.

The university also provides a not-for-profit continuing education program called CONCEPT, which is accessible online.

The Problem

Palo Alto earns a significant amount of business by selling on-demand & live courses to students and professionals. The university's CRM must integrate seamlessly with its marketing automation platform to power much of its business process.

In its prior state, CONCEPT at Palo Alto University had a disjointed website experience, which made it difficult for users to engage with. Users were often redirected to other sites when trying to navigate the website, and the website didn't integrate well with the university's systems. Users could only purchase one on-demand or live event course at a time and needed to navigate multiple checkout processes to access content.

The marketing website was hosted at concept.paloaltou.edu, but users were frequently redirected to Thinkific landing pages at learn.concept.paloaltou.edu to browse courses and make purchases. Additionally, live events were handled outside of the Thinkific learning management system (LMS) and were purchased separately through Infusionsoft forms.

The university needed a way to unify the shopping and checkout experiences for continuing education students by migrating to HubSpot. They also wanted to create a HubSpot CMS website where live and on-demand courses could be purchased together in a single shopping cart.

The Solution

Aptitude 8 used custom objects for Courses and Instructors to dynamically create a course index and course pages, with varied layouts by Course Type. These included live course events and on-demand courses.

The team ensured the course index page (Programs) could be filtered by custom property values. Search functionality was added, enabling users to filter search results natively rather than directing the user to a search results page.

Aptitude 8 also added a Headless Shopify configuration with custom cart functionality to enable users to purchase courses directly through the HubSpot CMS site. Only the final step in the transaction (payment processing) would be completed through Shopify's domain.

Finally, the client requested the ability to purchase courses for multiple students at once and to buy enrollments on behalf of others. To accomplish this, Aptitude 8 added a second step to the shopping cart submission. This step captures purchaser and participant information for each course and passes it into HubSpot and Thinkific for enrollment.

Altogether, the project included serverless functions used to pass LMS data to HubSpot, coded actions used to pass HubSpot data to the LMS, and the deployment of a royalty payments solution.

The Outcome

Palo Alto University gained an all-in-one technology stack containing multiple systems, including HubSpot CRM, Sales, Marketing, CMS, and Service, as well as integrations with 3rd party systems like Thinkific and Shopify.

The university's CONCEPT website became much more efficient and user-friendly, making it easy for students to purchase courses without having to wade through multiple websites. It became much easier for users to search for their desired course without having to manage tabs and search results pages as well. Additionally, the compelling new website design provided opportunities to feature instructors and partners associated with each online learning course.

The client and their users also gained new capabilities thanks to Aptitude 8's solutions. The course, instructor and partner details on the website are dynamically controlled by

CRM objects, automating page creation and saving time for the CONCEPT team. The LMS system was integrated into HubSpot, so teams could access purchases, enrollments, and user information directly in the CRM.

Why Aptitude 8?

Palo Alto chose Aptitude 8 because we demonstrate the possibilities of what can be done in a full HubSpot stack implementation. We take disparate systems and integrate them or replace them with better solutions, creating a central location of all our clients' data.

This was a large, multi-system project. Aptitude 8's CMS Hub and RevOps expertise brought the project together. Whether you need a small custom integration or a complete overhaul of your website, LMS, or CRM, Aptitude 8 has the HubSpot and RevOps experience to overcome any challenge.