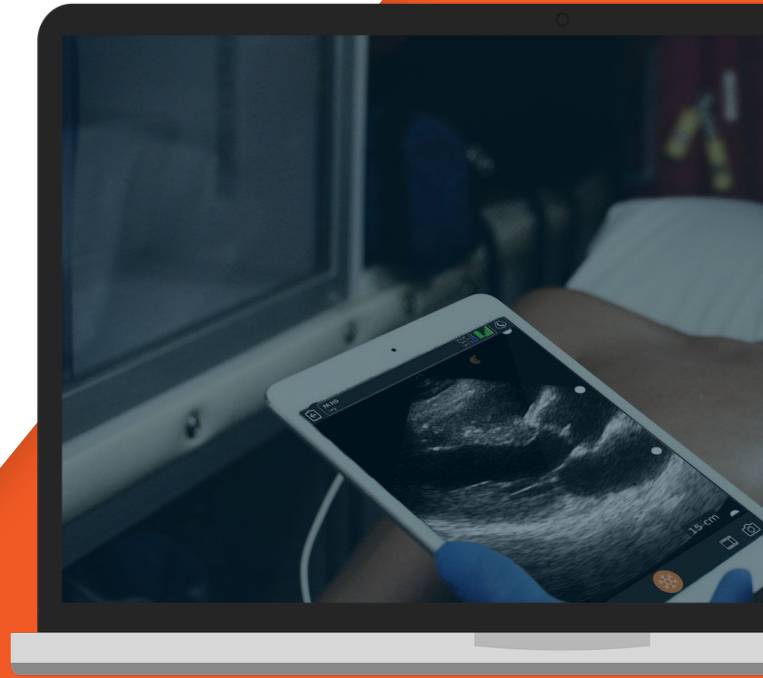# clarius

Clarius
CASE STUDY

> **I am so happy that we chose to work with MAC. MAC is of the best consultants I have ever worked with in my career.**
>
> — Genese Castonguay | VP Marketing

The **Client**

Clarius is a medical equipment innovator, whose mission is to improve patient care by making medical imaging more accessible and affordable through their handheld "pocket ultrasound" tools.

The **Problem**

When Clarius first reached out to us, they were at a critical point in their Marketing strategy. They were preparing to onboard their first Marketing Automation Platform (MAP), and needed an unbiased opinion on which platform would be best for their needs—Marketo, or Hubspot. And they were under a time crunch. Simultaneously, they were migrating CRMs from NetSuite to Salesforce, and needed their MAP to be configured in time for launch—in just one month!

The **Solution**

To start, we had one of our Marketo experts, and one of our Hubspot consultants meet with Clarius to understand their business needs, and what was important to them in a MAP—and to give them a "no fluff" break down of what each platform's strengths and weaknesses were, and how we saw those as aligning with their business requirements. After some deliberation, they decided that Marketo was the best tool for their business.

Once their Marketo instance was provisioned, we jumped into high-gear to get them set up in time fo their CRM launch. Their number one priority was to have the systems in place to optimize the Marketing <> Sales line of communication—which meant setting up a strategic scoring model, a lead lifecycle model, alert center, and the Marketo Sales Insights (MSI) module with accompanying interesting moments—while simultaneously preparing 20 or so Web Form programs to switch over.

To manage costs, they wanted to leverage their internal Marketing team to do a large portion of the heavy lifting—but still wanted the guidance and quality control to ensure the set up was done to best practices, and wouldn't cause issues down the line, interfering with their sales funnel.

A tall order—but we did just that!

We joined Clarius' weekly sprints to assign action items and talk through blockers. The good news was, they already had a fairly clear idea of what they wanted the lead flow to be like—so the objective of the MAC Team was to identify any areas to optimize their existing plan, and to execute the set up.

While we would manage some of the more complicated builds ourselves (such as the lead lifecycle, and the alert center), to leverage the team's bandwidth we built program templates for the Web Form and Webinar On-Demand programs, and trained the team on how to set those up, answering any questions along the way. When the team had completed their assignments, we would then take ownership of QA afterward to spot any errors.

During "go live" we continued to act as an extension of their team. We joined them for 3 or 4 hour working sessions to conduct final testing, and troubleshoot any hiccups.

MARKETING AUTOMATION CANADA

The **Outcome**

Clarius was ready to launch their Marketo instance at the same time as their Salesforce. And, most importantly, they were able to fulfill their Marketing promise—that they would clearly communicate qualified leads via email alerts, Salesforce tasks, and Best Bets in MSI, within 5 minutes of lead form fills. Finally, the "go live" went off without a hitch, thanks to the thorough architecture and team testing efforts.

The internal team learned a lot through the process, since they had open access to a Marketing Solutions Architect who could explain nuances of the system and best practices. Finally, they were able to keep the MAP launch within budget, thanks to the working model that we undertook. Success all around!

Today, we continue to enjoy working with Clarius—mainly as an advisor, when they are looking for some "Architect" advice to develop a complicated idea into reality!

Marketing Automation Canada offers expert Marketo consultant services. We can assist with Marketo design by using Marketo certified experts. We also offer expert Pardot consultants, and Pardot implementations by Pardot certified consultants.

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