Bridging the divide

How Vic.ai crafted a seamless connection between marketing and sales via intelligent system integrations

SITUATION

Vic.ai is a leading autonomous finance platform powered by artificial intelligence (AI). The company uses AI to address the most manual and inefficient task in accounting—invoice processing—to improve speed and scalability, increase productivity, and save costs. Ultimately, the platform empowers finance teams to reinvent their accounts payable operations, improve financial management, and make business decisions based on intelligent insights and data.

Seeking to equip its marketing and sales operations with effective tools and best practices, Vic.ai implemented Salesforce. However, Salesforce wasn't properly integrated with the company's HubSpot installation. The Vic.ai team needed more granular metrics to dissect the pipeline and understand why they won deals, why they lost deals at certain stages, what the key predictors of successful sales cycles are, and how they stack up to industry benchmarks.

"Because the two systems didn't communicate with each other, we only got a partial story about our customer's journey," said Lotta Lundaas, Vice President of Marketing. "Also, we couldn't get accurate reporting, which meant we didn't know what our sales pipeline looked like. Consequently, we couldn't estimate what needed to be done, and we couldn't project what to expect. This was a problem for everyone—from the sales representatives to middle management, executive management, and the board."

Lotta initially attempted to solve the problem in-house, but this effort failed. She also brought in a well-known Salesforce consulting firm to assist, but this, too, didn't work out as planned. That left Lotta searching for a systems integration partner that could operate in a managed service capacity. Her search led her to Integrev.

"The Integrev team really cares. They make it their business to understand the situation and think multiple steps ahead to come up with a solution."

LOTTA LUNDAAS, Vice President of Marketing of Vic.ai

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SOLUTION

Integrev focuses exclusively on helping companies grow their business. It does so by using best practices in scaling systems, processes, and teams by bridging the gap between strategy and technology. For Vic.ai, that meant fully integrating the organization's Salesforce installation with HubSpot.

The Integrev team began by providing Vic.ai with classic sales operations support. Once the phase of functioning as Vic.ai's analytics and insights partner was completed, the team's efforts had an immediate impact. At the next board meeting, the reports were automated, stable, and informative.

Next, the focus shifted to supporting the sales development representatives (SDR) manager by retooling Vic.ai's Outreach, HubSpot, and Salesforce workflows. After about four months of close work with the sales team, it became clear that the systems were not ideally set up to support the account-based marketing approach they needed. That's when Integrev pivoted to solve that problem by examining existing workflows.

Working closely with Lotta, Integrev first audited all business processes as well as technical automations. Once those workflows were optimized, the Integrev team suggested and iterated on ideal processes. Integrev then completed its work by building and iterating on a new technical architecture to support the new processes. Essentially, the Integrev team rearchitected Vic.ai's sales and marketing tech stack.

With an optimized and integrated tech stack and efficient workflows in place, Vic.ai now nurtures a new culture of data hygiene and integrity.

A look at the results

INCREASED PRODUCTIVITY

"Monthly reporting for the marketing department used to take about a day and a half," said Lotta. "Now we can generate reports in about ten minutes."

ENHANCED DATA INTEGRITY

Now that the sales and marketing departments have access to a fully integrated HubSpot and Salesforce integration, they enjoy greater data integrity.