Arthur Online Case Study

Zoho to Salesforce & Beyond

The Client

Arthur Online is a fast-growing property management software company, providing a comprehensive suite of tools to property managers, landlords, and tenants. The company's success led to a rapid increase in customers, which created data management challenges and inefficiencies. To address these issues and streamline their operations, Arthur Online chose RevQore.

The Project Scope

➔ Migration from Zoho to Salesforce: Arthur Online sought to upgrade from their existing Zoho CRM system to Salesforce to leverage its robust features, scalability, and integrative capabilities.

➔ Integrating Salesforce with Back Office Systems: Arthur Online required seamless data flow between Salesforce and their back office systems to improve customer and usage data management.

➔ HubSpot Implementation: To enhance their marketing efforts, Arthur Online aimed to integrate HubSpot (Marketing Hub) with Salesforce. This would enable better lead attribution reporting and optimize the marketing-to-sales handover process.

➔ Enhancing Sales Quoting Process: Arthur Online's sales team needed a more robust quoting process to effectively track pricing and discounting, and wins/losses at a product level.

➔ Customer Success with Planhat: Introducing Planhat would help improve customer onboarding efficiency and enable better identification of customer health and upsell opportunities.

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The Transformation Process - Part 1

Phase 1 - **Migration to Salesforce.** RevQore configured Salesforce to meet Arthur's needs. Data cleansing and deduplication processes were conducted to resolve the existing issues with duplicate records and poor data hygiene. This included a stronger and more efficient quoting process, allowing the sales team to track wins and losses at a product level, and providing valuable insights for sales strategy and forecasting.

Phase 2 - **Integration with Back Office Systems.** Salesforce was seamlessly integrated with Arthur Online's back office systems. This enabled the smooth flow of customer and usage data, improving data accuracy and operational efficiency.
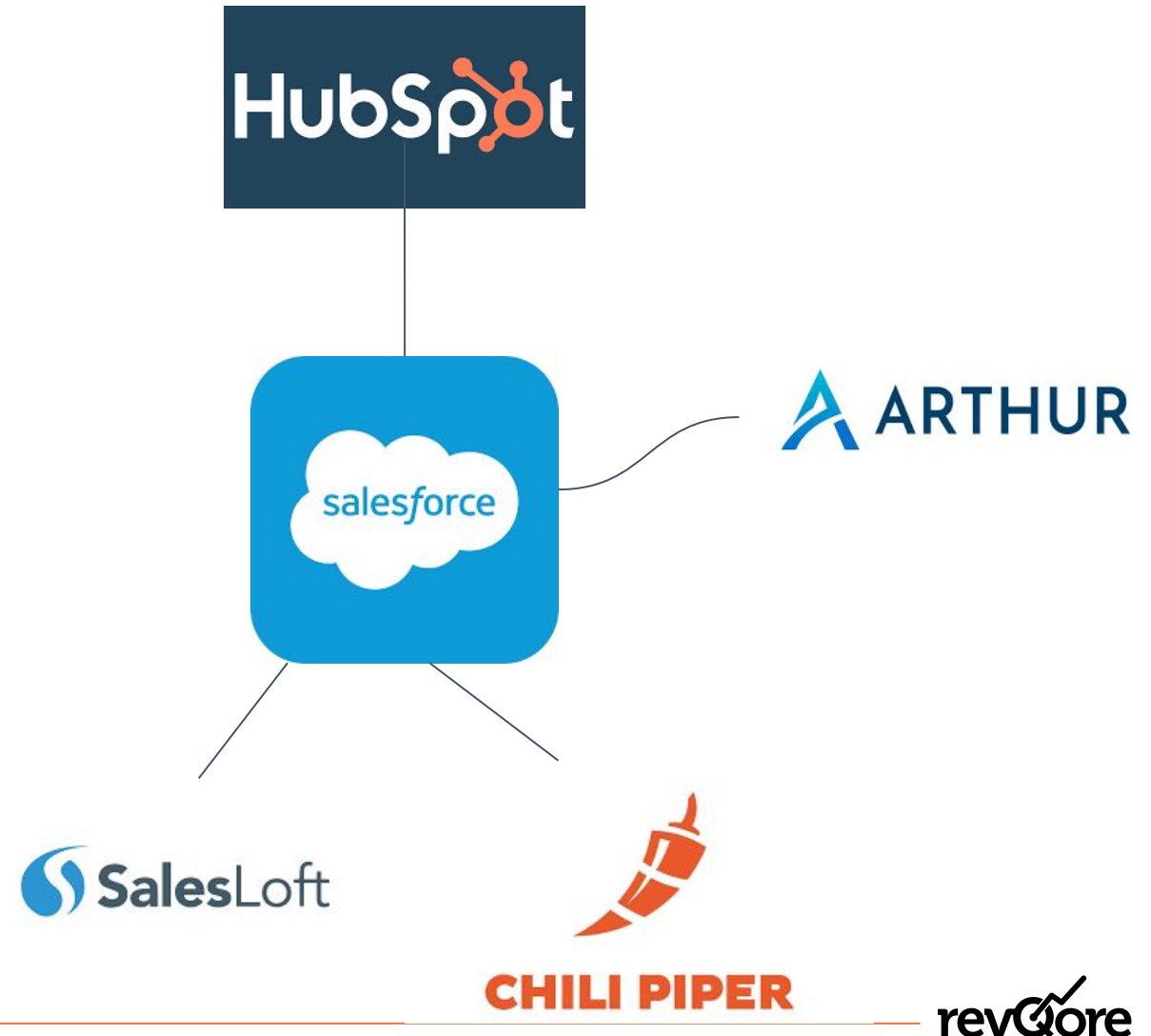
The Transformation Process - Part 2

Phase 3 - HubSpot Implementation.

HubSpot was successfully implemented and integrated with Salesforce. Marketing attribution was now clear, empowering the marketing team with better insights into campaign performance and lead generation. The marketing-to-sales handover process was streamlined, ensuring no leads fell through the cracks.

Phase 4 - Enhancing the Sales Tech Stack.

Salesloft and Chilipiper were introduced and integrated to underpin sales process with automated sequences and streamline demo bookings.

HubSpot

salesforce

ARTHUR

SalesLoft

CHILI PIPER

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The Transformation Process - Part 3

Phase 5 - Customer Success with Planhat.
Planhat was introduced to improve customer onboarding efficiency and identify upsell opportunities. This increased customer satisfaction and retention rates while ensuring a seamless customer journey.
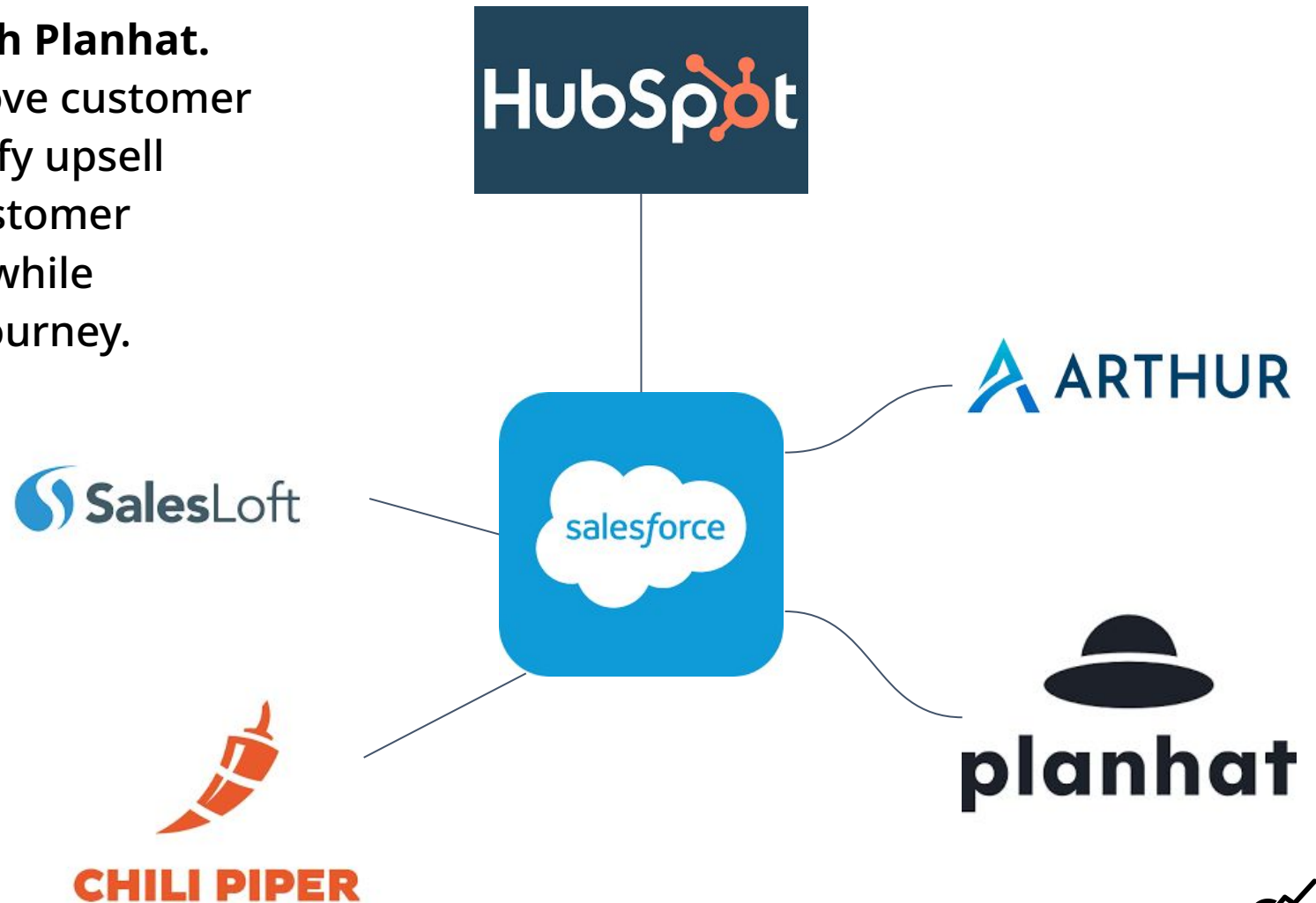
Outcomes & Benefits

Within just six months of the project's completion, Arthur Online experienced significant improvements across various aspects of their business:

1. **Data and Operational Efficiency:** The migration to Salesforce and integration with back office systems eliminated duplicate records and improved data hygiene. This enhanced data accuracy and operational efficiency.

2. **Marketing Attribution and Lead Generation:** The integration of HubSpot with Salesforce enabled precise marketing attribution, allowing the marketing team to measure campaign effectiveness accurately. Lead generation improved, resulting in higher-quality leads for the sales team.

3. **Optimised Sales Process:** The implementation of a stronger quoting process within Salesforce allowed the sales team to track wins and losses at a granular product level. This data-driven approach improved sales strategy and forecasting.

4. **Customer Success and Retention**: Planhat's integration streamlined customer onboarding and enabled better identification of upsell opportunities. This resulted in higher customer satisfaction, reduced churn, and increased revenue through upselling.

5. **Seamless Customer Journey**: The entire transformation process contributed to a seamless customer journey, reducing onboarding wait times and improving overall customer experience.

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Building on Arthur's success...

With the guidance and expertise of the RevQore team, Arthur Online successfully transformed its commercial processes and tech stack, allowing for improved data management and a seamless customer journey. This revolutionised the way Arthur Online managed its operations and customer interactions, significantly enhancing **efficiency, customer satisfaction, and revenue generation**. The business is now better positioned for sustained growth and success in the competitive property management software market.

The project was **recognised as a success at group level.** Arthur's new tech infrastructure was therefore adopted as the blueprint for its sister business Fixflo, which RevQore also implemented. RevQore then moved on to work with the parent company Aareon Group to implement HubSpot for multiple brands in the business and worked with Aaron UK to install a new client ticketing system.