How Lake One Digital helps PURIS continually *organize* and *optimize* their HubSpot CRM and *strategically market* their products to *win new customers* and bigger contracts

"We've received really great feedback on our marketing. We have people saying that it feels like PURIS is everywhere, and that's because of the marketing initiatives we do with Lake One. Before, people knew us, but now we've become newsworthy. We're becoming known, and we're building a brand."

AMANDA BAUMGART
Market Development Representative
puris.com

When PURIS began working with Lake One Digital, their HubSpot CRM was disorganized, under-utilized, and not functioning anywhere near its potential or value.

As a manufacturer of non-GMO, plant-based ingredients made from pulses, lentils and corn, PURIS sells a wide variety of food products and innovation systems to three very different customer segments.

So if ever there was a company who needed an organized and optimized way to keep track of, communicate with, and market to their large database of diverse clients and customers, it was PURIS.

Unfortunately, their HubSpot wasn't set up in a way to provide those capabilities.

Jake Achterhoff, now the executive director of a company related to PURIS, was brought in as a consultant to help

PURIS streamline and fortify many of their operating procedures — a major one being their customer service.

> **"The goal was to enable a more positive customer experience,"** Achterhoff said. **"A lot of that had to do with gathering more information through our website to really know who our customers were.**

"We also had thousands of contacts in HubSpot and none of them were organized so that we could market to them in a thoughtful way."

While PURIS had been working with another CRM partner, Achterhoff felt that **a fresh start with a new company would help them meet their goals more quickly and effectively.**

He'd received two recommendations to check out Lake One Digital, and said that from the first conversation with Lake One's Founder and CEO Ryan Ruud, he knew he was in great hands.

"Ryan understood what we needed and the level of support that was appropriate for us," Achterhoff said. "They could move quickly to get our CRM in order

— prioritizing what we should do first, streamlining things for us, and making sure we had a system set up that made sense.

> **"I also appreciated that they recognized we didn't know HubSpot that well and really wanted a partner who would bring recommendations and solutions to us that would help us accomplish our goals."**

PURIS not only decided to partner with Lake One to organize their HubSpot — which they began doing right away — but they also recognized they needed to hire a team member who could continually oversee their CRM management and collaborate with Lake One to further optimize the tool.

That team member was Market Development Representative Amanda Baumgart, who worked with the Lake One team on several key projects inside HubSpot.

The first project included making their deals process easier for their sales team so they could begin working in HubSpot instead of using Excel spreadsheets.

"Our sales team's adoption of HubSpot was a big issue," Baumgart said. "We had this CRM with all of these resources, but we had a sales team that was mostly using Excel sheets instead of HubSpot. **Lake One helped us rework the deals process and now we have everything in one place** and there's more transparency on where things are."

Another key project was organizing PURIS's thousands of contacts into three main customer categories and roughly 15 segments so they can market to their customers more effectively.

"Before segmenting, we had no way of sorting our contacts," Baumgart said. "**But now we can filter and that's been super helpful in our marketing campaigns.** If I want to reach out to specific leads I can

samples and measure results on them."

PURIS partnership with Lake One has not only optimized their ability to use HubSpot, it's also increased their capacity to market both their products and their thought leadership to current and future customers.

Lauren Perez, PURIS's Chief of Staff, said the company **relies on Lake One to provide both the ongoing strategic and tactical marketing support** they currently don't have the staff to do.

> **"Our internal marketing team is informal," Perez said. "We come up with what we want to do, but we need Lake One's support to execute on it. They really act as an extension of our team to make things happen."**

just select a filter and I have everyone I need right there. **Our marketing team figured out what segments we needed, and then Lake One did the back-end work of configuring those in HubSpot."**

The final key project inside HubSpot was transitioning PURIS's large sample program into a ticketing system so they could better track the samples and close new sales.

"We had a sample request system that was going through the deals process and it was negatively impacting our forecasting," Baumgart said. "Lake One recommended switching to a ticketing system, which was a great idea, and they took care of that for us. Now we have a far more organized CRM and can better track the

Two of the biggest marketing initiatives Lake One has brought to life for PURIS has been a series of webinars that have helped them show up as thought leaders in the plant-based space and email campaigns that allow them to communicate more effectively with their wide range of customers.

Perez said Lake One helped them with the webinars from start to finish — and **the results they've seen have been fantastic.**

"We have tons of bright minds here at PURIS and we weren't showcasing them," Perez said. "Doing webinars was something I always wanted to do but didn't have the resources or the knowledge to do it.

"I went to Lake One and told them what we wanted and that I didn't know where to begin. They helped us choose the webinar platform and design the email campaign. We ended up having over 100 people in attendance for our first webinar, including one of the largest potato manufacturing companies in the world who ended up locking in a multi-year deal with us."

Baumgart added that after that webinar, their requests for samples went up a couple hundred percent, and she's noticed similar success from the work Lake One has done with their email marketing.

"We've received really great feedback on our email campaigns," Baumgart said. "Prospects who had fallen off have come back and restarted their conversations, current customers reach out because they're interested in the new products we're featuring, and **new customers are reaching out because of the emails."**

Perez said a huge reason for this success is because their contacts are so strategically and specifically segmented in HubSpot.

"Before our marketing was a blanket approach and wasn't tailored or direct," Perez said. "We also couldn't measure success accurately. Now we're able to be much more targeted in our marketing."

Baumgart noted that because they're more targeted in their marketing, not only are they seeing more sample requests and sales conversations, but less contacts are unsubscribing from their email list.

"We're keeping people more engaged," Baumgart said. "They want to hear from us because we're sending them relevant content."

The strategic and well-rounded guidance that PURIS receives from Lake One is a key factor in the company's success — and a partnership that the PURIS team said any business could benefit from.

"Lake One has invested time to understand us as a company," Achterhoff said. "They shared a vision of what our HubSpot could do for us, and **they were willing to invest alongside us to make it a reality.**

"With their help, we've been able to go farther faster. **They are a one-stop shop** that is able to solve our immediate needs while foreseeing and preparing for our future needs. They chart the path, they monitor the execution, and they bring pace to the project. It's a great partnership." ☾

To learn how Lake One Digital can help your company *optimize* your HubSpot CRM — as well as *create results-driven marketing initiatives,* go to <u>lakeonedigital.com</u>