

Case Study

Modernizing Marketing At A Leading Advisory Firm Through Strategic Automation & Integration



The Challenge:

Auxano partnered with a leading Advisory firm with three decades of trusted experience, partnering with government leaders, top academics, and Fortune 100 companies to streamline operations across CRM, events, and communications. The project focused on automating manual processes, improving data quality, and integrating core tools like Salesforce, Slack, and Stripe.

Disjointed systems and manual workflows were limiting growth and efficiency.

Key issues included:

- **High email bounce rates, risking sender reputation**
- **Unreliable lead capture from Slack to CRM**
- **Time-intensive event registration and payment tracking**
- **Inconsistent campaign data and segmentation**
- **Limited visibility and collaboration across teams**

The Auxano Solution

Auxano delivered a tailored solution grounded in automation, clean data practices, and agile project management.

- **Email Health & Deliverability:** Implemented bounce tracking and list hygiene logic, reducing bounce rates to industry standards.
- **Lead Capture Fixes:** Resolved Slack-to-CRM sync issues and cleaned legacy data to ensure accurate, real-time lead creation.
- **Event & Payment:** Automation: Integrated Stripe with Salesforce to enable automated invoicing, approvals, and attendee tracking.
- **Data Quality & Insights:** Structured data fields and created dashboards to support accurate segmentation and campaign visibility.
- **Agile Collaboration:** Weekly standups and shared dashboards ensured transparency, fast execution, and alignment.

THE RESULTS!

- 50%+ reduction in manual work
- Clean, accurate CRM data
- End-to-end automation of event workflows
- Improved marketing and sales effectiveness
- Stronger cross-functional collaboration

Client Impact

"Auxano helped us transform how we work. Automation and visibility are now central to everything we do."

— Marketing Operations Lead

Industry

Technology

Project Overview

Modernize and automate data-driven marketing, event registration, and CRM operations to improve data quality, streamline workflows, and integrate key platforms like Salesforce, Slack, and Stripe.

Project Developed

- Sales Cloud
- Service Cloud
- Marketing Cloud Growth
- Slack
- Einstein for Sales
- Agentforce
- Data Cloud

Time Frame

12 Weeks