



CASE STUDY

FROM HUBSPOT TO MEMBRAIN - THE HOW AND WHY OF A SALES PLATFORM TRANSFORMATION



Sales technology is a key component of any sales transformation effort. PDAGroup understands that excelling in any aspect of business requires a flexible framework that enables innovation and execution of strategy throughout the organization.

Recently, PDAGroup partnered with the sales technology company Membrain to offer an integrated sales effectiveness solution that is built for complex b2b sales. The combined effort promises to improve collaboration, create a seamless customer experience, and enable continuous sales optimization on behalf of PDAGroup clients.

Here's how PDAGroup transitioned from Hubspot CRM to Membrain's b2b sales platform to achieve all of these benefits within their own company, so that they can now support their clients with the confidence of this proven approach.



PDAGroup, headquartered in Austria, is a consulting and training company offering top expertise in the field of B2B solution sales. In more than ten years, PDAGroup has trained 1000s of national and international customers, and measurably increased their “best sales performance.”

For many years, PDAGroup has proudly served large companies such as SAP, as well as numerous medium-sized companies that are actively building the future of sales. They design and deliver everything related to onboarding, enablement, and training needs across the sales organization, with a focus on innovative, human-centered solutions.



"We stored a lot of data in Hubspot, but no one was really using it on the job"

Benedikt Kramer,
Customer Solutions Business
Consultant for PDAGroup

"The transition turned out to be super easy," says Kramer. "We were well supported by Brenda, the customer success manager, and Evelina, the program manager. They got us everything we needed right from the start."

The biggest task of the transition was to clarify their process because Membrain is a process-focused tool. This required PDAGroup to have discussions with their team about how they were prospecting and what steps they were taking to develop sales and to formalize those discoveries into a consistent, dynamic sales process.

"It was impressive how fast and easy it was to get everyone on board with this," says Kramer.

Clarifying and formalizing their process had the immediate benefit of helping everyone on the teamwork more closely in lockstep. The second task was to train the team so that they could use the Membrain tool effectively, which in turn would help to reinforce the correct steps and behaviors in the sales process.

"One thing that was a stand-out in this regard," says Kramer, "was a series of bite-sized learnings that we did over two weeks. We started every morning with a short learning and demo. Then the next day we focused on the next function. Everything was so self-explaining that we didn't have any problems during the onboarding."

The bigger challenge in the transition was getting the data into the new platform. The initial set of data was moved using a simple mass export and import, which was easy and quick. However, because Membrain is process-focused and collects deal data in a more meaningful, contextualized way, bringing this deal data from one system to the other required a substantial amount of manual work.



"In Hubspot, it wasn't possible to take notes automatically in context like it is in Membrain," says Kramer. "So to get it into context in Membrain, our people had to sit down and copy-paste this information into the right places to make it make sense with the clarified process."

Britta Lorenz, Customer Success Partner for PDAGroup, adds that only the people who were working the deals understood the context of each deal well enough to make the adjustments, so these individuals had to manually transport their own deal data. This made it a relatively resource-intensive process.

But although it required them to perform this work in addition to their continuing sales responsibilities, Lorenz says the sales team feels it was worth it.

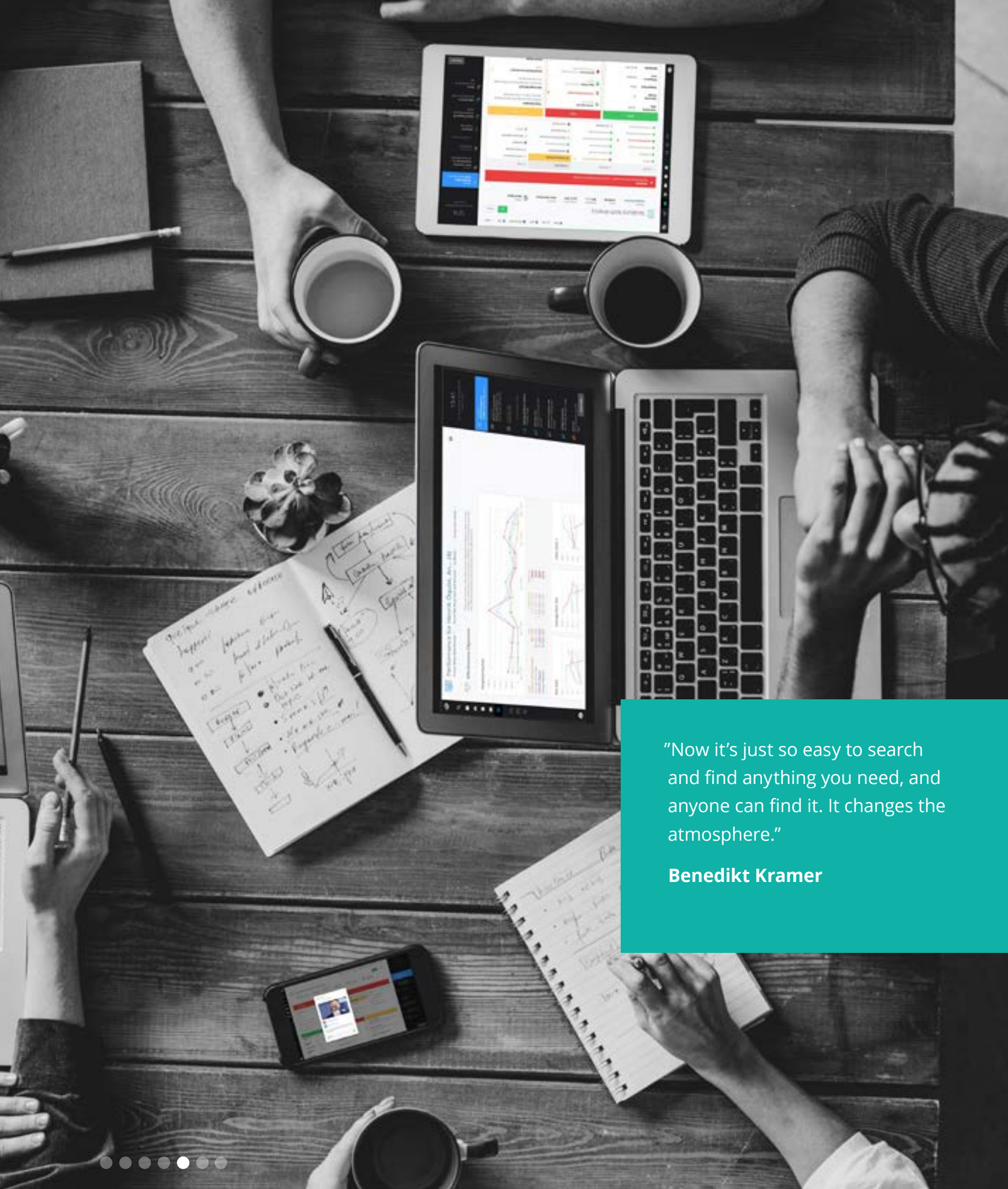
"As far as the data import, you just have to deal with it," says Lorenz. "Of course if someone else could do it for you, you'd appreciate it, but as the person who has the knowledge about the deal, you know you're the one who has to qualify and classify the information. It's not the nicest task, but you can see how much it's going to help you, so you just do it."

Additionally, Membrain's Clearpath Promise took out much of the pain of the transition by making it straightforward and predictable.

"There's no hidden cost, Membrain's team spoke very clearly about what to expect in terms of timeline, resources, and investment, and I cannot remember one promise that was not kept. A very nice experience compared to so many others."

Britta Lorenz, Customer Success Partner for PDAGroup

In the end, the sales team was grateful for the transition because the Membrain software is intuitive and easy to use and provides substantial benefits to them.



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Benedikt Kramer

THE OUTCOME

"With Membrain, our whole sales process is more transparent, and it's changed the atmosphere here of how we work together," says Kramer. "Anyone can step in and work any deal, and it's all more efficient and effective."

He says that Membrain has proven to be everything they hoped it would be for them. The key benefits it provides to the PDAGroup sales team include:

- Improved collaboration
- More seamless customer experience
- Continually optimized sales process

✓ IMPROVED COLLABORATION

Membrain organizes data in the context of the sales process, making it easy to access, easy to analyze, and easy for anyone on the team to understand and use.

This makes it possible for anyone on the sales team to pick up any deal at any time and move it forward in a beneficial way.

"With Hubspot, you knew the data would be somewhere, but no one wanted to take the time to research and find it," says Kramer. "Now it's just so easy to search and find anything you need, and anyone can find it. It changes the atmosphere. We're not just doing something with a few clients each, we're working together for everyone. It changes how you work together because anyone can step in and push any deal."

Lorenz adds that this wasn't possible when using Hubspot, but with Membrain, it's easy to see what actions were taken with each client and where they are in the process.

"It's easy to follow up," she says. "And we're all talking the same language, so we can build on what's already been done."

✓ **MORE SEAMLESS
CUSTOMER EXPERIENCE**

Improved collaboration leads to better and more seamless customer experience. Because Membrain facilitates a shared language and consistent process, the customer's buying experience becomes consistent and clear.

Membrain also makes it easy for salespeople to respond immediately to customer needs, no matter who is doing the follow-up.

"Before, we would have to sort out next actions internally," says Lorenz. "If the original salesperson wasn't immediately available, there was research that had to be done before anyone could act. Now the response is immediate because it's so easy to find what we need to take effective action. Customers appreciate that."

Kramer adds that Membrain makes it possible for the value messaging to remain the same throughout the sales process. This eliminates confusion and makes the process clear and easy for the customer.

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Britta Lorenz



✓ **CONTINUALLY OPTIMIZED
SALES PROCESS**

"I really love to see what the result of my actions is," says Lorenz. "When I send out emails, I can see what assets are opened, what links are clicked, and what actions are being taken."

Membrain's transparency of process and progress makes it simple to identify valuable prospects and go after them in an effective way. Internally, the entire team can see what's happening with each deal, and follow up in a productive manner.

In addition to making each deal move more smoothly and effectively through the sales process, this transparency has both immediate- and long-term impacts for process optimization.

Sales leaders can see where every deal and every salesperson is in the sales process, and identify where deals may be slowing down or require more support. Leaders with the right permissions inside Membrain can add video and other resources to help each salesperson move to the next level in a deal or in their overall performance. These materials are then served up in context to the salespeople who need them most.

Membrain's powerful analytics allow sales leaders to see where process improvements can impact the entire team, and those improvements can be built into the system quickly.

"It's simple to adjust and implement new things and add new assets," says Kramer. "It's not a one-time thing to improve the process, it's ongoing. We are currently and constantly redeveloping and reviewing with the whole team how best to do our work."

Membrain's process-focused tools enable the entire leadership team to see where deals get lost or stuck, which deals are most valuable and promising, and where to improve the process, as well as improve the personal capabilities of each seller.

THE FUTURE

PDAGroup's intent in moving from Hubspot to Membrain was to both to improve their own process, and to test the grounds on behalf of their clients.

"Membrain has delivered on every promise, and made our sales process so much more effective," says Kramer. "Now we can confidently offer these same benefits to our clients."

Lorenz adds that having gone through this process means that PDAGroup is "able to understand the concerns clients have about changing their tools because we've walked in the same shoes."

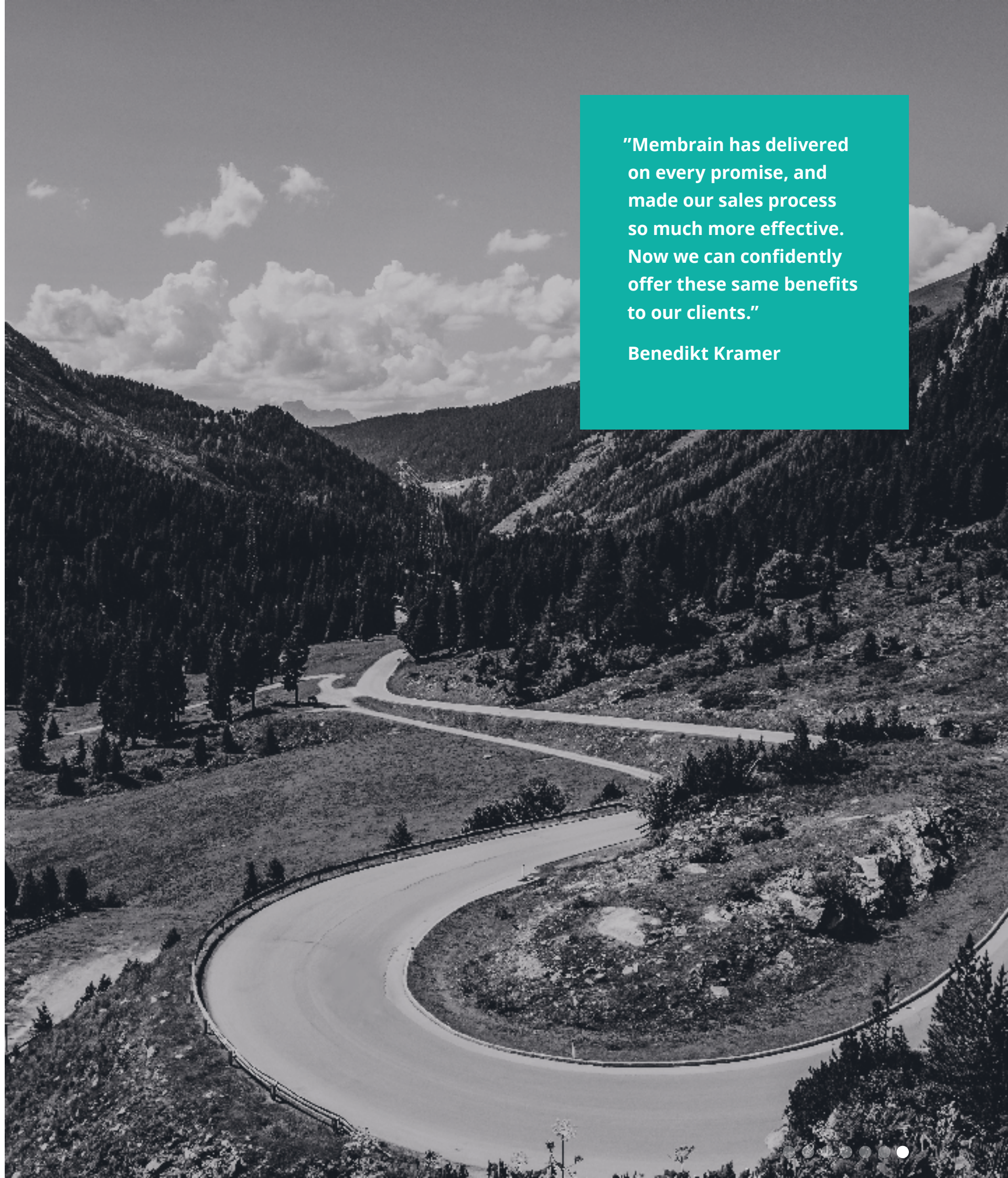
Kramer says that their focus is always on ensuring their clients achieve the outcomes they're aiming for and that the solution for each client will always be highly customized. For many clients, Membrain will be a part of their solution, and he's thrilled to be able to bring its benefits to them.

To bring PDAGroup clients the best of all worlds, PDAGroup's leadership now works hand in hand with Membrain, providing a 360-degree offering from strategy to execution, including consulting, process, training, and technology. PDAGroup focuses on the client's sales process and enablement elements to establish best practices for performance. Membrain's team delivers the technology that allows the process and enablement to be implemented and used on a day to day basis, for every step in the sales flow, reinforcing new habits.

Together, the two teams are able to help clients achieve their performance goals with greater ease and success.

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Benedikt Kramer



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TEAMS COMMITTED TO GROWTH

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