

Big Picture:

Summary: The entire digital strategy of the marketing department was built from the ground up

1. Campaign development/management
2. HubSpot setup and Salesforce integration
3. Lead handoff system
4. Lead scoring model
5. Technology management
6. Lead Generation strategy
 - a. Email
 - b. Webinar strategy
 - c. Digital ads (Linkedin, Google, Bing)
7. Marketing/sales alignment
8. Data & Reporting
 - a. Created a process from the ground up on tracking marketing data through the funnel
9. Revamped buyer personas by analyzing company clients and finding patterns in titles among key influencers
10. Marketing Attribution
11. Customer Journey Mapping
12. SEO Strategy with Topic Clusters and Pillar Pages
13. Campaigns
 - a. ABM
 - b. CS
 - c. Higher Ed
 - d. Broker/Consultant
 - e. RDS
 - f. CalPERS
 - g. SQL -> First Meeting
14. Vendor Management
 - a. Obo
 - b. ZoomInfo
 - c. HubSpot
 - d. Zapier
 - e. Jasper
 - f. ON24
 - g. Alloy
15. Campaign List development

16. HubSpot Administration

- a. Workflow development
 - b. Property creation/management
 - c. Integrations
 - i. Salesforce
 - ii. ON24
 - iii. ZoomInfo
 - d. Metric Reporting
 - e. Data Hygiene
 - i. Duplicate management
 - ii. Record completion
 - iii. Record Accuracy
 - f. Form development
 - g. Lifecycle management
- Built an entire lead handoff process from HubSpot to Salesforce (70+ different workflows) for all RVPs based on sector and territory that encompasses assignment and task creation
 - Created and managed an MQL and SQL Tracker to monitor all leads and task status
 - Generated 254 new SQLs and 1,628 MQLs, surpassing 2023 goals by 154% and 325.5%, respectively
 - Developed an entire marketing attribution system from scratch that incorporates HubSpot, Salesforce, and Tableau
 - Created a brand-new lead scoring model for categorizing the engagement of leads
 - Brought on On24 and helped with 4 webinars to drive hundreds of leads
 - Onboarded obo. to continuously improve business operations between HubSpot and Salesforce and the lead handoff lifecycle
 - Launched 4 unique multi-channel campaigns (Higher Ed, NJ State Gov, B/C Wave 1, and B/C Wave 2)
 - Spearheaded the creation of an email calendar and the creation of RetireeFirst's new monthly newsletter
 - Assisted in the development of multiple tableau dashboards to better monitor, track, and visualize the MQL and SQL journey
 - Created Salesforce Engage Email Templates for the Sales Team to use for prospect reach-out
 - Improved UX and overall website design as well as showcasing all webinars and gated contents through forms on WordPress and HubSpot
 - Built an entire tasks system from scratch for the RVPs to manage new leads