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StorHub's Marketing Automation Transformation

StorHub

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Overview

StorHub is a leading self-storage provider operating across multiple Asia-Pacific markets. With a rapidly expanding digital footprint and customer base, StorHub is investing in a future-ready marketing infrastructure to better manage its multi-channel customer journeys.





Introduction and Context

About StorHub

Q: Why is this transformation necessary?

- StorHub currently experiences high website traffic (20k-40k monthly visitors) but low lead-to-customer conversion rates.
- Key user journey data is fragmented across Zendesk (customer support), Storeganise (property management system), and SugarCRM (sales).
- Existing workflows rely on manual follow-ups, with limited campaign automation and inconsistent data between platforms.
- There is no unified system to support lead nurturing, booking recovery, or customer re-engagement based on behavioural data.

Q: What is the main objective of the transformation and how will the solution address it?

- The project will aim to implement HubSpot as the central marketing automation platform across all regional operations.
- It will unify customer data from Zendesk and Storeganise to provide a 360° customer view.
- It will enable targeted, automated workflows across email, SMS, WhatsApp, tailored to different stages of the customer lifecycle.
- The platform will be designed to deliver scalable, localisable marketing operations that can be extended to other markets over time.

Technology Overview

Technology Identification and Functional Application

- HubSpot Marketing Hub and Operations Hub will be implemented as the core martech stack.
- These platforms will be used for campaign management, customer journey automation, behavioural tracking, and integration with external systems.

Key Features and Functionalities:

Multi-channel workflows including email, SMS, and WhatsApp.

- Custom event tracking (e.g. booking form dropoff, move-in completion) for real-time triggers.
- Lifecycle automation covering lead nurturing, booking recovery, and post-cancellation winback.
- Zendesk integration
- Custom dashboards to track lead attribution, ROI, and workflow effectiveness.
- API-based integration with Storeganise to sync booking and property data into HubSpot.

Supporting systems

- Zendesk Service: Syncing support tickets and customer satisfaction scores to influence workflow eligibility.
- Storeganise PMS: Custom API integration to bring in booking behaviour and move-in/moveout events.
- SugarCRM: Retained as an operational CRM, with selected data fields mapped to HubSpot for campaign use.

Implementation Process

Timelines and Planned Activities

Sprint 1 - 4

- Discovery, process mapping, and documentation.
- Implementation of properties and objects
- Integrations setup

Beyond Sprint 4

- Iterative Agile sprints to develop additional functionalities and enhancements.
- Continuous deployment with incremental refinements.

Tasks Covered in Sprint 1 to Sprint 4

Sprint 1

Discovery and Technical Design

Sprint 2

- Ensure that the base objects are configured
- Create custom properties & custom objects tailored to the use cases

Sprint 3

- HubSpot & Zendesk integration
- Implement event tracking for
 - Form drop-offs
 - Click Behaviour
 - Booking abandonment

Sprint 4

- Setup 2 workflows
- Ensure workflows cover Email, SMS, and WhatsApp (SG)
- Discovery and Technical Design

Team Structure:

Team size: 1 Project Manager, 1 Business Analyst, 2 Hubspot CRM Specialists, and 2 QA Engineers

Metrics for Success

To ensure that the project meets its objectives, the following metrics will be tracked:

- Sprint Performance:
 - Velocity trends and burndown charts to monitor progress.
- Stakeholder Satisfaction:
 - Timely delivery of high-priority features.
- Agile Adoption:
 - Participation rates in Agile ceremonies.
 - Adherence to Agile principles during execution

The Vertis Approach

Tech-Driven Creativity

- 1. Vertis will deliver the implementation using Agile principles, allowing continuous alignment with stakeholders and incremental rollout of functionality.
- 2. All workflows and integrations will be designed as modular components that can be cloned and adapted for new markets (e.g. Japan, Malaysia).
- 3. HubSpot will be configured to support cross-channel orchestration, lead scoring, and behaviour-triggered campaign automation.

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Challenges and Resolutions

System Fragmentation

- StorHub's current stack is distributed across Zendesk, Storeganise, and Sugar CRM.
- Vertis will integrate these systems through native and custom APIs to ensure a unified customer view.

Lack of Native Storeganise Integration

- Storeganise does not offer a pre-built HubSpot connector.
- Vertis will build a custom integration using Storeganise APIs and middleware to enable event-based triggers.

Complex Campaign Logic Across Channels

- Messaging workflows must be coordinated across SMS, WhatsApp, LINE, and email.
- Vertis will manage this via HubSpot's Operations Hub and leverage APIs to integrate with regional message gateways.

Automation Requires Data Mapping

- Zendesk ticket data will need to be structured and scored to activate suppression rules.
- Vertis will work with StorHub's service team to define thresholds and flag logic.

Regional Scalability Requirements

- The platform must be extensible to markets with varying regulatory and communications needs.
- Vertis will configure HubSpot for localisation and introduce region-specific workflows and channels (e.g. LINE in Japan, WhatsApp in Singapore)

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Projected Impact and Results

Scalability and Expansion

• The modular nature of workflows and templates will enable future rollout to additional markets beyond Singapore, including Japan and Malaysia.

Improved Lead Engagement

- Automated re-engagement and recovery campaigns will allow StorHub to address key drop-off points such as abandoned reservations and post-cancellation churn.
- Personalised messages based on booking stage and sentiment will create more relevant touchpoints for leads and customers.

Cross-System Visibility

- Zendesk, Storeganise, and HubSpot data will be brought together to provide a unified view of the customer journey.
- Campaign performance will be tracked in real-time, using dashboards that integrate attribution, conversion, and customer service signals.

Faster Campaign Deployment

- Workflows and templates will significantly reduce time required for campaign launches.
- Dashboards and reporting tools will reduce the need for manual spreadsheet tracking.

Optimisation

- Poor Zendesk satisfaction scores will automatically pause campaigns, improving customer trust and experience.
- Campaign eligibility rules based on sentiment will help prevent negative feedback loops.

Operational Efficiency

- Manual follow-up will be replaced with automated, event-driven workflows.
- Campaign suppression, lead scoring, and segmentation will help teams prioritise high-value prospects.

Contact 1

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About Vertis

Vertis is a digital agency on a mission to constantly innovate and create exceptional digital solutions, elevating clients' brands and the experiences they deliver through the power of technology-driven creativity.

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