sedgwick

CASE STUDY:

How Sedgwick brought fragmented marketing operations together with HubSpot



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EXECUTIVE SUMMARY

When marketing operations span multiple business units, consolidating technology is only part of the challenge. Organizations also need consistent data, clear governance, and processes that teams can use without sacrificing the independence certain businesses require.

Sedgwick, a global claims management and risk solutions provider, faced that challenge across 16 legacy **Act-On** instances, disconnected reporting processes, and complex enterprise data requirements.

Vonazon partnered with Sedgwick to introduce a three-portal HubSpot architecture, establish clearer data and integration rules, and move marketing activity into a more connected environment. The work progressed from system design and migration into active campaign execution, webinar management, user training, and reporting.

Sedgwick's teams began managing live campaigns in **HubSpot**, testing webinar integrations with actual events, and using new reporting views to examine engagement. **One email deployment reached approximately 39,000 contacts with a reported 98% delivery rate, demonstrating the scale of marketing activity supported in the new environment.**

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ABOUT SEDGWICK

INDUSTRY: INSURANCE | FINANCE | BUSINESS SERVICES

Sedgwick is a global leader in risk and claims administration, helping businesses, insurers, and public entities manage complex claims, protect their people, and navigate operational risk. Its services span property and casualty claims, workers' compensation, disability and absence management, managed care, and specialized risk solutions.

Operating across multiple industries, geographies, and regulatory environments, Sedgwick serves organizations with widely different needs. Its business includes enterprise-wide services, specialized third-party administration, and risk-pooling programs that support distinct groups of customers.

This breadth creates unique demands for marketing. Sedgwick must communicate with diverse audiences, maintain distinct business and brand identities, and comply with varying data privacy and regulatory requirements, while giving leadership a consistent view of marketing performance.

As its marketing programs expanded, Sedgwick needed technology and processes capable of supporting that complexity without fragmenting data, reporting, and campaign execution across the organization.

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THE SITUATION

Sedgwick's marketing organization supports a complex portfolio of businesses, including corporate services, regulated third-party administration, and more than 25 risk pools with distinct communication identities.

Over time, its marketing technology had evolved to meet those individual needs. **Act-On** had expanded to 16 instances, while **Microsoft Dynamics 365** supplied much of the contact and company information used for marketing campaigns.

The arrangement supported ongoing activity, but much of the execution remained manual. Teams exported static CRM lists into **Act-On**, managed limited automation, and assembled campaign reporting from separate sources.

As Sedgwick expanded its account-based marketing and performance measurement efforts, the gap between its marketing ambitions and its existing processes became harder to ignore.

Sedgwick needed **HubSpot** to do more than replace **Act-On.** It needed to connect marketing activity with enterprise data while preserving the boundaries required by its different businesses.



"Our goal is for HubSpot to be the record of truth for marketing qualified leads."

–Sedgwick Stakeholder

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THE CHALLENGE

Sedgwick needed greater consistency without forcing every business into the same operating model.

Its corporate marketing operation required connections to **Microsoft Dynamics 365, Snowflake, Workday, and Webex.** Ohio TPA needed independent data access and communication controls to support regulatory requirements. The Pooling business needed to manage multiple brands and sending domains without mixing audiences.

Recreating the legacy environment would have preserved unnecessary complexity. Consolidating too aggressively could have undermined legitimate compliance and business requirements.

Data quality created another obstacle. Duplicate company and contact records in **Dynamics** produced approximately 5,000 company synchronization errors and 15,000 to 16,000 contact errors during integration work. Because duplicate records sometimes contained different values, the errors also affected the reliability of marketing audiences and segmentation.

At the same time, Sedgwick could not allow **HubSpot** updates to overwrite information maintained by its sales organization in **Dynamics**. The integration needed to respect which system owned which information.

Reporting carried similar consequences.

Sedgwick's analysts manually combined form submissions and engagement data from multiple sources, often cleaning lists before calculating campaign results. **Act-On's** limited data share did not provide the detail needed for more sophisticated analysis.

A Sedgwick analytics stakeholder explained:

> **"I could not do any reporting with the ACT on data share that they gave to us."**

Without reliable data relationships, new dashboards alone would not solve the problem. **Sedgwick needed a way to connect campaign activity, marketing engagement, and sales information before leadership could evaluate performance with greater consistency.**

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VONAZON'S APPROACH

1 Consolidating systems without compromising business requirements

Vonazon started by distinguishing the business requirements behind Sedgwick's existing technology from the historical decisions that had shaped it.

The 16 **Act-On** instances did not justify 16 equivalent **HubSpot** environments. Some separation was essential, particularly for regulated operations and independently managed audiences. Other requirements could be supported through shared standards and more deliberate governance.

That assessment informed a three-portal architecture. Sedgwick Main became the central marketing and integration environment, while Ohio TPA and Pooling retained the independence their operations required.

The guiding decision was to consolidate where it reduced complexity and preserve separation where it protected the business.



2 Establishing data governance before expanding automation

With the architecture defined, Vonazon turned to the information moving through it. Discovery had exposed overlapping contacts, inconsistent field structures, and legacy marketing lists assembled for different purposes. Moving everything into **HubSpot** without evaluating those relationships would have transferred the same problems into the new environment.

Vonazon worked with Sedgwick to establish migration priorities, contact and company data rules, subscription requirements, and governance standards. Those decisions provided a more consistent basis for segmentation, automation, and reporting. The **Dynamics** integration made that sequencing especially important.

Sedgwick's sales teams maintained customer and prospect information in **Microsoft Dynamics 365**, so **HubSpot** could not become an unrestricted source of updates. Vonazon refined synchronization rules around field ownership and tested how records moved between the systems.

When duplicate CRM records disrupted synchronization, the teams examined the operational requirement behind the affected data. Certain **Dynamics** lists needed to remain usable for marketing communications even when every associated CRM record could not synchronize cleanly.

This shifted the discussion from simply correcting integration errors to protecting the audience information Sedgwick depended on for campaign execution.



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3 Aligning lead management with how sales actually works

Lead management required a similar adjustment.

Sedgwick discovered that its existing synchronization behavior could update a previously handled **Dynamics** lead when the same prospect submitted another form. Sales users might therefore miss a new inquiry because it appeared as a change to an older record.

Vonazon and Sedgwick revisited the lead creation requirements for designated sales-intent forms, exploring how repeated inquiries could remain distinct and actionable. The work illustrated why integration design had to reflect actual sales processes rather than rely exclusively on default synchronization behavior.

The same principle shaped Sedgwick's lead scoring strategy. An initial model based on **Act-On's** limited criteria offered a starting point, but more meaningful qualification depended on available demographic information, engagement activity, and business-unit requirements.

Rather than treating a more complex score as inherently better, Vonazon helped identify where the underlying data and rules needed refinement before broader automation could deliver reliable results.



4 Making integrations and reporting work for real business needs

Webinar management provided one of the clearest examples of this practical approach.

Sedgwick wanted **Webex** activity connected to **HubSpot** so teams could manage registrations and track attendance as part of their marketing campaigns. Multiple webinar owners, security requirements, and registration workflows made a standard connection insufficient.

Vonazon developed and refined a custom integration experience, testing how users connected webinars to **HubSpot** forms and how registration information moved between the applications.

The work became particularly consequential when a development improvement helped Sedgwick avoid postponing a **HubSpot**-based webinar launch and rebuilding the event in **Act-On**.

Sedgwick's Director of Marketing Technology acknowledged the progress:

> **"I'm super excited to see this because I felt like we weren't getting anywhere with Webex."**

Further development and testing brought the integration into use with actual webinar activity, giving Sedgwick a more practical path away from its legacy event processes.

Reporting followed the same decision-led sequence.

Sedgwick already relied on **Snowflake** and **Power BI** for enterprise analytics. Vonazon did not assume every reporting requirement belonged in **HubSpot**, especially when some third-party integrations lacked the necessary detail.

Instead, Vonazon worked with Sedgwick's marketing and analytics teams to determine which metrics could be reliably viewed in **HubSpot** and which required analysis across the broader data environment.

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VONAZON'S APPROACH CONTINUED

The initial reporting work focused on event registrations, campaign engagement, and activity trends. As teams reviewed those views, the conversation advanced toward questions about paid media contribution, qualified leads, and movement through the sales process.

That progression mattered. Reporting was becoming a way for Sedgwick's teams to evaluate marketing activity and define better management questions, not simply a collection of dashboards.



5 Turning implementation into everyday adoption

Vonazon also treated enablement as part of making the new operating model work.

Sedgwick coordinated **HubSpot** training for approximately 80 users. The sessions helped teams understand campaign assets, workflows, forms, and the rules governing shared content and data.

As users gained experience, they began bringing practical questions back to the implementation team. Marketing stakeholders built campaign structures, experimented with advertising integrations, and refined workflows for their own needs.

The transition from learning **HubSpot** to actively working within it gave Sedgwick's teams a growing role in managing and improving their marketing operation.

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THE RESULTS

Sedgwick progressed from manually maintained **Act-On** campaigns to active marketing execution and reporting in **HubSpot**, with users building campaigns, managing workflows, and validating integrations against real activity.

The clearest change was how teams began using the environment.

Campaign stakeholders organized forms, landing pages, and advertising activity under **HubSpot** campaigns, making it easier to examine related marketing assets together. Users also began identifying limitations and requesting refinements based on actual work rather than implementation assumptions.

Live campaign activity demonstrated the transition at scale.

One email deployment to approximately 39,000 contacts achieved a reported 98% delivery rate.

While not a before-and-after improvement metric, it showed Sedgwick executing substantial marketing communications through its new environment.

Event reporting became more tangible as well. **A reporting review displayed 6,619 year-to-date webinar registrations, alongside views of registrations by event and month.** The reporting gave stakeholders a working view of engagement activity that could be refined around their needs.

The **Webex** integration also advanced from development into practical validation. A Sedgwick user confirmed connecting an actual webinar and reported that the integration functioned smoothly.

These developments changed the nature of the conversations between Sedgwick and Vonazon.

Early discussions focused on migration requirements, data access, and whether integrations would work. Later discussions centered on campaign attribution, paid media trends, reporting for growth teams, and how additional capabilities could support decision-making.

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THE RESULTS CONTINUED

Sedgwick's leadership also authorized further work on executive reporting, while marketing and analytics stakeholders began reviewing outputs and identifying the information they wanted to see next.

Not every underlying challenge had been resolved. CRM duplicates remained a data dependency, and advanced attribution required further reconciliation between **HubSpot** and **Snowflake**. The progress was nonetheless meaningful because teams were using the environment while continuing to refine it.

Sedgwick's request for additional Vonazon support provided another indication of that momentum. As the original engagement approached its available hours, the client sought continued assistance with workflows, reporting, and further development through the remainder of the year and potentially beyond.

Rather than ending with a technology handoff, the **engagement had created an active working relationship centered on making HubSpot increasingly useful to Sedgwick's marketing organization.**

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LOOKING AHEAD

Sedgwick's next priorities focus on deeper campaign attribution, more refined lead management, and stronger connections between marketing engagement and enterprise reporting.

Those opportunities build on the work already underway. With teams actively using **HubSpot**, future development can be shaped by observed processes, reporting requirements, and specific data limitations rather than assumptions made before implementation.

The next stage is less about replacing marketing technology and more about **extending the capabilities Sedgwick's teams have begun putting into practice.**



Are disconnected marketing systems limiting what your teams can see and accomplish?

Vonazon helps enterprises determine what to consolidate, what to keep separate, and how to connect **HubSpot** with the data and processes their businesses depend on. **Let's build an operating model your teams can actually use.**

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