



SUCCESS STORY | BENEFITS MANAGEMENT/HEALTHCARE

From Pardot to HubSpot: How a Benefits Management Leader Attained Better Marketing Visibility



INDUSTRY

Benefits Management/Healthcare

COMPANY GOALS

Migrate from Pardot to HubSpot to enhance reporting visibility and unite marketing, sales and events teams under one platform.

Introduction

A leading U.S. benefits management company that provides fertility, family building, and women's health solutions built a strong reputation for helping employers support their workforce through complex healthcare journeys. As the company's services expanded and its client base grew, so did the scale and complexity of its marketing.

Campaigns, events and digital programs were reaching the right audiences across multiple channels and teams. But as activity increased, it became harder to understand and show how those efforts translated into opportunity.

The company needed a clearer picture of how prospects were engaging with marketing and how those interactions connected to sales. So, they partnered with Kuno Creative to migrate from Pardot to HubSpot and build the infrastructure needed to support that visibility.

The Challenge

Pardot offered only first-touch attribution, which meant the full story of how prospects moved from early awareness to sales conversation was difficult to see. Monthly reports had to be assembled manually, pulling data from disconnected systems over many hours. Even then, the numbers told only part of the story.

The challenge went beyond reporting. Five internal teams operated in separate tools with no shared data or unified customer view. Pardot's tight coupling with Salesforce meant even routine updates often required engineering support, slowing down marketing operations. Meanwhile, sales had no real-time visibility into which prospects were actively engaging, leaving high-intent leads and opportunities on the table.

The Partnership

Kuno Creative approached the migration as more than a platform swap. A HubSpot Diamond Partner with HubSpot onboarding accreditation and hands-on Pardot certifications, the team brought deep experience across both systems. That dual-platform expertise helped them anticipate challenges early and design a migration plan that preserved the client's existing Salesforce architecture.

The project unfolded in three phases: HubSpot Marketing Hub onboarding, Salesforce integration, and full asset migration. Because Salesforce remained the company's system of record, the RevOps team mapped objects, properties, and workflows so marketing activity could move into HubSpot without affecting the CRM.

From there, Kuno rebuilt the company's marketing infrastructure inside HubSpot. Every landing page was recreated and refreshed, while contact records, custom properties, email templates, and files were migrated into the new platform. The team also streamlined the company's forms, consolidating 61 forms into just 10 using HubSpot's page-level filtering.

Throughout the process, Pardot remained live while assets were rebuilt, tested and quality-checked inside HubSpot. Once everything was ready, the final switch happened seamlessly, with legacy URLs redirected to preserve search visibility and ensure there was no downtime for active campaigns.

Key Wins

With HubSpot in place, the organization finally had clear views into how prospects were engaging with marketing. Activity that once happened quietly in the background (website visits, email engagement, ad clicks) could now be **surfaced automatically to the right sales representatives, giving them valuable context before outreach.**

The leadership team also gained something they had been requesting for a long time: real-time reporting that connected marketing activity to pipeline. Monthly reporting that **once required an estimated 60+ hours of manual work could now be reduced by half**, thanks to dashboards that surface performance insights automatically and help guide decisions about future campaigns.

Just as importantly, **five internal teams that had previously operated in separate systems were now working from the same data.**

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"The current resources we had with Pardot were prohibiting us from true speed-to-market and intentional outreach. With HubSpot, we can alert sales in real-time when hand-raising occurs and provide full context around a prospect's lifecycle to date. This allows for more timely, intentional outreach that helps keep leads moving forward to future buying stages ... Our migration from Pardot to HubSpot has been seamless in no small part thanks to the work of Jeremy and the Kuno team. We're so glad to have had them as a partner through this process!"

Vice President of Marketing

Quick Stats



5 internal teams

unified in HubSpot



61 → 10 forms

consolidated



**\$33k+ projected
annual savings**

in tools and outsourced costs



~50% reduction

in estimated monthly reporting time



0 downtime

during the final platform switch

The Vision

With HubSpot in place, the organization now has a marketing platform built to grow alongside the business. Marketing and sales teams can see how prospects engage across campaigns, content and events, creating a clearer picture of the customer journey from first interaction to opportunity.

That visibility changes how teams work. Instead of piecing together insights from multiple systems, they can access the data they need in one place and act on it quickly. And that clarity is shaping what comes next. The team is partnering with Kuno on a website redesign focused on improving user experience and conversion. Together, these efforts position the organization to continue refining its strategy and growing with confidence.

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