

SmartOrg — Case Study

RevOps as a Service | HubSpot Dashboard & Reporting | Campaign Attribution | Event Integration

Company	SmartOrg, Inc.
Industry	Decision Intelligence Software
Founded	1998
Growth Stage	Scale-up
GTM Maturity	Accelerated Growth
Engagement	RevOps as a Service (RaaS)
Strategist	Pedro Miquelasso

Situation

SmartOrg is a Decision Intelligence software company that has spent over 25 years helping Fortune 1000 executives navigate high-stakes portfolio decisions. Their platform is used by organizations like DuPont, ExxonMobil, Intel, and Medtronic to model uncertainty, quantify risk, and allocate resources with confidence. Despite the sophistication of their product, SmartOrg's internal revenue operations had not kept pace with the strategic rigor they deliver to clients. Key processes — from pipeline reporting to campaign measurement — were manual, fragmented, or missing entirely.

Struggle

SmartOrg was facing four core operational challenges when they engaged Elefante:

Limited Revenue Visibility Across the Pipeline

SmartOrg's leadership team lacked a centralized view of pipeline health, deal progression, and revenue performance. Reporting was manual and ad hoc, making it difficult to track commercial momentum or make data-backed GTM decisions.

Disconnected Marketing Event Data

SmartOrg relies on industry events like the IRI Innovators Summit to engage prospects and demonstrate thought leadership. But their event management tool, Contrast, was not integrated with HubSpot — meaning event attendance, engagement data, and follow-up workflows were not connected to the CRM or attributed to pipeline activity.

Campaign Attribution Gaps

Contacts and deals were not being properly associated to marketing campaigns in HubSpot. This made it impossible to measure which campaigns were driving pipeline and which investments were underperforming — a blindspot for a company that sells decision intelligence to others.

Underutilized HubSpot Environment

While SmartOrg had HubSpot in place, the platform was not configured to support the operational depth the team needed. Key features — from custom reporting to workflow automation — were either unused or underdeveloped, limiting the team's ability to scale their GTM execution.

Solution

Elefante RevOps designed and executed an ongoing RevOps as a Service engagement for SmartOrg, with strategist Pedro Miquelasso leading the account. The work focused on building operational visibility and connecting SmartOrg's commercial tools into a unified, actionable system.

Custom Executive Dashboard Suite

Elefante built a comprehensive set of custom dashboards inside HubSpot, purpose-built for SmartOrg's leadership team. These dashboards provided real-time visibility into pipeline health, deal velocity, revenue forecasting, and team performance — replacing manual reporting with self-serve, always-current insights.

Campaign Architecture and Attribution

Elefante restructured SmartOrg's campaign tracking in HubSpot, ensuring that contacts and deals were properly associated to campaigns. This gave the team clear attribution data — connecting marketing investments to pipeline outcomes and enabling data-driven budget allocation.

Marketing Event Integration

Elefante evaluated and implemented solutions to connect SmartOrg's event management tool, Contrast, with HubSpot. This ensured that event attendance, engagement signals, and follow-up workflows flowed directly into the CRM — closing the loop between SmartOrg's thought leadership presence and their sales pipeline.

Ongoing Strategic RevOps Support

As a month-to-month RaaS client, SmartOrg receives continuous HubSpot optimization, proactive recommendations, and hands-on execution from Elefante's team — including portal management, DNS and website support, and technical troubleshooting.

Results

SmartOrg's outcomes with Elefante include:

Executive-Ready Reporting Delivered

Leadership now has real-time dashboards that provide full pipeline visibility — no more manual reporting or ad hoc data pulls.

Campaign Attribution Connected End-to-End

Contacts and deals are now properly associated to campaigns, giving SmartOrg clear line-of-sight into which marketing investments drive pipeline and revenue.

Marketing Events Integrated into CRM

Event data from Contrast now flows into HubSpot, connecting SmartOrg's industry event presence directly to their sales follow-up workflows and pipeline reporting.

Continuous Optimization via RaaS

SmartOrg's HubSpot environment is proactively managed and improved month over month, with new features adopted, workflows refined, and strategic recommendations delivered on an ongoing basis.

Summary

SmartOrg came to Elefante as a company that understood the value of data-driven decision-making better than most — after all, that's exactly what they sell to Fortune 1000 enterprises. But internally, their revenue operations hadn't kept pace with the sophistication of their product. Pipeline visibility was limited, campaign attribution was missing, and marketing events operated in a silo from the CRM.

Through an ongoing RevOps as a Service engagement, Elefante built the operational infrastructure SmartOrg needed — from custom executive dashboards that earned direct praise from leadership, to structured campaign attribution and marketing event integration. Today, SmartOrg's HubSpot environment reflects the same decision intelligence they deliver to their clients: clear data, connected workflows, and the ability to act with confidence.