Insycle

Case Study

How Oyster Solved Salesforce & HubSpot Data Issues with Insycle

Executive Summary

Oyster faced challenges with siloed *Salesforce* and *HubSpot* systems, technical debt, and poor data quality. Using Insycle, they achieved:

- **90% reduction in lead response time** through lead-to-account matching.
- **Decrease in duplicate records** from 17% to less than 5%.
- **Automated processes** for lead conversion and assignment.

Oyster

Oyster is a platform that helps companies manage hiring, payroll, and compliance for remote employees globally.

"Insycle allowed us **to bridge the gap between *Salesforce* and *HubSpot,*** transforming disjointed systems into a single, cohesive brain for our teams."

Weronika Zubrzycka
Senior Marketing Operations Manager at Oyster
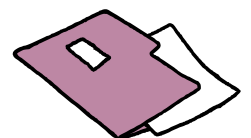
Oyster's CRM Data Challenges

Oyster's growth demanded seamless operations, but disjointed *Salesforce* and *HubSpot* systems impeded scaling and a unified customer experience.

- **Disconnected CRM Systems:** Salesforce and HubSpot lacked cohesion, hindering lead tracking and follow-ups.
- **Duplicate Data:** 17% of database entries were duplicates, causing inefficiencies and confusion.
- **Manual Processes:** Reps spent time assigning leads and fixing data instead of closing deals.
- **Siloed Teams:** Sales, marketing, and customer success couldn't align, leading to inconsistent customer experiences.
- **Missed Opportunities:** Inability to fully leverage data resulted in delayed follow-ups and lost revenue potential.

"Even with the best intentions, when systems are managed separately, it's **nearly impossible to build a cohesive structure that meets in the middle.** The lack of alignment made it hard to provide the seamless customer and prospect experience we aspire to"
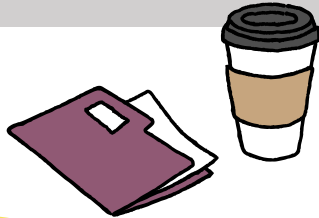
Weronika Zubrzycka
Senior Marketing Operations Manager at Oyster

How Oyster Transformed Their Data Operations with Insycle

Insycle

1 Resolving Duplicate Data to Eliminate Confusion and Missed Opportunities

- Reduced Duplicates – Insycle's tools **cut duplicates** to under 5%, ensuring **accurate, consolidated data**.
- Sales Impact – Teams focused on the **right accounts** without conflicting records.
- Marketing Impact – Campaigns **targeted correct leads** and accounts.
- Customer Success Impact – **Improved support** with a **single source of truth.**

2 Fixing Lead-to-Account Gaps to Avoid Delayed Responses and Lost Deals

- Faster Response – Lead-to-account matching **cut response times** by 90%, enabling immediate action.
- Sales Efficiency – Reps **prioritized leads by account importance,** boosting conversions.
- Enhanced Trust – **Faster, more relevant responses** built stronger prospect relationships.
- Team Alignment – Sales and marketing worked from the **same accurate data.**

> "Lead-to-account matching was a **game-changer** for us. It organized everything, triggered better notifications, and reduced response times dramatically.
> It's **one of the most crucial setups** for any B2B business."

Weronika Zubrzycka
Senior Marketing Operations Manager at Oyster

3 Addressing Manual Lead Assignment Bottlenecks to Prevent Rep Overload and Missed Leads

- Sales productivity – capped accounts per rep, **preventing overload.**
- Improved Lead Management – Leads were routed efficiently, **avoiding missed opportunities.**
- Customer satisfaction – Reps focused on **meaningful interactions,** not admin tasks.

The Result: Bridging HubSpot and Salesforce CRM data

Insycle

With **Insycle**, Oyster **bridged the gap** between *Salesforce* and *HubSpot*, turning a fragmented and inefficient system into a **unified, high-performing ecosystem** by addressing data quality issues, automating critical workflows, and fostering team alignment.

"Insycle is the **best tool I've used for CRM data management**. It's flexible, powerful, and delivers measurable results. I've recommended it to every team I've worked with."

Weronika Zubrzycka
Senior Marketing Operations Manager at Oyster