

Vocational Education Case Study



THE CLIENT

Plenty Training

Education / RTO (VET sector)

Client Details

Plenty Training is a leading Vocational Education and Training provider delivering accredited programs to both individuals and enterprise clients.

Operating in a competitive and compliance-driven environment, the organisation focuses on scalable enrolment growth, strong employer partnerships, and high-value training outcomes.

- **SMS / LMS:** aXcelerate - HubSpot integrated
- **Client since:** 2020-2024
- **Locations:** Varsity Lakes, QLD • National delivery
- **HubSpot stack:** Service Hub, Marketing Hub, Ops Hub, CRM

The Challenge

- **Disconnected Systems** > Salesforce and other tools created fragmented data and limited visibility across the enrolment funnel.
- **Manual Processes** > Slowed campaign execution, reporting, and follow-ups relied heavily on manual effort.
- **Inefficient Lead Management** > No structured pipeline or clear attribution across admissions, marketing and sales activity.
- **Teams Misalignment** > No shared view of engagement, pipeline, or performance. across teams.
- **Invisible High-value Accounts** > Limited capability to target and nurture high-value enterprise accounts.
- **No Structured Call Tracking** > Phone-based engagement without structured tracking or reporting.

The Solution

Multi-Year HubSpot Deployment

Lupo Digital delivered a phased HubSpot expansion for Plenty Training across four years, building out and combining HubSpot CRM migration, Account-Based Marketing (ABM), and telephony integration to create a unified, scalable revenue engine.

1 2020 - HubSpot CRM Foundation & Transformation

Initial HubSpot Marketing setup and CRM configuration, full migration from legacy systems into HubSpot (contacts, companies, deals), lifecycle stage and pipeline redesign, aligned to the enrolment journey, custom properties and segmentation for cohorts and enterprise clients and centralised marketing, sales, and reporting into a single source of truth for Plenty Training's student and corporate client data, across their national delivery network.

2 2020 - Sales and Marketing Aligment

Shared definitions for MQLs, SQLs, and account engagement stages. Real-time visibility of account activity across teams. Automated task creation and SLA-driven follow-up processes. Centralised dashboards for performance tracking and reporting.

3 2021 - Account-Based Marketing (ABM) Strategy

Ideal Customer Profile (ICP) definition across employers, government bodies, and enterprise partners. Target account identification and prioritisation Multi-channel campaign execution across email, paid media, and outbound sales. Personalised messaging aligned to industry, role, and training needs Sales enablement workflows embedded within HubSpot.

4 2022 - Aircall Telephony Integration

Bi-directional integration between Aircall and HubSpot. Automatic logging of inbound and outbound calls against CRM records. Call recordings stored within HubSpot for full visibility. Structured call outcome tracking and standardised data capture. Association of call activity with deals, lifecycle stages, and revenue.

5 2024 - HubSpot ABM Tools Implementation and Execution

Company-level targeting using firmographic and behavioural data. Contact role mapping across decision-makers and influencers. Automated workflows for engagement scoring and lifecycle progression. Distinct pipelines for enterprise partnerships and individual enrolments. Personalised marketing automation and sales sequences.

Capabilities Deployed

Lupo Digital's engagement with Plenty Training spanned three core capability areas, each building on the last to create a unified, scalable revenue engine.

HubSpot Migration & Foundation

- Full CRM migration (contacts, companies, deals)
- Setup of marketing campaigns strategically aligned to Sales
- Lifecycle stage and pipeline redesign aligned to enrolment journey
- Custom properties and segmentation tailored to training cohorts and enterprise clients
- Integration of marketing, sales, and reporting into a single source of truth

Account-Based Marketing Strategy

A targeted ABM approach was deployed to focus on high-value organisations and decision-makers. Key components:

- **ICP Definition:** Employers, government bodies, enterprise partners
- **Target Account List:** Development and prioritisation
- **Multi-Touch Architecture:** Email, paid media, and sales outreach
- **Personalised Messaging:** Aligned to industry, role, and training needs
- **Sales Enablement:** Workflows within HubSpot
- **Alignment:** Shared definitions of MQL, SQL, and account engagement stages
- **Visibility:** Real-time account activity across teams
- **Automation:** Automated task creation for sales follow-up
- **Reporting:** Centralised dashboards for performance tracking

Aircall + HubSpot Integration

Seamless Integration

- Bi-directional sync between Aircall and HubSpot
- Automatic logging of inbound and outbound calls
- Call recordings accessible within HubSpot
- Real-time activity tracking for sales teams

Structured Call Data

- Custom call outcome fields
- Standardised logging across all team members
- Association of calls with deals and lifecycle stages
- Full communication history per contact

Workflow Automation

- Automated task creation on missed calls or key outcomes
- Triggered workflows for nurture or re-engagement
- SLA-driven follow-up processes
- Notifications to ensure no opportunity is missed

Performance Insights

- Call activity dashboards within HubSpot
- Reporting on call volume, connection rates, and outcomes
- Individual and team performance visibility
- Attribution of calls to pipeline and revenue

Measurable Impact & Results

HUBSPOT STACK DEPLOYED

HubSpot CRM · Marketing Hub · Sales Hub · HubSpot CMS · Reporting/Dashboards · ABM + Target Accounts · RevOps Objects · Connected app ecosystem including: Aircall

The numbers enabled by systems change to ABM.

**ABM Opportunity Win
Rate**

60% (2024) → 100% (2025)

40%

Improvement

**Lead Response
Time**

From 15.5 days → to 2.46 days

84%

Improvement

**ABM Deal Cycle
Time**

From 77.7 days → to 28.8 days

63%

Improvement

**Outbound completed-
call rate**

74.1% (2024) → 100% (2025)

40%

Improvement

**Sales Team
Enablement**

Target Account Outreach

91.6%

Tracked

**Sales Calls
Logged**

2025

99.7%

A fragmented, manual growth model was transformed into a scalable, data-driven revenue engine through HubSpot, ABM, and integrated telephony.

Key Outcomes

CRM Transformation

Unified HubSpot CRM providing full visibility across the customer lifecycle, from enquiry through to enrolment and partnership development.

Engagement and Marketing Performance

Increased engagement across high-value accounts. Higher conversion rates from personalised campaigns versus broad outreach. Growth in meaningful interactions with enterprise stakeholders.

Pipeline & Revenue Impact

Significant increase in qualified pipeline from target accounts. Improved deal conversion rates across enterprise opportunities. Increased revenue influenced by ABM campaigns and targeted outreach.

Operational Efficiency

99.7% of calls automatically logged and tracked within HubSpot. Full visibility of communication history across contacts and accounts. Real-time reporting enabling faster, data-driven decision-making

Sales Productivity and Efficiency

Increased outbound call efficiency and connection rates. Reduction in manual administrative workload through automation. Faster lead-to-deal progression and response times

Why It Worked

1

Strategic Alignment

Strategic alignment between CRM structure and business model ensured every tool served a clear commercial purpose.

2

Deep ABM Integration

Deep integration of ABM into both marketing and sales workflows created a unified revenue engine rather than siloed activity.

3

Single Platform

Use of HubSpot as a single platform for execution, tracking, and optimisation eliminated data gaps and improved accountability.

4

High-Value Focus

Focus on high-value opportunities rather than broad lead generation drove stronger pipeline quality and conversion outcomes.

The Client Voice

What the client says about us

" What stood out about Lupo was their ability to connect strategy, systems and execution in a way that made sense for an RTO. They helped us make better strategic use of HubSpot across account-based marketing, reporting and team enablement in an education setting. For RTOs wanting a more structured, scalable use of HubSpot, Lupo brings both strategic guidance and hands-on implementation support. "

Maria Morton - CEO

Plenty Training · Varsity Lakes, QLD

" Lupo provided responsive, practical support that helped us keep HubSpot initiatives moving. From workflows and reporting to implementation follow-up and general platform support, they were reliable, easy to work with and helpful in turning priorities into action. "

Ashleigh Ridley – Operations Manager

Plenty Training · Varsity Lakes, QLD

" Lupo helped us turn our HubSpot strategy into something practical the team could actually use. Across ABM, workflows, reporting and team enablement, they brought both clear thinking and hands-on support. "

Levi Luke – Marketing Coordinator

Plenty Training · Varsity Lakes, QLD



Why Lupo Digital for Education & RTOs

- **HubSpot Expertise**

Deep experience delivering CRM transformations, automation, and reporting frameworks within HubSpot.

- **Sales Enablement & Integration**

Expertise in integrating systems such as Aircall into HubSpot to create a single, trackable revenue engine.

- **End-to-End Capability**

Strategy, CRM, automation, and optimisation delivered in-house ensuring alignment across all stages of growth.

- **ABM & Revenue Strategy**

Proven capability in designing and executing account-based marketing strategies that drive high-value enrolments and partnerships.

- **Education Industry Experience**

Strong understanding of RTO operations, enrolment models, and the need for scalable systems across national delivery.

The specialists in HubSpot and revenue growth for the Education & RTO sector

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