EBSCO

CASE STUDY:

How EBSCO De-Risked a Complex Marketo-to-HubSpot Migration Across Global Marketing and NetSuite



vonazon

INDUSTRY

Information Services

COMPANY PROFILE

EBSCO Information Services provides research databases, e-journals, subscription management, ebooks, discovery services, library technology, and clinical and medical information solutions to academic libraries, public libraries, schools, corporations, government organizations, hospitals, and medical institutions.

EBSCO

After close to a decade in Marketo, EBSCO Information Services engaged Vonazon to help move its global marketing operations to HubSpot. On the surface, the assignment was a platform migration. Once Vonazon began tracing how EBSCO actually used Marketo, however, it became clear that moving the technology was only part of the challenge.

Years of regional campaign structures, automation, data rules, forms, customer relationships, and integrations had become woven into EBSCO's day-to-day marketing operations. Some were still essential. Others reflected processes the organization had outgrown. And beneath Marketo sat dependencies with Drupal, middleware, and NetSuite that made simply recreating the existing environment inside HubSpot a risky proposition.

Vonazon approached the migration differently. Before deciding what to rebuild, the team worked with EBSCO to understand what the business still needed, where the existing architecture was creating friction, and which dependencies had to be untangled before HubSpot could become the new operating environment.

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The Business Context

EBSCO provides research databases, e-journals, subscription management, ebooks, discovery services, library technology, and clinical and medical information solutions to academic libraries, public libraries, schools, corporations, government organizations, hospitals, and medical institutions.

That breadth carries directly into its marketing operations. EBSCO markets across regions, product lines, institution types, languages, customer relationships, and audience segments, with global and field teams collaborating across the organization.

A replacement for Marketo therefore had to accommodate a much more varied operating model than a typical marketing automation migration.

The challenge was not simply whether HubSpot could send the same emails or host the same forms. It was determining what a decade of accumulated marketing operations was actually still doing for the business, and what deserved to follow EBSCO into its next platform.



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THE CHALLENGE

EBSCO's Marketo architecture had been built for practical reasons.

Regional workspaces gave different teams smaller, more manageable environments. Marketing Main became the standard-setting workspace for core templates. Global and administrative areas housed shared assets and functions such as list management, double opt-in, and preference processes.

Over time, however, the way EBSCO's teams worked changed. Marketers increasingly collaborated across regions, while the workspace architecture still reflected an earlier operating model. Product structures changed. Some folders represented products that were no longer marketed in certain regions. Programs accumulated. Some newsletters had been retired. Some engagement programs were still technically present even though their current relevance needed to be reconsidered.



What had once made the environment easier to navigate had gradually become something EBSCO needed to rethink.

The instance itself was not disorderly. EBSCO had maintained disciplined naming conventions, standardized many templates, and kept a recognizable folder structure despite nearly ten years of history. That discipline made the environment easier to investigate, but it did not answer the more important migration question: **which pieces still belonged in the future state?**

The answer varied considerably.



Some recurring processes, including subscription management, preference centers, data normalization, forms, newsletters, webinars, and events, supported active operations. Other assets represented one-time campaigns or historical activity that no longer needed to occupy space in a new system. Long-lived landing pages created a different problem again because they might still exist publicly and require rebuilding or redirects even when the campaign around them had ended.

The migration could not be driven by asset count alone.

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It also could not interrupt marketing while those decisions were being made. EBSCO still had campaigns to run, newsletters to send, webinars to support, and events already being promoted. Some activity would naturally finish in Marketo, while other programs would cross the transition and need to function in HubSpot.

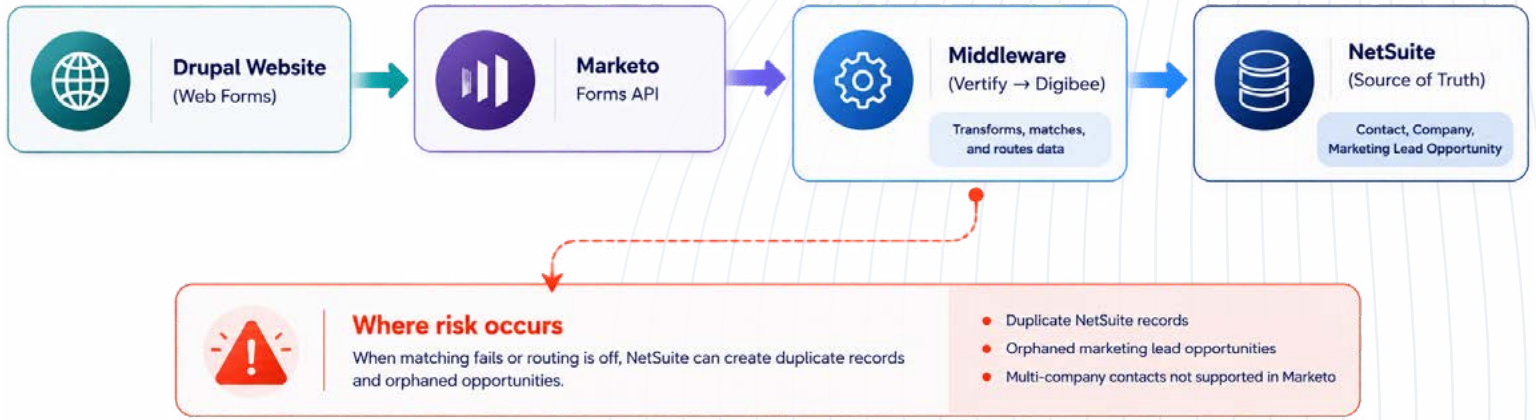
Then the investigation moved beyond Marketo, and the deeper migration risk came into view.

That made business continuity part of the architecture itself. Vonazon had to understand not just what EBSCO used, **but when each capability had to become operational in HubSpot and what could safely stay behind.**

A prospect filling out a form on EBSCO's Drupal website could trigger a path that extended well beyond marketing automation. Depending on the form, information could move through Marketo and middleware into NetSuite, where the system attempted to associate the inquiry with the right contact and customer records and create a marketing opportunity for sales follow-up.

When that matching worked, the process connected marketing interest to the appropriate NetSuite records.

When it did not, the consequences were harder to contain.



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EBSCO's team described cases where the existing integration created new records because it could not reliably identify an existing contact or company. Duplicate contacts and customers accumulated and required cleanup. Repeat inquiries could create additional marketing opportunity records. And because not every record in Marketo mapped neatly to a corresponding record in NetSuite, simply carrying the existing identifiers forward would not necessarily solve the problem.

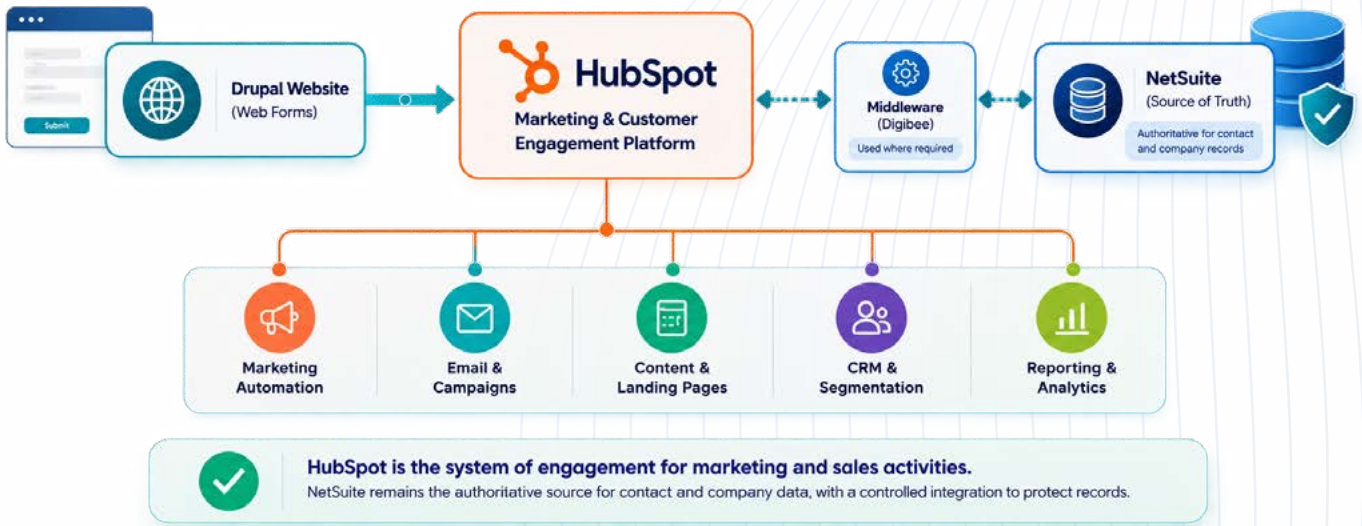
There was another complication. NetSuite could now represent a contact affiliated with multiple companies, while **EBSCO's Marketo environment could not fully model that relationship.** That limitation had already made some attempts to connect products, customers, and contacts incomplete.

More importantly, NetSuite was not isolated from the rest of the business. Contact information such as names and email addresses fed downstream systems, including systems where an email address could serve as a customer login.

At that point, the migration stopped looking like a question of how to connect HubSpot to NetSuite.

It became a question of **how to let marketing and sales data move between the systems without allowing a new marketing platform to compromise records that other parts of EBSCO depend on.**

A one-for-one recreation of the existing integration would not remove that risk. It could carry it directly into HubSpot.



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Migration Strategy

That realization shaped Vonazon's approach to the entire migration.

Rather than treat the Marketo environment as the specification for the HubSpot build, Vonazon treated it as something to interrogate. What business function did a program serve? Was it still active? Did the existing workflow need to survive, or only the outcome it produced? Was the regional structure still useful? Could HubSpot accomplish the same requirement more simply?

The migration was organized around decisions such as rebuild, consolidate, archive, retire, or rethink, rather than assuming that everything in Marketo deserved an equivalent in HubSpot.

EBSCO's own marketing team had already begun identifying areas that did not need to migrate, which gave Vonazon an important head start. The task was not to dismantle a poorly managed environment. It was to distinguish the useful operating logic inside a well-established environment from the history that had accumulated around it.

That distinction also gave the migration a natural sequence.

Launch-critical marketing functions came first because active operations could not wait for the entire transformation to be complete.

These recurring functions helped establish what HubSpot needed to support first:

- → **emails**
- → **webinars**
- → **forms**
- → **events**
- → **free trials**
- → **subscription processes**
- → **and more**

Data architecture had to be resolved before automation depended on it. Integration requirements had to be understood before field mappings became permanent. Record ownership had to be clear before either platform was given permission to update sensitive customer information.

The principle was straightforward: **do not build the new environment on top of assumptions the migration was supposed to fix.**



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VONAZON'S APPROACH

01

Simplify Marketo's existing architecture

02

Standardize processes while preserving flexibility

03

Strengthen governance and data ownership

04

Redesign NetSuite integration and data flows

05

Align HubSpot with future business needs

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The Marketo assessment began by looking at the areas that carried the most business significance and the greatest volume of activity. Rather than examine every folder with equal weight, Vonazon focused on the core global, marketing, and administrative structures to understand how EBSCO's environment actually operated.

That revealed an important dynamic. The regional architecture itself was not fundamentally unique from one region to another. Much of it derived from shared global structures, with regional differences layered in for language, product, and local execution.

That created an opportunity **to preserve useful organizational conventions** without automatically reproducing every workspace boundary that had developed over time.

The same pattern appeared in campaign operations. EBSCO had standardized templates for common programs, but actual execution still varied. Webinars followed relatively repeatable structures. Live events were much more flexible. Some landing pages had short lives tied to individual events, while others remained online much longer. Engagement programs warranted closer examination because some could be running while others belonged in the archive.

Instead of translating those differences into a longer migration checklist,

Vonazon used them to determine **which parts of HubSpot needed standardization and where EBSCO genuinely required flexibility.**



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Governance presented a similar lesson.

On paper, permissions did not always tell the full story of how EBSCO controlled its database. In practice, sensitive activities such as loading contacts were concentrated within marketing operations, with specific exceptions for users whose roles required them. EBSCO had already begun translating some of its role structure into HubSpot, so Vonazon did not need to start from a blank page.

The more important task was understanding the intent behind those controls and making sure the new architecture preserved the right guardrails rather than blindly copying Marketo permissions.

But the most consequential work came from following the data beyond Marketo.

Vonazon worked with EBSCO's marketing and technical stakeholders to trace the relationship among Drupal, the marketing platform, middleware, and NetSuite. **The discussion centered on the records that mattered most to the sales handoff:**

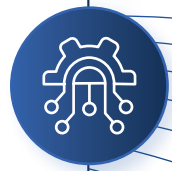
- → **contacts**
- → **customers or companies**
- → **marketing opportunities**

That exercise made the shortcomings of the existing model much more concrete.

NetSuite needed to remain authoritative for sensitive contact and customer information because those records were already connected to other operational systems. Giving HubSpot broad authority to overwrite names, email addresses, or existing customer relationships would introduce unnecessary risk.

At the same time, marketing could not simply consume NetSuite data and send nothing back. One of EBSCO's most important business requirements was still the path that begins when someone expresses sales interest. A form submission in HubSpot needs to reach NetSuite so the appropriate customer, contact, and marketing opportunity can be associated or created and placed in front of sales.

The right architecture was therefore more nuanced than choosing between one-way and two-way synchronization.



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Vonazon reframed the problem around controlled data ownership and directional synchronization.

Different data should move in different directions based on who owns it and what the business process requires. Established NetSuite contact and customer records need protection. Marketing inquiry data still needs a reliable route into NetSuite. Record creation needs stronger controls when a match cannot be made confidently.

That shift changed the integration conversation from “Can HubSpot connect to NetSuite?” to “What should each system be trusted to do?”

It also exposed why matching logic would matter so much.

HubSpot commonly relies on email addresses to identify contacts, but EBSCO’s NetSuite environment can contain multiple contact records sharing the same email. People can also be connected to more than one company. Those conditions make a simple email match inadequate as the sole rule governing how records connect.



HubSpot brings marketing engagement, customer context, automation, and reporting into one connected environment, while NetSuite remains protected as the operational source of truth.

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The Drupal form architecture raised a similar question about whether an existing mechanism should automatically survive the migration.

EBSCO's forms currently use the Marketo Forms API rather than relying solely on standard embedded forms. Some feed into the NetSuite process through middleware, while others have much simpler purposes, such as event registration.

Instead of assuming HubSpot needed to reproduce that architecture exactly, Vonazon looked at the reason it existed. EBSCO's web team had legitimate considerations around styling, localization, translation, and control over the web experience. HubSpot's native forms introduced potential advantages in integration and analytics.

The migration therefore created an opportunity to choose the future form model based on **the business requirements that mattered,** rather than simply inheriting the technical decision made for Marketo years earlier.

The assessment also helped separate genuine complexity from assumptions.

Early project planning referenced Redshift, Postgres, and potential data-warehouse requirements. Conversations with EBSCO clarified that those technologies were not part of the current marketing reporting environment. Rather than preserve a workstream because it appeared in the original scope,

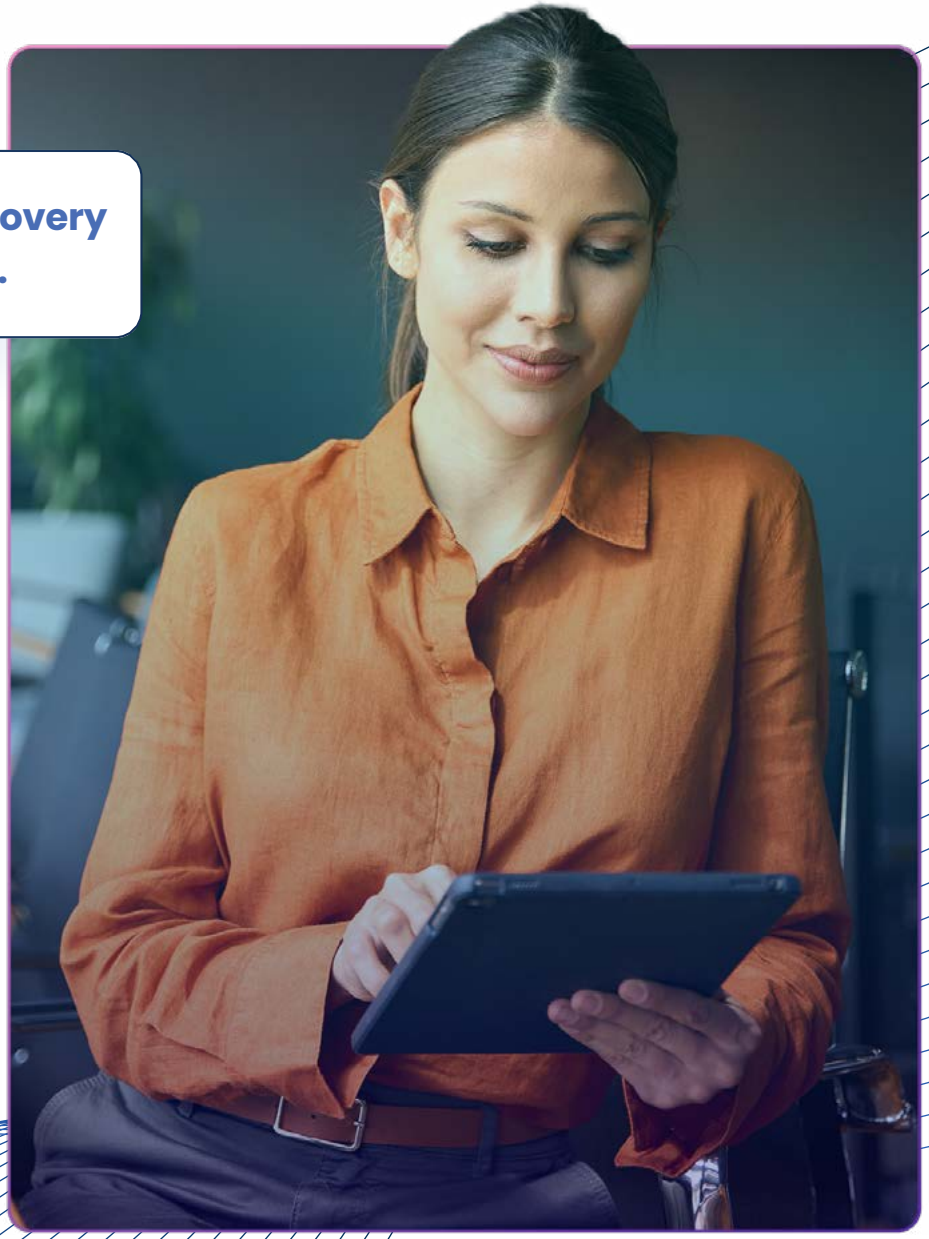
Vonazon narrowed the focus to the dependencies that actually mattered.

Reporting followed the same logic. EBSCO acknowledged that reporting was not one of the strongest parts of its current marketing operation outside specific use cases such as email performance and webinar participation. That did not make reporting a simple migration exercise. It meant the future reporting model should be designed around the questions EBSCO wants HubSpot to answer, rather than reproducing reports simply because they existed before.

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Across the engagement, each discovery led naturally into the next decision.

The Marketo structure revealed what could be simplified. Campaign analysis established what had to survive the transition. Governance showed where operational controls mattered more than technical permissions. Tracing the NetSuite integration exposed risks that field mapping alone could never solve. And challenging assumptions in the original scope kept the migration focused on EBSCO's actual operating environment.



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THE RESULTS

By the end of this strategic phase, EBSCO's migration was no longer defined simply as moving from Marketo to HubSpot.

Vonazon had established a clearer framework for deciding what deserved to move at all.

The assessment separated business-critical marketing operations from years of accumulated history, identified the campaign capabilities that should drive migration sequencing, and surfaced the data relationships that carry the greatest operational risk.

Most significantly, it reframed the NetSuite integration around ownership and control rather than connectivity alone. Protecting authoritative customer data, handling multiple company relationships, preventing unnecessary duplicate creation, and preserving the path from a marketing inquiry to sales became explicit requirements for the new architecture.

It also gave EBSCO permission to leave things behind.

Historical assets did not have to become new HubSpot assets. Regional structures did not have to survive simply because they were familiar. Existing middleware and form architecture did not have to dictate the future solution. Reporting did not have to reproduce the limitations of the current state. Even elements included in the original technical scope could be reconsidered when the evidence showed they were not relevant to how EBSCO actually operated.

That is what **turned the engagement from a platform migration into a redesign of the operating model** underneath it.

> ***Instead of asking how to reproduce ten years of Marketo inside HubSpot, EBSCO and Vonazon could move forward with a more useful question: what does EBSCO need its marketing environment to do now?***

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LOOKING AHEAD

The blueprint created through this work gives EBSCO a more deliberate path into HubSpot configuration, migration, campaign rebuilds, integration validation, QA, training, and launch. Each phase can now build against clearer priorities, ownership rules, and operational requirements rather than using the existing Marketo environment as the default specification.



Ready to Untangle Your Own Migration?

Years of marketing automation rarely move cleanly from one platform to another. The real complexity lives in the workflows, integrations, data relationships, and operating habits built around the technology. Vonazon helps organizations uncover those dependencies, decide what is worth carrying forward, and design a cleaner path into HubSpot.

HubSpot Solutions Partner Program ELITE

Let's map out a path forward.

Tony Herrera
Account Executive, Vonazon Inc.
(805) 791-5474 | (800) 600-7007
sales@vonazon.com