TAKE NOTE

Take Note Embraces All-In-One

Take Note is a UK-based market leader in transcription services that offers world-class customer support. A few years into their existence, they were using several disparate tools for marketing which made it challenging to gain visibility on performance. The lack of a CRM also made it challenging to manage an ever-growing sales pipeline. Take Note decided that it needed to find a solution which would help build an effective marketing strategy, gain visibility on their entire customer journey and discover the ROI of their efforts. The HubSpot Growth Platform seemed like the perfect solution, and since adoption, Take Note has seen a ~20% Growth in revenue while ensuring that it provides an exceptional customer experience.

22%	**16%**	**116%**
Increase in Website Traffic	in Customers	Increase in Leads

Moving from Disparate Tools to All-In-One

In 2006, the founders of **Take Note** initially sought to build a community of freelance transcribers in their spare time. By 2010, the demand had grown enough for it to become a full-time business. They decided to create Take Note to provide high-quality transcription services while delivering world-class customer service and guaranteed delivery times.

However, by 2018, Take Note realized that if it were to continue on its growth trajectory, it would need the tools to help it provide an exceptional customer experience. "At the time, we were using a lot of disconnected tools, like Google Analytics for reporting, Moz for SEO and MailChimp for email marketing. We also couldn't track leads and prospects and had no visibility on whether or not our PPC was working" explains Thomas Carter, Director of Marketing at Take Note.

On top of this, Take Note tried out various CRM systems but needed an all in one solution that would help the business to grow. "We tried Sugar CRM and Infusionsoft, but they were extremely complex to set up and difficult to navigate. With all these disparate tools we were using, I felt like we were operating in the dark", says Thomas. While he had heard about Hubspot, Thomas was intrigued about HubSpot's attribution and reporting capabilities.

Having started with HubSpot's Free CRM, Thomas decided to try out **Marketing Hub**. He was impressed by the look and feel of the tools within the Platform and believed that it could enable Take Note to provide the world-class customer experience that it desired. "Initially, the price scared me off. However, after trying out HubSpot, I realized that we were going to be replacing our disparate solutions with tools that were the same, if not better." The decision was made, and Take Note decided to go ahead, and signed up for the **Marketing Hub Profesional** in June 2016.

About Take Note

Take Note is a UK-based transcription service with world-class customer support alongside the highest standards of quality and value. We

Industry: **Professional Services**

Company Size: **Small-Business** 1-25 employees

Location: **United Kingdom & Ireland**

Software: **Growth Platform, Service, Sales, Marketing, CRM**

Implementing a Robust Strategy For Growth

The **HubSpot Onboarding team** helped Take Note with implementation which was quick and painless. "The process began by first bringing things over to HubSpot one by one. The HubSpot team enabled us to change all forms on our website to **HubSpot Forms**. It wasn't long before we were collecting data, and I was pleasantly surprised because they could build up a manageable database of customers for the first time. We could finally see from where our new business originated", says Thomas.

However, at this point, Thomas realized that he didn't have all the resources in-house to grow and build their Marketing department and sought the help of Gripped, a HubSpot Solutions partner to help them with their growth. "I wanted to leverage the knowledge that Gripped had of HubSpot to build the marketing department. It was clear that HubSpot was functioning well for Gripped and it's clients," explains Thomas.

Along with Thomas, Steve Eveleigh, Co-Founder of **Gripped**, took a logical approach with Take Note that would enable them to learn more about their customer base. "We engaged just after Thomas had purchased and taken the first step in using Marketing Hub. Thomas did a good job of setting up basics, and most of the initial work was to map the customer journey." Gripped also optimized the customer interaction points through persona-centric content, CTA's and Forms, set up reporting and implemented live chat. "Within a short time, everything tracked effectively, and the customer journey followed a logical path," says Steve.

Shortly after this, Take Note found it difficult to manage it's ever-growing sales pipeline while also providing an excellent customer experience. Thomas went to look for a solution but soon realized that HubSpot already had what he needed. "I initially approached HubSpot as a marketing tool and didn't know about the Sales or Service Offerings. It wasn't until I was working in the CRM that I realized all the potential capabilities. We realized that there's so much more we could achieve with **Sales Hub** through **Pipeline & Deal Management**, and **Service Hub** with the **Knowledge Base**". After some consideration, Thomas decided to go ahead with the professional tiers of Sales & Service Hub in June 2018.

The benefits of the new tools were felt immediately by the Take Note team. Working alongside the team from Gripped, Take Note started to gain back control of their sales process. "Before Sales Hub, the Sales team was working hard to keep up with customers and maintain communication. As everything was all in individual email inboxes, it was impossible to gain visibility and forecast results. Now, with Sales Hub, all communication is centralized, tracked, and they can run revenue forecasting." explains Thomas. Take Note was able to ensure that they provide a better experience for anyone who was looking to purchase their service. "Sales Hub matched our business needs perfectly as a lot of the potential customers did not purchase right away, and more information such as a quote to bring them further along the Sales Process."

By adding Service Hub, Take Note was also able to ensure they created a customer-centric strategy. They began by using the **Feedback tool** to track customer NPS and CSAT, which allowed them to improve their services continuously as Thomas explains, "We really didn't expect these tools to be available from HubSpot. For us, it's invaluable to learn what customers think about us. Feedback from customers has influenced many of our decisions in the product development process."

On top of this, Take Note is also using feedback tools in Service Hub to encourage its most satisfied customers to share reviews on Google, which are essential in a highly competitive market. "Without the NPS, we were blindly incentivizing customers to write reviews. Now, we can ask the right customers since they're following up with those who are the most satisfied with our services and it's more effective". Steve also believes that leveraging positive customer stories is hugely important to their growth. "When customers are willing to share their experience, it creates a differentiator and allows the uniqueness of Take Note to come to life."

Results are only the Beginning

Take Note began its journey with HubSpot to build an effective marketing strategy, gain visibility on their entire customer journey and build on its initial growth trajectory. Almost three years in, they have made significant improvements to their business, but they are only getting started.

Since signing up in 2018, Take Note increased their website traffic by 22%. At the same time, their customers and revenue has grown by 16-22%. They have also seen a 116% increase in leads. Thomas is delighted with the journey so far, and values the control he now has of the business. "Before, I was just hoping PPC ads would turn into sales. Now, we have a much better pulse on marketing spend. Leads don't fall out of the pipeline, and we are converting more into customers. For me, that's been huge."

While Take Note has achieved some great results so far, they have no plans to stop now, as Thomas explains, "There's still a growing opportunity in the transcription services market. It is competitive, and there is a real threat from AI and speech recognition. We use that technology too, but we think there's still a big market growth opportunity. I think for us that SEO is the way to grow within such a competitive market. We're making the right steps with the HubSpot Platform. Long term, we want to continue to focus on ensuring the quality of our services remains exceptionally high while using technology such as HubSpot to automate and optimize behind the scenes. We're investing heavily in technology, and there is a lot of tech behind the scenes to get it right."