



complexity made simple

Lead tracking and data integrity for Spatz Medical's global operations

CASE STUDY

Industry: Medical devices

Client: Spatz Medical

Year: 2024



Spatz Medical, a **global leader in the medical devices industry**, specializes in gastric balloons designed to help individuals achieve weight loss without surgery.

Due to operations spanning across multiple continents, Spatz Medical required a solid lead tracking and data management system to improve the accuracy of its lead sourcing process, involving multiple technologies such as Wordpress and Hubspot..

In 2024, Spatz Medical partnered with OPTI to implement a solution that would accurately track lead sources, ensure data consistency, and integrate demographic-based lead qualification without any disruptions.





CHALLENGES

The previous system faced several challenges:

1. INCOMPLETE LEAD TRACKING



The tracking was not capturing essential data used in determining the lead source such as UTM parameters and others, which led to incomplete and inaccurate lead source tracking.

2. DATA INCONSISTENCIES



Web form submissions included inconsistent and incomplete data, such as phone numbers with unsupported area codes and wrong formats.

3. LEAD QUALIFICATION BY REGION



Spatz Medical needed to direct leads to different pages based on their geographic region, however, the system lacked the ability to dynamically redirect users post web-form submission.



SOLUTION

OPTI set up Spatz Medical's lead capture forms such that they capture essential data in the desired format and direct leads based on geographic location.

1. ENHANCING LEAD SOURCE TRACKING

- ✓ **OPTI configured hidden fields to the lead capture forms** to automatically extract UTM parameters (e.g., campaign source, medium, etc.) from URLs.
- ✓ **Hidden fields led to capturing the name of the clinic** selected by the visitor upon form submission.

2. DATA INTEGRITY AND PHONE FORMATTING

- ✓ PHP and Javascript scripting was used to ensure correct formatting of phone numbers.

3. SEGMENTING LEADS BY REGION

- ✓ OPTI integrated a dynamic redirection system that sends the lead to the appropriate page based on the region data from the form submission.



RESULTS

As of Fall 2024, the system is live and productive.



Improved lead traceability

The enhanced lead capture forms allowed for accurate tracking of lead sources through the automatic capture of UTM parameters.



Data consistency

Implementing automated formatting, ensured that all data sent to HubSpot was valid and standardized.



Targeted user experience

The new dynamic redirection feature allowed leads to be redirected to the appropriate pages based on their region.



TESTIMONIAL

"They're always incredibly responsive and quick to address any requests we have."

- **Ethan Harris**, Spatz Medical

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OPTI

PRODUCT DEVELOPMENT, AUTOMATION AND DATA MIGRATION

Software company developing products and cutting costs by automations and data migrations. Founded in 2005, with extensive expertise in retail, medical, publishing, and gaming industries.

The OPTI team includes senior analysts and programmers, is ISO 9001 and ISO 27001 certified, HubSpot Solution Partner, Google Cloud Partner and certified in other technological stacks.

CERTIFICATIONS



KNOW-HOW

