

HubSpot Integration Best Practices

Techniques for Making your HubSpot Marketing Data Shine

HubSpot

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 **BEDROCK**
DATA

The (not so) Obvious Questions: What is an Integration and Why Integrate HubSpot?

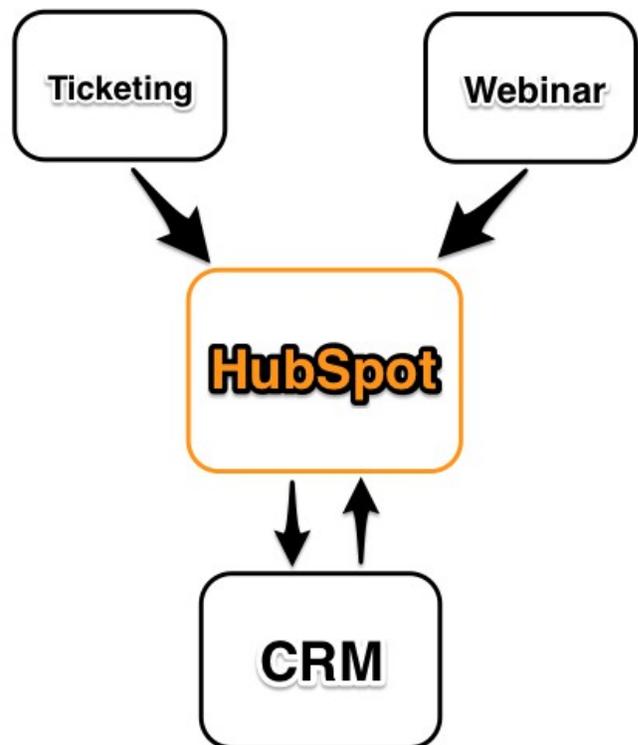
A business “integration” is an app that gives the ability to automatically sync or transfer back and forth between systems that your business is using. Integrations, you’ll quickly find, are not simple; they are complex and deserve to attention to detail. Many integration products out there are flexible enough to cause data problems if configured incorrectly, so make sure that you take the time to understand how they work.

Automated integrations are necessary pieces of business software, as without them you rely on manual exporting and importing of data between systems, which are painful, expensive and hard to execute unless you have an excel wizard on your team that loves manual data entry.

How HubSpot Integrations Work

HubSpot Integrations should take into account the role that HubSpot is meant to play as an inbound marketing system. HubSpot in most cases will “sit in the middle” between your website (forms) and other systems in a typical corporate business system hierarchy.

In the “top of the funnel” for lead generation, other marketing applications such as event ticketing (tradeshows) systems, webinar systems and website form applications reside and push lead data into HubSpot as contacts. HubSpot would then also integrate with a CRM (sales system) to feed leads to sales and receive data back from sales to update lists and dynamically inform your marketing campaigns, letting you achieve true marketing automation.



Top of the Funnel Integrations: Marketing Apps, Forms

“Top funnel” integrations sync data from other marketing or support applications into HubSpot and are typically “one-way” in pushing data into HubSpot. It usually doesn’t make sense for these systems to have data synced back from HubSpot, though in some cases (webinar and ticketing apps) it may make sense. So when a new lead registers for a webinar or an event, this data should be synced to HubSpot as a contact. If that record comes back at some point in the future and registers again, the integration should be smart enough to de-duplicate this record and update the existing record in HubSpot.

Example top funnel apps include webinar applications like GoToWebinar and Webex; event ticketing applications like Eventbrite and Cvent and form applications like Unbounce, Wufoo or plugins that you might find in CMS tools like Wordpress.

Real World Integration Scenario:

Megan is a marketer at a software company in San Francisco. She's heading up her company's large annual event that is taking place in around 6 months time and needs to start generating registrations. Megan has the need to sync records from her event registration system into HubSpot in order to utilize HubSpot's email marketing system to promote her event and get people to attend the event after registering. Megan also needs to make sure that if the same person registers more than once, the record in HubSpot is updated, rather than just created as a duplicate.

As the event nears and then takes place (without a hitch!), Megan also realizes that she needs to get some deeper activity data about her event registrants, including whether someone has registered but then didn't attend, and who in fact did attend her event.

Bottom of the Funnel Integrations: Sales (CRM), ERP and Finance

Bottom funnel integrations with HubSpot most commonly work against sales systems (CRMs), but can also integrate with ERP systems like NetSuite, SAP and Acumatica. These integrations should be bi-directional in nature, syncing data from HubSpot to these sales and logistics systems, and then back again to HubSpot as data changes in them as well.

The common use case for these integrations should go something like this:

1. New contacts added to HubSpot (through forms, imports or manually) should sync to the CRM as a lead or contact.
2. When contacts are edited in HubSpot (which can happen often through HubSpot's analytics system or by contacts completing another form on your site) the integration should recognize the existing record in the CRM and update it, rather than doing nothing or worse: create a duplicate lead or contact.
3. When records are added to the CRM (leads and contacts, but other records as well), the integration should add those records as contacts into HubSpot, again updating them if they already exist.
4. The integration should be able to pull data from other objects as well, such as CRM accounts and opportunities but also potentially from HubSpot campaigns, syncing data to the campaign or campaign member (as applicable) object in your CRM.



HubSpot provides a lot of analytics or intelligence on contacts that are on your website, receiving emails and interacting in social media. These contacts and their activities should be setup to sync from HubSpot into CRM and ERP systems so that your sales team can consume this data and inform the sales process.

True marketing automation can be achieved through HubSpot by setting up an integration to sync data from your CRM back into HubSpot to use for your marketing efforts. This data may come from the lead, contact, account, opportunity or any other relevant object in your CRM. You can then use this data to create smart lists in HubSpot that will trigger workflows in HubSpot automatically, creating powerful marketing automation campaigns.

CRM and ERP integrations should force you to think about the data objects that you can integrate and this should inform your decision as to which integration platform to use. For instance: you may have data on a particular object (like account or opportunity in the CRM) that you need to use in HubSpot to segment leads and drive marketing campaigns. Make sure that the integration you choose allows you to get the data that you need into HubSpot.

Real World Integration Scenario:

As folks begin registering for Megan's event, she quickly realizes that she wants to sync certain records over to her sales team to begin working as sales leads. After her event concludes, she also wants to make sure that she syncs all attendees over to her CRM, but wants to prevent folks who registered but didn't attend.

She also has a need to sync data back to HubSpot, specifically when someone from her event converts into a customer and actually buys a product. This data will inform her marketing analytics and her performance around the event in general. This data coming from the syncing of records back from the CRM into HubSpot should only update records in HubSpot, from data on the opportunity or contact in the CRM.

HubSpot Data Types

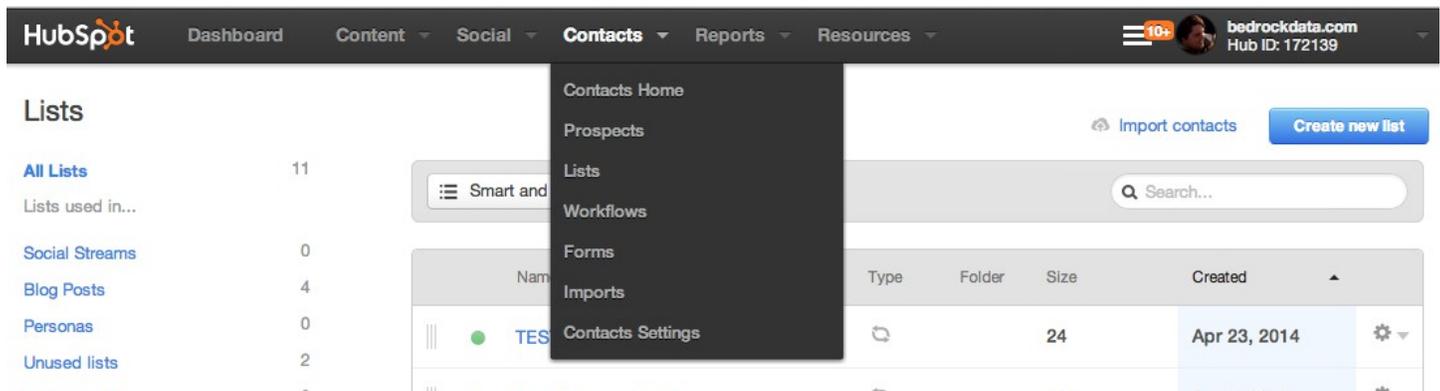
Before we can get into the business of integrating HubSpot as a system, let's first understand what data HubSpot has and allows you to integrate via their APIs.

Contacts represent leads that have been generated through inbound marketing campaigns. Contacts and the data associated with them are gathered into your HubSpot Contacts database, and then organized as you see fit into lists. Contact data is kept in fields: standard and custom, which you can manipulate, use in forms and will hold the data about each of your contacts.

Contact Analytics in HubSpot are activities associated to leads and appended to their records in fields. These activities can be email clicks, website visits, form submissions, social media credentials and more. Hubspot's contact analytics are stored in fields that are "read-only" and cannot be edited for the most part, besides through the HubSpot system, which updates this data automatically. Because this data is read-only, it can't be updated through an integration either, which means that this data will flow one way and not back to HubSpot from another system.

Smart Lists are how leads in HubSpot are organized for your marketing campaigns. Smart lists in HubSpot keep themselves up to date automatically as data on a contact changes, through an integration or otherwise. This is extremely powerful with regards to any integration, because it means that as data changes in any system that is pushing data to HubSpot, your smart lists will be automatically stay up to date.

Email Campaign Data is a new feature that was recently released by the HubSpot team, allowing you to integrate email campaign data activities with other systems out there. This data goes beyond the general, high-level campaign data about your leads/contacts such as "number of emails opened" and allows you to sync which emails your HubSpot contacts are actually interacting with. This is a powerful feature only provided by certain integration providers such as Bedrock Data.



HubSpot Integration Features: Multi-Directional, Data Updating, Lists and Filters

When considering integration products to integrate your HubSpot instance, there are a few features that should be considered, so make sure that you ask your integration provider about these:

Multi-Directional Integrations: Multi-Directional means that ability to add multiple systems to your integration, rather than just 2 systems, which you'll find in many basic integrations. Multi-directional integration platforms (like Bedrock Data, shameless plug) enable you to integrate all of your business systems that you're using or may implement as necessary, rather than just HubSpot and your CRM or any other two systems, such as your finance or support system. Having this flexibility will benefit everyone and enable data synergy across your entire company. To that end, make sure that other groups at your company are aware and have input into your integration choices!

Data Updating: Updating as discussed previously is the ability to have your integration not only create new records in HubSpot and other systems you're integrating, but also provide updates to the data in either system as data

changes. This is an especially critical feature when discussing HubSpot, as updates to contact records in other systems should change the smart lists that HubSpot leads are in at any given time so that you can trigger workflow campaigns from data changes anywhere across your whole business – a VERY powerful feature for any marketer.

Smart List Support (“Inclusion Lists”): You may find yourself wanting to hold onto certain contact records in HubSpot that you deem unqualified to send to your sales team. Perhaps you want to keep them rolling through some campaigns until they reach a “marketing qualified” status. In this case, you can create an “inclusion list” in HubSpot’s lists app that will include only the qualified records that you want to sync to your other systems. This gives you the ability to keep records in HubSpot until they are qualified and ready to send to sales.

Contact Filtering: It's no secret that HubSpot bases its pricing on the number of contacts that you can have at a given time in your HubSpot portal. Contact filtering allows you to exclude certain records as a part of your integration, which can give you control over the number of records that you have in HubSpot. This is also a nice feature to have if you want to prevent certain records in your CRM, ERP or other system from getting marketed to.

Integration Strategies: How to Integrate HubSpot

There are many ways that you can integrate HubSpot, and we are here to tell you how, based on your needs:

Manual Integrations: Nobody likes manual integrations, least of all the intern or employee you’ve hired to do data entry and loading for you. Manual integrations are manual exports and imports, typically using Excel and require a level of data manipulation in the middle. These types of integrations are time consuming, expensive and frustrating ... BUT may suffice for you if you only need to load data at very infrequent time intervals and have staff that is willing to bite the bullet on these data loads.



Real World Example:

Pros: Let's be honest, there is no upsides to manual export/import.

Cons: Expensive; Manual (not automated); Error prone; Bad user experience.

One-Way “Event Driven” Integrations: One-way integration platforms have risen into popularity with the development of apps like “If this, then that”, Zapier and other web applications that are similar. These services can be useful to you for simple integration points where you don’t require updating of your data consistently (which these services don’t do). Event driven integrations like these can be good for syncing data into HubSpot or simple contact syncing from HubSpot to other systems, but won't keep your data in sync as it changes and won't offer access to all of the data objects that you may want to implement.



Pros: Affordable; Easy to setup

Cons: Hard to maintain; No updating of data; 1:1 integrations only (no multi-directional)

Native Integrations: Native integrations are those that are written and maintained in house, by HubSpot. HubSpot offers a couple different native integrations at the time of this writing: Salesforce.com and GoToWebinar, as well as a nice integration with video platform Wistia.



Native integrations are great for the most part, but oftentimes don’t allow for a lot of flexibility. HubSpot does an excellent job with their Salesforce.com integration, but if you are using the Force.com platform or many custom objects in Salesforce.com, then the native HubSpot integration may fall short in some respects.

Pros: Affordable (free); Data updating supported (in most cases); Easy to Setup

Cons: Inflexible; Inconsistent Support; 1:1 integrations only; Limited future development

Data Driven Integration Platforms (Bedrock Data): Third party data-driven integrations with HubSpot like what Bedrock Data provides enable the best of both worlds, giving you powerful, multi-directional integrations that are flexible, easy to



maintain and are affordable. In terms of flexibility, third party integrations feature the ability to connect to the most amount of system objects in HubSpot and otherwise and can provide multi-directional “all in one” integration solutions to HubSpot users.

Pros: Flexible; Multi-Directional; Data updating supported; Easy maintenance

Cons: More expensive than a native integration

HubSpot Integration Choices: How to Integrate HubSpot With...

Salesforce.com: HubSpot has built and supports a native integration with Salesforce.com. This is a bi-directional integration that syncs new HubSpot contacts to Salesforce.com leads and contacts, as well as syncing that data back to HubSpot. Features of this native integration include inclusion list support, syncing of Salesforce opportunity data back into HubSpot. You can also sync activities to Salesforce.com from HubSpot based on certain activities such as form submissions and email opens



Salesforce Integration Options:

- HubSpot native integration (Free)
- Bedrock Data (from \$99/month): Used to integrate custom Salesforce.com objects such as Person Accounts.

Microsoft Dynamics CRM: Microsoft Dynamics CRM integrations with HubSpot must be handled by a 3rd party integration platform, as HubSpot does not provide a native integration with Dynamics CRM. Any Dynamics CRM integration with HubSpot should provide syncing with the lead and contact entities in CRM as a minimum, and should also pull in Account and Opportunity data as well. Bonus features of an integration would include the Marketing Lists and Activities entities as well.



Dynamics CRM Integration Options:

- Bedrock Data (from \$99/month, self or assisted setup options)
- Scribe (from \$400/month, assisted setup required)

NetSuite: NetSuite is a huge system that can be customized in many ways. HubSpot users also using NetSuite should obviously focus their integration efforts on the contact object in NetSuite, as well as related Lead, Prospect and Customer records. NetSuite integrations will have to be handled by 3rd parties like Bedrock Data, as a native integrations with NetSuite are not supported.



NetSuite Integration Options:

- Bedrock Data (from \$99/month, self or assisted setup options)
- Boomi (from \$1500/month)

SugarCRM: SugarCRM is a great alternative to Salesforce.com at a fraction of the price (free if you can host it in-house). Sugar employs a traditional CRM model, where there are leads that convert into contacts, which are then associated with Accounts and Opportunities. Sugar integrations are covered by 3rd parties as well, and could also include campaign and activities in any integration that you might want to employ.



SugarCRM Integration Options:

- Bedrock Data (from \$99/month, self or assisted setup options)
- Zapier (from \$15/month, no updating of data)

Zoho CRM: Zoho is another CRM that is a great alternative to Salesforce.com, and some of the other big players in the market today. Like SugarCRM and Salesforce.com, Zoho employs the traditional lead → contact/account/opportunity model and also enables you to create custom objects, fields and layouts. It's fully functional for the most part and offers great value as a product. Integrations with Zoho should sync lead and contact data back and forth to and from HubSpot, but also should pull in opportunity data and account data at the minimum as well so that you can use this data to market with out of HubSpot.



Zoho CRM Integration Options:

- Bedrock Data (from \$99/month, self or assisted setup options)
- Zapier (from \$15/month, no updating of data)