

Socious Uses Bedrock Data to Fully Integrate Sales and Marketing Data Between SugarCRM and HubSpot



About Socious

The idea behind Socious was to create an online platform that would give people a central place to connect, interact, and collaborate around a product, occupation, or shared interest. Socious believes that successful organizations find software that both reinforces best practices and serves their existing processes. Tools that force your organization to restructure, create workarounds, and learn a new way of operating often result in lack of adoption and buy-in.

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Socious is a B2B software provider headquartered in Mesa, Arizona. Socious uses SugarCRM in tandem with HubSpot to run their sales and customer management, inbound lead generation, and marketing automation.

Socious' marketing team captures leads via HubSpot landing pages and various form submissions. Prior to integrating with Bedrock Data, these leads had to be manually synced from HubSpot to SugarCRM via CSV file upload/downloads. This process was not only operationally inefficient, but also costly from a sales standpoint as Socious was regularly

having to wait for manual data transfers before these leads would enter their funnel in SugarCRM.

Socious needed a bidirectional integration that would automatically sync new contacts from HubSpot into Sugar, enabling their sales reps to work new leads quickly and efficiently. Additionally, Socious wanted certain HubSpot data to be continuously updated within SugarCRM, allowing sales reps to engage leads with a more complete history of prior marketing interactions.

With a bi-directional Bedrock Data integration, Socious was able to achieve all of the above. As marketers add or update Contact, Company and Deal data in HubSpot, this data is then synced to Sugar, subsequently updating and informing the sales team. The Socious sales team then uses this data to nurture and close deals in a timely and efficient manner.

In the other direction, as sales reps add or update Leads, Contacts, Accounts and Opportunities in SugarCRM, this data is synced to Hubspot. The Socious marketing team leverages this data to create more targeted and efficient campaigns and automation within HubSpot.

"Initially, I wanted to just get my lead data from my HubSpot into my CRM system so that my sales team could follow through with the lead....but then I quickly realized the value of taking my sales reps' actions in Sugar, and what that could do for our marketing team. I recommend Bedrock Data to companies who want to not only pass data in between two systems, but really integrate the data from 2 or more systems into their business practices." - Josh Paul, CEO.