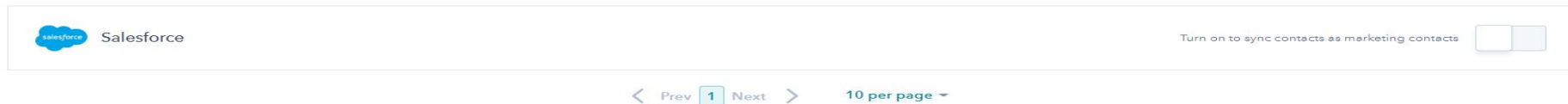# Salesforce + HubSpot Harmonization Documentation

Flow, Inc - December 2022 - Benjamin Haws

Hubspot - Gap Analysis

1. Integration User = xxx Who is this integration user? Do we still have access for when this times out?

2. Mapping looks sufficient for now. <u>Marketing Contacts</u>

3. Run import wizard and use SFDC as the data source. Inclusion lists (Question for / Clarify with CSM)

<u>Next Steps</u>

4. If SFDC Data is clean and the above steps are taken these lists SHOULD populate dynamically with the <u>ICP</u> and <u>Customer</u> data. Step two is important… SFDC Data = Marketing Contacts.

5. Add tracking code to website – Down the line; pages visits will become apart of the scoring model.

SFDC Investigation

1. Sync back to SFDC record for:
   a. Accounts
   b. Leads
   c. Contacts
2. How are accounts assigned?
3. Not all SFDC users can see ICP Box. (I cannot see it for instance)
4. Account Record Type (Partner vs Organization) Differences?
5. "Marketing Suspended" Differentiation - Once with sales only comms should be coming from sales (after first or second discovery call).
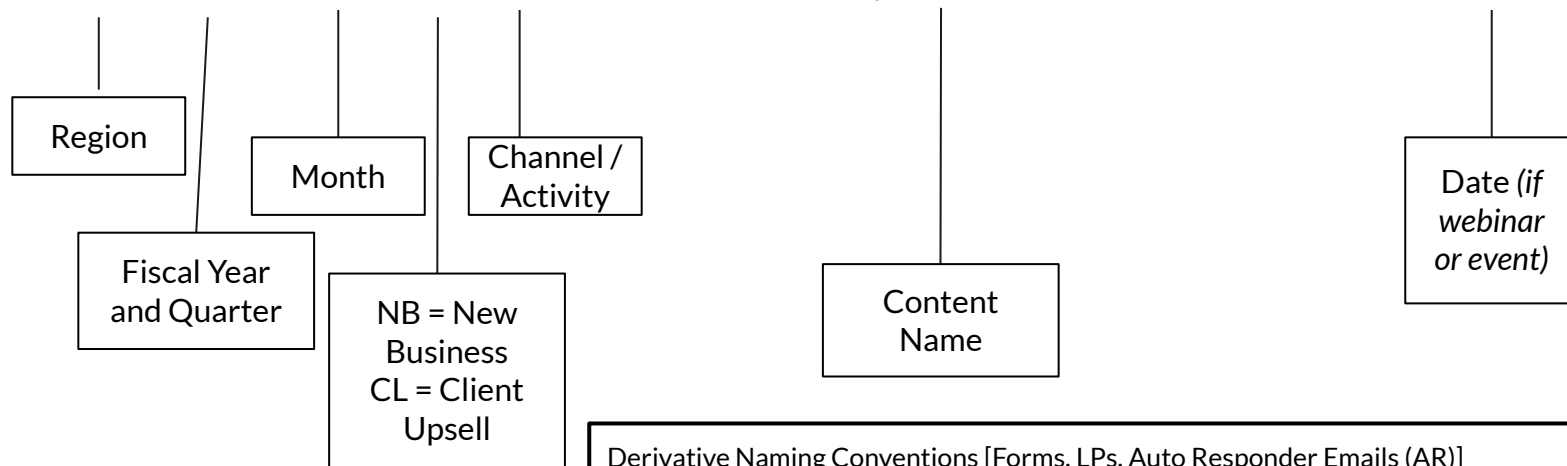
Campaign Management - HubSpot + SFDC

Naming Convention

US_FY22Q4_MO12_NB_WBN_Salesforce + HubSpot Harmonization Documentation_12/6

Region

Fiscal Year and Quarter

Month

NB = New Business
CL = Client Upsell

Channel / Activity

Content Name

Date (*if webinar or event*)

Derivative Naming Conventions [Forms, LPs, Auto Responder Emails (AR)]
1. Form: US_FY22Q4_MO12_NB_WBN_Salesforce + HubSpot Harmonization Documentation_12/6
2. LP: US_FY22Q4_MO12_NB_WBN_Salesforce + HubSpot Harmonization Documentation_12/6
3. AR: US_FY22Q4_MO12_NB_WBN_Salesforce + HubSpot Harmonization Documentation_12/6

Campaign Management - HubSpot + SFDC

Naming Convention

US_FY22Q4_MO12_NB_WBN_Salesforce + HubSpot Harmonization Documentation_12/6

Region

Fiscal Year and Quarter

Month

NB = New Business
CL = Client Upsell
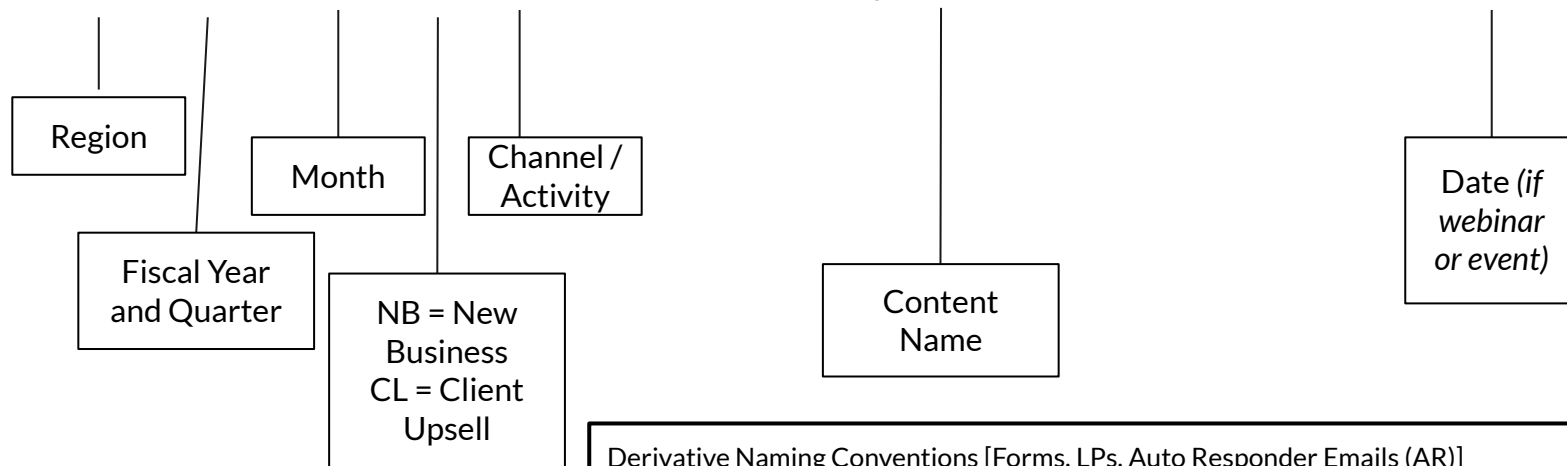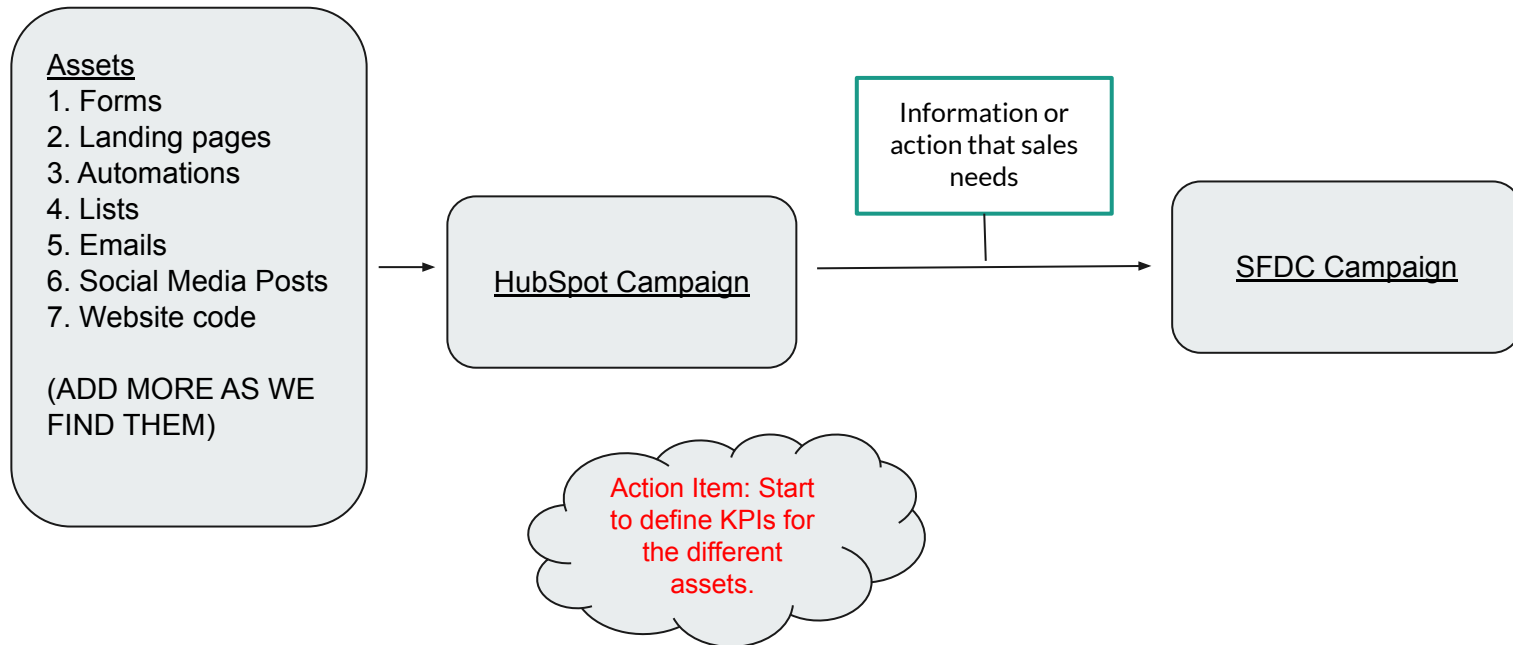
Channel / Activity

Content Name

Date (*if webinar or event*)

Derivative Naming Conventions [Forms, LPs, Auto Responder Emails (AR)]
1. Form: US_FY22Q4_MO12_NB_WBN_Salesforce + HubSpot Harmonization Documentation_12/6
2. LP: US_FY22Q4_MO12_NB_WBN_Salesforce + HubSpot Harmonization Documentation_12/6
3. AR: US_FY22Q4_MO12_NB_WBN_Salesforce + HubSpot Harmonization Documentation_12/6

Campaign Management - HubSpot + SFDC

Assets and Flows

Assets
1. Forms
2. Landing pages
3. Automations
4. Lists
5. Emails
6. Social Media Posts
7. Website code

(ADD MORE AS WE FIND THEM)

HubSpot Campaign

Information or action that sales needs

SFDC Campaign

Action Item: Start to define KPIs for the different assets.
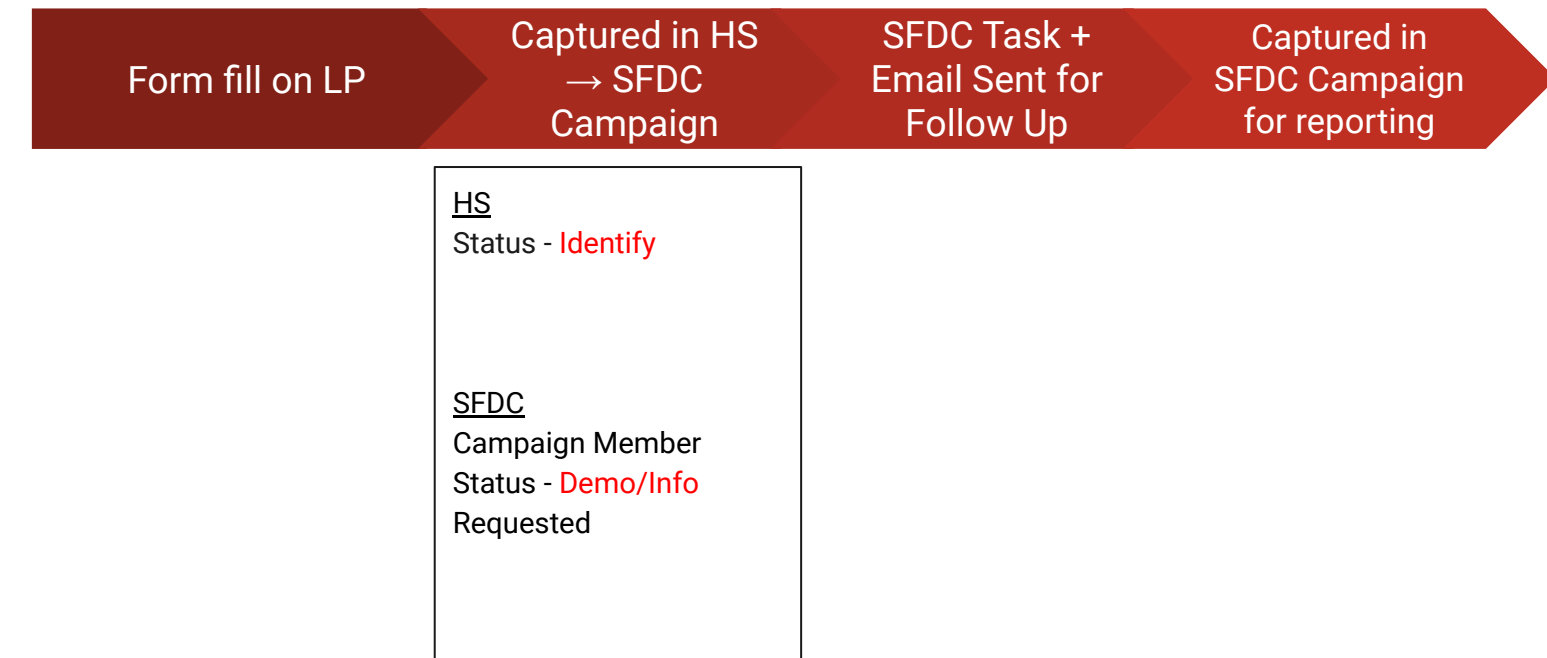
Channels / Activities

1 = Current state 2 = Future State	Hubspot Campaign	SFDC *(Campaign Member Status)*	Action / Triggers
1. Request a Demo / Request More info (top of all pages…excluding Ad Specific LPs)	Create form, add to LP and set automation rules - Track performance metrics	Demo / Info Requested	- Notify Lead / Account Owner - Add to SFDC with Campaign Member Status - Create SFDC Task (due 3 / remind 1) - Lead / Account Scoring Adjustment **(if needed once defined)**
1. Webinar / Event (Registration)		Registered, Attended, No Show	
1. Webinar (Replay)		View Replay	
1. Content DL		Downloaded Content	
1. Social Media		Downloaded Content or Viewed Replay	
2. Advertising - LinkedIn		Downloaded Content	
2. Advertising - AdWords		Downloaded Content	

Data Flow - Request a Demo / More Info

| Form fill on LP | Captured in HS → SFDC Campaign | SFDC Task + Email Sent for Follow Up | Captured in SFDC Campaign for reporting |

HS
Status - Identify

SFDC
Campaign Member
Status - Demo/Info
Requested

Data Flow - Webinar Registration

Form fill on Reg LP	Captured in HS + SFDC Campaign	Webinar Occurs	Automate to SFDC Campaign	Begin Flip to Replay

HS
Status - Registered for webinar

Zoom or HS
Triggered email with "Add to calendar" + "Login link" sent

SFDC
Campaign Member Status - Registered for Webinar

HS
Status - Attended or No Show

Zoom or HS
Triggered email with Thank you attending

SFDC
- Campaign Member Status - Attended or No Show
- Follow up tasks triggered

Data Flow - Webinar Replay

| Form fill on Reg LP | Captured in HS → SFDC Campaign | Send AutoResponder with link to YT Unlisted Video | Captured in SFDC Campaign for Reporting |

HS
Status - Viewed Replay

Zoom or HS
Triggered email with "Add to calendar" + "Login link" sent

SFDC
Campaign Member Status - Viewed Replay

Data Flow - DL'd Content

Form fill on Reg LP	Captured in HS → SFDC Campaign	Send AutoResponder with link to Asset	Captured in SFDC Campaign for Reporting

HS
Status - Downloaded Content

Zoom or HS
Triggered email with "Add to calendar" + "Login link" sent

SFDC
Campaign Member Status - Downloaded Content

Turning on SFDC <-sync-> HS – DECISIONS

Decisions / Confirmations / Questions

1. Confirm/review that all objects are mapped. (Review and confirm with Ty)
2. Confirm/review Integration SFDC to HS
3. Set up "Marketing Suspended" suppression list
   a. Map to LEAD object WORKING
   b. Question: are there parts of the sales cycle where the sales rep should be the only person talking to prospect?
4. Add tracking code to website (down the line; pages visits will become apart of the scoring model).

Turning on SFDC <-sync-> HS

TESTING

1. Execute Test Mapping
   a. Download a set of 20 leads; 20 contacts; 20 Accounts; 20 Deals from SFDC.
   b. Load Datasets into Hubspot; Map and Execute
   c. Spot check results; adjust if not behaving as expected

2. Run full data import from HS using SFDC as the source.

End Result: SFDC cloned into HubSpot

# Segmentation + Comms Rules + Lead Flow (50K foot view)

Leads / dGen - *via HS* - Email, Ads, Events, Webinars, Etc - Dynamic List (active 90, 180 days)

Accounts + Contacts / Sales - *via Sales Rep* - Marketing Suspended - Dynamic List for Suppression - (HS tracked - Data point for Later)

Clients / CSM - *via CSM* (Marketing Suspended - Dynamic List for Client Comms - Individual emails (HS tracked - Data point for Later)
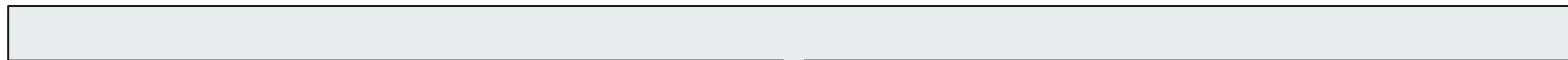
Hubspot to CAPTURE + AGGREGATE Touchpoints

SFDC to DASHBOARDS + TASKS + REPORT