HubSpot Sync with Lisa

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True,True,True,True,True

external,internal,unknown,unknown,internal

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https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy

\*\*Discussion Topics\*\*

- HubSpot Integration Challenges

- Experiencing delays in accessing HubSpot, impacting data entry and reporting, as access issues hinder the ability to log leads and track their status effectively.

- Requires clarity on lead assignment and status in HubSpot for effective tracking.

- [(10:56)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=656491) Unassigned leads are causing confusion in the reporting process.

- [(12:16)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=736758) A clear process for handling unassigned leads is necessary.

- Current data in HubSpot is inaccurate due to improper migration from NetSuite, leading to leads that are actual customers showing as unassigned leads and the migration process not accounting for existing customer statuses.

- Data Management and Reporting

- Recommends creating a lead source column to track where leads originate, aiding in understanding the effectiveness of different marketing channels.

- Proposes adding custom statuses for leads to improve tracking.

- [(20:18)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=1218261) Custom statuses can help differentiate between leads that are actionable and those that are not.

- [(20:18)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=1218261) This will enhance the visibility of lead progress.

- Emphasizes importance of maintaining clean data for accurate reporting.

- [(13:24)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=804988) Clean data is crucial for generating reliable reports.

- [(40:08)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=2408168) Inaccurate data can lead to misguided business decisions.

- Workflow Automation Opportunities

- Needs a clear process for handling unassigned leads in HubSpot to ensure they are not lost or overlooked, improving overall lead management efficiency.

- Potential to integrate UTM source data for better lead tracking.

- [(34:59)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=2099705) Integrating UTM data will provide insights into the effectiveness of marketing campaigns.

- [(34:59)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=2099705) This will help in optimizing future marketing strategies.

- Can automate workflows in HubSpot to reduce manual data entry for lcraig.

- [(22:27)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=1347875) Automation can streamline the lead assignment process.

- [(22:27)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=1347875) This will save time and reduce the risk of human error.

- Training and Support Needs

- Discusses the importance of ongoing support during the transition to HubSpot.

- [(28:10)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=1690685) Continuous support will help in addressing any issues that arise during the migration process.

- lcraig needs to familiarize herself with HubSpot functionalities, as she has limited experience and requires additional training to utilize its features effectively.

- Suggests separating hours for HubSpot training from other work for accurate billing, ensuring clear tracking of costs associated with HubSpot implementation.

\*\*Key Takeaways\*\*

[(02:30)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=150495) - Lisa is transitioning to HubSpot and has started familiarizing herself with the platform. She has questions about the migration process and data visibility.

[(10:56)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=656491) - There are 212 unassigned leads in HubSpot, many of which are existing customers from NetSuite. Cleaning up this data is crucial for accurate reporting.

[(27:22)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=1642205) - A list of final customers, including name, email, and status, is needed for proper data integration and to improve lead quality in future campaigns.

[(49:25)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=2965901) - It was agreed that the historical data in HubSpot needs to be cleaned up, and moving forward, only relevant leads will be entered to maintain data integrity.

\*\*Action Items\*\*

[(27:02)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=1622548) - Provide a list of final customers with name, email, and status

[(51:34)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=3094521) - Send the NetSuite data list for historical cleanup

[(39:33)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=2373178) - Create a column for lead source in HubSpot

[(52:12)](https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy?t=3132021) - Ensure no unauthorized data is loaded into HubSpot

Reviewing HubSpot integration and data management processes between MarketLytics and InnerView AI, addressing lead assignment and reporting issues.

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https://grain.com/share/recording/e2e5e932-8ef1-4d4d-8022-0ca9b439371d/inIaGxA60smU5ZxrKU9m26OUHAxL328jCi1qZjAy

Tayyaba Iqbal asks Lisa Craig about HubSpot. Lisa shares her initial exploration and previous workflows. She explains lead management through spreadsheets.,Lisa Craig addresses challenges with HubSpot access. Concerns include lead visibility and customer categorization. Unassigned leads are a significant issue post-import.,Participants discuss managing unassigned leads effectively. Data cleanup is necessary for accurate reporting. Consistent customer status is crucial for the system.,Tayyaba Iqbal requests a status update list. Lisa Craig emphasizes the need for data cleanup. Additional lead status categories are necessary for international leads.,Tayyaba Iqbal discusses customer status in lead management. Analytics ML clarifies definitions of lead statuses. The group agrees to keep leads categorized as open for now.,Participants emphasize Lisa Craig's need to learn HubSpot. Key topics include customer data collection and deal management. Merging dashboards is also discussed.,Participants discuss integrating lead source data from NetSuite. Concerns include data overlaps and manual entry issues. A new column for user input is proposed.,Participants confirm the need for better data management strategies. A new Lead Source column is proposed. Challenges with lead date availability are discussed.,Laura Craig raises concerns about data accuracy. Analytics ML assures future data integration from advertisements. Current limitations of existing data are acknowledged.,Participants discuss challenges in integrating NetSuite and HubSpot data. A plan to rectify data discrepancies is established. Collaboration is necessary for accurate historical data.

99875,366075,709551,1011858,1218261,1558948,2000905,2287485,2606178,2813568

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