Objective #5 – Devs to Hubspot API feed – bring additional fields from Marine data feeds and pass to Hubspot.

Business problem:

Business wants to use additional data from Neptune and Triton for marketing purposes that they don't yet have access to. In Hubspot this sits under the Contacts - Contact settings under Marketing

Objective:

Bring in additional fields from res system Marine data feeds and pass to Hubspot, on a more frequent basis than the current daily update.

The trigger criteria for the existing DW feed from Triton to Hubspot is based on whether customer made a quote or booking via Triton (separate from transacting or converting); trigger criteria should also be based on whether marketing preferences or client status changes.

Benefits:

* Additional data brought into Hubspot will allow improved segmentation & personalization that should lead to better rates of engagement with the customer
* Providing unsubscribe and client status changes to Hubspot API will give visibility to CRM team that customer requested to unsubscribe or was placed on blacklist
* Will also give sales users of Hubspot the visibility who has asked for the phone call suppression
  + Note: Unsubscribe and client status changes doesn’t actually suppress any emails in Hubspot, unless done in parallel with Objective #6.
* ~~More frequent updates than daily will offer Sales users of Hubspot the ability to turnaround communications to customers in a more timely fashion; e.g. sending follow up emails via Hubspot directly after an inquiry~~. Removed BRD v3 JM

Note:

* Work on this objective shall follow work on Objective #7; if testing proves successful, requirement to load historical data for Objective #5 may be de-scoped.

Out of Scope:

The implementation of Scribe or any other data integration tool to facilitate the import of transactional history into Hubspot, as part of this objective.

The following list of requirements must be met in order to successfully implement the CRM Phase III project. Requirements will be prioritized according to the following scale:

**Priority assignment –**

**Must Have (M)** – a critical requirement without which the product is not acceptable to the stakeholders

**Should Have (S)** – a necessary but deferrable requirement without which makes the product less usable but still functional

**Nice to Have (N)** – a nice feature to have if there are resources but the product functions well without it

**REQUIREMENTS**:

List of fields to be provided to Hubspot from Marine data feeds: **(M)**

Document: **Objective 5 New Fields to be added to DWH to HubSpot feed v2 20170810**

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1. Requirement is to load the 5 latest transactions (quotes and bookings) in the contact flat file of Hubspot. **TBD – dependent on #7**
2. This requirement may be nullified by the successful implementation of Objective #7 and is therefore
3. ~~Feed to Hubspot API need to be as close to real-time as possible, at a minimum, hourly, rather than the daily update that takes place currently~~. Removed from BRD V2 JM
4. Solution team shall provide updated documentation of the feed so that business has reference materials to work with for future needs. Feed documentation may include items such as: (**M)**
   1. Field mappings (Triton/Boxi/Hubspot/Feed parameters)
   2. Diagrams
   3. Timings
   4. Specifications
5. Need the ability to distinctly identify within the data: (**M)**
6. Confirmed bookings
7. Cancellations
8. Holds
9. Options

Requirements to support Objective #1:

1. Hubspot API must translate all newly-created date fields from Neptune client level data to the correct format MM/DD/YYYY **(M)**

* DOB for Neptune contacts is captured in DD/MM/YYYY format

1. Client type will be at contact level (NE, NB, etc.) instead of address level in Neptune (covered under Objective #1) **(M)**

* Whenever the Client Type field is amended in Neptune, this should send the new data to be sent from Neptune to the Data Warehouse feed. (This is covered in Objective #2.)
* The data warehouse feed should send over the most recent updates for Client Type to Hubspot API, which will make the corresponding status changes in Hubspot.

Requirements to support Objective #6:

1. Any time an adjustment is made to marketing preferences or client status changes in Triton or Neptune, this needs to be fed through to Hubspot: **(M)**

* Preference and client status changes will be picked up by the feeds out of DW (Objective #2)
* DW will pass on the updated data to Hubspot API

1. The following events should trigger an update from DW to Hubspot API within 24 hours of the trigger:

* Request to unsubscribe from ALL emails **(M)**
* Request to unsubscribe from PRODUCT SPECIFIC emails **(N)**
  + It is a capability in res systems to unsubscribe from specific products, but not in Hubspot
  + NOT a requirement to make this a capability in Hubspot.
* Any changes to Marketing preferences in res system (e.g. Opt-out (Exclude) value changed from Y or N and vice versa) **(M)**
  + Note: If the customer has opted out from receiving marketing communications in Hubspot, can’t opt back in via Triton. Functionality to opt back in is not able to be changed in Hubspot; this is a Hubspot restriction. Customer has to do this themselves on Hubspot forms. This will be a sales training issue.
* Any update to client status **(M)**

Requirements to support Objective #11:

1. Newly created fields for Objective #11 that must be translated to the correct format MM/DD/YYYY: **(M)**
   * New Email opt in date – Neptune
   * New Email opt out date – Neptune
   * New Email opt in date – Triton
   * New Email opt out date – Triton