How to Prepare for Your HubSpot Integration Launch

Checklist

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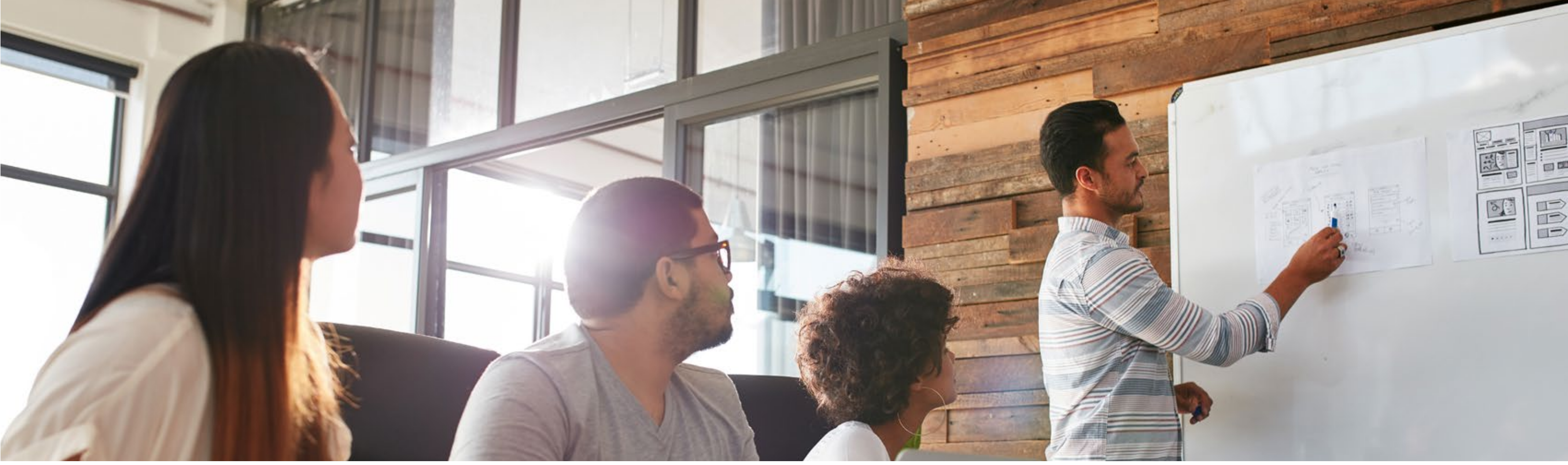

Have you been searching for a way to connect your HubSpot portal with your CRM or ERP for a seamless flow of data? If not, you may want to. From increased communication between sales and marketing, automated tasks, closed-loop reporting, and more, the benefits are numerous. But before you start your integration project, there are some things you need to do to prepare properly. Here's a quick checklist outlining those considerations.

1. Do Your Research

There are several steps to take when preparing for your integration, but none as important as determining how you'll get it done. You can:

- Download a packaged, ready-to-go integration from SyncSmart
- Work with a third-party partner like Lynton for a custom project
- Use HubSpot's native integration service, depending on your CRM system
- Tap into your company's development resources and do it internally

2. Gather Your Teams

Not involving the right people in any project can result in problems. Gather your stakeholders and ask:

- Who's going to be using the integration?
- What departments in your organization will benefit from the integration?
- Who should be involved in the project – sales, marketing, IT?
- Who will be your internal "project champion" or main point of contact?
- Who will be a part of your User Acceptance Testing (UAT) team?
- Do you have buy-in from leadership?

Meeting with your teams to work out project specifics is vital -- specifically, developing a test team, who can be anyone in your company that will use the integration! The sooner your teams are aligned, the more prepared they can be.

3. Pick Your System of Record

You need to choose one of your two systems in your integration to be your authoritative data source to help prevent data loss. Think:

- What do you want your single source of truth to be?
- Which system houses most of your critical data?
- Which platform will do most of the heavy lifting or syncing of data?
- Does one system have better quality data?

Generally, we recommend your CRM to be your system of record.

4. Define Your Business Processes

There's not much point in taking the time to undergo an integration project if you don't have defined business processes. Ask:

- What does your company want to achieve with the integration and what data will you need for it?
    - Better lead generation
    - Higher quality data
    - Improved content marketing
    - Increased revenue
    - Closed-loop reporting
    - Smoother sales processes

- What data do you need to define and qualify an SQL or MQL?
- What business processes/use cases are occurring now with your two systems that need to continue with the integration?
- What's the current flow of a contact between your two systems -- imports and exporting or something else?
- How does your lead scoring system work from start to finish?
- What other lead and customer data is essential to your sales or marketing teams?
- Do you need any custom records or objects to have a proper view of your company?

5. Clean Your Data

The more data you have, the longer it will take to do an initial sync. Try and clean it beforehand by:

- Assessing your CRM or ERP and HubSpot for duplicate records, then merging them
- Getting rid of known old or low-quality contacts within each system by marking them as inactive
- Establishing duplicate detection rules to prevent duplicates in the first place
- Updating or eliminating invalid email addresses
- Implementing specific fields to segment your database

6. Document What Needs to Map

Not all companies use HubSpot and CRM or ERP systems in the same way. To avoid any pitfalls of not mapping the right fields, and subsequently not having the right data syncing between your systems, get your teams together and go over:

- Which fields and objects should be mapped and in what direction is each object passing data (one way or bi-directionally)?
- What email and marketing opt out fields between both systems are needed to ensure proper mapping of data?
- What fields are required in each system to be considered a contact, deal, company, or something else?
- What should the value of a field or property that's mapping be if there's no value to associate it to in the other system?

Understanding what fields are required in each system to properly map is imperative. For example, HubSpot needs an email address to create a contact. If that doesn't exist in the system it's syncing to, it won't sync over -- unless you determine a default value to fill it in.

- How do you want to filter contacts from HubSpot syncing to the CRM?
- What fields do you need for segmentation, workflow triggers, and content personalization?
- Do you need custom fields mapped?
- What fields are important for your reporting needs?
- What fields are helpful for lead/contact data, accounts/company data, and deal/opportunity data, engagement/activities data?

7. Test, Test, Test

UAT is the time to ensure the integration implementation meets your team's expectations and goals while giving everyone a chance to monitor its functioning. Be sure to give your team ample time to test as it involves:

- Choosing which method to test - via Created Date, Modified Date, or by a specific user
- Testing a carefully selected amount of data to process between the systems
- Uncovering any bugs and making additional changes
- Pinpointing need for any additional field mappings
- Writing any documentation about the integration for your teams

Example of test scenarios:

- CREATE a new record
- UPDATE an existing record
- Marking a record “inactive”
- Deleting a record

8. Be Flexible with Your Timeline and Go Live!

Rushing through any project is generally not a good idea – unless you want a poorly executed integration. Make sure to take all the time you need to cover your bases but note:

- It could take thirty to 60 days for an out-of-the-box or packaged integration
- A custom project can take up to 90 days, as it involves working in Sandbox, transferring to production, potential homegrown systems, longer syncs and testing, and more
- Your initial sync, which populates all qualified records and syncs them from one system to the other, can vary in timeline based on the amount of data you’re processing

Remember: You may need to adjust your timeline based on the size of your CRM or ERP database! Three thousand contacts will take less time than 400,000 - but with patience and the right team, you’ll go live with a strong integration.

Ready to start with a packaged integration?

While this checklist covers a wide range of items, you may want or need additional guidance on something, which we can provide! Browse SyncSmart apps. If you'd like to talk about a custom integration, reach out to the Lynton team.

Reach Out Today!

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