HubSpot Integration

with **Salesforce**

Case Study

HubSpot

salesforce

Case Study

The Client

This client is a global, medical device manufacturing company with a presence in more than 100 countries and a team of approximately 3,000 people working relentlessly to help advance and support patients' quality of life. Their objective is to revolutionize lives with products and therapies for the head and heart.

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Key Challenge

Due to their large global presence, the client's Sales and Marketing departments eventually became very disconnected, and their marketing campaigns and sales outreach were inconsistent.

Marketing uses HubSpot as its primary digital marketing platform for running email and web campaigns. The Sales department utilizes the **Salesforce** CRM system for pipeline management.
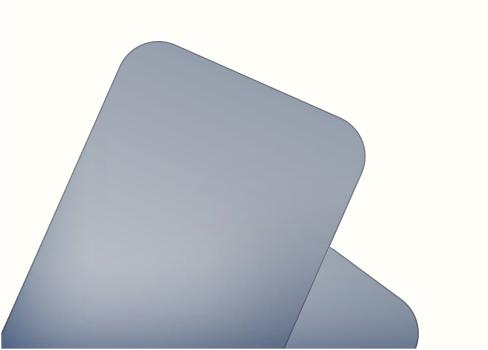
Because these two key platforms, HubSpot and Salesforce, were not talking to each other, multiple challenges existed for both departments. Marketing collected and nurtured great leads, but there was no easy way to pass them along to Sales. The marketing leads are manually passed to Sales via emails and spreadsheets.

...Key Challenge

- During the lead handoff, the data set didn't include the intelligent scoring metrics Sales used to assess the buyer intent and prioritize their leads
- Marketing was unable to easily use the data captured in Salesforce for designing intelligent marketing campaigns

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The Smartbridge Solution

The Smartbridge team designed a seamless integration between HubSpot and Salesforce to enable an automatic data transfer between the two platforms. The solution supports two types of marketing campaigns, direct to consumer (DTC) campaigns that reach out directly to patients and caregivers, and regular campaigns intended to educate and build brand awareness within the health care provider community. HubSpot considers both patients and providers as contacts without much differentiation. However, it's important to differentiate these two types of leads in Salesforce for the Sales team because they have completely different conversion paths.

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Here are the highlights of the solution:

- HubSpot campaigns capture leads as new HubSpot contacts.
- The integration between both platforms creates Salesforce leads corresponding to new HubSpot contacts.
- A custom Salesforce lead conversion process converts leads to create provider contacts and patient records.
- Once the lead is converted, any updates to Salesforce contacts are synchronized back to HubSpot. This allows future HubSpot campaigns to use the latest CRM data.
- Any subsequent changes to the lead score or campaign participation metrics are directly synchronized to Salesforce contacts.

Bi-directional transfer of information allowed Marketing and Sales teams to get a single view of prospective customers' data across both platforms.

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Success Through a Modernized Integration Solution

With a dynamic bi-directional sync, changes in one system are automatically synchronized to the other.

The HubSpot integration with Salesforce solution helped in the following ways:

- Shorter sales cycle due to the improved Marketing and Sales collaboration
- Enhanced customer experience due to consistent messaging from Sales and Marketing
- Reduced errors in lead data caused by manual data entry
- Reduced non-compliance risk of email marketing regulations because the Sales team can now flag email opt-out when they receive a verbal request from a lead

The HubSpot-Salesforce solution has let us automate the lead management process for the client by minimizing errors and maximizing results. With our elite team of Salesforce experts and HubSpot enthusiasts, we are constantly putting together sustainable solutions to further improve the manufacturer's relationship with its customers and providers.