Agenda

- Welcome & Housekeeping w/ **Doc & Brandon**

- Mastering the Salesforce / HubSpot Integration: How to Make the Integration Not Suck w/ **Tate**

- **Q&A** w/ **Tate**

- What's new in HubSpot w/ **Brandon & Doc** *(if time allows)*

- Final **Q&A & Wrap-up**

HubSp**o**t User Groups Salt Lake City

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Co-Leader **SLCHUG**

HubSpot **GOLD** CERTIFIED AGENCY PARTNER

THEY **ASK** YOU **ANSWER** CERTIFIED COACH

HubSpot User Groups Salt Lake City

Our Next SLCHUG Events

. . . .

May 8, 2024
August 7, 2024
Nov 13, 2024

Location & Time TBD
Stay tuned for announcement + registration & more details!

LUNCH
AND
LEARN

HubSpot User Groups
Salt Lake City

INTERACTIVE ONLINE
WORKSHOP

Attendees here get first access

Stay tuned for announcement + registration & more details!
Will share the URL at the end of the event.

We will continue to do these monthly.

MASTERING
THE SALESFORCE / HUBSPOT INTEGRATION

HOW TO MAKE THE INTEGRATION NOT SUCK

HubSpot User Groups Salt Lake City

FEATURING **TATE STONE**
WATCH THE REPLAY

Who am I?

- Worked with Salesforce and HubSpot for 8 years

- Started RevBlack in 2022 with a focus on HubSpot AND Salesforce

- Official Consulting Partner of BOTH HubSpot and Salesforce

- Certified Salesforce Admin and Developer

REV BLACK

40%

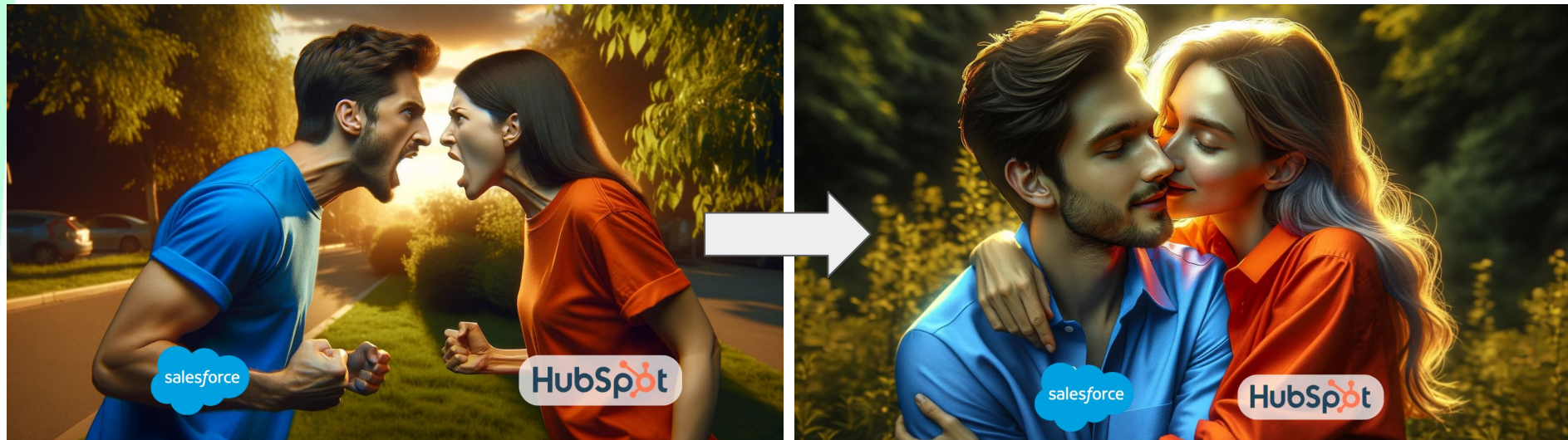of HubSpot customers are also customers of Salesforce

*Unverified

REV
BLACK

Common Use Cases

Salesforce as core CRM

- **HubSpot Marketing Hub** ›
  Pardot, Marketo, Etc

- **HubSpot Sales Hub** ›
  Sales Engagement, HVS,
  Outreach, Salesloft, Etc

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Key Differences

- Core Focus & Usability

- Customization & Scalability

- Pricing & Cost of Ownership

- Functionality & Improvements

- Who uses the CRM?

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How to get the best of both worlds

- Be open minded

- Understand the data model

- Get into the weeds

- Clearly define "roles" for each tool

- Unify ownership of tools

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Best Practices

- Regularly audit the integration and resolve sync errors
- Have a specific HubSpot integration user in Salesforce
- Don't sync Marketing Email activity to Salesforce as tasks
- Get rid of Leads if you can
- Remember HubSpot "campaigns" and Salesforce "campaigns" are very different
- Capture new prospects and upload lists entirely in HubSpot
- Use HubSpot workflows for data cleanup if you can
- Be careful mapping formula fields and calculated properties
- Don't leave records owned by inactive users
- Install updated HubSpot Visualforce pages in Salesforce (Acc, Lead, Con, Opp)
- Document where automation lives
- Be extra careful with duplicates
- Be careful with validation rules

Resources

- Salesforce Unmanaged Packages
  - Enhanced HubSpot Integration for Salesforce (Basics)
  - Enhanced HubSpot Integration Marketing Hub

- Blogs
  - 4 Tricks to Improve your HubSpot/Salesforce Integration Today
  - The 8 Most Common Salesforce + HubSpot integration errors (... and how to fix them)
  - Salesforce + HubSpot Integration: Use Mappings & Sync Rules to Reduce Sync Errors and Improve Data Quality

- HS + SF Integration Expert GPT

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