

# HUBSPOT ANALYSIS

## Agenda

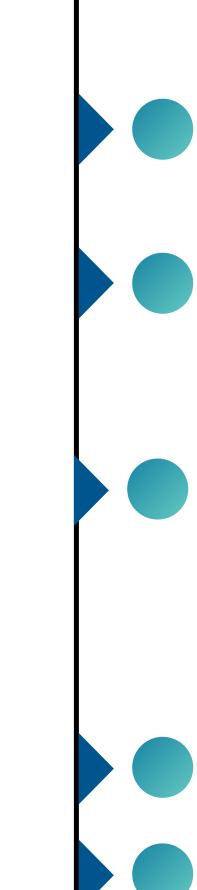
- HubSpot Situation
  - Current Integration
  - Ideal Integration
- Solutions
  - HubSpot Microsoft Dynamics 365
  - Lynton Dynamics by SyncSmart
- What We've Achieved

Consideration
Next Steps



# **HubSpot Situation**

**Incomplete Integration** 





Incomplete Websites Integration | Brand Kits

#### EMAIL

Outlook - not connected

#### REPORTING

Multiple sources and steps Attribution - not set up

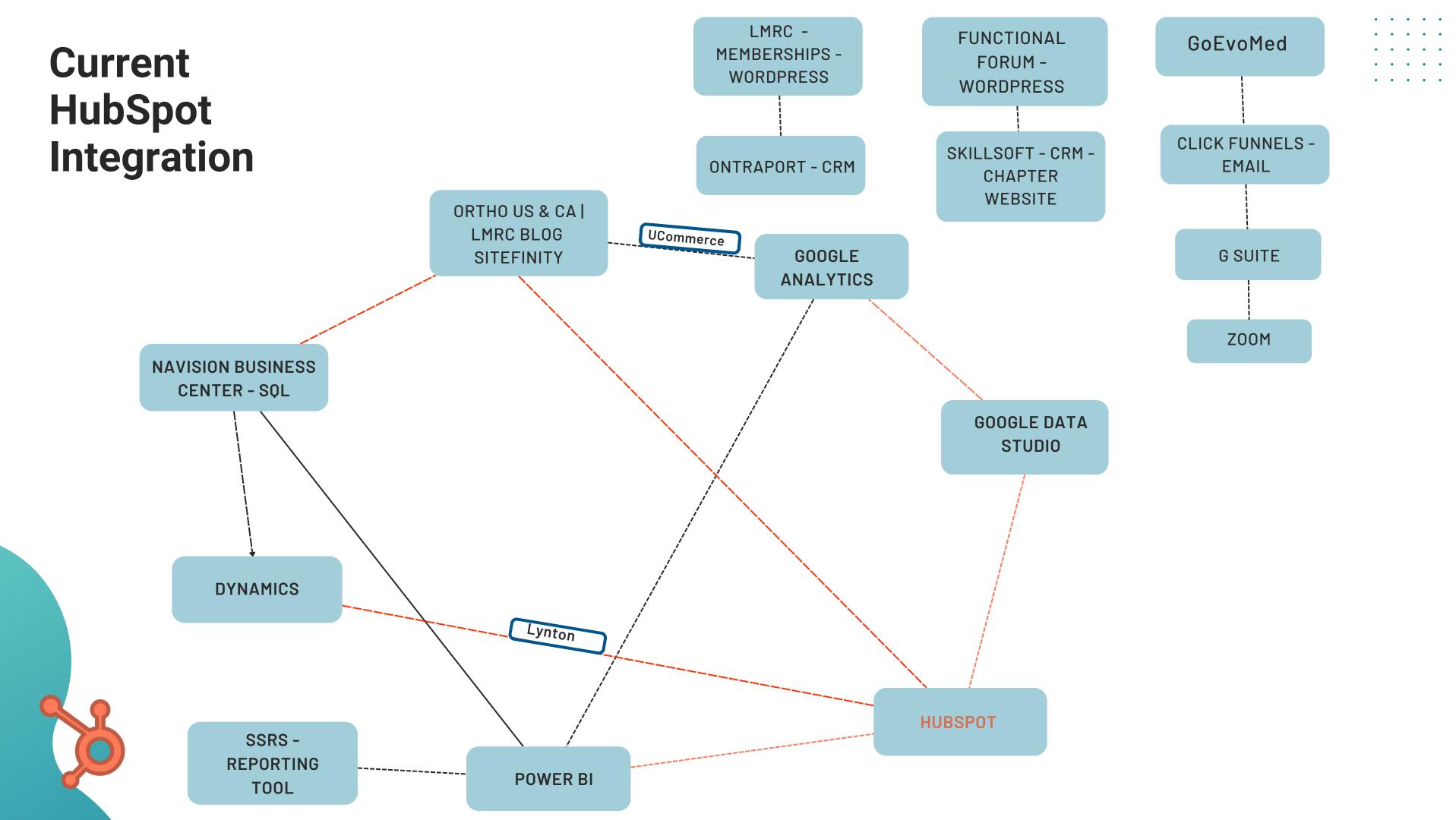
#### LYNTON

- Incomplete Integration: Dynamics not mirroring HubSpot
- Contacts and Accounts not properly syncing
- Deals not syncing
- Unsubscribed Contacts error

#### SALES HUB - NOT PURCHASED

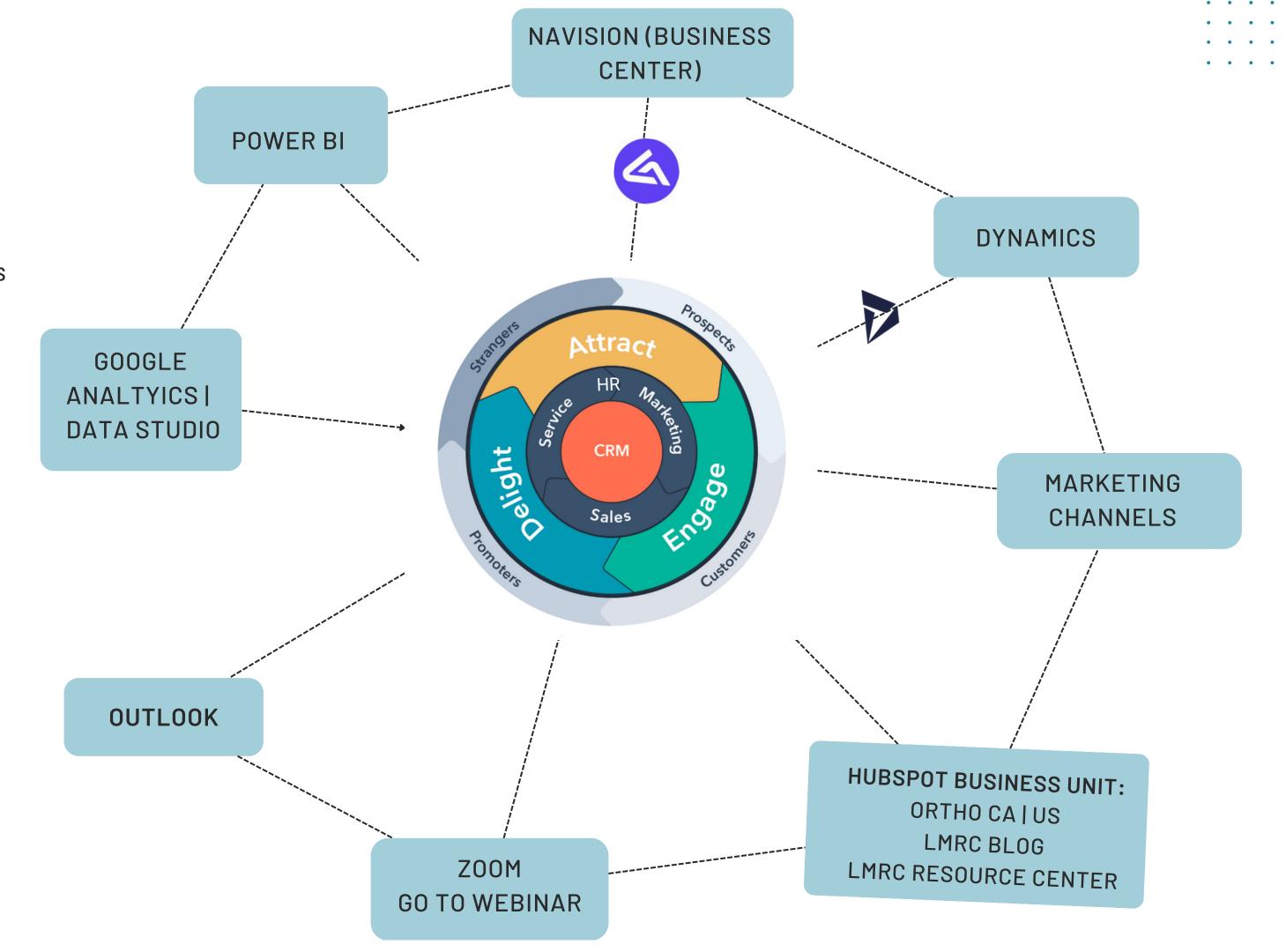
#### DATA CLEANING

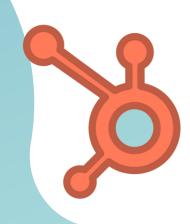
HubSpot and Dynamics contacts need cleaning



## Ideal HubSpot Integration

CRMs | Departments | Systems





# DIGITAL MARKETING CHANNELS

Ideal Integration with HubSpot





# HubSpot Solution:



HUBSPOT APP



Use HubSpot Certified App to Integrate HubSpot and Dynamics - Free

#### **HUBSPOT BASED SERVICES**

Technical Consulting HubSpot + Lynton \$3K Technical Consulting: Data Sync Custom Integration \$2.5K Inbound Consulting: Sales & Marketing Alignment \$3K

REPORTING - IN ONE PLACE



Google Data Studio and HubSpot -Connected Next Step - set up attribution in HubSpot

#### DATA CLEANING



Started - organized marketing vs non marketing contacts to reduce the annual fee Hire a Data Cleaning Company - Insycle Data Management - HubSpot Certified App -Deduplicate, Import, Associate, Format - \$8.00/mo

# **HubSpot Technical Consulting Service:**

HubSpot rep would get in touch with Lynton and assess the issue \$3K



#### 1. Discover

- Review business requirements for a custom integration
- Understand the system being integrated, exploring use cases and types of data

#### 2. Plan

- Create and collaborate on a project plan outlining consulting and development items
- Determine priorities, timeline and task assignments

#### 3. Educate

- Review relevant HubSpot development best practices: understanding authentication options, developer portal setup, working with rate limits, API code clients and common usage patterns across relevant APIs
- Explore potential pre-built integration options (such as utilizing HubSpot native integrations, third party or iPaaS systems to aid in integration development)

#### 4. Execute

- Define the objects, volume and frequency of the data sync
- Determine optimal data model mapping between integrated systems
- Recommend a data flow between systems, identify the data required for automation, segmentation, personalization and reporting
- Provide recommendations on HubSpot APIs necessary for the integration
- Receive support via email and scheduled calls for core integration functionality

#### 5. Wrap Up

- Help troubleshoot any HubSpot related issues with the integration and ensure integration satisfies specific business requirements
- After project completion, the customer team is responsible for ongoing maintenance and any future HubSpot consulting would require a new consulting agreement



# **HubSpot Technical Consulting Service:**

Custom HubSpot App Integration \$2.5K



#### 1. Discover

- Review business requirements for a custom integration
- Understand the system being integrated, exploring use cases and types of data

#### 2. Plan

- Create and collaborate on a project plan outlining consulting and development items
- Determine priorities, timeline and task assignments

#### 3. Educate

- Review relevant HubSpot development best practices: understanding authentication options, developer portal setup, working with rate limits, API code clients and common usage patterns across relevant APIs
- Explore potential pre-built integration options (such as utilizing HubSpot native integrations, third party or iPaaS systems to aid in integration development)

#### 4. Execute

- Define the objects, volume and frequency of the data sync
- Determine optimal data model mapping between integrated systems
- Recommend a data flow between systems, identify the data required for automation, segmentation, personalization and reporting
- Provide recommendations on HubSpot APIs necessary for the integration
- Receive support via email and scheduled calls for core integration functionality

#### 5. Wrap Up

- Help troubleshoot any HubSpot related issues with the integration and ensure integration satisfies specific business requirements
- After project completion, the customer team is responsible for ongoing maintenance and any future HubSpot consulting would require a new consulting agreement



# HubSpot Inbound Consulting Service:

Sales and Marketing Automation: \$3K



#### 1. Discover

- Through a discovery call, your consultant and sales and marketing leaders will gather an understanding of your current process and define objectives for a new one.
- Multiple discovery calls may take place with the marketing and sales team separately to define each process in greater detail if necessary.

#### 2. Plan

- Review with your process highlights/objectives with leadership team and consultant
- Receive a process flow diagram and/or document from your consultant, outlining exactly what happens when, and team responsibilities.
- On a collaborative consulting call(s), your consultant will explain the new process, and begin planning the implementation with the team.

#### 3. Educate

- Marketing and sales will designate process builders, who will meet with your consultant in ongoing working sessions to implement the process.
- Working sessions will continue as-needed to ensure what's "on-paper" becomes a reality in HubSpot.

#### 4. Wrap Up

- Your Consultant will update process diagrams and documents to reflect the work achieved so far.
- Your Consultant, with your operations team and leadership, will identify future opportunities and decisions to make.

## Lynton Solution:



#### LYNTON DYNAMICS APP

Re - Sync

#### **INTEGRATION STRATEGY & DEVELOPMENT**

\$7,500 - \$12,500

Discovery phase to narrow the exact cost for development

#### **INTEGRATION SUPPORT & HOSTING SUBSCRIPTION**

\$825-\$1,375 / month

New support and hosting subscription

#### **MARKETING HUB ONBOARDING**

\$6,000-\$15,000

Guided calls and working sessions - no actual implementation

#### **TOTAL RANGE**

- One Time: \$13,500-\$27,500
- Recurring: \$825-\$1,375 / month (\*can be paid annually)

## Achieved





Lynton and HubSpot on the best approach to move forward Both agreed on Re-Sync

#### DATA CLEANING

Completed Eligibility Flow - segmented marketing vs. non marketing contacts

#### **INTEGRATION COMPLETE**

- Integrated Google Data Studio with HubSpot
- GDPR Compliance



#### AUTOMATION

Started simple e-mail automation for Z-Binder and Ortho Spore email campaigns





# Marketing Hub Enterprise (Marketing Contacts version) - \$49,380/year

Product	List Price	Discount	Your Cost
Marketing Hub Enterprise (10k contacts included)	\$3,600	15%	\$3,060
40,000 Additional Marketing Contacts	\$400	5%	\$380
Business Units	\$1,000	37%	\$630
Operations Hub Starter	\$50	10%	\$45
		TOTAL	\$4,115/month

# Consider: Migrating to HubSpot



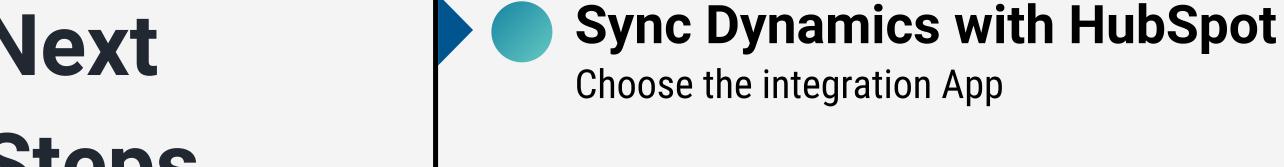
## MIGRATION FROM DYNAMICS TO HUBSPOT

- Everything in one place
- Seamless Collaboration between Sales and Marketing
- Integrate all existing tech with HubSpot
- Integrate Navision with HubSpot use: <u>Alumio</u>



Product	List Price	Discount	Your Cost
Marketing Hub Enterprise (10k contacts included)	\$3,600	15%	\$3,060
40,000 Additional Marketing Contacts	\$400	5%	\$380
Business Units	\$1,000	37%	\$630
Sales Hub Professional (88 seats)	\$8,800	20%	\$7,040
		TOTAL	\$11,110/month

## Next Steps



- **Onboard** 
  - **HubSpot Microsoft Dynamics 365**
  - Lynton Dynamics by SyncSmart
- **Automate** Continue and Advance with Automation

**Clean Data** Jenna + Nicole + (Anna) HubSpot Certified App

### **Achievements**



## Sync Dynamics with HubSpot

Chose the integration App - Kingsway Soft - currently using in integrating Dynamics with Navision - a more powerful tool than HubSpot App - Kingsway Soft connects directly to our Database where we store a copy of Dynamics and pull info from Nav.



### Onboarded

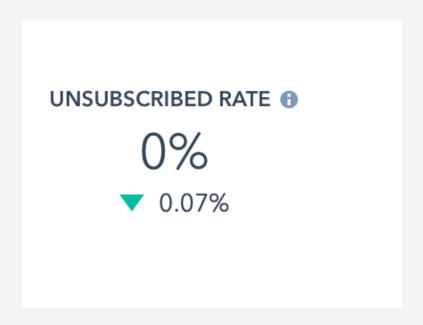
- HubSpot Tech Successfully ended Tim Luciano
  - Successfully mapped the integration
  - Tested HubSpot in Sandbox
  - Moved from Sandbox to Production
  - Integration goes both ways between Dynamics and HubSpot
  - Successfully identified the source of unsubscribes (Threat): Lynton. This was related to the Opt-Out Syncing. We disabled the Opt-Out sync between Dynamics and HubSpot

### **Achievements**





Unsubscribes - Dec 23-28



# Next Steps 2023

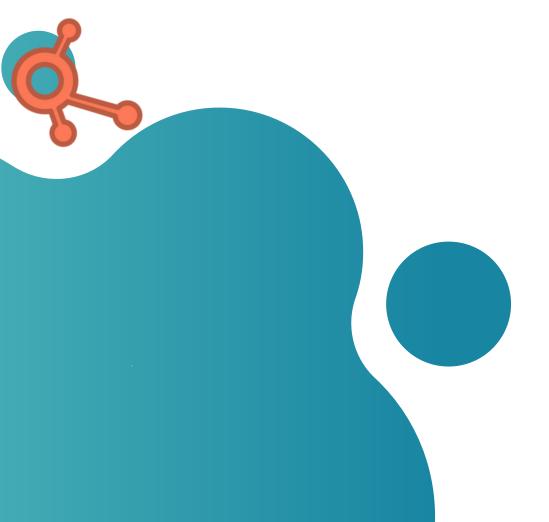


- Onboarding
  - Sales and Marketing Alignment Automation David Linares
    - Starts in January
    - Custom Operations Outline and Supporting Automation Process
- Survey Assistance
  - Savannah Mozingo Customer Success Manager
    - We meet every 8 weeks
    - Will assist with creating surveys without having to pay more for subscription
- Campaigns Set Up
  - LMRC | ORTHO
- LMRC Sales + Marketing Alignment
  - Deals | Pipeline | Workflow

### **Achievements**



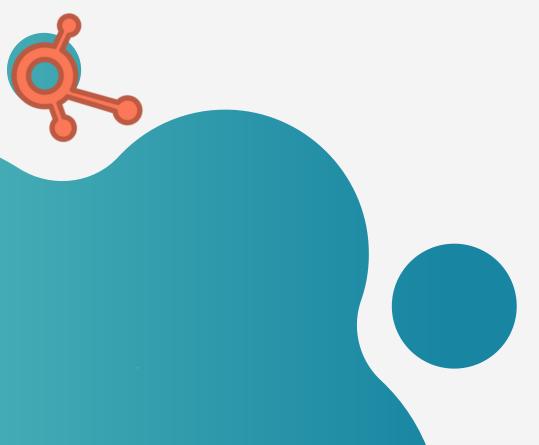
Chose the integration App - Kingsway Soft - currently using in integrating Dynamics with Navision - a more powerful tool than HubSpot App -Kingsway Soft connects directly to our Database where we store a copy of Dynamics and pull info from Nav.



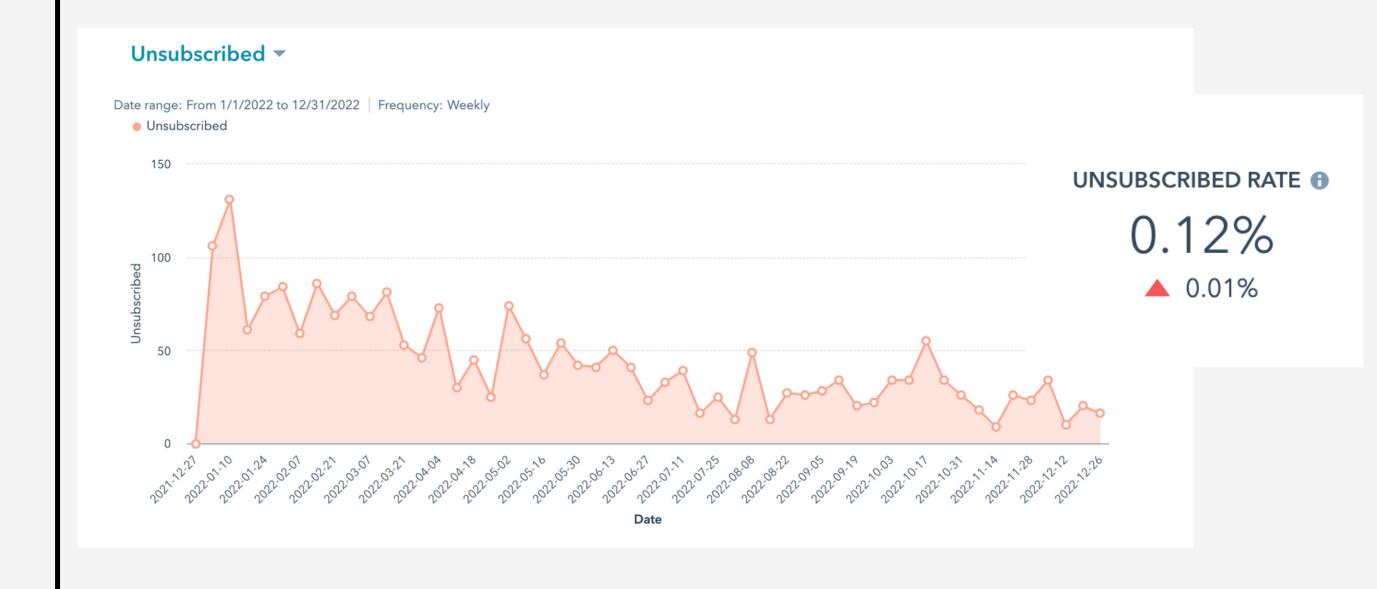


- HubSpot Tech Successfully ended Tim Luciano
  - Successfully mapped the integration
  - Finished HubSpot Testing in Sandbox
  - In the process of moving from Sandbox to Production delayed due to Ujwal leaving.
  - Integration goes both ways between Dynamics and HubSpot
  - Successfully identified the source of <u>unsubscribes</u> (Threat): Lynton. This was related to the Opt-Out Syncing from Dynamics. We disabled the Opt-Out sync between Dynamics and HubSpot

### **Achievements**



## Unsubscribes due to Lynton mapping

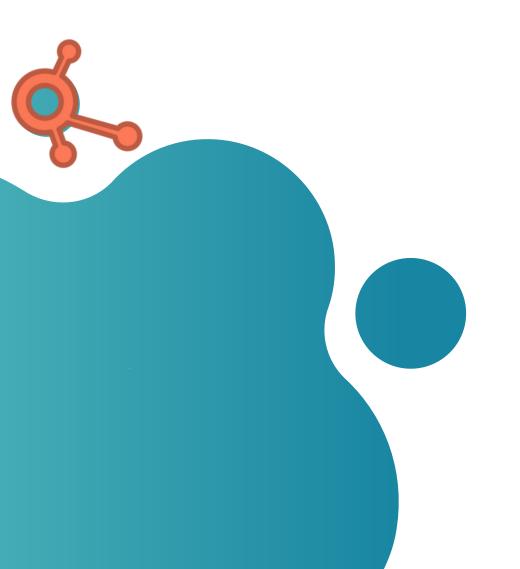


# Next Steps 2023



- Onboarding
  - Ortho Custom Operations Outline and Supporting Automation Process -David Linares
- Survey Assistance
  - Savannah Mozingo Customer Success Manager
    - We meet every 8 weeks
    - Will assist with creating surveys without having to pay more for subscription
- Campaigns Set Up + Workflows + Sequences
  - LMRC | ORTHO
- Revenue Attribution
- Data Cleaning

# Next Steps 2023





- Sales and Marketing Alignment Automation David Linares
  - Schedule: Started on January 6th Ends on March 1st 10hrs
  - Key Focus Areas: Automation | LMRC Sales Pipeline + Marketing Alignment | Deals | Workflows | Sequences
  - Key Team Members: Yaa Boakye, Anna Cooper, Nicole Gordus

#### 2 Phases:

- Phase 1: Marketing & Sales Foundation and Process Mapping. (Where we understand your current sales & marketing processes and how your sales team uses Dynamics)
- Phase 2: Workflows Recommendation Build out process

## What we were using HubSpot for

- Emails (execution + collaboration)
- Forms
- Social Scheduling
  - **Lists**

## What we use HubSpot for

- Emails (execution + collaboration)
- **Forms**
- Social: Scheduling + Reporting + Campaigns
- Calendar: Planner
- Campaigns: emails, forms, social
- Tasks + Some Collaboration
- LMRC Sales Integration (Outlook; Templates)
- Reporting
- Lists
- UTMs: for social + email tracking



## What we will be using HubSpot for

- Emails (execution + collaboration)
- Forms: workflows
- Social: Scheduling + Reporting + Campaigns
- Campaigns
- UTMs: for social + email tracking
- LMRC Sales Integration (Pipeline; Outlook; Templates; Calendar)
- Reporting
- Automation | Workflows | Sequences
- Surveys
- Tasks + team collaboration
- Lists
- Calendar: Planner

