Coastal Consulting

INTEGRATION GUIDE

5 Steps to Prepare for the HubSpot Salesforce Integration

www.coastalconsulting.co

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Introduction

Integrating HubSpot and Salesforce is simple—it's what comes before and after pressing "Connect" that presents a challenge. This guide is for the team looking to get it done and to do it very well. We'd like to prepare that team for the HubSpot Salesforce integration so they can avoid the costly mistakes and pitfalls that all too often accompany integrating HubSpot and Salesforce. Sound like you? Great, keep reading.

Most organizations that integrate HubSpot and Salesforce (commonly known as SFDC) use Salesforce Sales Cloud as their primary customer relationship management (CRM) platform and leverage HubSpot as their marketing automation tool.

However, if you're looking to add HubSpot to your MarTech stack, it's likely that you already use a marketing automation tool like Pardot, Marketo, or Mailchimp. Meaning you need to prepare to integrate SFDC with HubSpot and migrate data, automations, and content from your legacy marketing automation tool to HubSpot. This process typically takes our team 80-150 hours from start to finish—so you have your work cut out for you!

But, don't worry, this guide will walk you through five manageable steps to integrate HubSpot and Salesforce (**and get it done 65-75% faster!**).

Before we get started, here's a preview of the steps:

1. Build a Systems Integration Map
2. Migrate Marketing Automation Tools
3. Consolidate your MarTech Stack into HubSpot
4. Prepare your Data for the HubSpot Salesforce Integration
5. Install the HubSpot Salesforce Integration

STEP ONE

Build a Systems Integration Map

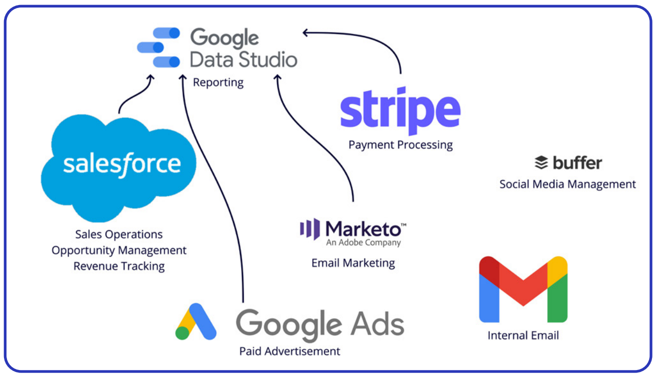
What is a Systems Integration Map?

A systems integration map is a visual that shows all of the tools you use to run your marketing and sales operations and how data flows between them. Typically, this includes the platforms you use for CRM, advertising, email delivery, quoting, order management, fulfillment, payment processing, account management, automated calling or SMS, analytics, social media management, and more.

How to Create a Systems Integration Map

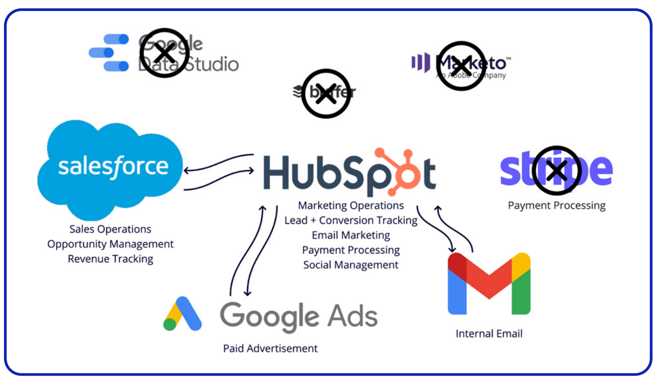
Evaluate your current systems

This one isn't as complex as it may sound. You can use a pen and paper (or a digital whiteboarding tool like Miro) and start small. Put your core systems in the middle and draw lines between them, illustrating how data flows throughout your tech stack.



Evaluate your current systems

Once you visualize your current tech stack, consider which tools can be replaced by HubSpot during your HubSpot implementation. For example, HubSpot's social media tools can replace Buffer. HubSpot's advanced reporting tools can replace Data Studio. And, the HubSpot Payments tool can replace Stripe.



STEP TWO

Migrate Marketing Automation Tools

What should I migrate to HubSpot from my legacy marketing automation tool?

Now that your systems are in order, it's time to plan your HubSpot launch date. We've shown how many tools HubSpot can replace. But, the biggest elephant in the room is your current marketing automation platform. Usually, when an organization signs on with HubSpot, the countdown timer begins to the contract end date with your legacy tool.

In other words, it's go time.

Asset migration is consistently the number one delay in migrating marketing automation platforms and integrating Salesforce and HubSpot. So, prioritize this step above all else.

Typical HubSpot implementations involving a migration take 3-4 months to complete. But, if you're like most normal companies, you have way less time than that to pull this off because the review process took longer than expected and (the list goes on).

So, how do you turn 3-4 months into one month?

So glad you asked.

Migrating systems is like packing up and moving to a new home. You look around your house and see everything in your kitchen cabinets, bedroom closets, living room, and—oh wait! the attic. So, where do you start? Usually, with the things you use the least and can't seem to get rid of. You know what we're talking about. Those skis you got on clearance five years ago even though you live in Florida and have never once skied? Yup, those. FOMO (the fear of missing out) lives within us all. We're unwilling to donate those skis because what if our friends decide to plan a ski trip next year? They won't, but there's always the "What if?" So, just like those skis, we feel the need to make an exact copy of everything we have in our legacy marketing automation tool just in case we need them again. But you won't.

The moral of the tangent—use this opportunity to do spring cleaning on your marketing automation tool. Leave the email campaign from 2017 where it belongs—in the past. Only move your active campaigns, collateral, communications, and automations to HubSpot.

Consolidating will help complete your migration 50% faster (on average).

But, we said we could reduce your migration time frame by 65-75%. ***We know—keep reading.***

Now that you have your Marie Kondo mindset ready let's start thanking the old system for what it was and let it go. Start by running an export of all assets in your current system. This method varies by system, but the how is just a quick Google search away. Here's an example of how to export assets from Pardot. The evaluation steps are the same if you're using a system other than Pardot, but the export process will vary.

Asset Migration Checklist

Once you have all of your assets exported in an easy-to-evaluate format, it's time to ask yourself the following questions.

- [ ] Has this asset performed well?
- [ ] Have we used this asset within the past 12 months?
- [ ] Is this asset relevant to our current offering and audience?

If the answer to any of these questions is no, this asset should not be included in your migration, and it's time to let go.

Example:
How to Export Assets from Pardot

Follow these steps to export all assets from Pardot:

- After selecting "**CSV Export**," navigate to **Admin > Exports** to download each export.
- Then, add each exported file to **one spreadsheet in individual tabs**.
- From there, **add a column** to each tab named "**Migrate to HubSpot?**".

Review each asset individually and decide if it will serve your brand in the future or if it's time to let it go.

ASSET	HOW TO EXPORT
EMAILS	Marketing > Emails > Tools > CSV Export
FILES	Marketing > Content > Files > Tools > CSV Export
LANDING PAGES	Marketing > Landing Pages > Tools > CSV Export
FORMS	Marketing > Forms > Tools > CSV Export
AUTOMATIONS	Marketing > Automation > Tools > CSV Export
LISTS	Marketing > Segmentation > Tools > CSV Export

How do I migrate assets to HubSpot?

Congrats! You've narrowed your focus and identified the key marketing assets that need to come out of your legacy marketing automation platform and into HubSpot. What now?

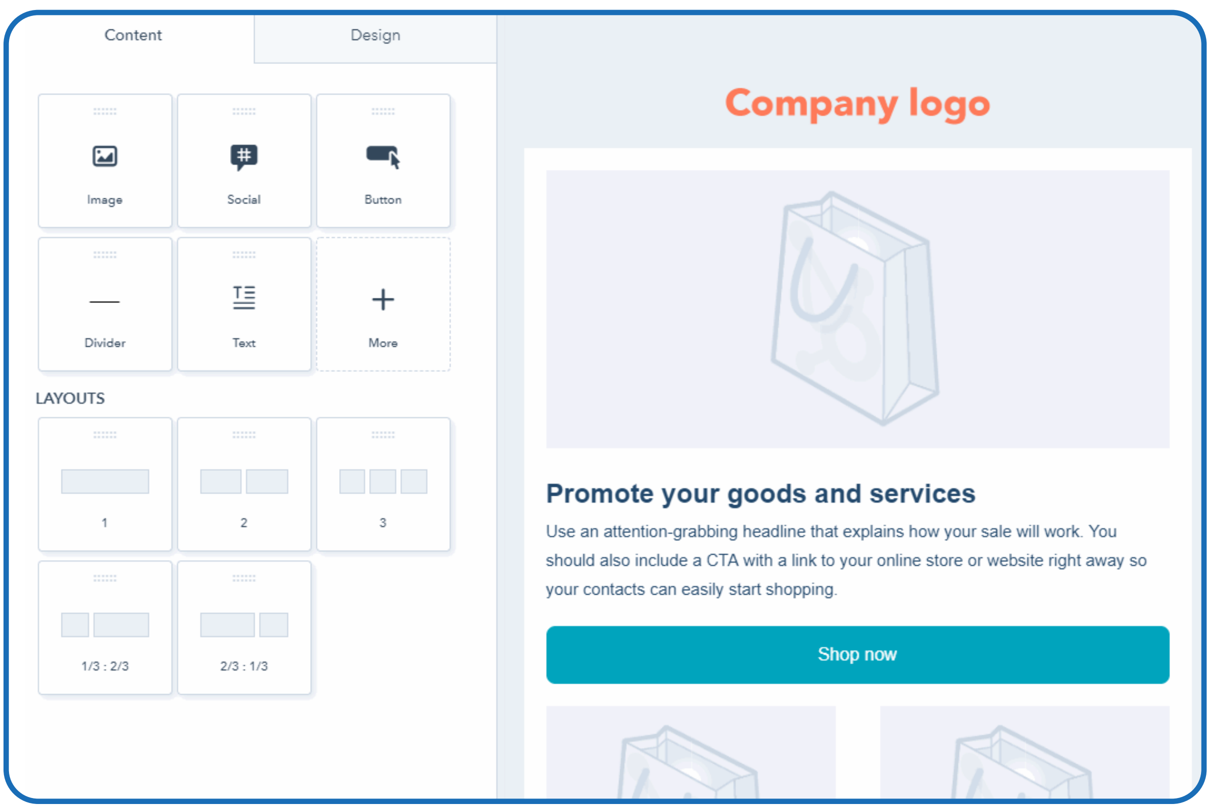
Unfortunately, there isn't a "Click to Migrate" button yet, so this part is a bit manual. You will need to recreate your emails, landing pages, forms, and automations in HubSpot before turning off your old system. Email is the most complex one to tackle, so we've outlined those steps below in detail. Once you have a plan in place for asset migration, you can move on to **Step 3: Consolidate Your MarTech Stack into HubSpot**.

How to Build an Email Template in HubSpot

Email templates in HubSpot can be created using **HubL + HTML** or the drag and drop builder. If you created your current templates using HTML or if your brand relies on complex design to deliver emails, consider working with an HTML expert to adjust the code from your legacy tool to account for the HTML nuances in HubSpot. Every system has different merge tags for First Name, Unsubscribe, Preference Center, etc. Several have platform-specific code requirements as well. So, you'll need to adjust custom-coded emails for each platform you switch to overtime.

Luckily, most marketers do not go the route of custom email development. Most developers don't even go the route of custom email development as it is by far the **hardest code to maintain**. Why? Because each email client (Outlook, Gmail) and device (Apple iOS7/iPad, Apple iOS7/iPhone, Desktop, etc.) has a specific code requirement for the email to render properly.

Consider using the **HubSpot drag and drop email builder** if you'd like to skip the coding.

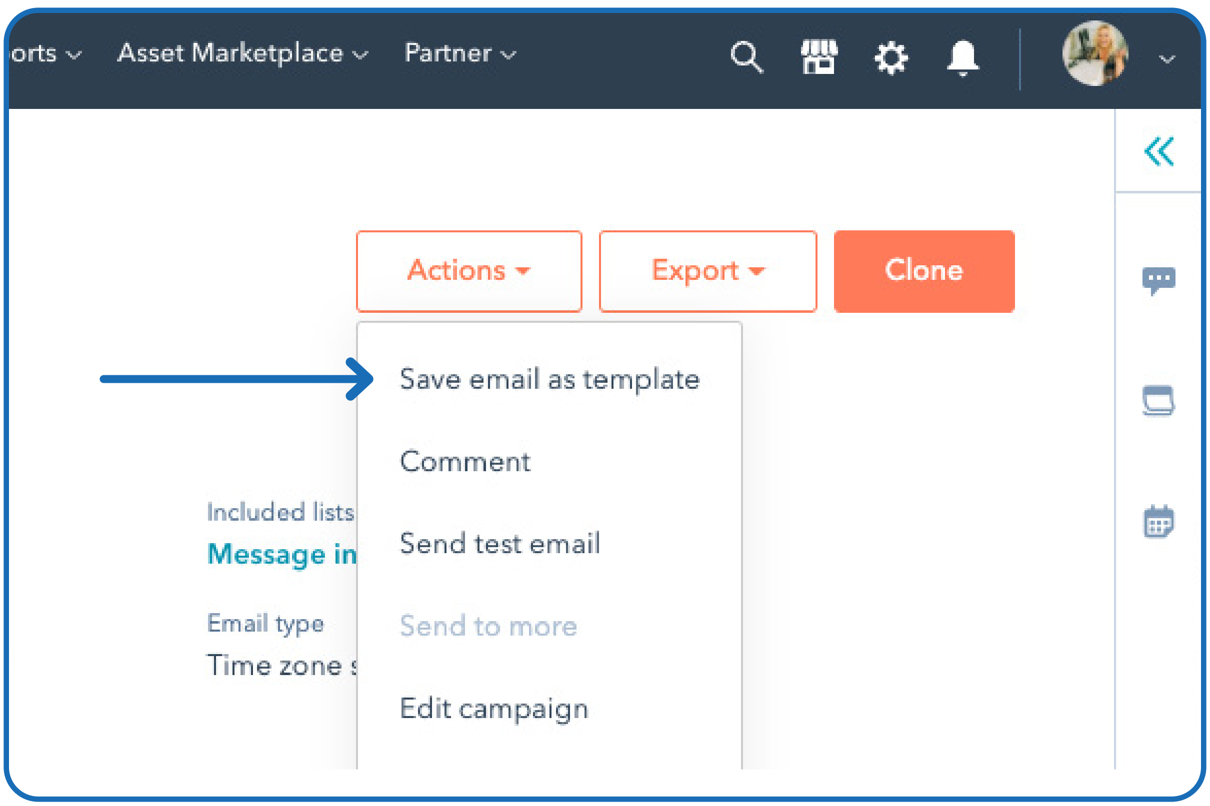


Migrate Email Templates into HubSpot

Now that you know which emails you're moving over to HubSpot and how to create a HubSpot email template, it's time to stop preparing and start doing!

To make this process faster (and get closer to saving 75% of your time spent implementing HubSpot!), take a look through the emails you're migrating. Do you see a pattern? You likely have 2-3 formats that are consistent throughout your emails. Those formats are called templates in the email world. Meaning a standard organization of the text, images, and calls to action (CTAs) that make up the emails your customers are used to receiving.

Once you've identified your 2-3 templates, pick one email from each formatting group and build that design using the HubSpot drag and drop email builder. When completed, select "Save email as a template." Repeat for each template needed to match your standard email formats.



Now that you have the email templates ready to go, start creating your emails in HubSpot. This can be easily done by reusing the templates you created and updating each template with the subject line, text, images, and links from the emails in your migration spreadsheet that you created earlier. Templating your email migration to HubSpot will greatly reduce the amount of time it takes to migrate platforms and get you sending emails from HubSpot faster.

STEP THREE

Consolidate Your MarTech Stack into HubSpot

HubSpot is crafted, not cobbled. Over time, it's easy for our MarTech stack to grow and grow until it's a monster to manage. We end up with 31 systems doing the work that one tool (HubSpot) could do. Now that you've invested in HubSpot, it's time to start reducing your MarTech stack! Revisit the systems integration map you built in Step One. Take a red pen (or the delete button) to the map and remove all of the systems that can be replaced by HubSpot.

Now, before you hit "Cancel Account", you'll need to configure HubSpot to replace these tools.

Here are a few steps to get started:

1. Connect your domain to HubSpot via your DNS provider for landing pages and emails
2. Connect your social media accounts to HubSpot
3. Connect your Google, Facebook, and LinkedIn Ad accounts to HubSpot
4. Create a chatbot in HubSpot to add to your website
5. Create a blog in HubSpot
6. Configure email settings in HubSpot
7. Integrate Google Search Console with HubSpot to monitor SEO

STEP FOUR

Prepare Your Data for the HubSpot Salesforce Integration

HubSpot, at its core, is a CRM and CRMs are fueled by data. Data drives every customer experience, business decision, and report you've experienced or created. If you'd like HubSpot to successfully attract, convert, and delight your customers, you'll want to pay close attention to this part.

Understanding the differences between HubSpot and Salesforce

HubSpot vs Salesforce

If you do a quick search, you'll see the following product definitions:

HUBSPOT

A cloud-based customer relationship management (CRM) platform that helps scaling businesses grow better with sales, service, marketing, and content management software.

SALESFORCE

A cloud-based customer relationship management (CRM) platform with applications for sales, service, marketing, and more that help brings customers and companies together.

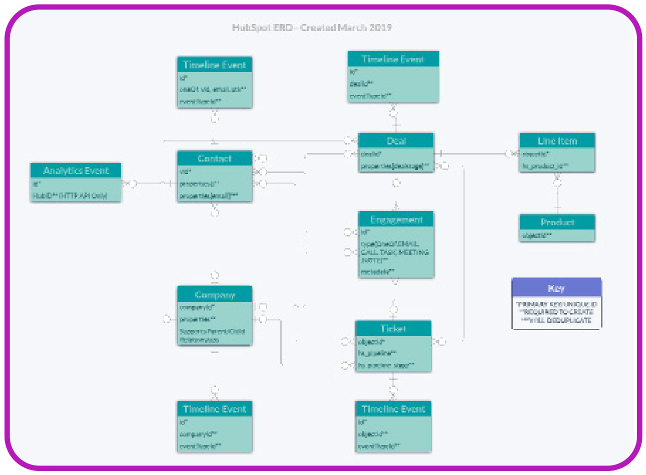
By definition, the platforms seem pretty similar, right? That's because HubSpot and Salesforce were both designed with your customers in mind. And they both focus on helping you create the best customer experience possible. However, HubSpot and Salesforce differ in their approach.

HubSpot combines all of the features you'll need to scale and grow your marketing, sales, and service operations through their Marketing, Sales, Service, CMS, and Operations Hubs. On the other hand, Salesforce has an extensive list of product offerings that allow you to purchase subscriptions to platforms they have acquired (like Pardot and Salesforce Marketing Cloud) to scale your operations.

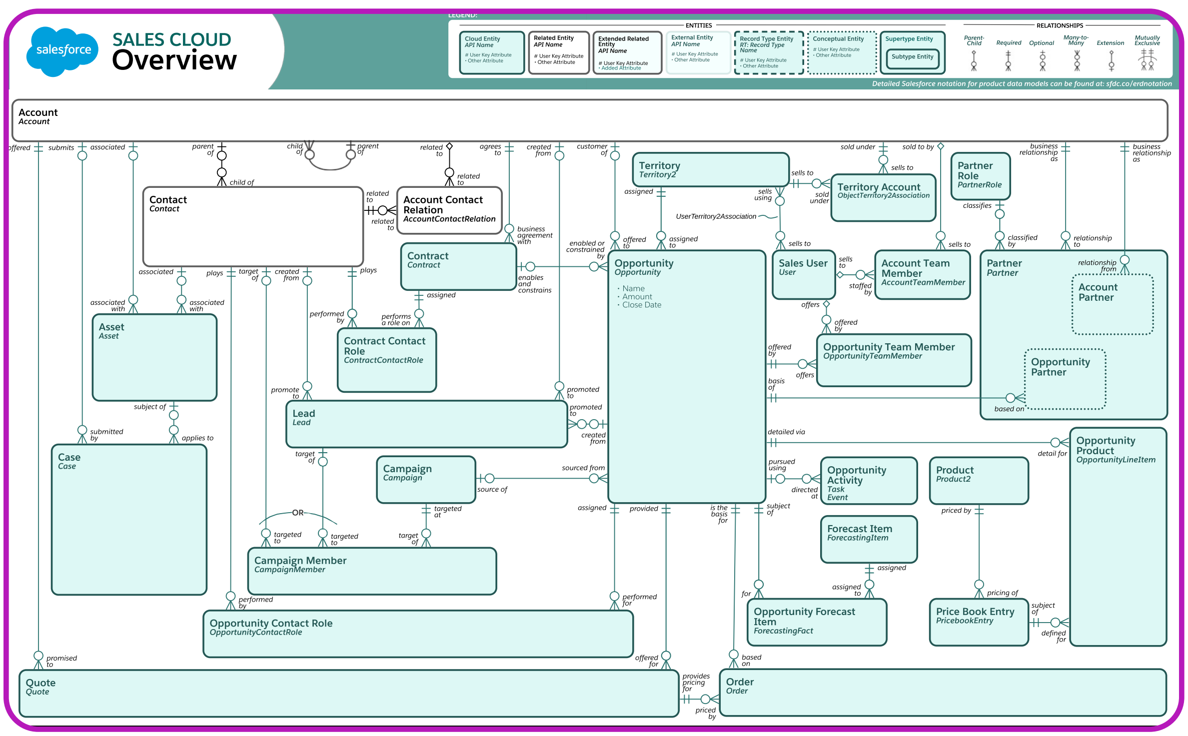
Data Model Differences in HubSpot and Salesforce

At the highest level, HubSpot's data model centers around contacts while the Salesforce Sales Cloud data model centers around accounts.

HubSpot has [four core objects](): Contacts, Companies, Deals, and Tickets. The contact accumulates the various objects via their engagement with content, activities with the sales team, purchasing decisions, and customer service interactions. The contact object is the star of the show, while the other three objects play strong supporting roles to provide the contact with everything they need to have an awesome customer experience.

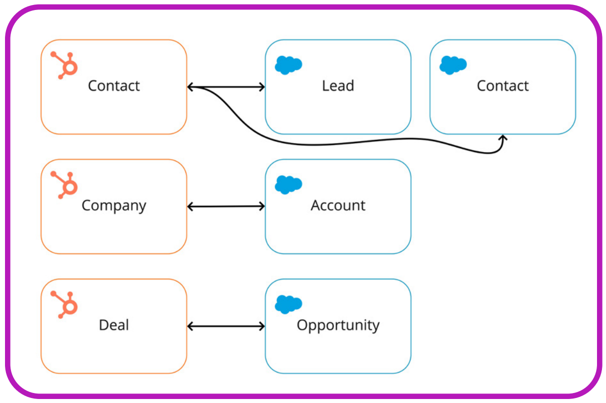


Salesforce has [five standard (and complementary) objects](): Leads, Contacts, Accounts, Opportunities, and Cases. Accounts store information on the company and group contacts, opportunities, and cases around companies to create a holistic view of the company from the Account page. While these are the core Salesforce objects, the Salesforce ecosystem offers many more.



Right about now, you may be wondering how you can integrate HubSpot and Salesforce if the data models differ. Your concerns are valid as this is one of the trickiest parts of the integration.

The most important data model nuance for the HubSpot Salesforce integration is that both Salesforce Leads and Contacts sync with HubSpot Contacts.



How do Leads and Contacts in Salesforce compare to Contacts in HubSpot?

Leads in Salesforce denote potential customers who have not yet expressed interest in working with your company. For example, Jessica may have downloaded your ebook on managing a productive team, but she has not yet submitted a demo form for your project management platform. Therefore, Jessica is a lead as she is not yet ready for sales, nor is she ready to purchase.

As an additional example, Michael downloaded the same ebook in the past, and he recently submitted a demo form for your platform. Michael is now ready to be passed to sales to provide a demo to confirm his interest before converting him to a contact. In Salesforce, you should only convert a lead to a contact once they have expressed interest in working with your company and you have enough information about their interest to create an opportunity for them. Comparatively, in HubSpot, Jessica and Michael would both become Contacts in HubSpot when they first downloaded your ebook.

In HubSpot, all potential and current customers live in the Contact object.

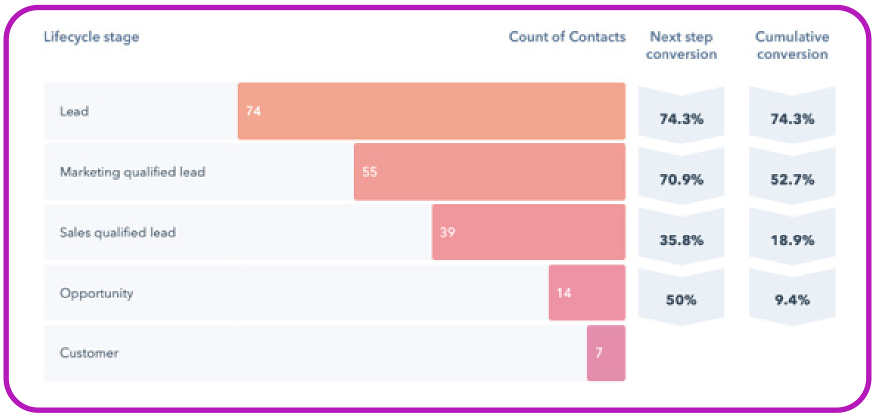
So, how does HubSpot denote the difference between a lead and a contact?

HubSpot uses the **Lifecycle Stage property** to track how contacts and companies progress in your organization's sales process and customer lifecycle. For example, when Jessica and Michael submitted the ebook, they would be Contacts, and their Lifecycle Stage would be set to "Lead". When Michael submitted the demo form on the website, his Lifecycle Stage property would change to Marketing Qualified Lead. Once the sales team connected with Michael and confirmed his interest, they would convert Michael's Lead record to a Contact in Salesforce, and the HubSpot Lifecycle Stage would change to "Sales Qualified Lead."

How can you track conversions in HubSpot without the Lead object?

If you're a seasoned Salesforce user, your gut reaction when learning that HubSpot does not use the Lead object may be negative. Usually, this concern stems from two things. First, how will we know if potential customers are actively in the pipeline (Contacts) or if they are being nurtured for sales (Leads)? Second, how will we report conversions without the Lead object?

The Lifecycle Stage property is the answer to both questions. While Lifecycle Stage is a property rather than a dedicated object, it serves a dual purpose of tracking pipeline progression and conversion rates between stages. HubSpot includes the Lifecycle Stage property on the Contact and Company objects to power reporting and segment lists to track conversion, segment contacts by their stage, and personalize communications.



Clean Your Salesforce Data

Each time you add a system to your MarTech stack, you create a great opportunity to audit your data for quality and cleanliness. When integrating Salesforce with HubSpot, you will also need to account for the data privacy and documentation requirements in the **HubSpot Acceptable Use Policy**.

Long story short, you need to make sure that the contacts and leads you're storing in Salesforce have given you permission to store their data and contact them. Unlike most marketing automation tools, HubSpot actually means what they say, and they do enforce the data permissioning policies outlined in their **Acceptable Use Policy**. Improper data hygiene from purchased or scraped lists can result in **quarantined contacts** (and a terrible brand reputation, if we might add).

If your data has sketchy origins, you're not alone. But, you can't take the skeletons in your data closet into HubSpot. They'll catch up with you—and potentially cost you, big time. So, take some time to run through your data and make sure you have permission and that you can prove when and where you got it before importing data to HubSpot.

STEP FIVE

Install the HubSpot Salesforce Integration

Now that you've laid the foundation, you're ready to install the HubSpot Salesforce integration! This part is going to get a bit technical. So, get your game face on, head to the **HubSpot App Marketplace**, and let's get started.

Configure a Salesforce Integration User

What is an integration user?

Every member of your team that is in Salesforce has a user profile. Your user profile gives you a login and a set of permissions (a fancy word for capabilities) in the platform.

An integration user is the login information that connects Salesforce to the system you're integrating with and is the channel used to send information back and forth. So, this is the User that shows when something happens in the integrated system. We recommend using a dedicated integration user for each system you integrate with Salesforce.

What is a dedicated integration user?

A **dedicated integration user** is a user profile set up with a unique profile, role, and permissions created for 3rd party integrations. When setting up integrations, we don't recommend connecting them with an actual user within your company, even if they are the ones managing the integration.

How to configure your integration user

Luckily, the integration user is just another user in your Salesforce account. If you do not have any Salesforce licenses yet, you'll need to purchase a new license to set up the new user.

Once you have a Salesforce license available, navigate to Setup > Users > Create User and build a new user for the integration. To ensure the integration works smoothly, you'll need to give your integration user a few specific permissions.

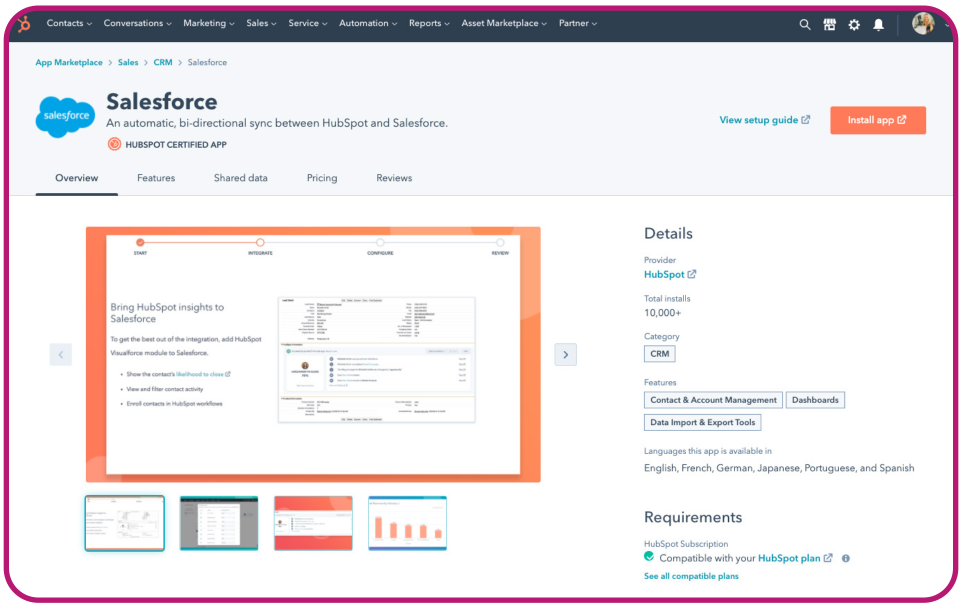
To do this, you need Account Access permissions in HubSpot & System Administrator or be assigned the "HubSpot Integration" Permission Set in Salesforce. You can also duplicate the System Administrator Profile in Salesforce and create a custom profile for the integration user.

On the User Profile level in Salesforce, you will need the following system permissions:

- [ ] API Enabled
- [ ] Modify Metadata
- [ ] Configuration & Set Up access
- [ ] Download App Exchange

You will also need to add View permissions for the Type field on the Task object to the integration user. Once you grant the necessary permissions, you can connect the integration.

NOTE: You cannot add the “HubSpot Integration” Permission Set in Salesforce until you install the HubSpot App from the Salesforce App Exchange. Complete ***steps 1-3 below to see this Permission Set*** in Salesforce.



Install the HubSpot Salesforce Integration

The integration install process will begin in HubSpot. Here’s how to get started!

1. Go to the App Marketplace in your HubSpot account (navigate to this by clicking on the Marketplace icon then selecting “App Marketplace”)
2. Type “Salesforce” into the search bar and select Salesforce integration
3. Click “Install app” in the upper right corner
4. Next, click “Log in to Salesforce”

5 Enter the Salesforce credentials for the Integration user into the pop-up window and log in

6 Click "Start the Salesforce package installation" to begin the installation.

Now, let's continue the process in Salesforce.

7 You will be redirected to the App Exchange from within your Salesforce account once you complete steps one through six.

8 Select "Install for All Users" and click "Install"

9 Select the "Yes, grant to these third-party websites" checkbox, then Continue.

10 The package installation will begin (it may take several minutes)

11 Once it's complete, navigate back to Hubspot, go to the Hubspot connector wizard, and click "Next"

12 The connector wizard then directs you to add the Hubspot Visualforce module to the Lead object in Salesforce (you can skip this step and revisit later)

13 Select "Next" or "Skip this Step" to choose how your data will sync between Hubspot and Salesforce.

14 You will be able to select between a "Recommended setup" or "Advanced setup" (if you need to do a selective sync or want to keep certain contacts out of Salesforce, you will need to select the Advanced setup option)

15 Either option then directs you to review your sync settings. If it all looks good, select "Finish setup and begin syncing." (You can change your sync settings at any time, but this will not retroactively delete or change data that's already synced to Salesforce.)

16 You did it! The integration is configured. You can now import your Salesforce data into Hubspot to expedite the initial process of syncing your data into Salesforce.

Not sure where to start? The HubSpot Salesforce Integration can be trickier than it seems. Our team specializes in the integration install and everything that happens next. If you're hitting a wall and want an expert to help you break through it, reach out to our team. We're happy to help!

Connect with Coastal

HubSpot Implementation and Integration Case Studies

Case Study: How Clinicient and Keet Health Migrated from Marketo to HubSpot and Integrated Salesforce

Industry: Health SaaS

50 Team Members Onboarded	**130** Assets Migrated from Marketo
26 HubSpot Workflows Implemented	**4** Custom Reporting Dashboards

TEAM

On December 12, 2017, Clinicient, Inc. announced their acquisition of Keet, Inc. Keet Health is a health tech company on a mission to restore humanity in healthcare. Since 2015, Keet has been committed to helping providers, employers, and health systems facilitate and deliver more connected, higher-quality care through our digital delivery platform for patient engagement and clinical outcomes. Keet, Inc. operates independently as a wholly-owned subsidiary company of Clinicient, Inc.

While Clinicient and Keet complement and support each other, they are separate companies with customers who have unique needs. They both have sales, marketing, and content strategies that need simple and effective tracking.

Systems

While Keet is a subsidiary of Clinicient, they are separate companies with unique customers. They both have sales, marketing, and content strategies that need simple and effective reporting. When we met the team, Keet Health used HubSpot, and Clinicient used Marketo. Both companies integrated their marketing automation tools with Salesforce, and they were having a few challenges with data integrity and reporting.

Challenges

1. Unsubscribes from one organization's communications transferring to the other
2. Thousands of duplicate records were created with no clear source or resolution
3. Technical debt from several systems and processes that were not maintained or dismantled

Solution

To tackle these challenges head-on, the Coastal team implemented HubSpot's Marketing and Operations Hub for Clinicient. This process typically takes three or more months to complete. But our team had it done in under two!

That's because we specialize in the HubSpot Salesforce integration AND HubSpot implementations and are intentional in taking on the right clients at the right time. So, we put the full force of our team behind this project and had HubSpot and Salesforce implemented and integrated in no time.

Results

How we took them from "That's great" to "You were able to do what?!"

We made our mark. And took lots of pictures along the way! In six weeks, we implemented and integrated HubSpot Marketing Hub Enterprise & Operations Hub Professional with Salesforce for two brands in 6 weeks using Selective Sync. This implementation typically takes three to four months, but we like to do things differently. We don't coast; we go coastal!

Leveraging the HubSpot + Salesforce integration, both Keet Health and Clinicient are now able to communicate with their customers individually while building complementary reports. Custom lifecycle stage tracking is now used to track conversion across the Clinicient customer lifecycle to show the impact of various marketing and sales activities. Additionally, HubSpot attribution reporting now provides detailed insights into the ROI for each piece of marketing content and interaction throughout the funnel.

Finally, Clinicient and Keet Health were able to leverage their newly scalable systems to grow in their industry. In January 2022, both Clinicient and Keet Health were acquired by WebPT, the leading outpatient physical rehabilitation SaaS platform for patient and practice management services.

"Coastal is the marketing operations partner I've always been looking for. After migrating to HubSpot and having a slightly tumultuous time at first, finding the team at Coastal was like finding my own pot of gold. The entire team, helmed by Lauren, is helpful, understanding, and experienced. Our company has a ~unique~ situation when it comes to Salesforce and HubSpot, and Lauren didn't even bat an eye. Every time I reach out for help, she is gracious and so very helpful (no matter how much heads up I've given her and her team). I truly feel like Coastal is an extension of our team. I would recommend them to anyone looking for an experienced partner in Salesforce, HubSpot, and general marketing operations activities."

Taylor Goldsmith, Keet Health
Senior Manager Brand and Content

The Wrap Up

Integrating HubSpot and Salesforce is easy. It's the preparation and follow-up that presents a challenge. Steps one through four of this guide get you ready to go, and step five takes you through the integration. But, what comes next?

After the HubSpot Salesforce Integration installation, a myriad of workflows, automations, field mapping edits, and setting adjustments are needed to run the integration without a hitch. Managing the integration is a big lift without the proper tools to run smoothly. But, the lift is well worth the reward. So, let us share a potential solution to the elusive question, "What next?".

STEP SIX

Partner with Coastal Consulting

Our clients become HubSpot and Salesforce integration experts during our partnership. We work with them through each step of the process outlined above (and everything that happens next). We typically partner with our clients for four to six months to get them off the ground with (and maximize the potential of) the HubSpot Salesforce integration.

Partnership Roadmap

Partnering with an agency is a big commitment. We get it because we've been there. Our team is full of talented individuals who have never worked in an agency before joining Coastal. We're ex-in-house marketing and marketing operations professionals on a mission to make the agency experience better for the clients and the agency team.

Here's a look at our process:

1. **Kickoff Call.**
   GetOur kickoff calls are a little different than you're used to. Regardless of who's involved in the HubSpot Salesforce Implementation project, we request that a member of your Sales, Marketing, and Customer Service team join this call.

   All of our solutions follow the **Revenue Operations framework**. That means we create fully aligned Sales, Marketing, and Customer Sevice processes centered on delivering a great experience to your customers. And, we can't do that without the input of your entire team.

2. **Mapping and Planning.**
   After gathering perspectives and pain points from your team, we'll do a deep dive into your systems, processes, and customer journey.

   When we're done, you will have an updated systems integration map and a customer journey map that details how you attract, convert, and delight customers throughout their time with your company.

3

Implementing

Now that we have a process and a plan, it's time to put it into action. We'll follow all of the steps outlined above (and a few we didn't get to) to ensure the HubSpot Salesforce Integration is installed correctly.

Because we do this every day, we can keep surprises to a minimum and ensure this is done correctly the first time, which saves you time, stress, and expensive fixes down the road.

4

Optimizing

Now, you have a brand new tool primed and ready to create an awesome customer experience. So… now what? To start, a few key workflows go into making HubSpot and Salesforce jive together. These include lead status and lifecycle stage automation, automated lead scoring, lead triage, lead assignment, and more. We'll start with those —and go from there!

Turning the integration on is just the start. Personalizing your customer experience with automated nurture workflows, campaigns, and sales enablement processes is how you get the most out of HubSpot. And, we know how to get you there.

5

Training

Alright, we made it! HubSpot is up and running, your key nurture workflows are activated, and the hard part is behind us. But wait, what happens once we're gone?

With most firms, the answer would be chaos. But, after partnering with Coastal, you'll receive extensive training, documentation, and coaching to learn how to leverage HubSpot (and the integration) fully so you won't wind up looking for another agency partner to manage your HubSpot account in the future.

6

Mastery

Once you've confidently completed training, you're ready to be the master of your own destiny in HubSpot and Salesforce. Now you have the tools to succeed and the know—how to get them to work for you—and not the other way around. Our work is done here—and yours is just beginning!

Partner with Coastal

Who is Coastal Consulting?

We're so flattered that you asked! Coastal Consulting is a boutique marketing automation agency focused on helping our clients master HubSpot and Salesforce. We do the things that other agencies won't. By training and empowering your team to master the tools in your tech stack, we create HubSpot experts—so you don't need to keep hiring people like us!

Our typical client has an international presence, uses HubSpot and Salesforce (or is planning to!), and brings in $50M+ per year in revenue. While we specialize in integrating HubSpot and Salesforce, our expertise doesn't stop there. We're a team of ex-in-house marketers with more than your garden variety of inbound and outbound marketing expertise up our sleeves. Once your systems are integrated, we know how to glean valuable insights from your customer database and strategize alongside your sales and marketing teams to create a lead generation and customer relationship strategy that converts and is built to last.

Sound interesting? **Meet the team that makes this vision a reality.**

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