INSIDEA

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HUBSPOT × SALESFORCE · NATIVE INTEGRATION

HubSpot Salesforce Integration

HubSpot × salesforce

The native HubSpot and Salesforce sync connects the two systems. It does not, on its own, produce the reporting, routing, and clean data your revenue process depends on.

PARTNER TIER

Elite Solutions Partner

HubSpot's highest partner tier

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

HubSpot Onboarding · Platform Enablement · CRM Data Migration · Custom Integration · CRM Implementation

NATIVE VS CONFIGURED

Same connection, very different outcome

NATIVE, OUT OF THE BOX

- Syncs contacts, accounts, leads, and opportunities
- Bidirectional sync with inclusion lists
- Standard field mappings out of the box
- Selective sync rules by object

INSIDEA CONFIGURED

What we deliver

- ✓ Objects and fields mapped to your revenue process
- ✓ Conflict and record-ownership rules that protect good data
- ✓ Historical migration and cross-system deduplication
- ✓ Custom objects and lead routing wired to your workflow
- ✓ Tested end to end, with sync errors monitored

HOW WE CONFIGURE IT

Scoped to the outcome, then tested

01 Data audit
Field inventory across both systems and what the sync must accomplish.

02 Mapping
Objects and fields mapped to your process, not just the defaults.

03 Rules
Conflict handling and record ownership so good data is never overwritten.

04 Migrate
Historical records brought over and duplicates resolved across systems.

05 Test
End-to-end testing with ongoing sync-error monitoring.

WHERE TEAMS GET STUCK

- ▲ Custom objects and non-standard fields need manual mapping
- ▲ Field conflicts overwrite good data without clear rules
- ▲ Historical records are not backfilled by the native sync
- ▲ Duplicates form across both systems over time
- ▲ Sync errors go unnoticed without active monitoring
- ▲ Ownership and routing are not mapped to your process

WHAT THAT COSTS YOU

Broken attribution and reporting, reps working from stale or duplicate data, and lead routing that misfires at the exact moment speed matters.

◆ COMPLEX INTEGRATIONS START WITH SCOPING

Every environment is different. Data volume, custom objects, historical records, and multi-system workflows all shape the work. Complex integrations and full CRM migrations are scoped separately, starting with a call to map exactly what the integration must accomplish before we build or quote.

Make the Salesforce sync do what your process needs.

A 30-minute scoping call, then a fixed-fee plan to configure and test it.

Book a scoping call →