

HUBSPOT × SALESFORCE · NATIVE INTEGRATION

HubSpot Salesforce **Integration**


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.

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

PARTNER TIER

Elite Solutions Partner

HubSpot's highest partner tier



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
- ▲ Duplicates form across both systems over time
- ▲ Field conflicts overwrite good data without clear rules
- ▲ Sync errors go unnoticed without active monitoring
- ▲ Historical records are not backfilled by the native sync
- ▲ 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 →](#)