

Transcript

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Nsovo Shimange 0:12

Good morning, everybody, and welcome to today's webinar, how to supercharge your operations with business Central and HubSpot integration. My name is sobash mange. I'm an inbound marketing manager here at Struto and I'm your host today. Before we get going, we just go through some housekeeping. So first of all, you'll notice that your microphones have been muted and your cameras have been turned off. This ensures that everyone has the best experience without any disturbances.

Please feel free to use the chat feature and the Q&A button we'll be taking.

To submit questions, we'll be answering those at the end of the webinar. This webinar has been reported and will be available on the shooter universe afterwards. Your feedback is value, so please take a moment to put in our survey that we'll send out at the end of the webinar.

And Please note that by attending this webinar you have opted into our marketing updates which feel free to unsubscribe at any time. Next, I'd like to introduce our speakers. I'm joined today by my colleagues Ryan and Sean who bring deep technical and operational expertise.

Into the integration challenges we'll be talking about today, let me not steal their Thunder and give them a chance to introduce themselves formally. We'll start with Ryan and then we'll move on to Sean. And then afterwards I'll just briefly take you take you through what we're going to go over today.

Ryan winner.



Ryan Waters 1:40

Yeah, thanks and silver. So first of all, yeah, great to be here on the call today. I'm Ryan waters. I am a solution architect here at Struto. I typically bridge the gap between sales and delivery. I get super passionate about.

Solving problems for businesses getting into the technical landscape and articulating requirements back from maybe non-technical people to technical people. So it's definitely my my passion there, but that's me. I'll hand over to Sean.



Sean Fowles 2:12

Hey there. Thank you. Very excited to be here as well. I am Sean files. I head up revenue at STRUTO, so Rev OPS for some of you that know that from my history. I'm a former SAP consultant and I've worked in numerous ERP's, so finance systems. And have connected them to CRMS of all kinds. So again very familiar with multiple areas in technology I work closely with Ryan when we're talking about solution architecture and I think the main mission from my perspective is to find business process and efficiency. So I have been a business process and efficiencies. Manager before in that operational role. So again we bring that experience to the conversation. So the reason we kind of talk about this in a little bit more detail and give our BIOS as we do is we do see a lot of folks doing webinars, but not always from the perspective of the operation side. So we hope this adds value in how we're building this.

About back to Union solo.



Nsovo Shimange 3:11

Thanks so much. Next, I think we'll have a look at the agenda. So on today's agenda, we'll introduce you to the tools we'll be speaking about. That's business Central and HubSpot, and then we'll have a look at the problem landscape and the common pinpoints that you may face.

Next, we'll examine the true cost of silos in your business, and then we'll have a look at what the world a silo free world will look like and we'll show you how to tear down those walls. After that, we'll deep dive into Struter IX and look at the ROI and the efficiency that brings. And then finally, we'll close off with some questions.

At the end. So I guess next I'll hand over, I'll hand it back to Sean to take us through what business central is and what HubSpot is, yeah.



Sean Fowles 3:53

Thank you.

Perfect. So we started business central just because this is kind of from a HubSpot perspective, you know that's the common theme. And for those that know us, we're a HubSpot partner and you know we've we've been HubSpot partner for you know many, many years, but our niche really is to work with that that technical side of your landscape, not necessarily your marketing.

Leads and seo. It's more around. Where's the data flow and what comes through. So just talking about business, central business central in our experience sits as a

financial backbone in the Microsoft Stack for those that have had Microsoft products. So again you might have.

Been on a vision or something to that effect and fragmented your systems over time and retained business central at the core of that financial process. Again, it can do numerous things naturally like the accounting practise, your financial management. We are familiar with it in an inventory and supply chain capacity as well. And then again when we're talking about that inventory flow planning, that inventory or planning that stock so that you know your downstream or upstream sales processes can interact. Those are areas in which we focus. So again, it's a well known brand. We appreciate that it's well embedded in a lot of organisations, but something we'll cover off later is that it's just a piece of a stack from Microsoft perspective. So again, if we were to compare it to other solutions that we would hear, some would have SAP, some would have syspro, some would have business Central, NetSuite would be others that you might have heard.

Bit of in the past that's in that band. So again your traditional user or the user we would expect to have this conversation with is somebody in that kind of finance director or the CFO type role, a financial manager or an operations manager would know more about the ONGOINGS in the business central instance.

But what we find and what we'll get into with the HubSpot side and perhaps we can flick to the HubSpot slide to to finish this this point, the HubSpot side is kind of your whole upstream journey. So making the marketing happen, how does the sales team engage and actually close that business?

What data do they have handy to ensure that that data or that those sales can be made and then actually how do they go to that solution downstream? That's the entire side of it. You know, I think we find that business central in the feedback we've received from customers doesn't have a strong foothold there.

So again, HubSpot does so HubSpot, is that inclusive CRM, a lot of you who registered and for those that asked us to record for them, you've expressed you're using parts of HubSpot, perhaps not all of HubSpot but.

You're doing that because of another solution that you have, you know, which is perhaps representing its ability to do that. And again, we we don't, you know this, this conversation is to make sure that you understand exactly where those two things depart from each other. What HubSpot does allow is a unified view. And I think it's an absolutely enormous feature like.

We HubSpot using the single pane of glass. A lot of you will use the customer 360,

but that is the concept. Now when you talk about bridging what a finance system does and what this does, your finance system being business central won't have. Finite activity information against each step in the process, right? So again, that's an area in which we'll unpack shortly, where your CRM will do again, and you're trying to see a quick picture of your customer. HubSpot is the position for that.

Cool. So I think we can progress from there. Again, just a couple more things from my side. Just to just to round out some of the initial thinking.

The synergies in these solutions is what we look for now HubSpot.

Is a or has been established and has been voted that best of breed solution right now. Again, it's comparable to other solutions in certain senses because a lot of solutions do similar things right. So again what you'll notice on screen for some of you who have business central, you might also have dynamics floating around in your.

Say so now.

This comes back to an old process from a Microsoft perspective, and numerous vendors do the same thing is that they have a product for every part of the journey. The challenge is those products aren't always best of breed, so customers go in and they have a single vendor view where they work with that specific.

Product or product level. So like we recognise Microsoft has a good name in the industry and is well known and we all know it from in Carter Encyclopaedia. But now we look at it and go well. Did all of those products grow to the best of breed over the time that they did?

Did Microsoft, for example, invest in dynamics as a CRM to compete as best of breed with HubSpot in today's modern age? Now that happened, we know this because we've got case studies which we can share with you after and white papers to go with.

That talk about exactly how that hasn't happened, right O customers that are migrating off those solutions and blending best of breed away from single vendor. In addition to that, again you want to choose more O again, what we've seen the synergies now are missing are that the teams themselves don't have the choice of the way to work.

What we see with HubSpot and the adoption at the moment is that the teams themselves are asking the business to procure HubSpot because it's better and easier to use. Teams themselves are coming to us going. Can you speak to our COO so that we can actually get engaged and understand exactly how we get rid of our current?

CRM because it doesn't do or flow like we wanted to. This is the area in which we're focusing what we also see is that folks are complaining about cost of ownership in the solution that we talk about today. There isn't a you don't need an onsite specialist or a hyper focused.

Mega admin and the vast majority of what you'll do will be you doing it, you owning it, and you controlling it. And in the solutions that we compare to, we can confirm you know that's a complete difference. You know the number of people we meet where we have to.

Help them educate their numerous resources that manage their CRM for the transition to a CRM that they will in their individual capacities manage. It's a daily exercise. And then lastly, again, we're talking about integration. So again these integration steps and Ryan will cover off a bit of the value later in integration.

Having these things integrated and working the way that you need, as long as you can articulate that we can process that. So there are ways to do this that are nice and simple. So again, we'll cover that off in more detail. I'm happy we can crack on and this is kind of hopefully the last bit of my initial speech or the 2nd last bit.

So we have to paint a picture of pain, right? So again, a lot of you might be saying, well, look, can we get it? We've got some things working. We're quite comfortable.

But you know, having this conversation initially or the fact that you are here.

Means that you some of these things maybe resonate with you. So for today the exercise is have a little piece of paper on the side and just check off. You know if something like this resonates with you or is familiar to you. And we can have that value conversation with you after the fact to say like what, what saving is there actually for you?

Now, in this scenario, we're talking about scattered solutions. So again, one thing isn't the source of truth. Another thing has the information, and I need to go and ask for it or I'm exporting from two different places in order to centralised that view. We see it as multiple or scattered systems. OK again.

The majority of the folks we deal with will have multiple products under the same vendor and still report this problem right now. Again, I won't go into too much of the generic or the cliched points, but the second you have to enter data twice or you have to request it from two places.

Means you have to review it. The majority of the reports we get is that the data doesn't always match up, right? And that's again from a scattered system perspective. The second you do that, you actually then push the silos out, right. So

again.

Your trust in the solution and the data is immediately eroded because you have to then compare it and confirm on every occasion that what you've pulled out is correct. It's not a good place to be. So as a manager, if you're a manager attending today's session.

You can probably resonate to the fact that on one or two occasions you've had to ask somebody if something's correct. Not a good place to be. It's a simple waste of time, and it's a loss of trust, and it's a waste of your team's time as well, because what you then do is you've got to go through a practise with your downstream teams to confirm that. What?

They're doing or what they're entering, perhaps on a regular basis in multiple solutions is actually resulting in what you're seeing. So just think about that scenario, how many trust layers have you dropped there in that case, then I'll add one thing is imagine you have a new starter coming into the solution.

Doesn't know in which point they need to enter.

If they enter the wrong data, how do you bring the confidence to them to work better? Just the point I want to make there the ongoing scenario earlier I mentioned around people is also from a maintenance perspective you now have situations where data isn't correct.

You've now got to go and maintain those data points.

That's going to cost you someone, not just your time. So now you've got your time, your team's time, and then an additional person looking to try and plug those holes when they arise. None of these make for any good decision making. So again, as I'm progressing down screen with the points you now start to make less comfortable decisions, right. So again, if you can sit here confidently.

None of this applies to us. That's perfect. Your blank page is appropriate, but if you're looking at this going well, fair enough. Decisions aren't made with 100% confidence. Then we're not having the right conversation. The last thing really is just around alignment as a team. So we've talked about not having the data in the places. They should be. It's scattered across multiple solutions. The team has lost trust. The business itself might question that data, and as a result you have a general misalignment. So with that, if we had to quantify each of those areas or attribute time to each of those areas.

And put the risks down on them. You know, we could start to understand percentages with you of this. You know, we've got some customers and again we'll

share the case studies and we'll share the White Paper with you and. And I'm sure Ryan will go into more detail but.

Some folks save thousands of dollars a month. Some folks save 10s of thousands of dollars a month just in that capacity. Not having to go and reconcile that information on a regular basis. And I think that's that's what we want to do with you is understand. Are there figures like that drifting around?

Because that's the problem cost. So again we see that as opportunity cost once that's in place, we see that number and then we look at what is your optimization from there. Once we've got a trusted solution working and well connected with data that's trusted by the team with alignment.

Where's your scaling and accelerating from there? And I think just please keep in mind that those are the metrics that we'll work with. So I'll stop there and I'll move along. Ryan, you came off mute. Did you want to add something?



Ryan Waters 15:47

Sean, I think you're just nailing it really. At the end of the day, lots of pain points, lots of challenges. I'm going to be getting into how we can lighten the mood a little bit when we get to my slides, but I think you're really cracking down on the pain that you know, a lot of these businesses are going through. Perhaps yours is having some of the same issues.



Sean Fowles 16:06

100% I think just while we while I wrap up this this journey down down the slope again I think on screen we deal with islands and I think a lot of folks always talk about these like silos, silos and islands. For me Island is a better way to put it because.

The reality is, under the surface everything is connected right? So again, as a team, you're all part of the same organisation. You just can't see it. You know there's a body of water between you and the next person, and that's what we're trying to resolve is to say we trust that we're part of the same setup, right? There's a lot of business that needs to happen in between.

But this this is this. This process effectively now again I'm going to say it, there are loads of cliches in these conversations. So every marketing mail that you get will tell you about data silos and it will tell you about operational inefficiency. The reality of the matter is that these are the metrics that we use to confirm the value right again.

The biggest problem that folks face is that you do get the headache. I appreciate it. You get the headache that you need to solve the problem and therefore it's a bigger issue. So again, I don't just want to get involved and clean it up because I have to dedicate time to it. We have to dedicate budget to it.

You know, we have to train and teach the team and you know I'm going to get that one person who doesn't want to take it on board. They're an Ireland. So our focus and again, Ryan will uplift this conversation. It will be to establish how do we bridge that gap with you, right.

Again, that single version of truth, it's not far away from the process. It's just it needs to be explored and confirmed. That's effectively our goal. I think the last thing I'll add is from an operational perspective, it might not be 1 user holding the answer. So again just for.

Day and the conversation as we perk up a touch, we want to understand from your perspective who would be asking for this. Right. So again, if you're a manager user in the conversation, please think from that perspective. Make your notes. But if you're not and you are representative of your actual downstream or upstream users.

You have to note for them what where they might sit in that in in, in those in those islands, as we've portrayed it. So cool. That's from me. I think the main pain again, I would like to just point out before Ryan jumps in.

There are plenty of cliches, right? Again they they, everybody says they can solve. We appreciate that's the case. The reason for asking the question is absolutely appropriate. But you know, the actual flow to the solution we have to make sure we do it correctly and we'd love to support on that basis.

So Ryan, what would it look like on a nicer side of this conversation?



Ryan Waters 18:51

Thanks, Sean. So at the end of the day, you know, we all know there's a lot of pain that goes with this type of issue. Really. There's so many of them that Sean's really gone into detail of unpacking. I want to take you forward.

And and help you vision what life might look like a little bit in a silo free world, because at the end of the day, we want to really establish a single source of truth for your entire ecosystem so that you know that your information that you have in the system is accurate and reliable.

And the benefits for your sales and marketing team, really it's a it's a game changer from that perspective. Imagine your sales team actually or your your marketing team

actually knowing the exact products and sales invoices that have been purchased from a client perspective or coming into HubSpot giving them.

Complete visibility on the order fulfilment side of things personalising the marketing campaigns and the likes of that, and equally from the you know your procurement or your order fulfilment side of the business and knowing you know exactly what sort of engagements have happened.

In order to get a sale through the door, so giving you complete transparency from both sides of the fence really is is that what we'd be thinking about? A good example here would be the ability to run a workflow in the HubSpot perhaps six months after a purchases happened where you can have a maybe a cross.

Or an upsell opportunity to promote other products that might be relevant based on behavioural triggers. Knowing exactly what was sold and the details of the products that were sold in HubSpot could enable that level of personalization. So lots really from it from that perspective.

Now for all of you that sit in the engine room on the call, the people in the OPS and the finance team imagine your workflows to be completely automated so that you know your fulfilment is really on track. You know, you've got trust in the data, there's no repeat manual data entries which let's face.

It can cause a world of inaccuracies you can rely on trusted information that comes through from that side of the fence and then the other side looking at leadership, you know, imagine being completely confident in the data that you have coming from multiple systems here. You know, it's not just your marketing and.

Your sales activities, but it's also you know the actual revenue that's been generated from the products that you're selling the inventory, the likes of that. So you can blend both both sides of the fence together helping you make more accurate informed decisions.

And I think at the end of the day, the ultimate winner here is the actually the customer. And you know what we want to do is we want to remove as much friction between the handoff between various departments so that the customer feels much more informed. They're getting a stronger experience. And also when.

Communicating with anyone from the business, we're all speaking from the same hymn sheet. Should have that 360° view. You know, when dealing with a customer so that that relationship that we build is strong and and solid. But yeah, back over to you, Sean.



Sean Fowles 22:17

Yes, I think look, the reality is that we've got to tear down some walls as we adequately state on screen. I think the the area is trust. So from your team's perspective, you need to be open to collaborating. You'll collaborate with the likes of our team.

You'll collaborate with each other, so again, I'm using an example of and I'll take Ryan's example of, you know, finance and marketing, marketing being appreciative of the fact that finance needs certain information. And similarly finance noting that they can ask for certain things from marketing, knowing that they'll come. You know, we talk about things like attribution and understanding those.

Relationships. That's what we focus on one of the areas that we see this in is that you might have bottlenecks in reporting. So again, data not being present for the users, you can't report on that information. It takes time. And again to the earlier point, there's no trust, right?

This process we need to effectively create the road map for you of what what needs to be seen where and by who in order for it to be trusted. Once we do that from a technology perspective, the bottlenecks themselves, they they cease to exist.

Right, simply because the rules are made and the rules get followed and we can then pump the the volume based as you based on new scaling. So again a lot of this might be familiar to you, but you're just not achieving it at present it's it's it's hopes and dreams but not not realities. The last point here really is that.

How we integrate is a very important piece, so again there are native integrations. So some of you would have gone to marketplaces and clicked on connectors. They're extremely light. The other challenge is they also have one way flows. We're not looking at that. We're looking at how we go into a more detailed approach, what are the rules that you need.

That data can we get across and is it bidirectional? So your conversation with us will be related to what's needed on your side. We have plenty of conversations where it's a simple solution required. So we're not going to try and bake a very fancy thing if we don't need to. So again, just back to the first point.

We want to collaborate, so again, it's the culture of collaboration, us and you in getting that blueprint correct.

Back to you guys.



Ryan Waters 24:29

Great. Thanks, Sean. I'll take this one. So next, you know we've we've obviously gone into the pain. We've gone into the future vision, but now we want to figure out a little bit more about the how and that's comes from a strategic direction service that we would offering where we can help you bridge the gap.

And what do we do here? First of all, you know, before even understanding the approach of, you know, what method we're going to use to do an integration, we're going to look at doing a service where we're going to run deep discoveries to really understand the business, the requirements get all the technical stuff.

Together. So it's about object mapping from side to side. You know we think about contacts in HubSpot becoming customers in business central. We think about things like deals becoming sales orders. We need to map out the journey and define the different data points.

Once we know what we're integrating, we got to start thinking about the when you know, when do we send data between two systems? So with that we need to define the clear data sync policies so that we know what are the triggers as to when and when we shouldn't be moving information between the systems.

And on top of that, obviously, security is critical. We need to ensure that you have consistent authentication protocols that provide enhanced security methods. Last thing we need is for data to get leaked or anything like that. So ensuring that your data is fully secure through an integration method.

That is critical and think of that as another scenario. You know when before doing an integration like this, you might find teams importing and exporting data that could lead to all sorts of levels of risk and issues that come up from that perspective. So we want to ensure that your data is maintained in a secure manner.

And Sean touched on this a little bit in the last call, but there are different methods we could take as to doing an integration. So first of all, we need to understand there is a native connector in the marketplace that does handle dynamics and HubSpot integration, sorry, the business central and.

Dynamics integration, but at the same time, sometimes that's not always fit for purpose. Sometimes you need a little bit more than a plug and play sort of installation. You might need more stronger sync policies as an example, or you might not be able to connect various.



Sean Fowles 26:50

Right.



Ryan Waters 27:02

Data points to other sides on the fence there, so we'd go through that exercise to help you evaluate if the native connector can fit. If not, we would probably introduce maybe a more custom integration. So that leads me on to the next slide if we can maybe switch into that.

So at Juto, we've been working really hard at developing a bespoke middleware scenario that we like to think of as your central nervous system for your data. So not only are we thinking about a tool that can obviously scale with your business.

We think of a purpose built middleware that can really connect everything in your ecosystem as long as it has an API. So it acts as a place where you can easily configure and scale your different data points in your business to ensure that the data flow is accurate.

And real time at the right sort of moment. And we think of it as more than just the connector. I think of it from an electrician perspective, a connector you'd think about connecting two wires together because you want data to flow between those two or through a circuit, if you will, when we think.

About a unified data fabric, we're more thinking about like a full nervous system of a body where you want information to move at the right time and the right way. The right level of information to be passed across so that when you're sitting on both sides of the fence, you're getting the right information at the right time that.

That's relevant to you in your role working within the business. So all of that needs to be evident and can be quite a critical component in any of these projects. And what does it do? It helps you address some very specific pain points.

The obvious thing here is we're going to automate the record updates. No more manual data entry, no more errors in manual data entry. All the likes of that, that that can bring. We want to allow you to have real time bidirectional sync. So with some of the native connectors it might just.

Be A1.

Way sync and sometimes that's fine. Sometimes you only want to send information from 1 system to the other. But what we're able to do is in times where we need it, we can have bidirectional syncs in place so that we can obviously make sure the right

information is in the right place. The next level of complexity that can come out of that.

Is understanding what the source of truth is for that exercise, right? So you know, when we think about business central, we think about that the source of truth for your financial information being on that side of the fence. So when we build sync policies, we're ensuring that it's always.

Respecting what's in the one system over the other, and equally because HubSpot becomes your communication customer reference tool, we want to ensure that it treats that as the master of the data, sending the information through into business central so we can clearly define.

Which side of the fence it should trust at various given times? And with that, it enables you to build your customizable workflows, again thinking about the triggers when should I send things between different systems? How should information flow through the business itself? And last but not least.

We are thinking about scalability.

Which due to IX we want to be ensuring that you can continue your journey to connect for to have a fully connected ecosystem. So should you need to go and plug and play other systems into the mix to ensure that system and your data is flowing throughout your whole organisation we can.

To ensure that you have flexible architecture at your fingertips to ensure that you can build upon an ecosystem that is in the real world, always scaling at any point so crucial that we kind of cover off all of those elements really.

And that next slide, if you don't mind, we're going to unpack a little bit about the benefits that that brings to your business and it's almost the outcomes that we're looking to generate here at hubs at struto. Outcomes are the most important part of this whole exercise at the end of the day, you know from a non.

Technical perspective moving information around is one thing, but we do it to achieve very specific things, first of which is a unified customer view. We want to ensure that your marketing teams and your finance teams.

Don't have their own silo views. They have a dedicated view that's relevant to them, surfacing the right information, ensuring that the customer is always put at the heart of every decision that's being made. We're gonna help you improve your data accuracy, ensuring that you always have the right up to date.

Clinical information really at your fingertips throughout every exercise. We're also going to enhance your sales efficiency because there is no more delays in between

selling a product and finance or fulfilment going out and distributing a product. We want to ensure that things happen.

In real time, automatically and speeding up the actual efficiencies with selling all of your products and services that you might have and equally we want to streamline your processes with that because at the end of the day, taking as much friction out of the business as possible is only going to leave.

To better customer experiences and bigger revenue uptake is what we typically see with these types of projects. And last but not least, we want to ensure that you and really the output of all of the stuff coming together. We want to ensure that you have the right data to make really informed.



Sean Fowles 32:57

Yeah.



Ryan Waters 33:08

Business decisions based on the insights that your data is giving you, you should be able to see, you know, clearly, be able to see when to scale, you know, might be your products. It might be your services, it might be your staff, but at the end of the day, we want to ensure that you have all the information at your fingertips coming in through various systems.

So that you can really be informed and be on the on the on the trigger with that. But yeah, I think that's it for this slide if we can maybe jump on to the next. And Sean, if you wouldn't mind maybe unpacking some of the use cases that would be great.



Sean Fowles 33:43

With pleasure. So I think the, the, the big thing here is that you're all going to have use cases. So I think we can only articulate a few of them. Again, I asked for the the pen and paper exercise in parallel. If you have any that you don't see, please don't feel like you know we can only cover this.

It's extensive, you know, and I think to what Ryan said before, if we take a blueprint and we talk about our capacity and capability, you will continue to find areas to fine tune and improve over the course of our relationship. And I think that's that's exactly the point, right. So in that nervous system concept.

The use cases that you see on screen they're there and again we will distribute this. So I won't read it. You know line by line, but the main point is if we're talking about

who wants to see what way that's the big piece, right? So I want to see information as the CFO in this scenario around you know, what is the marketing.

Spend in the success of a campaign and what is the budget that I need to attribute or provision for the next campaign? Marketing team doesn't have any problem sharing that because it's front and centre and there's no fancy reports that need to be built. In some cases you have a use case where the team doesn't even need to present that data. It's available.

And visible in dashboards that get automated in real time. This is the unified view that we try to position for you and I think this all enhances your ability to deliver faster. So what we mean by that is if we're talking about generating interest, closing a sale, getting that sale fulfilled.

And then getting paid for it. That cycle speeds up significantly. So again, what we have here is and again this is a HubSpot concept. The flywheel adds the component of the data that comes from your business central and your finance solution.

And is fed back to it into that revos flywheel. So again, I've said at the beginning of the call, my role at struto's, you know, I head up revos, we prefer we we we share revos concepts with numerous customers and this is just one of those elements in the flywheel.

I think the biggest thing for us really.

What all this actually enables in the customer experience is the ability. And as these use cases state to create additional platforms for your customers. So what we didn't touch on today are use cases where you start to give your customers self-service.

We're just talking about streamlining your team and your team's trust.

But if we box off all of these little elements, we can start to look at a self-service world creating portals, providing your customer a direct view themselves. You have the same view on the back end that they have in the front end O many different scenarios of improvement.

And ultimately scalability, because in a scenario where you have self-service off the back of an efficient internal machine, you're just expanding your capabilities. So I think from our perspective, I only want to touch on these really at a high level again. If any of them resonate with you, you can immediately stick them on your homework sheet again. If there's things you'd want to achieve here, and you can see them being valuable, please, it's it's immediately a sign that that's that's an area. If you have them and they are running, but they need to be enhanced.

The same conversation applies. So again, if you currently get your product synced

but you can't see a certain value, or it's the intervals are too wide, another good reason to be talking to us, but cool, I think from that side I'd be happy we move on. Just going to give it a moment, Ryan, just take us through the just a basic flow. I think it just gives the folks here just a sense of of what happens.



Ryan Waters 37:14

Yeah.

I'll try to keep this light on here, save a bit of time for the Q&A at the end here, but just think about some very basic scenarios on the left hand side. This is part of what we would do in the strategic side of things, but we would want to map out some data flows really and what we're looking at example #1 is.

In HubSpot, you're going to your sales and marketing team are generating new contacts with that, we're automating the creation of a company record and it gets to a point where and you might decide that there's a specific life cycle stage or specific segment of your contacts and companies that need to sync to.

Business Central, but we've used Juto IX to put those sync rules together and the output of that would be to go and create the contact and company and business central. So we want to ensure that those two elements are happening, triggering the right amount of companies and people through to the other system itself. And then maybe another example.

Of this would be if we think about products in your HubSpot product library and wanting to sync some of that through maybe from your inventory on the business central side. The important part there is when you create a deal in HubSpot and you're using, you want to actually put the exact products that.

You're quoting on inside the deal. You can pick from real world exact inventory on the other system. We might be able to bake in some inventory levels as well. On top of that, if that's what you need. So making sure that when adding a product, it is actually in stock and the likes of that.

And equally, when that then syncs through to the business central side of things, obviously we want to go and create an opportunity on that and perhaps a sales order could be generated off the back of that and equally reducing stock levels because we've committed this to a very specific deal itself. So I'll leave it there, keep it quite simple.

But just wanted to give a quick taste of, you know, what's possible from that perspective. But the world is literally a oyster on that one.



Sean Fowles 39:24

No pressure. Cool. And then yeah, I think really just to round us out today, again, I think we talk about that engine, you know the growth engine in your world or the flywheel, whichever whichever resonates best with you.



Ryan Waters 39:26

Fat.

Yeah.



Sean Fowles 39:39

The goal is really just to try and help you with that initial ROI. So again, if you need to talk about a business case internally or you're trying to make the decision or you, you know, setting this out for a must do often, it's like, well, what do we get back out of it? And I think at at the header level.

As I said before, we're talking about what we save and the trust we build. That's your first calculation. So again, by doing that, you'll get to a point where your traditional processes reach a better point, right? So that could be something. And again, we refer to NPS. In this case, you do an NPS, now you go and get that process right. And you do the NPS again, you'll see the initial uptick, that's step one. You can do that internally and externally for this process, right? So again, it'll be a case of what does my team think of the current run we go and make the change and what does my team think after, you know, we're quite confident that you'll get a good result there.

In addition to that, we then see once your foundation is solid and we've got that blueprint implemented and your solutions are now speaking without the bottlenecks, we then talk about growth. So again, what can we do more, how can we improve the customer experience further? Are there areas in which they can self-serve again in a world of AI?

How can we use this new found data that we've brought in with the right intervals that we want to enrich processes and content and outreach all the opportunities exist there? And then lastly, I think the big thing is data quality is critical. So just to round this out, I took you down the road of pain earlier.

And it's based on trust. Whenever you've got integration and a flow of data that you don't trust, you have a problem. Our mission with you will be to set that goal of

getting trust. And when we achieve that point, you can then have an organisational level of trust which is critical.

And that means opportunity to grow simple as and I'll keep that as brief as that was. So let's take us to the next and I believe we'll get quite close to QA, if not right on it. So go for it in silvo. Do you have anything in the chest?



Nsovo Shimange 41:39

Yeah, I think we're right there. Thank you so much since. Yeah, I think if anyone has any questions, there's AQ and a tab up at the top. You could just click that and then ask some questions. And then I think just typical questions that we do, we get when we interact with our clients and I think.



Sean Fowles 41:41

Yeah.



Nsovo Shimange 41:57

Would be informative to everyone that's on this call. So the question would be, how long does a typical integration take to implement any of you? Can guys want to take that question?



Sean Fowles 42:11

I'm happy to jump that one. So we we sleep a cycle based on what we want to move the timeline is variable, right? Again, it's not an endless timeline. So we've had some integrations that have run as short as three weeks simply because the data flows are very simple.



Nsovo Shimange 42:12

At.



Sean Fowles 42:27

And the requirements are maybe in single direction, others have taken kind of around your six to eight week Mark and that's simply because there's a lot more iteration. So again if it's complex data points that need to move and we need to confirm that they're across and that their business rules being changed in either side of the solution, you'll need a bit more time in order to.

To affect those. So again, I use the term variable not to open the timeline indefinitely, but again, some folks believe that it's plug and play. We don't like to set the incorrect expectation because we are often solving more complex problems than are visible on the surface. So we try and help you with a little bit of time.

But yeah, this is not a year long exercise or two year exercise. We'd like to, you know, confirm that.

Back to you in Sobo.



Nsovo Shimange 43:13

Thanks so much. Thank you. Just something else. What kind of training would be required or is there any sort of onboarding that would be needed? Should we? For example, my company went to go ahead and get through to IX.



Sean Fowles 43:31

Jeffrey Ryan, do you want to jump in?



Ryan Waters 43:33

And.

Sorry, I actually drew a blank double to the other question.



Sean Fowles 43:38

No worries. So it's all good. So I'll jump straight in. So from a training perspective, the so the beauty of this is that we work with your team and we give you visibility through the process. So from a HubSpot side, the the blueprinting process is team engaged. So it's not like we come and say this is what you get and good luck to you. It's running without new knowledge.

It will be, you know, we want this data to go here, this data to go here and that gets documented and is shown to your team as part of our handover. So again, once we've created the integrations, we've created the flows you know that data flow is presented back to the team.

Onboarding itself again, onboarding of the technology is not as stressful. The onboarding process is really just around how does the solution change and where do I look to get what I want? That part is very easy and very simple to do. And what we really try and do is empower you to own that. We appreciate.

You'll have new starters or you'll have different parts of the business that want to

know. And if you're able to dedicate somebody in the team to be just a champion, not a full admin, not a full CRM owner but just a champion for that data flow, we can certainly enable them with the greatest of ease.

What's our last question? So I think we you mentioned we have a few, sorry Ryan, do you want to add something?



Ryan Waters 44:52

Yeah, I think there's one there from Sebastian that that's what caught me up by surprise. There. I was looking at Sebastian's question, and I did the end. So almost question like that, Sebastian's asking about what's our experience or knowledge about integrating dynamics and business central. So I think that's a great question. And what are the benefits of a single?



Nsovo Shimange 45:02

Uh.



Ryan Waters 45:11

Vendor in this case I'm wondering, Sean, if you wouldn't mind handling that one as well. That's a great question.



Sean Fowles 45:17

No problem. So again, we've we as a as a HubSpot partner, we've integrated HubSpot and dynamics quite regularly just for, for companies who've had dynamics for some time and have a heavy dynamics footprint that they can't easily extract. So what you'd have in that scenario more often is.

Marketing teams will use HubSpot because of its strength. HubSpot gives a picture to marketing and sales organically, so you don't have to create those two different pieces. But then at a certain point a sale or a lead would move to the CRM right to your dynamics instance.

Dynamics in business central there are back doors between them, but again, those are dynamics consultants that are required to do that. And that's actually one of the areas that our case study which we share with you will highlight in the cost differences that they are. So again, some of our customers have saved, you know, north of 50,000.

Not having those bespoke integration expenses and using the tools that we've

referenced today. So again, great question, Sebastian. We've got plenty of experience advising on it, but I will say this, you know I'd say more than, I'd say 7 out of 10 in terms of the conversation or at least 70%.

Have shaken the dynamics CRM from their stack after us working with them and understanding what HubSpot capabilities are so very low attention we do find in Group organisations where dynamics is mandated, perhaps from a different part of the entity, you know, or where there's a large instance and there's a smaller instance of dynamics.

We just talk to the group around whether or not that instance is functioning or needed, so it's not like you need to extract dynamics in totality. But if your business or your division doesn't need the dynamics instance and you would function better in HubSpot, we can help you make that business case for the greatest of ease.

So we hope that covers the position and, Sebastian, you're welcome to to ping us if you have any more questions, absolutely.

Cool. What else do I have anything else?



Nsovo Shimange 47:16

All right. Thank you so much, guys. Yeah, I think that's it for today. And then I'd just like to thank everyone for joining us today and then you're welcome to book a call with us. And if we want to discuss anything further.



Sean Fowles 47:30

Brother.



Nsovo Shimange 47:30

We will be in touch. We did talk about a white paper, so we'll send that to you and we'll send through the recording and great to have one everyone here and we'll see you on the next one. Thank you.



Sean Fowles 47:42

Thank you for joining cheers folks.



Ryan Waters 47:43

Perfect. Thanks everyone.

□ stopped transcription