

Struto_Intro to Integrations Webinar_5 Dec 2024

0:05

All right.

0:06

Well, welcome everyone.

0:08

Before we dive into the good bits and the content, be prepared for you.

0:12

Just a couple of housekeeping rules.

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First off, all of the attendees who are joining or of course, muted and cameras are automatically turned off.

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You won't be able to turn those on, but please feel free to use the chat and the Q&A feature on the webinar itself.

0:31

Please Add all of the questions that you'd like us to answer on the webinar in the Q&A section, but feel free to use the chat to chat amongst yourselves or to give us any feedback.

0:44

This for a webinar is being recorded.

0:47

You will be able to access it access it on the Struto universe shortly after the session.

0:54

We will e-mail you a link to the recording as well so that you can access it at any time.

1:02

After the survey, we are going to share it.

1:05

After the webinar, we are going to share a survey with you as well.

1:09

Please fill that in and submit it.

1:12

Your feedback is incredibly valuable to us and we're definitely hoping to improve upon this experience and deliver a lot more webinar content in future.

1:23

And then lastly, by joining this webinar, you are automatically being opted in for our marketing communications.

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So you will receive updates about our latest products, future events, and any updates that we are making.

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You can, of course, as always, unsubscribe at any time.

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Let's get started.

1:49

So First off, who are we?

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So we at Struto have been an elite HubSpot partner for several years now and and HubSpot partner for probably 13 years now.

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I believe we have got a global footprint.

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Our team is based in South Africa and in the UK, but we work with clients internationally.

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So we have clients from the states, Europe and Middle East all the way through to Asia and Australia.

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We hold every accreditation that HubSpot office and we're very proud of the work that has, you know, given us the opportunity to apply and then those accreditations.

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We are a technical HubSpot solutions partner focused specifically on integrating your systems with HubSpot and designing websites and apps on the HubSpot CMS.

2:57

I am Estee Hall, I head up the services at Struto and I am a HubSpot Certified Trainer.

3:06

I recently published a course on the HubSpot Academy called Scaling Sales, Marketing and Service Hubs with Integrations.

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Does it tie in very nicely with the webinar on the content that we're going through today.

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So please check it out and it'll give you a slightly broader understanding than just this webinar can cover.

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Joining me today is Paul and Mark.

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Paul, would you like to introduce yourself?

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Yes, thank you, St.

3:37

Hi, guys.

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My name is Paul Sweet.

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I head up the product management team at Struto, so responsible for all of our products that Struto produce and taking those products to market.

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I work very, very closely with Paul

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and Mark where we take customer requirements, market challenges and we create products that that help meet those challenges.

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So I'm looking forward to showing you a little bit about what we do.

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Fantastic.

4:05

Mark.

4:06

Hi.

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I'm Mark, Product Owner for Street IX team and I live and breathe integrations and I'm looking forward to showing everyone what we're building in that space today.

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Thanks.

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Fantastic.

4:22

Thank you.

4:23

And we're also joined by Tamryn, and Nsovo who are just supporting us.

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They'll be answering any of your questions in the Q&A if they can, all flagging it to us so that we can answer it in the Q&A section at the end.

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And of course, what we're covering today is an introduction to integrations.

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We'll be covering some basics and then showing you a demo of the Struto IX that we have built.

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By the end of this webinar, you'll understand the different types of HubSpot integrations.

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You'll learn about the benefits of integrating any of the HubSpot hubs, sales, marketing and service, either all of them or individually with other systems.

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You'll also view a practical demonstration of integration setups, hear real world success stories and use cases, and gain best practices for successful integrations.

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As mentioned earlier, there will also be AQ and a session towards the end.

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Hopefully, we'll have enough time to cover all of your questions now.

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First off, let's start with why integrations matter.

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83% of IT leaders cited integration challenges as barriers to digital transformation last year into creating an integration between the different systems that you use creates seamless communication between those business tools and your data, and it enhances efficiency.

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So centralizing your data management leads to automation opportunities, the possibility to personalized your communications and experiences, and it enhances your operations efficiency, but also the scalability.

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If your team isn't stuck doing manual work for every single customer or every single account, they can spend more time on the the engagements and the experiences that actually matter and they can do more of it because they spend less time doing manual work.

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Paul, anything to add there?

6:43

No, no, I think you've covered it all.

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Yeah, integrations allow you also to reinvent processes that you currently sit with.

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So by having systems connected, it opens up the door to different types of processes that are more leaning towards more automated processes.

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Definitely.

7:04

Now we at Struto often refer to the love stack concept.

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A love stack is a harmonized and strategically integrated tech stack.

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Now the keyword there is of course strategically integrated because just integrating for the sake of integrating is definitely not going to give you a love stack.

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The opposite of a love stack is a Frankenstack and where you have mismatched tools and potentially some tools doing the same thing but for different departments or teams.

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But unlike a frankenstack, a love stack ensures smooth data flow and operational efficiency.

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So you really gain a lot of the benefits and efficiency from having your data flowing smoothly between systems.

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A love stack is really a well integrated but also cohesive tech stack.

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So again, just integrating for the sake of integrating is not going to get you a love stack.

8:04

What you're looking for here is where it makes sense to actually integrate that data and what purpose is that data going to serve in the other system?

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They really work best when they evolve organically based on the need that you have and building an integration, syncing the data across for a specific purpose.

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You do want to use the right solutions, of course, the the right software systems and integrate those rather than being forced to adapt a system that isn't fit for purpose.

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Now if you're integrating HubSpot with other systems, there are four primary types of integrations.

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The four types are HubSpot built native integrations, third party applications, integration platforms as a service, and custom integrations.

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HubSpot built native integrations is going to be your go to for straightforward and non complicated integrations.

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So these are are integrations that have been built by HubSpot and you can find them on the app marketplace.

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They are quick and easy to use.

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They all use the same user experience and if you've done one, you'll be able to do all of them or use all of them.

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They're very easy to use and of course HubSpot built them.

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So HubSpot supports them and maintains them.

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So you are able to reach out to the HubSpot support team if you having an issue with the HubSpot built integration.

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But it does offer limited customization opportunities.

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So whilst if you have OPS Starter, you would be able to customize the properties that sync between the two systems, and you can include custom properties, you aren't able to customize the objects that sync.

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What object syncs are available on the app Marketplace is what you can use.

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Of course you also can't customize what object syncs to what object.

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So if you for some reason wanted to sync your HubSpot contacts with Opportunities in Salesforce, you're not able to change the object to object bearing.

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You're also of course not able to do complex and specific bespoke processes or transformations within the native integrations your third party applications, most of them are also available in HubSpot App Marketplace, but unlike the native integrations, they're not built by HubSpot themselves.

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They are built by third parties, whether that be the system that you're integrating with building those or a completely third party.

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All of them have been reviewed and approved perhaps.

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But if they are available on the app Marketplace, definitely the first place to go.

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And if you don't find an application or solution there, then going on to the system that you want to integrate Hotspot with similar app Marketplace would be a good backup option to try.

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Now these of course extend the applications over and above what HubSpot has built.

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So it does give you a greater variety and a greater number of tools that you can integrate with.

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But you can sometimes face some compatibility issues.

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And instead of being able to contact HubSpot support, those would be supported by whoever actually developed them and built them.

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Here again, you're faced with the same challenges you have with the HubSpot Bolt integration, being that you can potentially customize the properties that sync between the two systems, but you wouldn't be able to customize objects or transformation logic or complex workflows.

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Your next option is going to be Integration Platform as a service.

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So this would be tools like Zapier and Workato which can connect multiple systems, not just two.

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So these are systems where you can connect all of your systems and then you set up a specific rule that that triggers based on an action being performed and then syncs data where you want it to sync depending on what your use case is.

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This is best if you're automating workflows between multiple systems.

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So for example, if a deal gets moved to closed one in HubSpot, you want to sync the data to Salesforce and then you want to sync the data to 0 and create an invoice.

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This is scalable because it does give you the option to very easily add another system, but you may require technical expertise because it's not the easiest solutions to maintain to set up.

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And it also requires because it's based on triggers and an action happening to then sync the data.

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You would need to set up a ZAP or a pipeline for each and every action that can happen.

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That should trigger a sync across.

14:01

Your last option is going to be custom integrations.

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So this is a custom built middleware and uses hubspots.

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AP is and the other system that you're integrating with AP is.

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This of course requires that the system you're integrating with has available AP is to connect to and this whilst it is a bigger project to take on, it really gives you the highest level of customization because you are building a custom integration or working with a partner to build a custom integration.

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It gives you the flexibility to sync whatever you want to sync between the two systems, but it also gives you the option of doing data transformations between the two systems.

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It does require ongoing maintenance and technical expertise, and if you don't have that technical expertise in US, definitely partner with someone who does have that technical expertise to support you.

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Now if you're looking to integrate HubSpot with another system, the first step is of course going to be to choose the correct integration and integration type.

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Now if you are looking for a basic connector that just does a very simple job and there is a HubSpot built solution on the App Marketplace, that is going to be your first point of call.

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If there isn't a HubSpot built one, but there is a third party app available.

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And again, you're not looking for complex integrations, you're looking for very basic sync these 5 fields to the system, then third party apps on the HubSpot App Marketplace, it's going to be your second point of call.

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If it's not available on the app marketplace, again, try the marketplace or the, I know all of them call it

something else, but essentially the the same place on the system that you're trying to integrate with and look for an integration there with HubSpot.

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If that doesn't work, I would recommend checking out your integration platform as a service options.

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This is going to be best if you do have multiple systems, complex workflows, but it needs to sync on a very specific trigger and you don't have too many triggers or you don't want to continue a sync between the two.

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And then lastly, if none of those options are available, then you would consider custom integrations or if you're looking for more flexibility than any of the pre built options or the integration platform as a service can offer you.

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Now a couple of key benefits of integrations, the first of which being the seamless data flow between platforms that you've connected.

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This results in reduced manual tasks because you get the opportunity to create automation that you potentially didn't have if the data was syncing between these systems.

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You also reduce the number of manual tasks because the data is syncing and your team don't have to either manually transfer it onto the other system or export it and perform various pivot tables and queries and things within Excel.

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Because of that as well, it does give you an enhanced collaboration between your teams.

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Think about it this way, if your sales team are working in ACRM system, your marketing team are working in HubSpot and the data aren't isn't talking to each other, they're never going to be aligned.

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Marketing is going to keep sending sales leads that sales does not consider qualified and sales are going to keep throwing away the leads that marketing does generate for them.

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If you're in the same system, if you've got access to the same data within your system, it definitely enhances that collaboration, but also brings alignment across your different teams.

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And then lastly, and probably the most important, but it does give you an opportunity to personalize your customer experiences, whether that be through automation and being able to send

communication, you know, at the right time or with the right content and and context in it, or whether that be on your actual 1 to one personal communications with a customer where you're able to go.

18:56

Oh, yes, I can see you logged the support request about this.

19:00

Let me show you how that works.

19:03

Either way, the customer experience is definitely going to be improved and it's definitely something that would affect your retention rates and your upsells cross sells, but also referrals.

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Now, if you're looking to integrate marketing hubs specifically, what you would be able to do is to automate marketing campaigns further or more deeply than you would be able to if your marketing hub hasn't been integrated with your other data and your other systems.

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You're also able to integrate Marketing Hub with systems like Google Analytics, Hot Jar, or any other reporting suites that your company uses and that can allow you to gain deeper insights into your customers, into your prospects, and into your whole database.

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You would also be able to personalize your website content and offers.

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If you're using visited tracking tools or if you're using the HubSpot website pages and you've now got useful information from other areas in your business, you'll be able to use that data to personalize the content that is displayed to your customers and visitors.

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You're also able to integrate social media and AD tools to simplify both social media management and AD management, but also report on everything in one central place.

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We recently created a integration with Marketing Hub for a customer of ours.

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They're AUK based delivery management company and they specialized in mailing fulfillment, contact centres and international delivery.

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When they came to us, they were manually entering data across systems and that resulted of course in a lot of time being spent on transferring data, but also errors crept in as they do when we humans add data.

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We built a custom integration that synced Dynamics with HubSpot.

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So this resulted in the marketing data and leads being synced to the Dynamics CRM, which the sales team were using immediately.

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And it increased productivity across both the marketing and sales teams.

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They were able to build a number of automated workflows as well that increased the OR improved the follow up time, the relevance of their communications to customers and overall it's improved their customer experience.

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Now Sales Hub specifically, if you're looking to integrate Sales Hub with other systems, some of the benefits you'll see is automated lead capture and qualification.

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Those leads can come straight into Sales Hub.

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You could set up qualification rules and then route them to the correct person to handle that specific lead.

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Because of that, your sales workflows would be streamlined and you would be able to automate things that the sales team hates doing, making their lives easier and enabling them to spend more time selling.

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Integrating Sales Hub with reporting tools that your business uses would also enable you to gain your sales performance insights where you needed to in real time.

23:04

And we generally see an improved collaboration not just between salespeople, but between sales and other areas of the business like the finance team or the operations team because of integration with Sales Hub.

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Because it makes life so much easier.

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No chance of something falling through the cracks and everyone just loves each other more.

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We recently integrated sales Hub for a customer of ours.

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They are AUSA based company that specializes in golf technology products.

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Their sales and marketing team were using HubSpot and then they were using NetSuite as an ERP system.

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When they first came to us, they were having challenges in synchronizing the data between the two systems and they did not have.

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They couldn't trust their data because HubSpot was saying one thing, NetSuite was saying something else.

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So they were really struggling to understand what is actually true and managing their customer information across both of these platforms.

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So again, we bought them a custom integration that syncs data between HubSpot and NetSuite.

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Now essentially how the integration works is that they still doing all of their marketing and sales within HubSpot and then as soon as a deal was closed, one that sinks through to NetSuite to create the order and the invoicing and everything that needs to happen after a deal's closed one, did this improve their efficiency?

24:46

They eliminated those data silos because they were able to.

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If something gets updated in one system, it gets updated in the other as well.

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There's not a mismatch in data, and everyone is on the same page and can see exactly the same thing.

25:03

This allowed them to, of course, set up workflows that sent automated communications, automated invoicing, automated notifications about delivery, and it really enriched their customer relationships, made their customer relationship management a lot easier and laid the foundations for their future digital growth.

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And then service hub.

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So if you're looking to integrate your service hub with other systems, it can give you streamlined customer support tools.

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So if you have got multiple channels, not just e-mail and forms, and you want to integrate those to come into service hub into your ticketing and your help desk.

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You know, having everything in one place instead of your team having to go to multiple different sources to get the support requests coming through is definitely going to be a lot easier for the whole team.

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You would also can enhance customer feedback loops.

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So if you wanted to integrate service hub with a survey tool or use the native survey tool, but integrate that with another system that your sales and marketing teams are using.

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Having that data shared between all of the departments is essential if everyone is to remain focused on your customer happiness and your customer satisfaction.

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And then again, you would be able to automate a lot of the manual tasks that your services team are doing and be able to lighten their load so that again, they can focus on the more important more custom engagements and interactions that are valuable to your customers.

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We recently didn't integrate or created an integration between HubSpot and SAP Business One for another customer of ours.

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They are a e-commerce platform selling fine wine and spirits globally.

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They again, it's very similar to the previous example with Sales Hub, but here they were using Service Hub and SAPSAP was being used as the ERP system to manage stock deliveries, all of the invoicing and financial information.

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However, their customers frequently had specific account managers who were using HubSpot.

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If a customer reached out to their account manager to find out, you know, what's the latest on their delivery or has a specific wine been moved to a different storage area, anything like that, the account manager would have had to log out of HubSpot, log into SAP, find the information, and then only be able to give that information to the customer.

28:19

With their custom integration we've built, we've automated that data sync, so we've been able to set up automated communications from HubSpot about delivery, about storage, and about any of the functions that their operations team are fulfilling.

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So not only has it reduced the number of support requests or queries they've gotten, you know, to their account managers, but in the unique case where someone potentially didn't see an e-mail and still messages the account manager to find out where their delivery is, they can very easily see that information in HubSpot and share that with the customer much, much quicker.

29:08

OK, now I'm going to hand you over to Mark to talk us through Struto 9.

29:14

Thanks, Estee.

29:18

So Asia has actually covered a lot of the benefits, but I'm going to summarise them here.

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What you get with Shoot IX is seamless integration and connectivity across all the platforms that you have in or operate with, which means fewer data silos and that means better operational efficiency.

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We also provide custom integration development if it's needed, tailoring our integrations to any specific needs that a customer might have.

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Struto IX is a real time data synchronization.

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It means that you get the data you want, where you need it, when you need it.

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It allows you to take control or find control over your data.

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Stuff like where it lives and how it moves and where it moves.

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And these things make it a lot easier to manage any compliance and security requirements you have around your data.

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You get scalable architecture, which means as your data grows, our systems automatically scaled to keep up with you.

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And Yep, as far as security goes, our platforms run on AWS and they're protected and altered, audited by world class independent security organization.

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So data is secure.

30:52

And finally, I think the most important part is that we spent a lot of time making sure that our systems are easy to use because these integrations can be difficult.

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And so we'll see some of that in the next slide.

31:07

Yeah.

31:07

And there we go.

31:08

Thank you.

31:09

So here you can see some shots from our management dashboard where it's really simple to set up new customers in just a few minutes.

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Just as simple as adding the credentials for the systems you want to integrate or creating the customer, then adding any credentials for systems you want to integrate and building pipelines to connect those systems.

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Beyond that, if we see the next slide, we can see how pipeline pipelines are built.

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Extremely simple sort of drag and drop interface.

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And this is part of our desire to keep things as simple as possible.

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So it's selecting connectors from our library of connectors, adding some configuration and away you go.

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Adding them to adding some schedules and away you go.

32:10

Yep.

32:10

And that will extract, transform and load between all of your systems.

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Thank you.

32:18

Great.

32:18

Thanks, Mark.

32:19

I think it's my turn.

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Yep.

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So what we're going to show you next is a demo of of SH50 and HubSpot integration.

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This is one of our it's called a flagship recipes in an effort to make things, as we say, as quickly deployable and manageable as possible.

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Our clients can get to the point where they extract value from the system or from the integration as quickly as possible.

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So Struto IX has what we call recipes.

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And those recipes are not just a connector to 1 system, but a configuration around a connected, a connection between two or more systems.

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So it's a complete deployable integration that immediately allows you to start using both systems as a connected single entity.

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The use case that I want to present to you today is a, it's a SAS company.

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They sell digital products online.

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And the problem that they had were they had disconnected finance, marketing and sales teams using various systems.

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And this obviously led to, especially with the finance side having to manually reconcile things like payments.

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They also have, you know, partial payments.

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So clients are not paying an entire invoice at once.

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They're paying in multiple payments and relaying that payment information, that account status back to marketing and sales teams was proving difficult and leading to a lot of mistakes and delays.

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How we did this solution?

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Well, the first thing we did was centralized the information, centralized the processes.

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So sales and marketing moved into one system, which was HubSpot.

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We then integrated HubSpot with Sage and then we invented, reinvented some of the processes that they were currently using because now the older manual processes fall away and we can do cooler things with, with an integrated system rather than than having them in different places, right?

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So the first thing we're going to look at very quickly is what, what is the anatomy of a customer within the SAS space or within anybody using HubSpot as ACRM, but particularly around, you know, embedding an e-commerce kind of function within, within the CRM.

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So the first thing we have is we obviously have the customer from which all things stem.

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So it's the kind of the 1st place people need to go to in order to understand what has happened with this customer throughout the processes that we that we conduct against them.

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And so number one on the right hand side is we've got, are there any deals currently in play for the customer?

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Are there any subscriptions that have been purchased?

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And again, because it's an e-commerce platform or a SAS for a SAS company, you might have subscriptions for various different products that are all running at different times with different billing frequencies.

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So that all gets encapsulated with any subscription module.

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We've got the the invoices.

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So which invoices have gone out for that customer, for the subscriptions that they've purchased.

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And then lastly, you know what payments have been made against those invoices that have been issued to the client.

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They're very important to know all of these things right up front.

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What we're going to do then is we're going to go and create a new deal for this client.

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We'll do that very quickly here.

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We'll leave the amount blank because that will be taken care of.

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We're going to add a product, so we'll add product B and create that.

36:09

We now have a deal and the salesperson's done a really good job at selling the deal.

36:13

The deal closes, the customer's happy and we then convert that deal to a subscription because we now need to maintain a regular invoice cadence with with the client.

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We'll quickly add a customer and let's say this was a monthly deal, monthly recurring revenue and we actually upsold them.

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So we're paying 1300 pounds, 1400 instead of the normal 200.

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Sales people work on Commission, so create that subscription.

37:01

Right.

37:02

So now what's gonna happen is the subscription gets created and we automatically generate an invoice off the back of that subscription based on that billing frequency.

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So this is the first invoice.

37:16

That invoice has now been created and we should see that invoice at the bottom.

37:25

There we go, here's our invoice and typically what would happen at this point in time is somebody would have to go into Sage and manually create or raise this invoice, generate that invoice of the system, then either send it from Sage if it's supported or attach it to an e-mail, download it, then attach it to an e-mail and then forward it on to the client.

37:47

In our instance, what we've done is we've deployed this Struto 9 recipe which has connected the two system with pre built logic in it to take an invoice from HubSpot, send it over into Sage as a as an invoice and we can then have a.

38:08

We then have a picture within Salesforce, sorry within HubSpot that shows that we have an invoice that's currently in an open status.

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Once the invoice is created in Sage, we'll see back in HubSpot that that invoice has not been paid or it has been paid.

38:23

We'll be able to know exactly what that invoice number is and we can then take the necessary financial steps to go and try and chase payment on that invoice.

38:35

OK, so we're just going to give it a second to to synchronize back to Sage.

38:41

And if I go into our Sage system, there it is.

38:48

So the very, very top one, 1399 lbs has now been created in Sage.

38:54

You'll see that we have an invoice number of 372 and finance can now go and chase the payment for that invoice.

39:03

So if we go back to HubSpot and we go into that invoice, my invoices tab, OK, so there's the invoice that's been, that's been that's been created.

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If I click into that invoice, I'll record a manual payment against it.

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And so they made the full payment.

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We record that payment right now typically this function could be a would have been handled either by credit cards.

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So once the subscription has been purchased, maybe that process is encapsulated within the website itself.

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And the the client would have received a payment link and they could have made a direct payment using a credit card.

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Or they might have done a bank transfer after the sale has gone through.

40:09

And somebody had to manually go and, you know, say, OK, they've called in to say that the payment has been made.

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They've confirmed that the payment has been made.

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And then they go and create or at least state that the payment, the invoice has been paid.

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This payment then is recorded back into, say, via St.

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to IAG.

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So let's go back, see if this is captured.

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We should see a transaction pop up here.

40:34

There we go.

40:35

There's the transaction top, top one at the top, top line 1399 lbs payment captured against that invoice number and that sale is not closed off.

40:48

Nobody needed to go into Sage.

40:50

There's been absolutely no accounting function needed other than the integration that's been that's been put in place and that's the sale concluded.

41:01

So if we go back into our customer now, this picture will look slightly different.

41:10

So we will now see, you know, just very immediately see that we now have a new deal.

41:26

We've had 9 invoices issued, but only 8 payments.

41:31

OK, so immediately we can go and chase one of these, one of these, one of the one of the invoices has not been paid, not one of these.

41:44

Maybe that invoice hasn't been issued.

41:47

OK, so we've got two subscriptions against this customer.

41:51

They've got product A, product C, they're both active.

41:54

We've got all the invoices all in one place.

41:56

So even though they're in Sage, we can also view them.

41:58

Sales can view the invoices within HubSpot.

42:03

Marketing no longer needs to worry about marketing the same product as somebody who's already who already owns the product.

42:13

So, you know, I get that quite a lot where people try to sell me things I already have already have already purchased.

42:21

Sales can immediately say, you know, we're not going to sell the next item to you until the previous invoice is paid.

42:28

There's a lot of things that then get opened up.

42:30

And more importantly, we don't have to involve finance in anything right now.

42:34

They they can stick to, to doing what they need to do and they don't need to chase invoices unnecessarily because we might have an account manager that can do that from hotspot.

42:43

All right.

42:50

If you want to go back in, you got it there.

42:53

So whatever we demonstrated, so data silos are broken down, sales can sales marketing and account management can see what what the financial details are around their client.

43:04

And customer retention is enhanced because we can now have more targeted proactive renewal campaigns because we are aware of when that subscription is going to be renewed.

43:15

There is no manual entry in two system because one system is controlling the other system.

43:22

Marketing penetration and effectiveness is now enhanced.

43:25

We have more up to date information available to the marketing team.

43:28

They know exactly where their customer is, who the customer is, what that customer owns and how their what their customers account status is.

43:36

That means that it's more targeted, more effective and leads to better campaign ROI.

43:42

And because we have these systems enabled, we can now bolt on e-commerce functionality on top of or in addition to other functions within the business.

43:52

So that's where we reinvent what's currently being done and that's all being aided by having a well integrated system within your business.

44:01

OK, thank you very much.

44:05

Thanks, Paul and thanks, Mark.

44:09

So if you are integrating your apps for account with other systems, there are a couple of best practices that you should keep in mind.

44:19

Now First off, you need to ensure data consistency and data quality.

44:24

It does not help to sync data and make sure that all of your teams have access to data if it is inconsistent, if it is not formatted correctly, and if it is plain wrong.

44:37

So there definitely needs to be some guidelines and some processes put in place to ensure certain data points get entered, some rules around what can be entered, and then frequent checks to ensure the health of your data.

44:55

We also recommend that you establish a source of truth for data and not just for, you know, all of your data being this system is the source of truth and we're just sharing it everywhere else, you need to get into the weeds a little bit.

45:12

So either you should set a source of truth for each object.

45:17

So for example, company's source of truth could be HubSpot, but your contact source of truth could be another system.

45:30

And then your last option is going to be that you actually get detailed with each property.

45:36

So instead of saying your source of truth for all company information is HubSpot, you can say for the payment status that is going to be Sage, but for address and for any other information that is going to be HubSpot.

45:55

It's very important to establish and document this and make sure that everyone is aware of it.

46:00

Because if for some reason someone has been updating that data point in the wrong system, you know, you need to know that there needs to be rules set up in the integration with what is going to overwrite what in the other system.

46:15

And you need to be able to go back to documentation that just details why it is like it is so that in two years time when everyone's forgotten about but building the integration, you don't accidentally delete something that you definitely shouldn't to a dot.

46:34

We also recommend that you establish and maintain a data dictionary because terms used for the same thing or terms are used for the same thing, but they're different in different systems.

46:47

So for example, Salesforce and HubSpot, HubSpot calls it companies, Salesforce calls it accounts, HubSpot calls it deals, sales force calls it opportunities.

47:00

That is going to be the case probably across every system that you work with where you have got inconsistent terminology and it's very important to document this.

47:12

Is this in the other system very important to to define that at an object level, but equally as important to dive into each property what it means we're syncing to and you know if it is called something else in two different systems to determine and maintain which are syncing with each other.

47:36

And then lastly, you need to align your teams.

47:40

So it's great that your teams have got access to the same data and can work towards the same goal, but they can't do that if they don't have a shared goal and then shared understanding of what everyone is trying to achieve.

47:56

You need to align them according to what that goal is, what those standards for customer service and experience is, and all of them do need to work together towards that same goal, right?

48:14

I believe we've got some time for questions, Mark.

48:19

Paul, do we have any questions in the Q&A section?

48:22

I think we have one question around data security and House Streeter IX handles data security.

48:28

So I can take that one, Mark.

48:32

We've built the platform in such a way that we do not store any information that is not necessary for most integrations.

48:41

We don't need to store any data other than at the time that the information is being transferred.

48:46

So if we are syncing 1 record, let's say as we saw in the demo where we're passing an invoice over into Sage from HubSpot, we store that invoice record for seconds whilst we sort of encapsulate that message and make it ready for a Sage transfer.

49:06

As soon as that transfer is confirmed as being received by Sage and we have the reference numbers back to prove it, that record is immediately deleted from our system.

49:15

In fact, it's never actually stored to disk, it's only stored in memory.

49:19

So the information is stored in both the systems that need them, they're not stored in the system that does not need them for a prolonged period of time.

49:30

Further to that, whilst it's being transferred, it's encrypted.

49:33

And the systems through which they are being transferred are, as Mark said, previously, governed by the platform's security measures and also audited by third party companies.

49:45

So we're taking measures at every step of the way to make sure that that data security is maintained and adhered to.

49:59

Perfect.

50:00

Thank you for the question.

50:03

Great.

50:04

If there's no other question or if you have questions, please pop them in the Q&A.

50:08

And we have got a couple more minutes to answer those questions.

50:13

And so was asked how long does an integration take?

50:17

Well, this number is very much dependent on how much alignment we have between the stakeholders.

50:24

It depends on the size of the project, it depends on the number of systems that we are integrating.

50:31

But to deploy a recipe as I've shown there today can take from a week to a couple of weeks, at most 4 weeks, which is going to be two sprints.

50:43

And the reason for the prolonged nature is just planning the deployment.

50:48

Various systems have different security protocols that need to be adhered to.

50:52

So yeah, deploying the solution is not doesn't take long, but fine tuning it and making sure that everybody knows how to use it once it's implemented is the part that actually has the most impact because there's a lot of change management that might potentially come into it.

51:12

Yeah, Thanks, Karen.

51:13

I hope that answers your question as well.

51:16

If it's the same question, very similar to Insolvo.

51:21

Cool.

51:24

Fantastic.

51:31

If there's no more questions, then we can call it a little bit early and give you a couple of minutes back.

51:37

But thank you so much for joining us today.

51:39

Mark Paul, thank you for your help and thank you for joining us.

51:45

And yeah, we'll share the recording with everyone.

51:48

See.

51:50

Thanks, everybody.

51:51

Take care.

51:51

Thanks.

51:52

Bye.

51:52

Bye.

51:53

Bye.