

# CRM Resellers: Grow Your Business by Reselling Inbound Marketing Software



Salesforce



NETSUITE  
ONE SYSTEM. NO LIMITS.



Sage CRM



ZOHO



Microsoft Dynamics



SUGARCRM.



HubSpot

# Introduction

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We wrote this ebook for CRM resellers who are interested in helping their clients better manage and align their marketing and sales processes.

Our premise is simple. By integrating our inbound marketing software with your CRM software, you can offer your clients a complete closed loop marketing package – and make money in the process.

We also realize that most CRM resellers are busy. That's why we want to make your involvement as easy as possible.

If after reading this ebook you decide you want to discuss becoming a partner with HubSpot and reselling our software, let me assure you we will help you become successful in your cross selling efforts.

What that means is that we can be involved in your sales process until you're comfortable reselling the software on your own. We have educational resources available to help you ramp up. We also have dedicated sales people who are well versed in CRM systems to help you during your sales process.

Regardless of your decision, we hope you get from this ebook a better understanding of how integrating your CRM software with inbound marketing can help your clients achieve greater results.

If you have any questions or would like further information about [HubSpot's Value Added Reseller Program](#), please contact me.

Sincerely,

Chris Johnson

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## Warm Leads

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Salespeople sell more if they make “warmer” sales calls. The warmer the sales call *before it starts*, the more likely the lead is to convert after it starts. A cold call is often an annoying interruption in someone’s day. A warm *lead* is someone who has already responded to your company. Warm leads are therefore higher quality leads. A lead is also higher quality if it is more *valuable* based on factors such as probable order size, influence on other potential customers and likely lifetime spend. Of course, you want your salespeople focused on leads rated highly on both counts — i.e., they’re warm *and* they’re valuable.

Rating leads on these criteria should be easy. Things you want to know include:

- When and how often leads visited you online (website, blog, LinkedIn page, etc.)
- What brought them there (e.g., the keywords of their Google searches)
- When and how often they converted (e.g., filled out a form to get a white paper)
- What campaigns, promotions and offers they respond to

This is all online *marketing* information. **However, the systems salespeople actually use to manage their sales activity — CRM systems — are not typically designed to capture that marketing information.**

Online marketing information is managed by online marketing systems, like HubSpot. And unless HubSpot and your CRM system are integrated, it will be difficult for salespeople to leverage your marketing in their sales calls. That means getting less ROI from HubSpot, your CRM system, *and* your salespeople. More importantly, it means salespeople won’t consistently connect with the best leads, or touch the leads’ hot buttons, or convert the highest-value leads first. **That’s why HubSpot makes CRM integration easy to do and easy to use: so CRM users leverage the best leads in the warmest way possible.**

# Where the Best Sales Leads Come From – Inbound Marketing

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The payoff of HubSpot CRM integration is bigger sales from better leads. But the salesperson can't just have a great lead; to be fully leveraged, he or she also needs to know *why* the lead is great. Is this a potential high-value customer? Is this someone who's come back to our website often? Have they filled out forms several times to get promoted content?

HubSpot's role is therefore two-fold:

- 1) Help marketers produce leads
- 2) Produce actionable intelligence about the leads. To accomplish both tasks, it applies the principles of *inbound marketing*.

One of the strengths of inbound marketing, in fact, is that lead-qualifying information results as a natural byproduct of producing the lead itself. In other words, leads tend to be information-rich and highly qualified just by coming in the door — so CRM users can begin get to work selling the lead right away. This gives them a significant speed advantage — *provided the lead gets into the CRM system quickly*.

Inbound marketing leverages the fact that most people (78% of them, in fact) use the web to research potential purchases. Inbound marketing engages consumers during the natural course of that research via blogs, search engines and social media. It differs from outbound marketing in that potential customers *find you* by consuming self-selected content (e.g., blog articles, white papers, eBooks, and webinars) rather than through interruptive content (e.g., commercials, email blasts and telemarketing). It's obvious why people would prefer to do business with a company they engaged with on their own rather than with a company that's intruded into their space uninvited. (That may be why 200 million Americans have registered on the FTC's "Do Not Call" list.)

## Why HubSpot

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Your clients' potential customers select their content because it is useful and interesting. Many of the best practices for making it that way — and also for helping self-qualified people find it — are built into HubSpot.

HubSpot is a software platform that helps your clients create, publish, and promote their content as well as measure and analyze people's responses to it. For example, you can:

- Use HubSpot's content management system (CMS), blogging, search engine optimization (SEO), and social media tools to generate more traffic and leads from your website.
- Use HubSpot's landing pages, lead nurturing, and email marketing tools to get your web leads more sales-ready
- Use HubSpot's analysis tools to determine which marketing campaigns are generating leads, to qualify leads by sale-readiness, and to tailor content for greater impact
- Use HubSpot's social media intelligence tools to link to a lead's social media accounts (Twitter, Facebook and LinkedIn) associated with his or her email address

*Integrating HubSpot with a CRM lets you attract and win more and bigger customers based on who visits you online, when, how often, why, and what they did while there.*

## The Virtuous Cycle

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Once inbound marketing begins so does a virtuous cycle (Figure 1). As you publish content, you also gather intelligence as to what's working and what isn't in terms of lead generation and qualification.

For example, you may talk to salespeople, review sales reports, or test alternative versions of a campaign (perhaps with different keywords or by targeting different job functions). You can then apply this intelligence to your content — i.e., fine-tune what, when, and how much you will publish and in which venues.



Figure 1: Inbound Marketing's Virtuous Cycle

In HubSpot you not only can fine-tune the content to the leads you wish to generate, but you can also tune the lead rating system so that you are targeting on the best leads more precisely. That, in turn, generates more sales leads and more intelligence, and the cycle continues. As the number of leads grows and quality improves, you are able to see measurable gains on both fronts. Your ability to measure these gains, in fact, enables you to set specific measurable goals for the inbound marketing team — just as you do for your sales team.

But great marketing results, of course, are not ultimately what you're after. What you really want are great sales results. That's why you shouldn't limit this virtuous cycle to just the marketing side. By integrating HubSpot and the CRM you can extend the cycle so that with each rotation you're improving not just the number and quality of your sales leads — but you are also improving the number and quality of your sales. Not only are your marketing efforts and results aligned but also so are your marketing efforts and sales efforts. There's actually a term for this expanded virtuous cycle: "closed loop marketing."

## Closed Loop Marketing

In closed loop marketing (Figure 2), the feedback driving inbound marketing now comes from two sources. That's the sales lead intelligence from marketing's internal analysis (blue arrow), but now also from the sales results themselves (red arrow). The benefits are clear:

- Marketing can fine-tune content and campaigns in line with actual results as they happen
- Salespeople have direct knowledge of which leads are in response to which content as those responses actually occur
- Marketing analytics (e.g., lead rank tuning) feeds off real-time data, thereby becoming more accurate and robust
- Marketing analytics and sales analytics can be synced, improving both
- Both marketing and sales people are more effective in generating and leveraging optimum lead opportunities

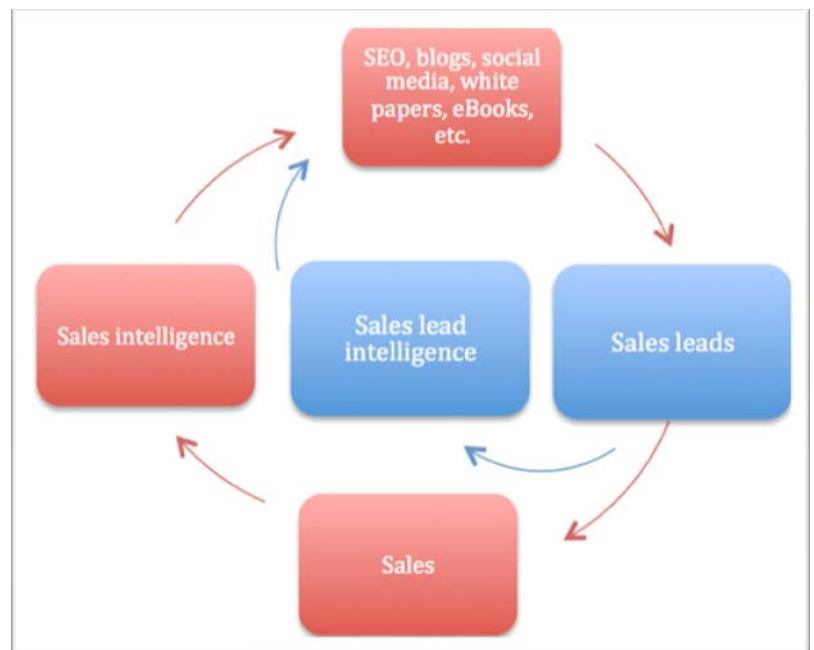


Figure 2: Closed Loop Marketing

Realizing these benefits is easy — first by integrating HubSpot and the CRM, and then by employing the intelligent lead handling workflow that results.



## Intelligent Lead Handling

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Working together, the two platforms enable intelligent lead handling from one end of the lead cycle to the other. Figure 3 shows the five basic steps involved, as described here:

1. Leads convert by either filling out a form on your client's website or by importing leads into HubSpot. These forms can be: a) HubSpot landing pages, b) exported HubSpot forms, or c) third-party own forms, where the lead data is passed into HubSpot via an API.
2. Lead data is stored in both HubSpot and the CRM system, including detailed lead intelligence gathered by the HubSpot software.
3. The integration automatically de-duplicates leads that already reside in the CRM system using: a) each lead's distinct HubSpot ID, and b) each lead's email address.
4. Leads are then assigned to the appropriate sales reps based on the lead assignment rules in the CRM system. Figure 4 on the next page shows an example of how lead information might be displayed in Microsoft Dynamics CRM.
5. When the sales team closes a deal, the opportunity record associated with the original lead record in HubSpot goes to a 'Closed Won' state. The integration then passes that record back to HubSpot, where it is represented in HubSpot's source analytics as a customer, thus "closing the loop" on that initial lead record.



**Figure 3: Intelligent Lead Handling Workflow**

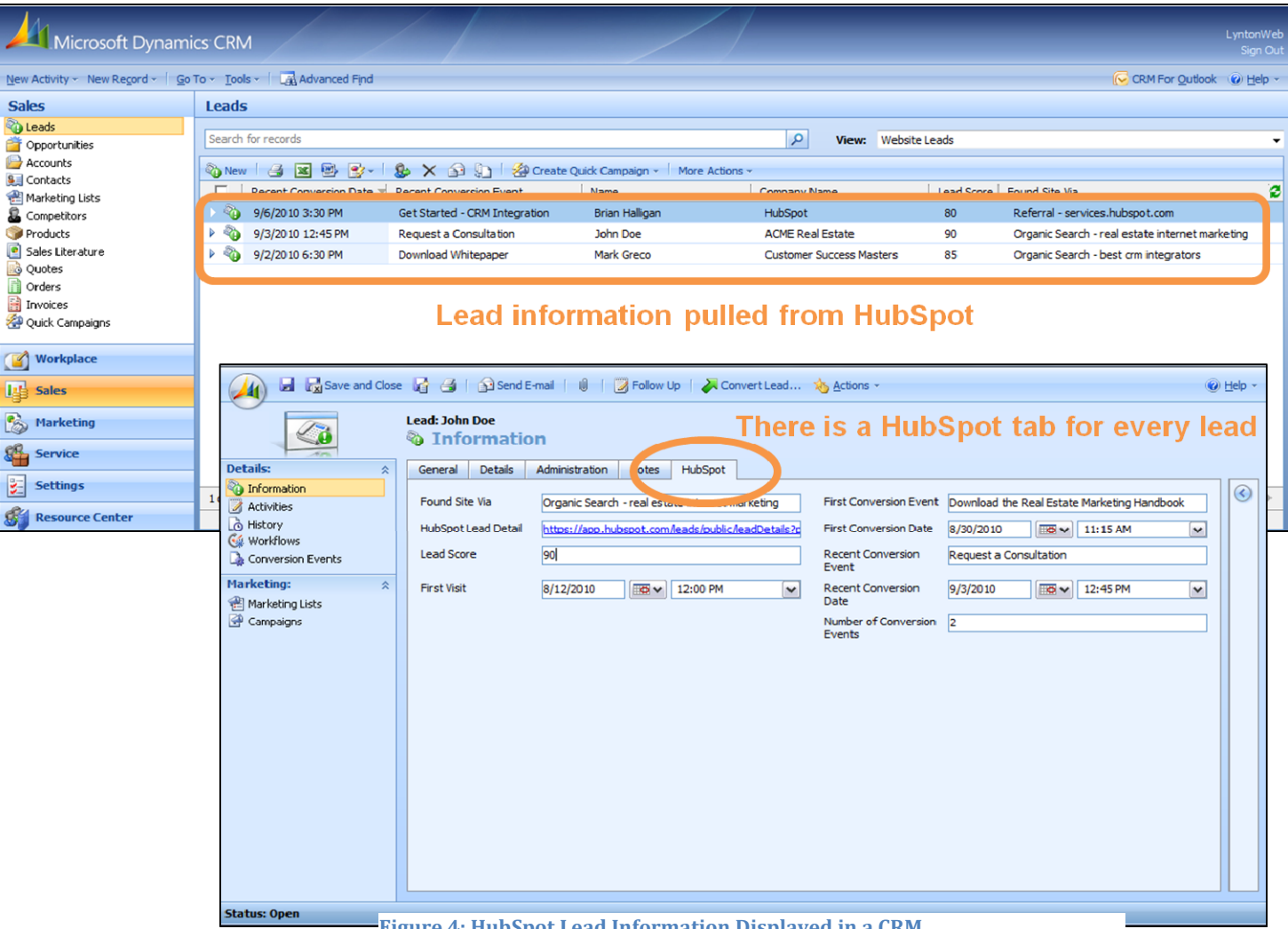


Figure 4: HubSpot Lead Information Displayed in a CRM

Leads exist simultaneously in HubSpot and the CRM system because both marketing and sales use them. With clear visibility on both sides, lead handling is well coordinated. For example, while salespeople on the CRM side are contacting leads to close individual customers, marketing continues to warm these leads using various HubSpot tools, for example:

- HubSpot’s lead nurturing tool allows clients to create and set up automated email campaigns to engage leads over time at a pre-defined cadence. Research proves that following up with interested leads within a week of their initial conversion increases sales conversation rates.

- HubSpot's email marketing tool lets you send targeted emails to specific segments of their database, create draft and test emails, and measure the results with click-through and unsubscribe data.
- HubSpot's easy-to-use landing page wizard lets you quickly and intuitively create effective landing pages to convert more visitors into leads. The tool includes a landing page dashboard, form editor, and tracking URL creator to easily manage and duplicate landing pages, pull in the most relevant data, and get decision-enabling analytics for all campaigns.

HubSpot lead information is available to the CRM as soon as HubSpot and the CRM are integrated. This typically takes 1/2 to 1-2 days depending on your CRM provider and how customized your CRM is.

## How to Integrate HubSpot with a CRM

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An “integration” is software that enables HubSpot and the CRM to pass data back and forth. When an item is updated in one of the two platforms the update is reflected in the other. Because HubSpot and most CRMs are cloud-based, the integration software runs remotely and is not usually something you have to deal with directly. In fact, your integration may already be built. If so, it just needs to be configured and turned on.

HubSpot integrations are available for most popular CRMs, including Microsoft Dynamics, NetSuite, Salesforce.com, SugarCRM, Highrise, Infusionsoft, and Zoho. The actual integration is performed by one of HubSpot’s partners. (If you don’t have a CRM, a HubSpot partner can help you select and set up the right one.)

To configure the integration, the HubSpot partner will ask you questions such as:

- What HubSpot fields should appear in the CRM?
- Should items updated in HubSpot be updated on the CRM on a schedule (e.g., every five minutes) or immediately when a HubSpot update occurs (e.g., a web visitor submits a form)?
- What functions should support the HubSpot data within the CRM? (For example, would you like to sort leads by lead rating, number of conversions, data of last conversion, or some combination?)

The HubSpot partner will review these and other questions so that the integration is tailored to your business. If your CRM is not cloud-based or there is no integration already available, then the integration may take up to five days. By then, however, your salespeople will have immediate visibility to your best sales lead data.

Increasingly, that data comes from inbound marketing — even though most CRM systems were not designed to capture it. HubSpot CRM integrations solve that disconnect to enable closed loop marketing. That’s making both the marketing and sales teams much more productive — and warming up a lot of sales calls.

## Value to CRM Reseller (You)

In addition to the upsell opportunity, and commission from an additional product over the lifetime of your client, you receive other added-value benefits when you resell HubSpot to your clients.

- Increased client satisfaction ensures longer client retention
- Reduced threat from competing integrators
- Additional revenue from integration services
- Extended market reach by building connectors and apps

## HubSpot API Documentation

If you have access to a developer, the integration can be performed using the HubSpot API. To set up and complete the integration, you will need access to the HubSpot API documentation, which can be found at <http://docs.hubapi.com>. Here you will find code samples, frequently asked questions, and an online discussion group for the development community.

The screenshot shows a HubSpot documentation page with the following content:

**Using the Leads API with SugarCRM**

**Contents [hide]**

- 1 Background
- 2 Create Custom SugarCRM Fields for HubSpot Lead Intelligence
- 3 Setup API User
- 4 Setup HubSpot API Configuration File
- 5 Setup Periodic Script to Sync Leads
- 6 How Does It Run
- 7 References

**Background**

The purpose of this page is to illustrate one possible way to integrate SugarCRM ("Sugar") into the HubSpot system using the Leads API. It's not the only way, and it's not guaranteed to match your specific needs, but it should provide useful details and examples for your reference.

SugarCRM is a separate company and a separate product. HubSpot does not provide any kind of support, consulting, or guarantees with regards to SugarCRM. You need to know your own SugarCRM system and how it works in order to complete this integration.

**Create Custom SugarCRM Fields for HubSpot Lead Intelligence**

Before adding leads to SugarCRM, you'd typically need to add some custom fields to SugarCRM to store the HubSpot Lead Intelligence.

Log in to your SugarCRM installation and navigate to *Admin->Studio* to add these fields. The list below, again, is not comprehensive, and is just intended to serve as an example.

Field Name	Field Label	Type
hubspot_guid_c	HubSpot GUID	Text
hubspot_first_visit_c	First Visit	Date
hubspot_first_conversion_date_c	First Conversion Date	Date




# The Integration

If you are able to use the HubSpot API to integrate with various CRMs, you may be invited to offer CRM Integration Services to HubSpot’s customers via the HubSpot’s Service Marketplace.

<https://services.hubspot.com/crm-integration/directory>

### Want to Integrate HubSpot with your CRM?

Integrate HubSpot with your CRM to get the benefit of lead sharing, de-duping and closed-loop reporting. If you don't have a CRM yet, Partners can help you decide and set up the right one. Contact a Partner directly or [Learn More](#).

Partner	Price / Day*	CRM	# of Customers	CHI*	HubSpot Certified	Contact
 lyntonweb.com <small>complete web solutions</small>	\$1200	MS Dynamics, Infusionsoft, Highrise	3	99	✓	<a href="#">Contact</a>
 HARVEST SOLUTIONS <small>experience • methodology • analytics</small>	\$1720	Salesforce.com	1	75	✓	<a href="#">Contact</a>
 business communications group, llc <small>trust-based marketing to accelerate sales</small>	\$2500	Salesforce.com	2	N/A	✓	<a href="#">Contact</a>

\* If you already have HubSpot and a CRM system in place, implementation typically takes 1-2 days depending on how customized your CRM is. If you do not have a CRM system, implementation can take up to 5 days.

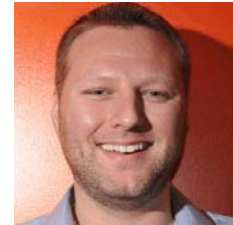
\* CHI, or Customer Happiness Index, is a score automatically calculated by the HubSpot software indicating the marketing success achieved by the Partners' customers. [Learn More](#) about CHI, other metrics and how to select a Partner.

If you don't have access to a developer, leverage HubSpot’s Service Marketplace yourself and hire a partner to perform the integration. Depending on the complexity of the current setup of your client’s CRM system, the integration is typically completed in 1-2 business days. If the client currently does not have a CRM system, the integration usually takes 5-7 business days to be completed.

## Next Steps

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**If you are interested** in finding out more about HubSpot or becoming a value added reseller for HubSpot inbound marketing software, contact Chris Johnson at [cjohnson@hubspot.com](mailto:cjohnson@hubspot.com) or call him direct at 857-829-5510.



**If you want more information** about the value of inbound marketing in relation to lead generation, be sure to see our on-demand webinar – [The State of Inbound Marketing Lead Generation.](#)



**If you are interested** in finding out how best to use social media as a tool to help achieve your business and marketing goals, check out [HubSpot's Social Media Marketing Hub.](#)



### Company Snapshot

- HubSpot was founded in 2006 by Brian Halligan and Dharmesh Shah and is based in Cambridge, MA down the street from MIT where the company was conceived.
- HubSpot offers small, mid-size and enterprise businesses the first inbound marketing software-as-a-service platform that lets users take advantage of the changing nature of how products and services are researched, bought and sold.
- HubSpot invented [Website Grader](#), a free marketing tool which rates businesses' sites based on marketing effectiveness and provides a score and useful advice on how to improve. More free tools can be found at [Grader.com](#).
- HubSpot has 4,000+ customers, and boasts a 97% retention rate.