

Keep your customer data in sync across all your business apps, two-way and in real time, so you can focus on driving business strategy, not tedious tasks.

The Opportunity

As a business grows, the number of tools it uses multiplies. A web of disconnected tools makes a team inefficient and leads to a clunky customer experience. To remove the friction for both the team and their customers, businesses need a natively connected tech stack. To connect their tools, they have a few options:

| Traditional out-of-the-box integrations | Custom solutions | HubSpot's Data Sync |
|---|------------------------------------|--|
| Easy but rigid | Powerful but costly and code-heavy | All the punch of a custom-built connector Easy, code-free package |

With HubSpot's Data Sync, the operations team will be free from integration fires, the go-to-market teams will be aligned and empowered, and the customer experience will be seamless.

What is Data Sync?

Data Sync by HubSpot is an automated way to share data between HubSpot and other apps without manual data entry or time-consuming imports and exports.



HubSpot talks directly with another app, no spreadsheet required.



Data is shared continually between apps, keeping the information consistent and up-to-date in both systems.

Combine Data Sync with the Data Quality Automation workflows in Operations Hub to not only keep data updated but clean and useful, too.

When To Use

Let's take a step back and talk about getting data into HubSpot. To do this, you generally have two options: import or sync. The chart below shows these options with additional detail outlining two types of syncing.

| Import | Sync | HubSpot's Data Sync |
|--|--|---|
| <p>Spreadsheets and CSV files</p> <p>What it does: Allows you to manually bring data into HubSpot</p> <p>How it works: Upload a file and match data columns to properties.</p> <p>Considerations: Can be time consuming, prone to formatting issues, and tedious for regular updates.</p> | <p>Trigger-based integrations (e.g. Zapier)</p> <p>What it does: Gives the integration a list of steps to follow</p> <p>How it works: When some action happens in one app, sends a piece of information to the other app and tells it to take a certain action with it.</p> <p>Considerations: Good for automating repetitive tasks and business processes.</p> | <p>What it does: Tells the integration what you want to achieve</p> <p>How it works: Instead of an action triggering something in the other app, you simply define which data fields you want synced and which to leave out of the sync.</p> <p>Considerations: Good for providing an up-to-date look at any synced record, no matter which app you're looking at.</p> |

Trigger-based integrations and Data Sync serve two different purposes but can work hand-in-hand rather than one replacing the other.

Consulting on Data Sync

Below are more specific guidelines on when to recommend HubSpot's Data Sync.

Good Fit

- Initial qualification: A customer has data that lives outside of HubSpot that would improve their ability to personalize, segment, etc.
- There is already a connector available for the application they want to integrate. Consider Data Sync before exploring custom solutions.
- Customer wants a fully bidirectional and close-to-realtime sync.

Bad Fit

- The objects they want to sync are not available as part of the connector (e.g. deals, engagements). Check the respective app listing for details.
- The triggers for the action are not solvable by a simple filter. For example, syncing contacts when "Lead Status = X" is not granular enough to trigger the sync.

Use Cases

The use cases are as unique as each business, but below are a few ways Data Sync could be used:

Sync your CRM with your ERP



Ensure customer data stays up to date between front-office (marketing, sales, and service) and back-office (finance and billing) teams.

Integrate your CRM and marketing apps



Sync CRM fields to marketing to personalize campaigns and analyze revenue impact. Sync marketing data to the CRM to score and rotate leads and inform sales conversations – whether HubSpot is your CRM or not.

Establish HubSpot as your source of truth



Use Data Sync to migrate all your contact and company data into HubSpot, including historical data.

Sync reps' phones with your CRM



Ensure reps always have access to up-to-date information when on the road.

Setup and Ongoing Sync

Connect Data Sync

To set it up, walk through the steps outlined in [this Knowledge Base article](#).

Data Sync's default field mappings are free for all HubSpot users, and custom field mappings are available with Operations Hub Starter and up.

Perform the Initial Sync

Once you've connected HubSpot with your other app, Data Sync will scan all the records in both apps to see where it needs to create or update records.

The initial sync is similar to a CSV import, except Data Sync can push and pull the information two ways so records can be enriched from both sides. Or, you can set up the sync to be strictly one way, if preferred.

Let Continuous Sync Run

After the initial sync, Data Sync keeps the databases updated according to the rules you set up: Update the external app with information from HubSpot, update HubSpot with information from the external app, or both.

Changes to your records in HubSpot are sent to your other app in near real-time. Generally speaking, Data Sync will perform a scan of your other app every five minutes and make whatever updates are needed -- day in, day out.

Get Additional Help

For more detailed authentication instructions and helpful hints on common issues, see this [Support configuration guide](#).

Data Sync will eventually power all native integrations but not right away. For the most up-to-date list of available apps, along with their objects that can be synced, visit the [HubSpot App Marketplace](#).