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HubSpot
Operations Hub

Guide Book

AN EASY WAY TO UNDERSTAND THE BENEFITS OF
OPERATIONS HUB AND HOW IT WORKS

Introduction

The Challenges of Business Growth

As companies scale, more internal friction occurs, which decreases the quality of customer experience. Often, different teams start building their own processes to accommodate growth, which leads to information being siloed in other departments. The result? Disconnection, miscommunication, inefficiency, and poor customer service.

How Do You Combat Growing Pains?

The answer is simple: RevOps. Revenue operations eliminate friction by aligning marketing, sales, and service operations across your organization's processes, platforms, and people. Combining these critical areas under a unified operation ensures constant cross-functional data flow, open communication, integrated systems, transparency, and aligned efforts, all of which contribute to holistic business success. In short, RevOps enables organizations to scale efficiently without compromising user and customer experience. So what do you need to get started? First off, you need the right tools.

Service

Marketing

Revenue Operations

Customers

Revenue Operations

Sales

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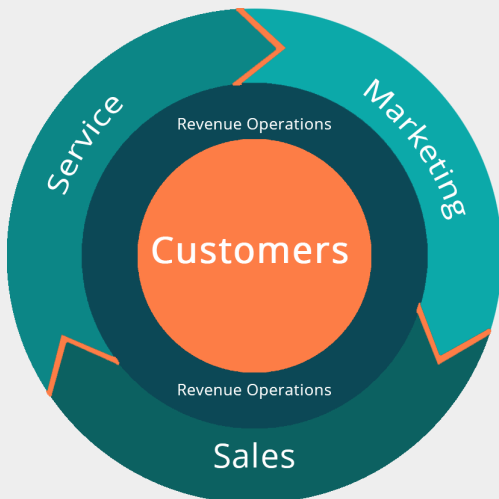
Operations Hub

Cue: Operations Hub

HubSpot recently introduced its most revolutionary product yet — Operations Hub. HubSpot boosted its marketing, sales, service, and CMS hubs with Ops Hub to address business growth challenges. Ops Hub connects your apps to unify your tech stack, cleans your data automatically, and automates business processes, so you don't have to go through time-consuming data entry, imports, and exports. Ops Hub streamlines the operations across an organization by providing an aligned platform, process, and perspective.
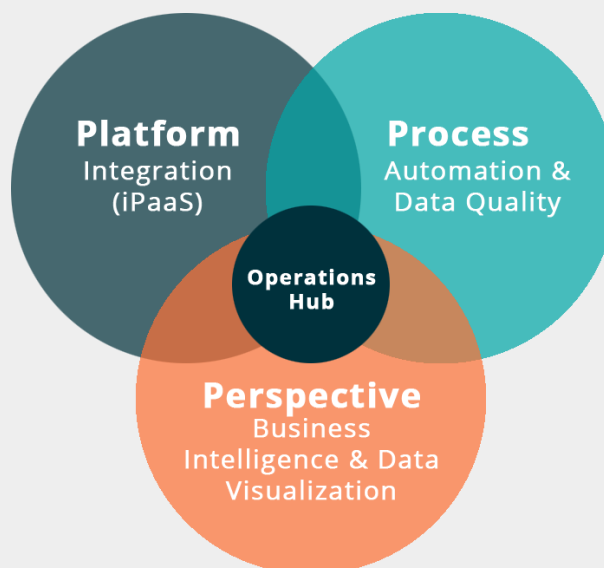
Platform

Provide every team the information to do their job.

Process

Make information go to each team consistently, efficiently, and automatically.

Perspective

Understand information to drive business strategies.

Platform
Integration (iPaaS)

Process
Automation & Data Quality

Operations Hub

Perspective
Business Intelligence & Data Visualization

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Powerful Features

Data Sync

Eliminate the burden of data entry, imports, and exports by integrating your applications and data with HubSpot seamlessly in a code-free package.

Data Quality Automation

Remove manual and time-consuming data clean-up by automatically fixing dates, names, and more with new sets of workflow actions that automatically format property values.

Programmable Automation

Get the simplicity of standard workflow actions with all of the flexibility of customization. Supercharge your automations by custom workflows through Javascript code execution.

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Data Sync

Data Sync makes it possible to share data between HubSpot and other applications without tedious data entry, imports, and exports. HubSpot automatically transfers data between your other app and vice versa to keep information in both systems up-to-date. Data Sync in Ops Hub works like a custom-built connector with bidirectional sync, custom field mapping, historical filter in a ready-made code-free package. In essence, Data Sync makes your tech platforms talk to each other so you can have a robust flow of data communication between your teams and your customers.

Who Qualifies as a Good Fit to Use Data Sync?

Chances are, you probably have several platforms that you rely on to run your business. Your tech stack naturally expands when your company does. Integrating apps is difficult when you don't have prebuilt and user-friendly interfaces. If you rely on various applications and don't want to go through the complicated legwork of integration, then Data Sync is an excellent fit for you. With Data Sync, you can seamlessly integrate your apps to have your data available to your teams. No codes needed.

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What Apps Can I Integrate with HubSpot Using Data Sync?

Data Sync can integrate HubSpot with thirty of the most in-demand applications, with plans to add more applications shortly. You'll find the initial list of apps that can be integrated with HubSpot below.

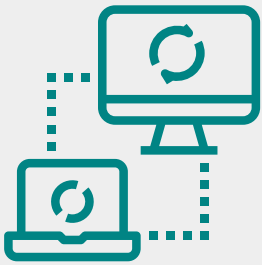|				
Mailchimp	Google Contacts	Outlook & Exchange	Stripe	Xero
Intercom	ActiveCampaign	Zoho CRM	NetSuite	Zendesk
Square	Sendinblue	Airtable	MS Dynamics 365	Outreach
Aircall	Salesloft	Keap	Constant Contact	RingCentral
Bullhorn	Pipedrive	Mindbody	Nimble	Magento 2
Copper	Freshdesk	Drip	iCloud	Sugar

Setting-Up

To get started, all you need to do is select the app that you want to sync with HubSpot. Then, select objects you'd like to sync continuously. Each object has field mappings that connect your data and records with your target application. Data Sync's default field mappings are free for all HubSpot users, and you can get custom field mappings starting with Ops Hub Starter.
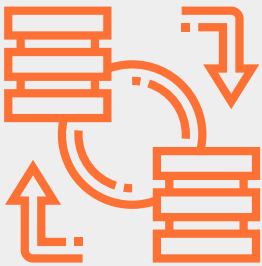
Once HubSpot is connected with the other app, Data Sync will examine all the records in both systems to determine which records to create and update. Data Sync updates records bi-directionally, so your data can be consistent from both applications. You can configure it to serve your organization's needs. You can update the external app with information from HubSpot or vice versa, or both. Afterward, your applications will be continuously updated and synced every five minutes.

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Data Quality Automation

Data Quality Automation cleans data along while data is being synced. Automate the time-consuming administrative tasks of cleaning properties. You don't need any technical skills to set up data quality actions and workflows. Simply click ready-made automations, and provide your team quality data. Common data issues like capitalizing first name properties and deleting unnecessary information can now be automated in Ops Hub.

Who Qualifies as a Good Fit to Use Data Sync?

Messy data makes inefficient teams, and it's a common occurrence. Different teams adopt various naming conventions, and it ends up confusing everyone in the organization because they don't know where, what, and how to find data. Usually, employees are assigned to do clean-up projects to rename data and fix spreadsheets; then, the cycle goes on again. If this scenario is all too familiar to you, then Data Quality Automation is perfect for your company because with it, cleaning data isn't just easy; it's automatic.

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Setting-Up
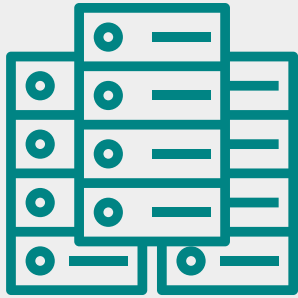
Create or edit an existing workflow, turn it on, and the data quality automation will do the rest. The great thing is that this doesn't just help with data quality inside your HubSpot account. If you're using integrations powered by data sync, that cleaned data can flow into all of your other apps as well, giving your team the high-quality data they need to do their jobs in all their apps.

Programmable Automation

Your menu of automatable actions is predefined in standard HubSpot workflows like sending an email, triggering an ad, etc. But now, with custom workflow actions, you can build customized workflow actions using JavaScript. You can now also write code natively inside HubSpot workflows to perform advanced actions that leverage third-party systems. So, if you're thinking about automating something within HubSpot, the answer now will most likely be "yes."

Programmable automation lets you create custom actions inside workflows. A trigger webhook action passes information from HubSpot to another app using an HTTP post request. This allows you to send data from HubSpot to an external system or trigger alert notifications in a third-party app. Custom code actions can let you program actions using JavaScript. Additionally, Node JS libraries are also available to make API calls, run SQL queries, format text, model objects, and so much more. Custom code actions also support adding API keys which are encrypted to be stored in HubSpot securely.

Who Qualifies as a Good Fit to Use Programmable Automation?

If you want to customize your processes to fit your organization perfectly, programmable automation will be a fantastic solution for you. With programmable automation, you can automate sales lead rotation by geography, employee capacity, and more. You can also pull data from third-party systems and have HubSpot make logical decisions to do what you want it to with a series of steps using custom workflow actions. You'll also be able to see the capacity of your customer service employees and assign tickets accordingly. These are only a few examples of what you can do with programmable automation. There are various ways you can go about customizing Ops Hub to fit your business needs, and the possibilities go only as far as your imagination.

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Use Case Scenarios

Marketing

For example, let's say that you have four variations of an email for a campaign, and you would like to send that out to 25% of your contacts for each variation. Using programmable automation, it can select contacts to receive specific email variants.

Sales

If you want to better automate lead rotation depending on specific operations criteria, you can now rotate leads with custom logic and third-party queries. So when a new lead comes in, it can automatically query another system to determine sales rep capacity and then assign the lead in HubSpot based on the information that it finds.
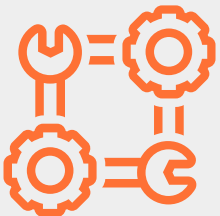
Services

Manage capacity based on ticket assignment. For example, when a new ticket is created within HubSpot, Ops Hub can trigger a call to the tickets API to fetch all open tickets and all agents assigned to them. You can now see which agents are currently logged on and assign the newly created tickets to an agent with the least number of tickets.

OBO is one of the top partner agencies of HubSpot that provides professional services regarding programmable automation. It's always beneficial to seek professional help if you are unconfident about navigating programmable automation on your own. So, it's essential to keep that in mind when starting your automation journey.
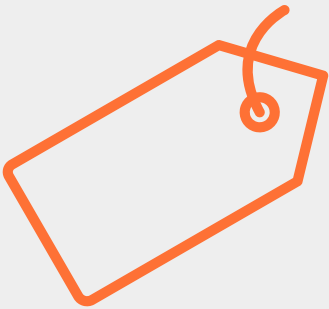
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Get a Free Demo of HubSpot's Operations Hub

If you're interested in HubSpot's Ops Hub, but you need to see a visual demonstration of how it works. HubSpot provides a free demo of Ops Hub for all interested parties! Just go and fill out a form to schedule your free demo with a HubSpot representative **here**. You can also give us a call at **(410) 650-5708.**

Pricing

I'm sure you're wondering about the pricing, packaging, and services each Ops Hub bundle includes. So, we have compiled the bundles for you to look at on the next page. Webhooks, workflows, custom-coded bots, and webhook actions are probably familiar to customers who have already purchased the enterprise subscription. An important thing to note is that these features will be available on enterprise subscriptions for legacy customers. Legacy customers are people who have purchased enterprise subscriptions before April 21. But, new customers will have to buy Operations Hub since these features are now housed in it.

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FREE	STARTER	PROFESSIONAL
Free	**$50/month**	**$800/month**

FREE	STARTER	PROFESSIONAL
HubSpot Sync • Two-way data sync • Default Field Mappings Ecosystem Integrations • All Third Party Integrations Good fit for: Companies that have more than one SaaS application integrated.	Everything included in the free version HubSpot Sync • Custom Field Mappings Good fit for: Companies that have various tech stacks that require segmentation and custom properties.	Everything included in the starter pack Programmable Automation • Custom Coded Workflow Actions • Custom Coded Bot Actions • Webhooks Data Quality Automation Additional Portal Capacity • 3000 Additional Reports • 300 Additional Dashboards • 100 Additional Lists • 100 Additional Workflows Good fit for: Companies that have technical resources on staff and have extensive tech stacks that require custom processes.

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A Message from OBO.

We are incredibly excited about this new development of HubSpot! And if you're just as enthusiastic about it as we are but don't exactly know how to start, let us know! Our team is happy to guide you through the process of customizing your Ops Hub so your organizations can scale the way you want.

Reach out to us anytime at **oboagency.com/contact-us/**

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