# Invimatic
Innovation in Automation

Streamlining Data-Salesforce and HubSpot Integration for Enhanced Efficiency

In today's business landscape, managing customer data across multiple platforms is essential yet challenging. This case study explores how a leading supply chain framework tackled this issue by integrating Salesforce and HubSpot seamlessly.
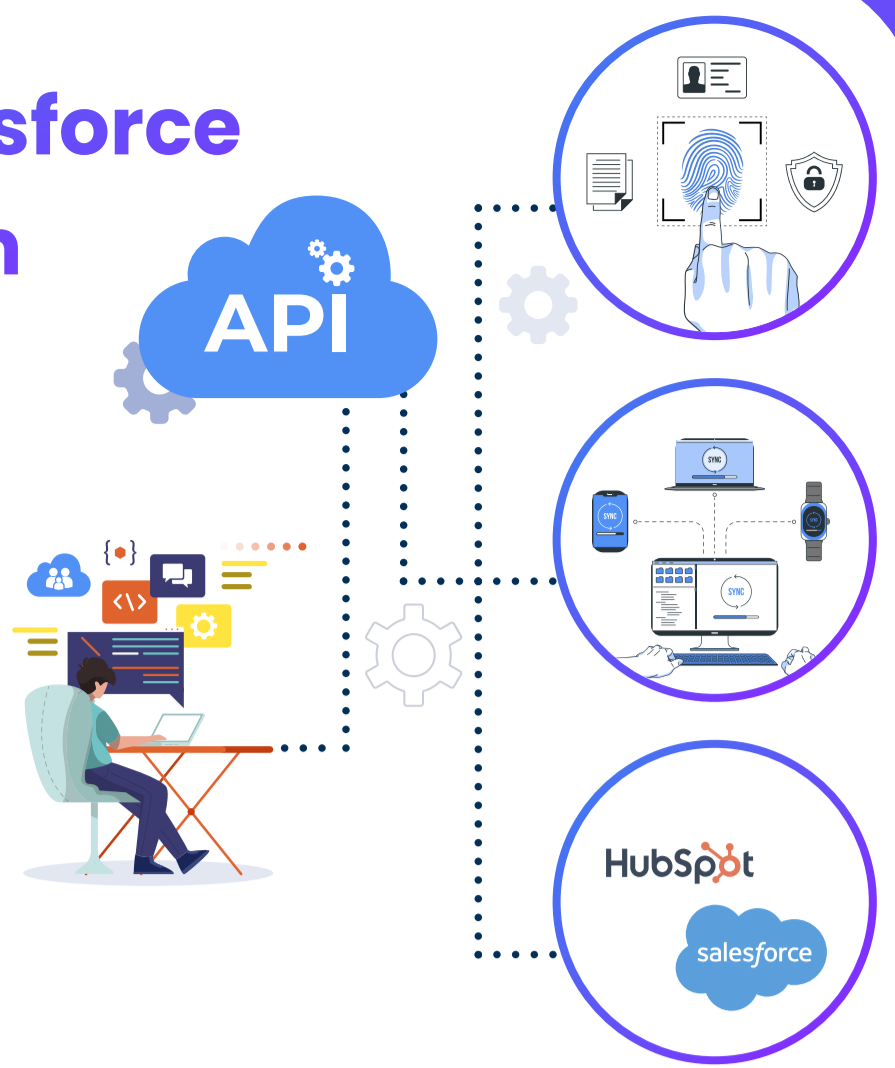
Company Overview

The client has a rapid application development framework in supply chain space, with large enterprise customers.

Challenges

- The challenge lies in the divergence of tools, with sales teams using Salesforce for customer information management and the marketing team relying on HubSpot for automation.

- Given that both teams can independently update data in their respective platforms, maintaining synchronized data between the systems is crucial.

- Ensuring data consistency is essential not only for the efficient performance of each team but also plays a vital role in upholding process accuracy.

Solution Offered

- A Dell Boomi-based integration is recommended to seamlessly connect data between the platforms.

- To empower marketing teams, integration includes Accounts, Caontacts, Contact Demographics, Subscriptions, and Renewal details moving into HubSpot, while Campaign Performance and Unsubscription details are integrated from HubSpot to Salesforce.

- OAuth2-based authentication is implemented in both Salesforce and HubSpot to facilitate API calls. The integration is built with API throttles for both platforms.

- In instances of two-way record conflicts, the modified time is compared to determine the winning side. Real-time data transfer is facilitated through the implementation of HubSpot webhooks and Apex Triggers.

Technical Stack

DELL boomi	APEX Triggers	oAuth2	HubSpot	REST API
Dell Boomi	APEX Triggers	oAuth2	Hubspot API	Salesforce API

Results

> Real time data enabled the marketing team to be 50% more efficient

> The targeting errors are reduced by 75% percent.

Conclusion

By implementing a Dell Boomi-based integration, the client achieved real-time data transfer between Salesforce and HubSpot. This streamlined approach led to a **50% increase** in marketing team efficiency and a **75% reduction** in targeting errors, resulting in improved productivity and decision-making.