APTITUDE 8

# FROM DATA TO ACTION:

*Connect Your Data Warehouse to HubSpot with Reverse ETL*

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# A Guide to Activating your Data in HubSpot

Gone are the days of relying on intuition and guesswork to make critical business decisions. In today's rapidly evolving economy, success hinges on the ability to take calculated steps that mitigate risks and ensure a promising return on investment.

Welcome to the age of data-driven strategy, where unlocking data's potential is vital for growth and outpacing rivals.

This guide delves into how Reverse ETL platforms, like Hightouch, can redefine how businesses handle, analyze, and act on data in HubSpot, propelling success to new heights!

# Intro to Data Warehouses

Data Warehouses have revolutionized the way businesses handle and leverage data. A Data Warehouse is a centralized repository that accumulates and organizes vast amounts of data from multiple sources within an organization.

## Why do businesses use data warehouses?

A Data Warehouse provides a unified and comprehensive view of the company's data, as well as facilitates historical data storage, allowing businesses to track trends and gain valuable insights over time.

They also support complex queries and data transformations, empowering data analysts and data scientists to perform in-depth analysis and uncover hidden patterns.

A few examples of well-known data warehouses include Snowflake, Databricks, Azure and Google Big Query.
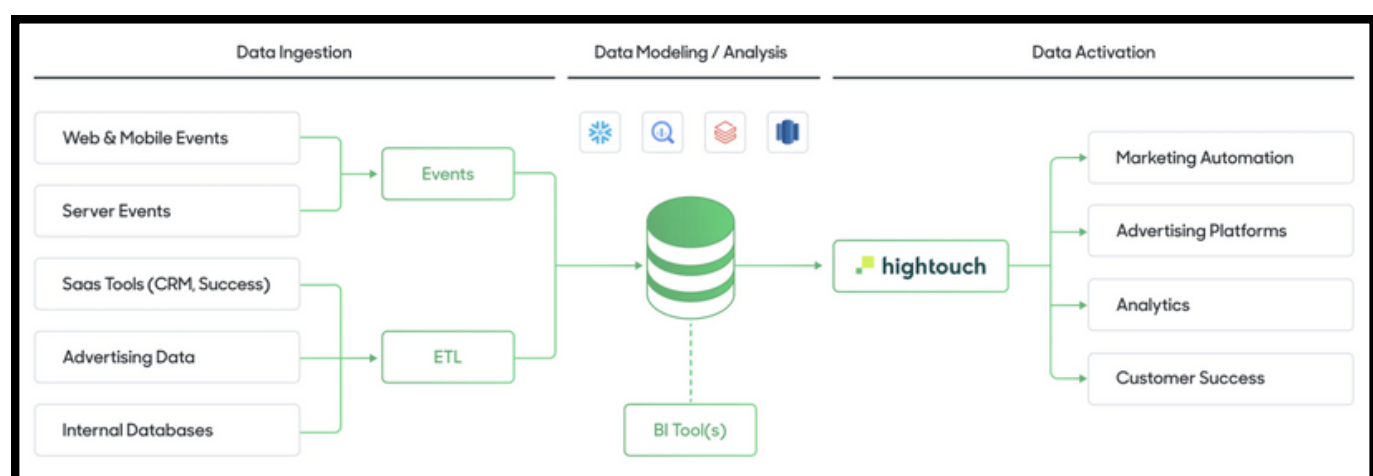
# About Reverse ETL

### What is reverse ETL?

Reverse ETL is a newer concept designed to help organizations make better use of data from various software platforms.

Traditional ETL processes are used to extract data from source systems, transform it into a suitable format, and load it into a target data warehouse or data lake for analysis.

Reverse ETL reverses this, moving data from a central store back to operational systems, making data insights actionable in everyday business processes.

# About Reverse ETL

## Hightouch is a great example of a Reverse ETL option.

Hightouch is one Reverse ETL option that enables you to enrich HubSpot with customer data and transform the way you use your CRM.

Hightouch is a provider of Data Activation and Customer Data Platform (CDP) solutions and:

- enables teams to activate data directly from their data warehouse to over 200 destinations
- is used by organizations like Cars.com, Spotify, TripAdvisor, PetSmart, and GameStop
- unlocks a scalable CDP alternative by enabling users to activate data points directly from their organization's data warehouses out to others tools

## Where can a Reverse ETL Platform fit in a tech stack?

A reverse ETL platform like Hightouch, can be integrated at various points within your tech stack, typically after data extraction. It ensures that your data is readily available for analytics, reporting, and downstream applications, enhancing the overall data ecosystem's value and insights.
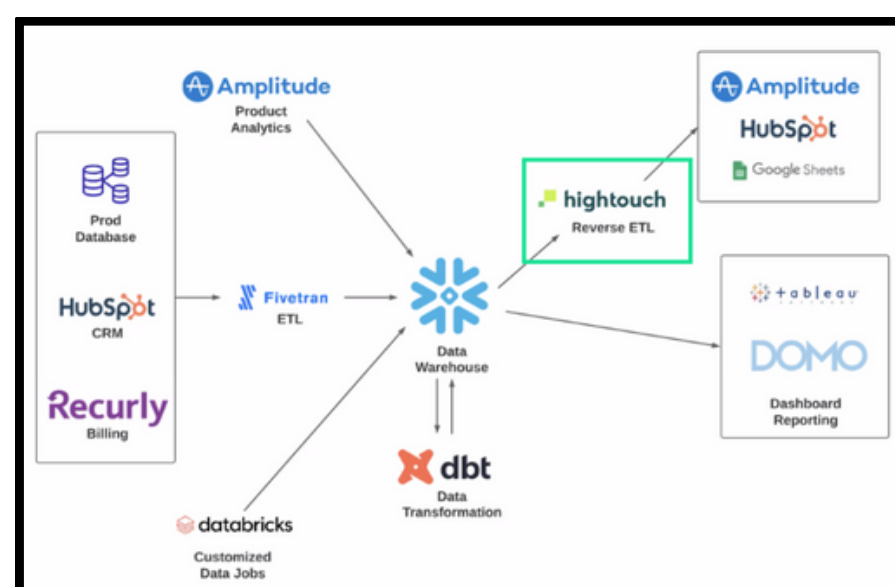
# How to Set Up Hightouch and HubSpot

So you've decided you're ready to get more out of your data? Configuring your Hightouch <> HubSpot integration isn't as complicated as it may seem. Within a matter of a few minutes, you can have your integration set up and seamlessly syncing data between your platforms.

1. Set up Data Warehouse connection
2. Define data mapping
3. Configure Hightouch & HubSpot integration
4. Define sync frequency & rules
5. Test & monitor the integration

Watch the video demo at https://youtu.be/RJHnxTasUCI.

# Taking Action with your HubSpot Data

Whether it's crafting precise personas, forecasting trends, or building a dynamic webpage, get ready to harness the potential of HubSpot's integrated data and let your imagination run wild with new ideas and strategies.

Follow along as we unveil how data synergy can empower every facet of your business, fostering collaboration, and propelling your entire organization towards unrivaled success.
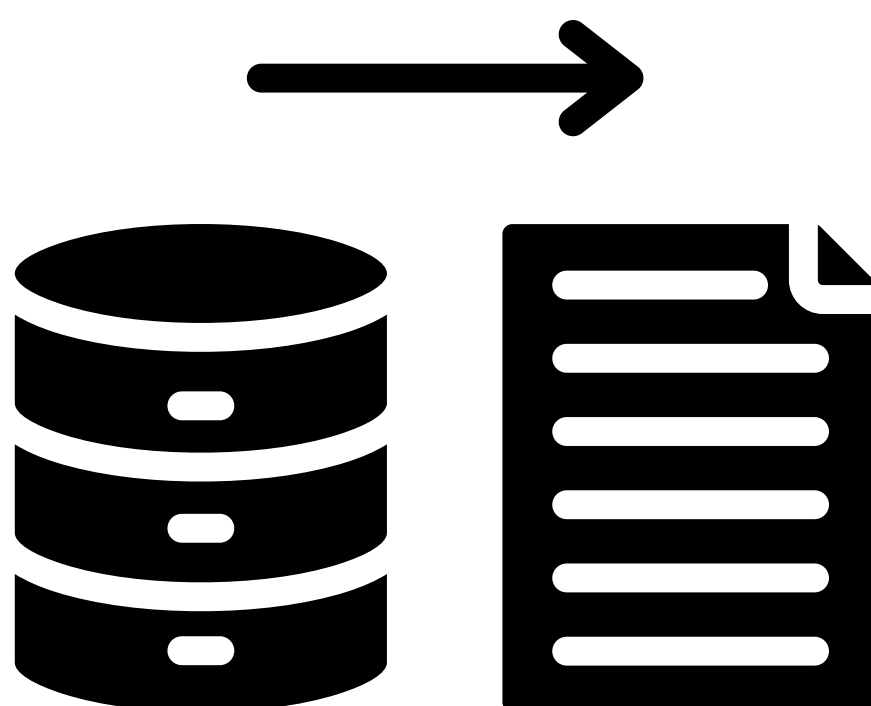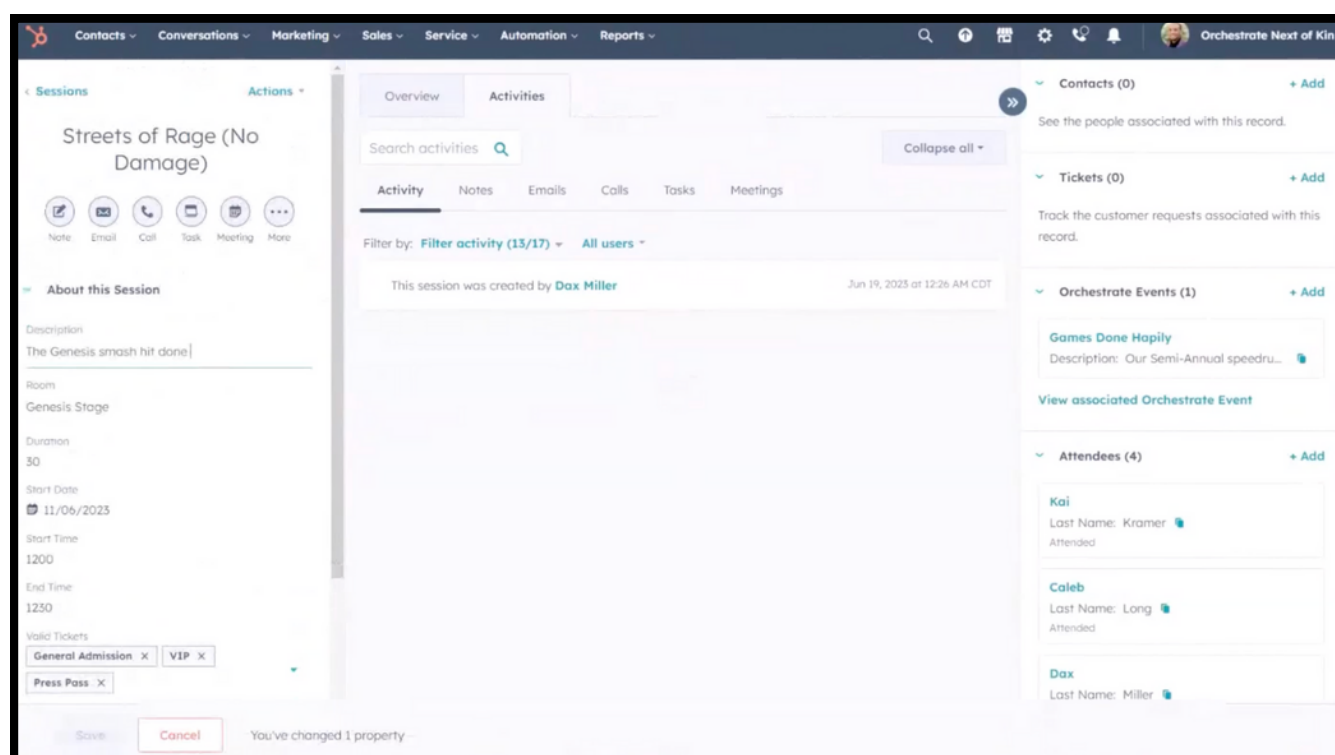
# Data Powered Web Experiences for GTM Teams

Imagine a world where your website experience feels tailor-made for every visitor, where data and creativity join forces to make it happen. Thanks to the power of Reverse ETL platforms, your data warehouse becomes a valuable resource, sending essential insights directly into HubSpot's CMS Hub

## Craft Dynamic Marketing Web Pages on CMS Hub

Once your data is organized and stored inside of HubSpot, you can build custom modules in HubSpot's CMS Hub to pull that data onto any web page.

This solution not only streamlines the presentation of event details but also removes the need for manual updating and ensures that the information displayed is accurate and current.

A great example of a data-powered website your Marketing team can build is an event site. Let's say you're hosting an event with multiple different sessions - You can create a Session Custom Object that stores all of the information about each session, inside of HubSpot.
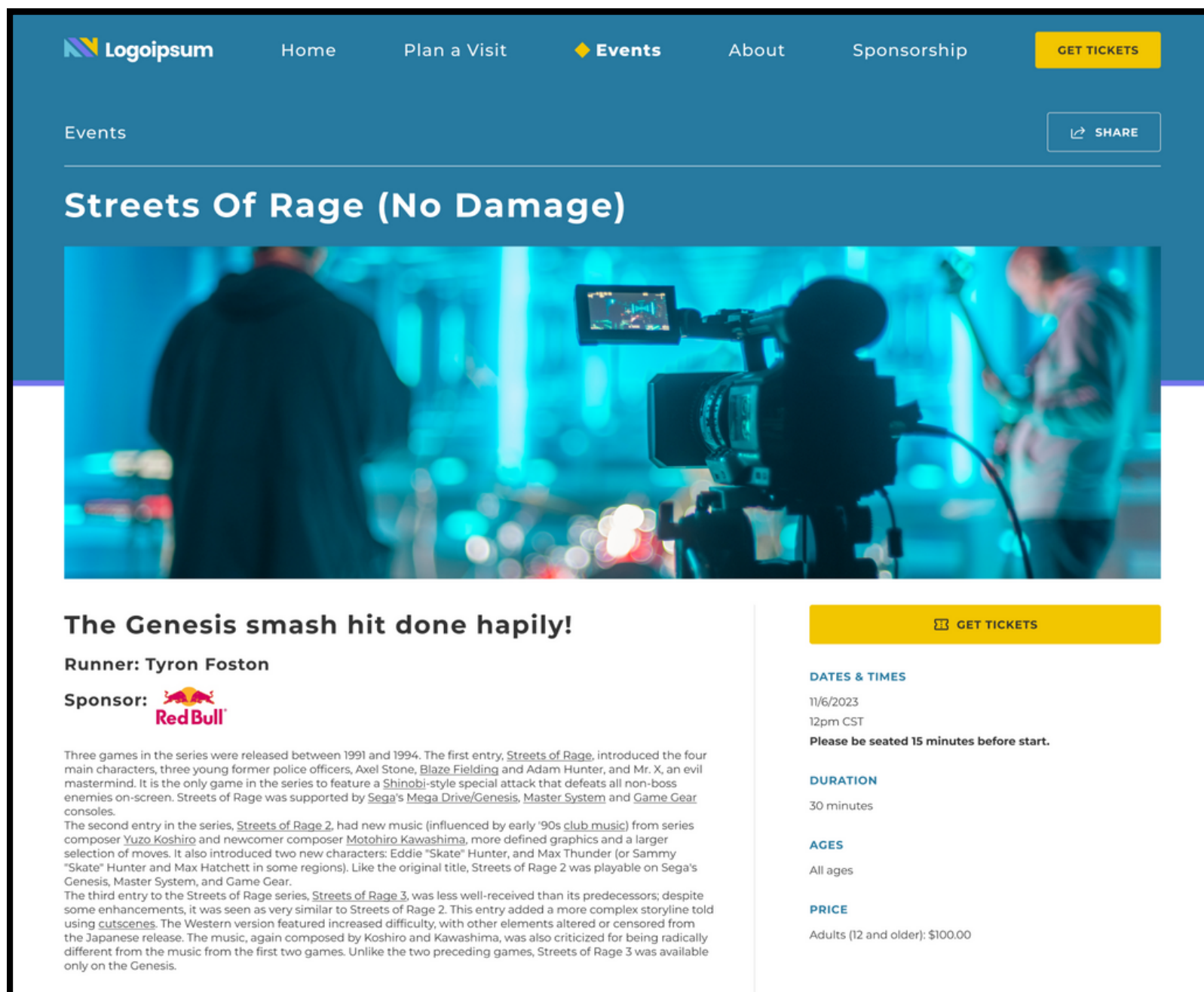
# Data Powered Web Experiences for GTM Teams

## Craft Dynamic Marketing Web Pages on CMS Hub

With all of that information on your Session custom object, you can use a custom module to auto-populate your event site, updating important session details in real time such as:

- Session Descriptions
- Locations
- Duration

- Start & end time
- # of registrants
- Max capacity

# Data Powered Web Experiences for GTM Teams

## Craft Dynamic Marketing Web Pages on CMS Hub

You can also offer a calendar, or agenda view of your session for your attendees as well.
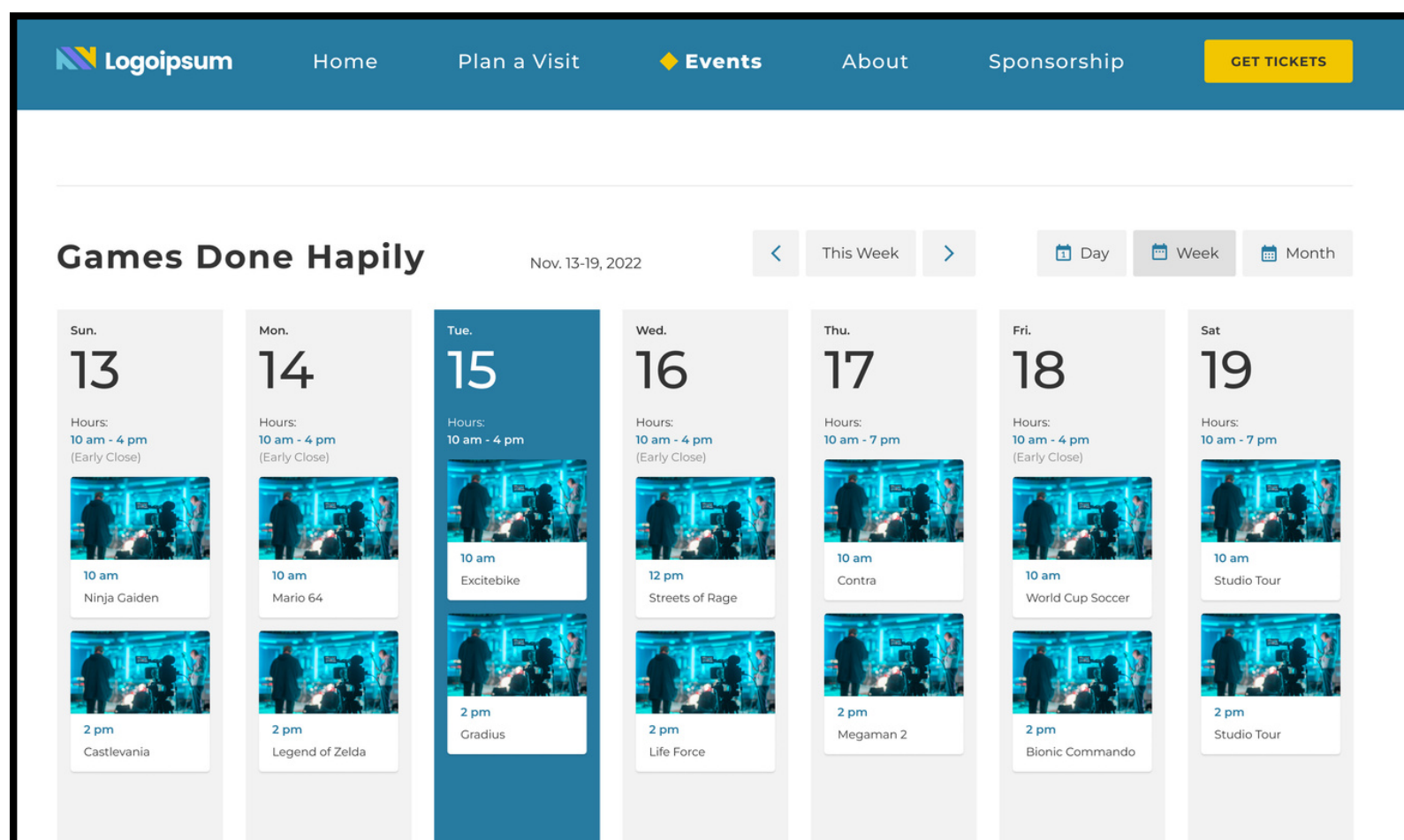


Watch a demo at youtu.be/OhGVtnJlf5M.

Visit aptitude8.com/case-study/INBOUND-2022 to read a case study about how we relied heavily on data to build the immersive and dynamic digital experience for all attendees at INBOUND 2022.

# Data Powered Web Experiences for GTM Teams

## Driving Sales & Customer Success with Data-Driven Web Pages

The benefits of having access to data in HubSpot to drive your website stretches beyond just marketing. By powering your site with an inventory of data, you can unlock a world where personalization fuels your customer's experience throughout their lifecycle.

### Account-Based Sales

Account-Based Sales is a great example of how your sales team can use data to build personalized, web experiences for their customers.

You can build dedicated landing pages with account-specific information like:

- Customized pricing
- Relevant success stories & case studies
- Account reports
- Personalized recommendations
- Dedicated webinars

### Customer Portals

Customer Portals equipped with the right data empower your Customer Success teams to deliver a tailor-made experience to every customer.

Customer Portals can be designed to facilitate various Customer Success activities, such as:

- QBRs with customer reporting
- Support tickets and case history
- In-person event management
- Progress tracking
- Product or service usage & check-ins

# Activate your Product Data & Drive Growth

## Working With Your Data Beyond Spreadsheets & Warehouses

Utilizing Reverse ETL isn't just about data movement; it's about organizing that data and putting it to use. Analyzing your product data, beyond seeing it in a spreadsheet, can provide you with valuable insights into customer behavior.

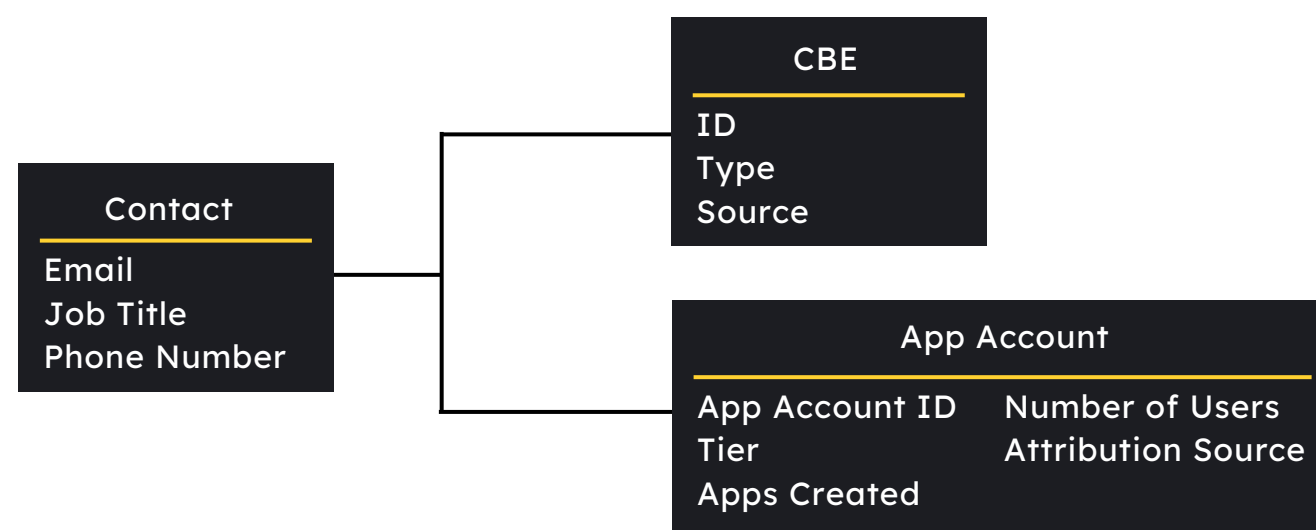You can organize product data into two categories:

### Custom Behavioral Data

Custom behavioral data refers to any data that details an action the customer has taken including if they've signed up for a free trial or whether or not they have completed their account.

### Usage Data

Usage data refers to data like how many times someone has logins, and how many users or apps have been created.

How does your product data map to your HubSpot data model?

**Contact**
Email
Job Title
Phone Number

**CBE**
ID
Type
Source

**App Account**
App Account ID    Number of Users
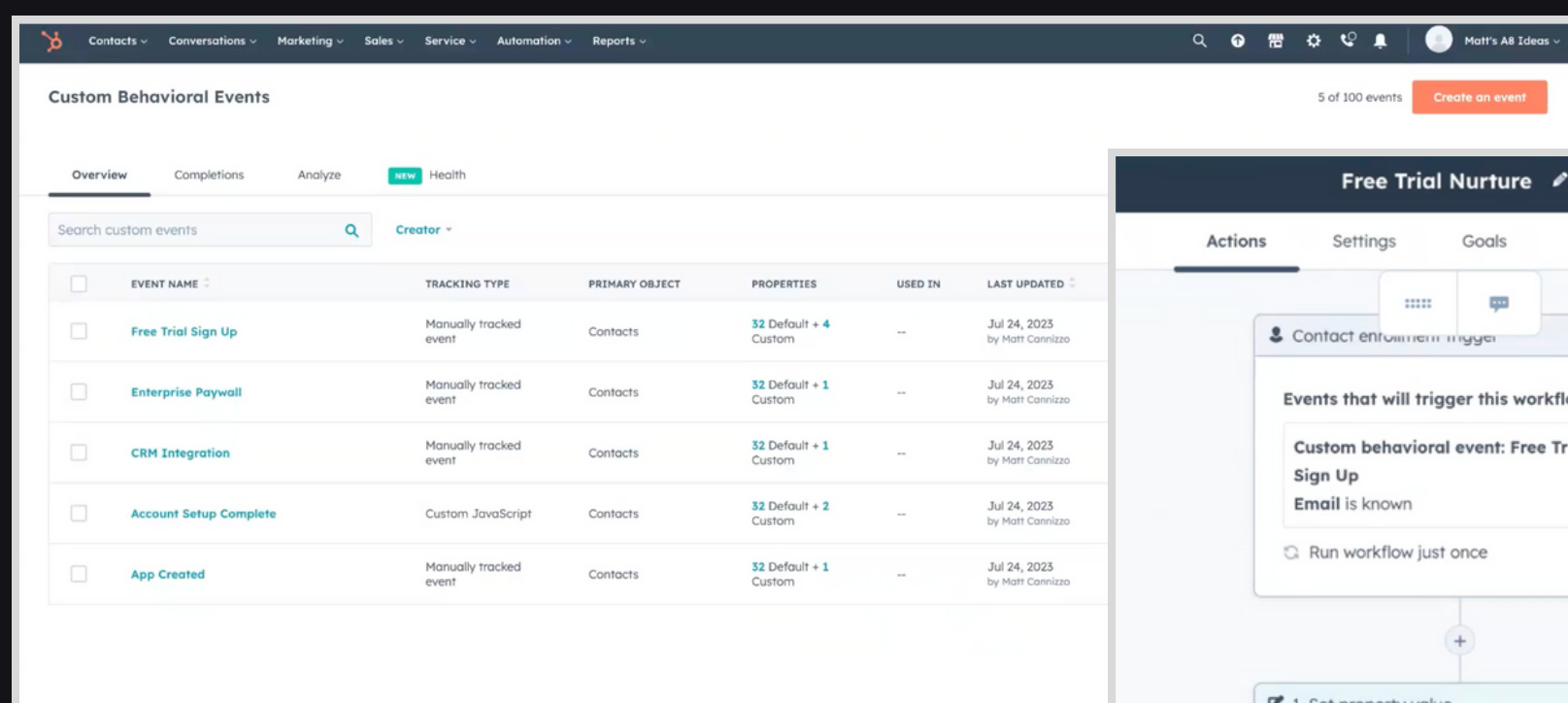Tier                      Attribution Source
Apps Created

# Activate your Product Data & Drive Growth

## Leverage Custom Behavioral Event Data to Power Your GTM Strategy

If you're in the SaaS industry, your product data carries immense potential energy. Having this data inside of HubSpot opens the door of possibilities for what you can do inside of HubSpot.
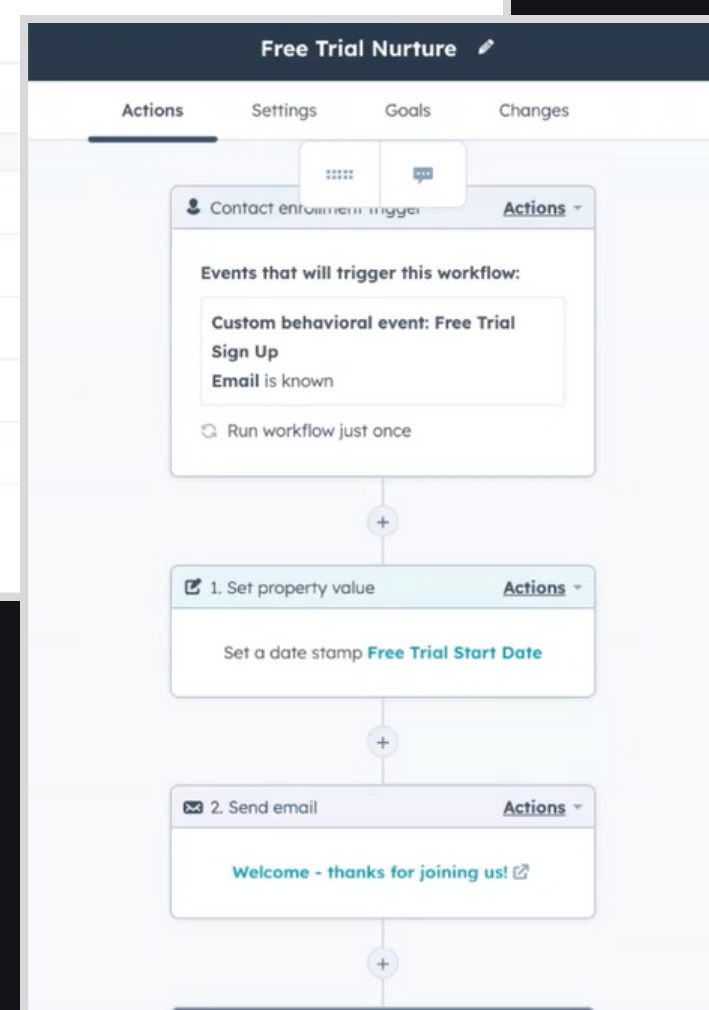
A few use cases include:
- Free trial nurture workflow
- Free trial scores to identify hot leads
- List segmentation for email marketing & automation
- Increase visibility into accounts to flag struggling accounts and surface successful accounts for case studies etc.



Watch the full demo here: youtu.be/sa6W6FY-gLQ

# A Commerce-Powered CRM Using Reverse ETL

## Elevate Your GTM Team's Strategy with Access to More Data

Your CRM serves as the primary hub for your internal, go-to-market teams. With Reverse ETL, these teams can seamlessly access data directly within HubSpot, allowing them to leverage their existing workflows and daily operational environment.
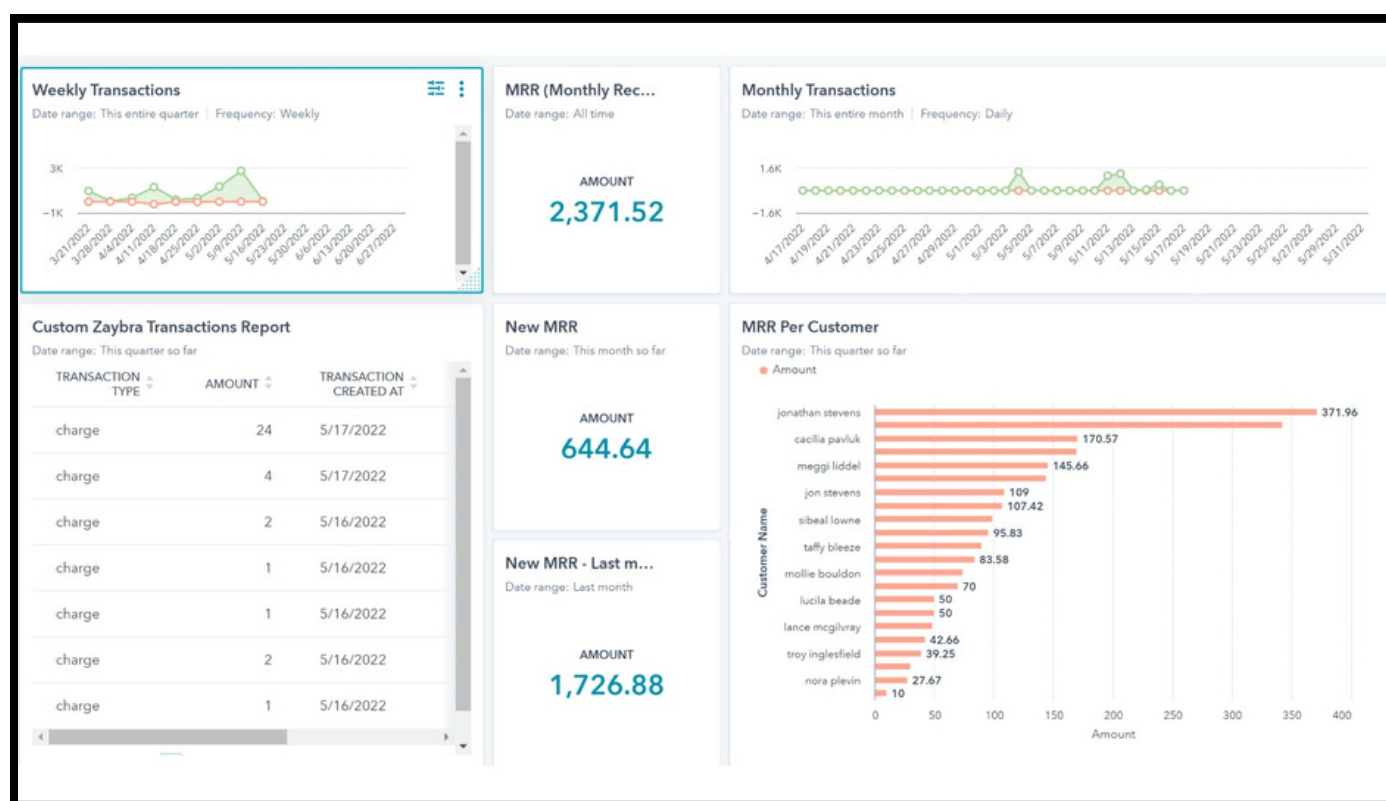


By utilizing reserve ETL, efficiency and collaboration reach new heights for your sales, customer success, and marketing teams.

Watch a demo video here: youtu.be/e76P7tPr0_M.

# A Commerce-Powered CRM using Reverse ETL

## Maximize your Marketing Team's Potential

Although Marketing primarily operates before a payment is made, there are some interesting use cases for this team.

- Personalized Marketing Campaigns
- List Segmentation
- Upselling and Cross-Selling Opportunities
- Customer Lifetime Value (CLV) Analysis
- Marketing Analytics and Reporting

# A Commerce-Powered CRM using Reverse ETL

## Enhance your Sales Strategy

Insight into customer purchasing behaviors and patterns, can help sales teams improve strategies and close more deals. A few ways your sales teams can leverage payments data in their CRM include:

- Penetration into Target Accounts
- Cross-Selling Opportunities
- Customer Behavior Insights
- Rep Motivation and Commission Reporting
- Effective Forecasting
- Churn Prediction and Mitigation
- Quota Setting and Resource Allocation
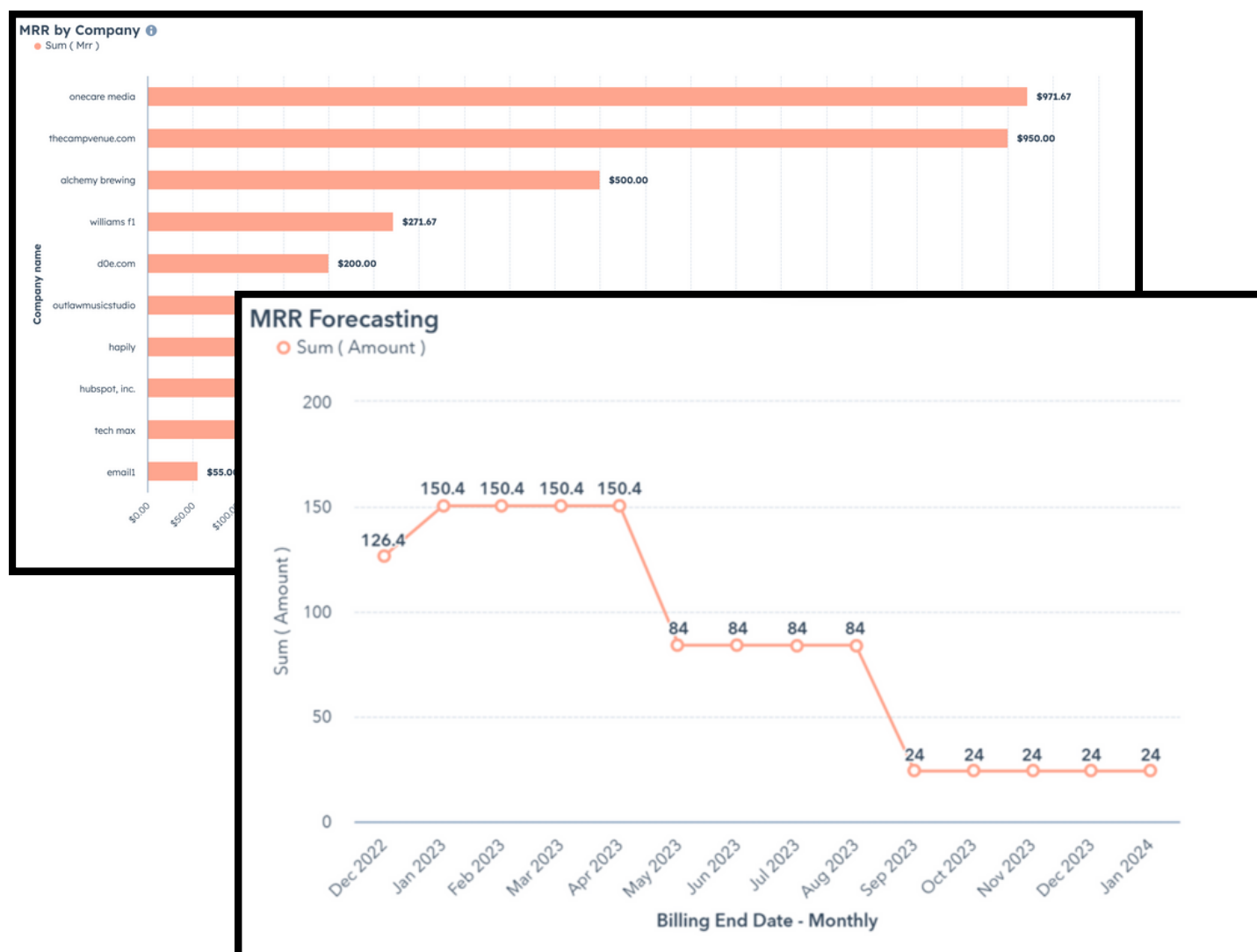
# A Commerce-Powered CRM using Reverse ETL

## Elevate your Customer Success

With payment data in your CRM, teams can leverage automation to enhance the customer experience and drive growth. A few use cases include:

- Streamlining Onboarding Processes
- Task and Milestone Tracking
- Celebrating Relationship Milestones
- Account Health Automation
- Usage Alerts and Support
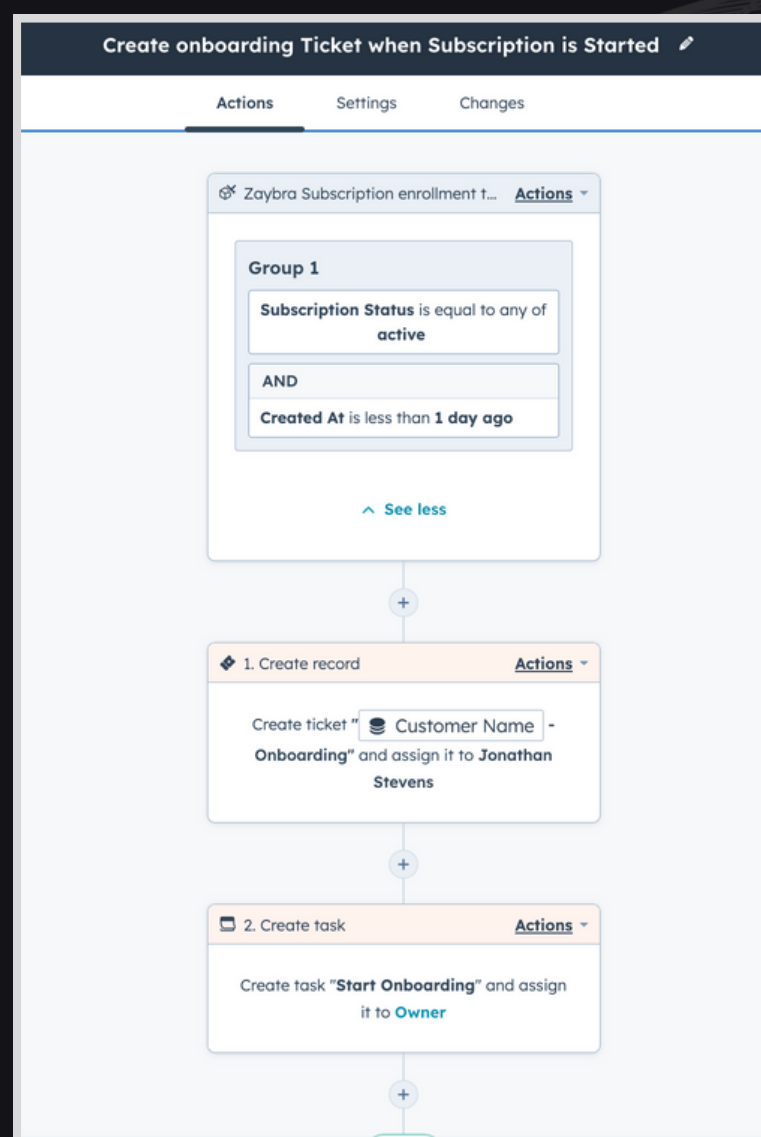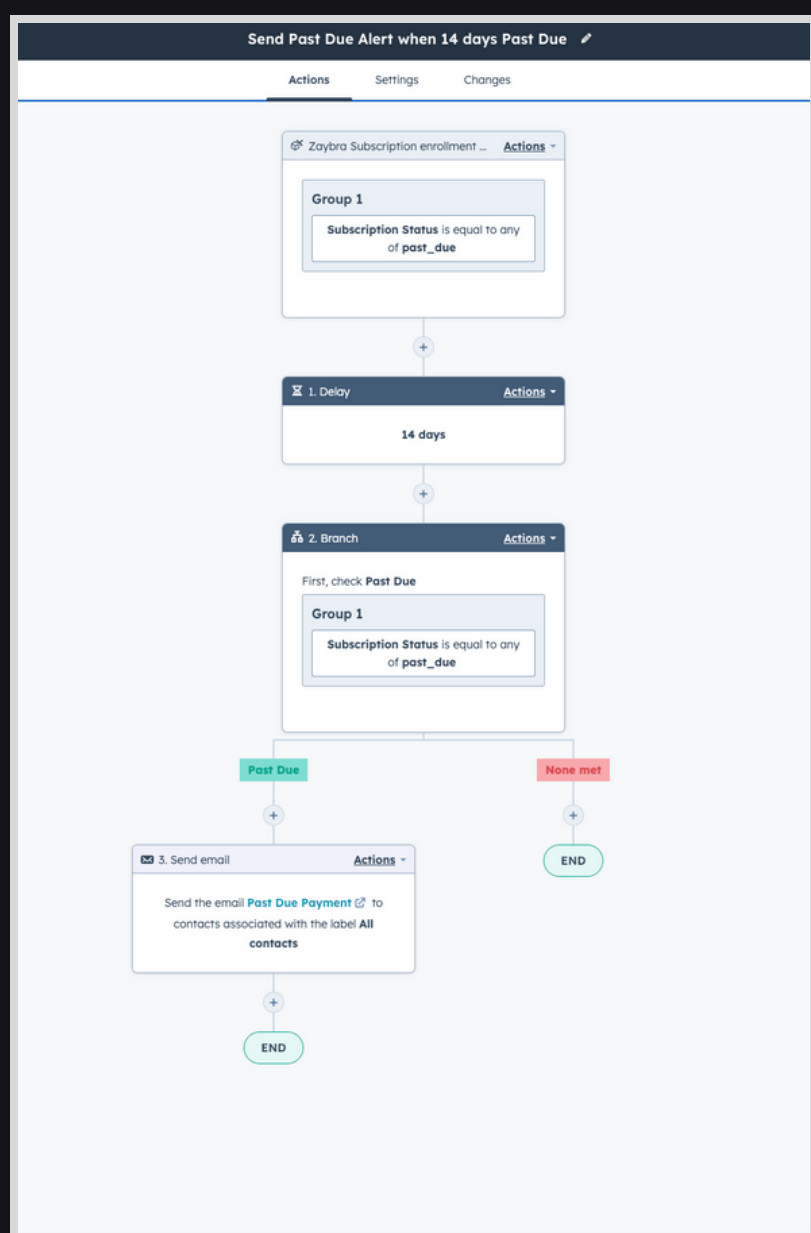
# Ready to get started?

## *Unlock the Full Potential of Your CRM*

With a little help from a Reverse ETL platform like Hightouch, the possibilities are endless when it comes to leveraging the power of your data.

From identifying trends to building tailored experiences, HubSpot empowers you to transform raw data into actionable insights that drive growth for your GTM teams... So why wait?

Let's chat so you can start making the most of your data! Reach out to us at aptitude8.com/contact-us.