APTITUDE 8 HubSpot

The Operations Hub Playbook

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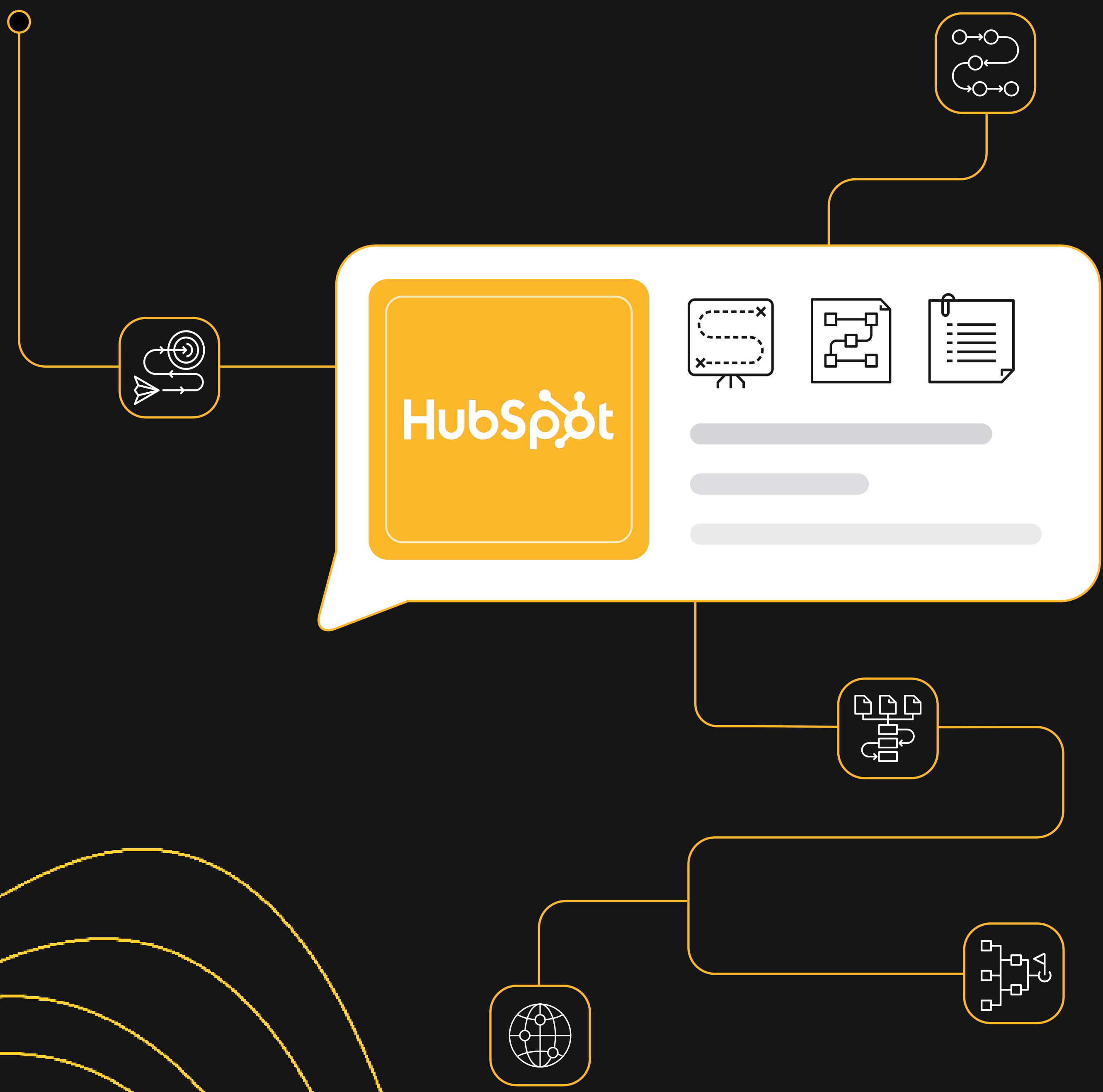

At HubSpot, we're beyond excited to drive the RevOps revolution with Operations Hub, a new product specifically designed for operations teams. With this Hub, operators today will be empowered to play an influential role in helping their companies delight customers at scale. We believe there's nothing more important to a scaling business than the customer experience – and with Operations Hub, we're giving operations teams the tools they need to transform from a reactive fire-fighter into proactive friction-fighters, ready for scale.

With that, we're pleased to present The Operations Hub Playbook. We hope you find value in the blueprints and look forward to seeing what you build!

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Operations Hub is a new product line from HubSpot that connects your apps, syncs and cleans your customer data, and automates your business process. It unites your company around a single source of truth and frees your operations team from reactive busywork. Operations Hub is comprised of three core features:

1. **Data sync.** Data sync is a new, native way of connecting your business apps to HubSpot. With data sync, you can keep all your HubSpot records in lockstep with the rest of your tech stack, freeing you from hours of spreadsheet exports and imports.
2. **Data quality automation.** Dirty data slows teams down and ruins customer experiences. With data quality automation, cleaning data isn't just easy; it's automatic. Data quality automation entails a new set of workflow actions that format property values in certain ways: capitalizing letters, fixing date properties, and more.
3. **Programmable automation.** Programmable automation enables you to execute JavaScript code directly within HubSpot workflows. Programmable automation encompasses three automated actions in HubSpot: a new "custom code" action in workflows, the "create a webhook" action in workflows, and custom-coded bot actions in chatflows.

All three features are incredibly powerful; in this asset, we'll focus on the most flexible of the three, programmable automation.

I.

Data Architecture:

Using Operations Hub to organize data, move data points across objects, and automate the framework for a sound reporting strategy.

APTITUDE 8

Simplify and Enhance SDR Reporting with Single Object Fields

What problem this blueprint solves:

One of the challenges with business units that operate across multiple objects throughout the sales process is pulling together succinct reporting that captures everything you need in 1 view. We find this particularly difficult with SDR teams when you may want to report on which SDR sourced a meeting, which rep they booked the meeting for, and see the attribution for subsequent deals and which stage they went to.

Steps to build

Using a coded action inside of Operations Hub, you could enroll a deal into your workflow.

This coded action could search across all engagements for any associated contacts using the Engagements API:

1. Find the discovery call event using the event type field
2. Determine which user booked that event
3. Populate a text field or a dropdown on your deal with that user's name

You could now easily report on your deals based on which SDR scheduled the last meeting prior to that deal and which stage the deal got to all within a simple deal view or deal report.

You could extend this with additional levels of complexity to take into account which SDR booked the first meeting, had the most engagement, or even run programmatic splits off of a combination of activities to your liking.

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Automate CRM Hygiene

What problem this blueprint solves:

Say your company has it's own application. This application contains lots of important user data that triggers various actions for all of your commercial teams.

Let's talk about a specific action that your account management team requires.

In this scenario, your account management team requires the association of a specific user type (passed from your app to HubSpot via api) to the company **so they can send emails with company based tokens.**

Steps to build

First, you'll need to create custom contact properties in HubSpot to map your user type and the company your user is associated with (account ID).

Next, ensure you pass this info everytime you send it to HubSpot via API.

Lastly, create a workflow with the enrollment criteria equalling "user type" is X. Then, write a custom coded action to pull that user types account ID and associate it with the appropriate company.

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Advanced Single Object Reporting

What problem this blueprint solves:

Hubspot has native attribution functionality, but it can be difficult to combine all the datasets into the same report or pull data from multiple objects in a succinct view. An example use case would be wanting to report for a deal, which SDR booked the meeting that led to that deal, which AE closed it, which marketing touch generated the deal, and which marketing touch was the last touch.

Steps to build

1. By using a deal based workflow and a coded action, we can combine all of this data into custom fields on the deal.
2. First we create our custom fields to store this data, and then our coded action will query associated records to find all meetings booked on contacts associated with the deal, and which user created the first one.
3. We will stamp that users name into a custom field called “SDR Booked By.” We can then follow similar logic by pulling all marketing engagements from the deal and associated contacts and grabbing the first one to occur, stamping that into a custom field, and doing the same with the last engagement.
4. We can add further finesse to this by adding time limits, such as only counting marketing engagements or meetings that occurred less than 90 days before the deal create date.
5. We can then build a simple Deal report that combines all this data together, allowing us to report on full funnel marketing attribution in a single easy to view report!

II.

Integrations:

How to use Operations Hub for both push and pull integrations without the need for middleware.

Integrate Hubspot with any Finance Tool Without 3rd Party Middleware

What problem this blueprint solves:

Who are our customers? Who's been invoiced for this month's services? This account wants to purchase additional services, but do they have any outstanding invoices?

These are common questions for Sales, Customer Success, Finance, and Billing teams. To answer these questions accurately, a Customer Success rep usually launches a mini investigation into your CRM and ERP systems, clicking back and forth through multiple tabs, and maybe even reaching out to a team member from another department to verify their findings.

Wouldn't it be easier to have a seamless, automated connection between your CRM and ERP system? Hint: without purchasing yet another tool to connect the two.

Cue Operations Hub: Automating the connection between Hubspot CRM and ERP Systems creates a seamless experience for revenue teams and finance teams. Long gone are the days of manually creating new customers in your ERP System and missing out on real time finance data in your CRM.

Steps to build

1. Navigate to the Connected Apps section in your Hubspot settings and connect your ERP system
2. Create a few custom fields on the Company object to contain customer information from your ERP system. Think: ERP System ID, ERP System Status, ERP System Most Recent Invoice Date. But enter your ERP System name (like Netsuite) instead of "ERP System" of course.
3. Then draft a workflow to automatically sync new customers to the ERP system. Workflow Enrollment criteria recommendation:
   - Deal Stage has recently been updated Closed Won AND Company does not exist in ERP system (ERP System ID is unknown)
4. You'll set up the workflow actions to push data from the New Business Deal into your ERP system. This data push will auto-generate:
   - A new Customer record in the ERP system
   - An invoice attached to the new Customer record based on Product data in the Hubspot Deal
5. Hubspot will intake the response from the ERP System API call to update your Hubspot system with the IDs and direct links to your ERP
6. Ta-da! The entire Customer billing process is now closed loop and your team can ~easily~ understand their current invoice status and easily find the Customer in both Hubspot and your ERP system.

Enrich your Hubspot Records with External Data Using Pull Integrations

What problem this blueprint solves:

CRMs only represent a piece of your whole prospect data set. Often customers are using tools like ZoomInfo or Clearbit to enrich their records or connecting an ERP or accounting system to add further context to CRM records. However, many Hubspot Customers are using external tools that do not connect to Hubspot natively, and while they may have publicly available APIs the cost and complexity of building a custom integration using middleware is high.

Steps to build

Using coded actions, you can fetch data from external systems all natively inside of Hubspot.

On record create, a form fill for instance, a workflow could run and query your accounting or ERP system to enrich a record with data on whether their company is a customer already, the last invoice they paid, or the last job they booked with your company, all without needing a full bidirectional integration.

Similarly, you could query databases specific to your industry or market and enrich that record with corresponding information to better inform your ABM or marketing segmentation initiatives.

By triggering this from Hubspot you reduce the need for complex and risky 3rd party integrations and coded solutions, and can control when and how these scripts run all without ever leaving Hubspot.

Automate Data Transformation and Migration

What problem this blueprint solves:

Whenever you implement a new system, or migrate a business process into a system you already have, one of the most painful parts is data transformation. Often your source system has a flat file but you want to convert that file into multiple records in your Hubspot org. We ran into this with a real estate customer that was getting file exports from their MLS system, but that export contained data about properties, buying agents, selling agents, and sometimes had multiple units in a single row. We see similar problems with companies using Content Syndication strategies and trying to manage multiple vendors who feed them files with different formats and field values leading to manual work trying to standardize the data prior to import.

Steps to build

By using an Operations Hub coded action, you can parse imported data and automatically transform it every time it comes into your system.

You could do this with a file that needs to be converted from flat into a multi object data schema by creating an "import object" and having a workflow run off of that import object. The import object would trigger the workflow on create, and the coded action would use various CRM object APIs to create the necessary records.

For our real estate example, this could create or update contacts for the buying and selling agent, custom objects for the property fields, and deal records for bid information.

Similarly, for our content syndication example, we could use a contact workflow and a coded action to parse date from Import fields specific to content syndication, and set the correct value in the fields we use in our database, converting 5-10 to 7, Q2 to March, or other data formatting preferences to ensure your data is consistent regardless of the source.

APTITUDE 8

III.

Advanced Workflow Automation:

Take your workflow automation to the next level by removing limitations of standard actions and run fully code based actions.

APTITUDE 8

Automate CMS pages based on CRM Data

What problem this blueprint solves:

Businesses add new partners, new customers, and other relationships they want to feature all of the time, but often the lag between that relationship becoming official and getting around to updating your "partners" or "featured customers" section of your website can take months, if it ever gets updated at all. You can use Operations Hub to automate this workflow by leveraging CMS Hub Enterprise and coded actions.

Steps to build

Whenever a new Company is marked as an "active partner" in the type field, enroll that company into a company based workflow.

You will create a coded action that will update a HubDB table that powers your website section called "Partners" with that companies information, all fed directly from the CRM. If you wanted to surface only specific details, you could even make those required fields when a user marks a deal in the Partnership Pipeline closed won.

This will automatically update the website and show that partners information live on the site. You could take this a step further if you created partner specific landing pages for partners, much like Hubspot does for [Solutions Partners,](#) and build entire webpages for individual partners automatically, all driven by CRM workflows.

Build a Referrals Program Inside HubSpot

What problem this blueprint solves:

Have you ever thought about building out or updating your current referral program? Maybe your current design is clunky, ill-designed, or has too many roadblocks? Better yet, maybe you have a revolutionary design for your marketing team's referral program and just need a tool to build it out.

Look no further than Operations Hub and its superb custom functionality.

Tools You'll Need

- Referral Program Designer
- Referral Program Blueprint
- Referral Incentives
- Developer
- Operations Hub Pro

Steps to build

To begin the build, you'll want to lay out space for the referral code data to live. This can be accomplished by simply creating a contact property with an apt name (i.e "Referral Code"). In building out your referral program blueprint, it is foundational for your customer to know about their referral code ASAP. Why not draw up plans to include this in the onboarding process?

After creating your "Referral Code" contact property, use Operations Hub's search tool to lookup and match with an existing contact's referral code. You'll want this to trigger whenever a new contact is created and this "Referral Code" field populated.

Next comes the fun stuff. As the architect of this new process, you can design your referral program in many ways. Maybe you want Operations Hub's search tool to automatically notify the user whenever their referral code is used. Maybe you want to add a new dimension and build an Operations Hub app that automatically adds a credit to the referrer's account.

Your space is up to you and Operations Hub is waiting for your designs.

APTITUDE 8

How to Simplify Renewals with Automation

What problem this blueprint solves:

Renewal Deal management can be a tricky process due to many factors:

- Pricing changes over time
- Varying contract terms and duration of services offered
- Scaling Customer Success teams managing large volumes of customers

Typically, Customer Success teams are quick to onboard and support a new customer right after a Deal is Closed Won, but it can be difficult to maintain the customer relationship throughout the entire contract term. You definitely don’t want a cold or non-existent customer relationship when the customer’s renewal date is right around the corner.

Enter Operations Hub: By automating renewal Deal creation with Operations Hub, you can easily track the renewal pipeline, as well as further automate tasks around the renewal Deals to make sure your Customer Success reps are warming up their relationship with the customer well before the renewal date. This automation helps increase renewal conversion and reduces the workload on your customer success teams.

Even if you have workforce changes within the Customer Success team, you can reassign the renewal Deal owners based on the criteria you determine for who is best suited to manage the renewal or upsell Deal in the future.

Steps to build

If you haven’t already, you’ll need to add Subscription End Date, Service End Date or Renewal Date properties to Deals. These dates should indicate when the customers services or subscription will end and when the customer needs to decide whether or not to renew their services or subscription.

Then you’ll set up a workflow to enroll Closed Won Deals, and create a new Renewal Deal with a Close Date equal to the Renewal Date from the original Opp.

Next, you’ll copy the Products from the original deal to the renewal deal, and clear out the discount fields on each line item. Clearing out product discounts is optional but Revenue teams typically want to view the baseline price before adding discounts in case pricing has changed since the original deal and your business no longer offers the discounts previously offered. You can always add discounts later on.

Lastly, you’ll set up Deal assignment to the CSM best suited to drive the renewal or upsell efforts. This can be done based on Company CSM ownership or other criteria determined by your Sales and Customer Success teams.

IV.

Data Routing & Assignment:

Use Operations Hub to extend your routing and assignment logic past round robin.

Manage Capacity Based Ticket Assignment Using Hubspot

What problem this blueprint solves:

For larger service organizations, round robin ticket assignment simply isn't sufficient, and the web of rules for assignment are too vast to manage with standard workflows. Organizations need the ability to perform skills based, capacity based, and other routing models they can't build using standard workflows.

Steps to build

Using coded actions, you can build a capacity based assignment model. What you will do is create a ticket based workflow that runs a coded action.

Your coded action will query the Tickets API and the Users API to find which users are service hub users, and get a list of active tickets.

Your script will sort the tickets based on assignee to determine which agents have the lowest number of tickets currently assigned, filtering by status.

You can then assign the newly created ticket enrolled in your workflow to the agent that has the least number of tickets. You could expand this functionality to include SLAs, ticket priority, ticket size, or any other parameters you store within your ticket records.

Advanced Deal Assignment

What problem this blueprint solves:

If your Sales team is divided by a specific segment of your target market (geographic, industry, etc) then a simple round-robin amongst reps simply won't cut it. Managing and assigning Deals based on geographic territory, for example, can be tricky...especially when combined with other dimensions. We've seen this problem where a rep may be responsible for covering several specific states and a few select large accounts that may span multi-states. The last thing you want is to have reps, Ops, or management spending time manually changing deal owner assignments.

Steps to build

You can automatically assign a Deal owner based on your territory criteria by using an Operations Hub coded action.

Each time a Deal is created, you can hit the Hubspot Deals API to grab the Deal and assign it to the correct rep based on the IP location of the Deal's primary contact.

You may also want to store territory data on a custom object to more easily manage regions, and then reference the appropriate region inside of the coded action. This would allow you to have reps that are assigned to specific geographic areas as well as some other criteria such as industry.

Advanced Forecasting

What problem this blueprint solves:

Hubspot has native forecasting tools, but for companies looking to get very analytical and build algorithms to help them predict close rates and forecast incoming cash flow they need something more robust.

Steps to build

Using a coded action and some calculations, you can build a living and dynamic forecasting solution.

Whenever a deal is created, enroll this deal into your deal based workflow and run your coded action. Your coded action will query the Deals API and pull the average time to close for all deals assigned to that owner in that deal size range over the last 6 months. The close date will then automatically be set based on these criteria.

You could further this logic by updating probability to close dynamically by owner, by market segment, or by market size to bring what used to be a functionality limited to spreadsheets and a business analyst into your CRM as a living and dynamically updating algorithm forecasting closed deals.

V.

Custom Objects:

Leverage Operations Hub with custom objects to build fully native custom applications within Hubspot.

APTITUDE 8

Extend Hubspot Into Your Own SaaS Application

What problem this blueprint solves:

A big challenge for most software companies is that the place where the teams that manage customer relationships spend their time, the CRM, is not the place where they manage customer subscription data or licensing. This results in support fielding tickets that request for trial extensions and then needing to go log in to an active admin panel, or worse submit a request to a product team, to extend a prospective customers trial. Similar flows happen when a customer converts from the sales process into being a paid user and tenant creation has to be managed manually.

Steps to build

With coded actions, you can automate all of these flows.

By adding a field for "trial expiration date" to your contact record and creating a workflow that hits an endpoint your product team exposes, you can extend trials all without ever leaving Hubspot and with minimal engineering time.

You can extend this functionality to create paid user accounts when customers sign through the quotes tool using quote based workflows and a coded action that sends all the necessary accounts to create data to your SaaS product.

You could make this even fancier using custom objects and originating a customer's Subscription object from Hubspot, allowing a deal workflow to generate a subscription with all the correct data, and a subscriptions object workflow to push that subscription into your product and update it with the correct ID.

This will allow you to empower your go to market teams to use the tool they're in every day, hubspot, to make changes directly to a customer's product level data.

Build a Full Application Native to Hubspot

What problem this blueprint solves:

While you can build apps for Hubspot and deploy them in the marketplace, you may not want to list your app for the general public. There are also limits to the current app ecosystem in that you cannot run code with a workflow extension or other installed app, meaning you need an external service to power your application.

Steps to build

With custom objects and custom coded actions, you are able to build entire applications native to Hubspot.

Take for instance a commissions app. With two custom objects, one for a commission plan and another for a commission event, and a simple custom coded action you can manage and calculate all of your commissions natively inside of Hubspot.

First, create a commission plan record and store your commission details on it (such as % of commission paid on deal won, quota numbers, ramp bonuses, and spiffs). By storing a user ID on your commission plan object, you can build a custom coded action that runs on deals being marked closed won.

When this happens, your action will be invoked and search for a commission plan with the same user ID as your deal owner. Based on information on that specific commission plan, your coded action can generate a commission event directly inside Hubspot.

You can then use these commission events and add fields for things like whether it was paid out or not, build reports on commissions, and have a fully functioning commissions application all without adding another SaaS product or external service.

This can be extended to most anything you can imagine, and is truly the most powerful use case for Operations Hub.

APTITUDE 8

Now that you've made it through The Operations Hub Playbook, we hope you've found a few blueprints you're interested in trying out.

Special thanks to Connor Jeffers, Ryan Finkelstein, Nicole Kimball, Matt Cannizzo and Cahleel Copus. They have spent countless hours building workarounds for our HubSpot clients over the years. Now with the release of Operations Hub, we're more excited than ever for the endless possibilities available to us and our clients in HubSpot.

Should you start and find you need a hand along the way, feel free to reach out to our blueprint architects at Aptitude8.com or by filling out this form.

We would also like to thank HubSpot for their partnership and help creating this playbook. Without their team, we would not have the ability to build on these tools and we couldn't be more excited about what the future will bring.

Happy HubSpotting.