HubSpot & Dynamics 365

Integration Guide



A Complete Guide to Integrating HubSpot Software with Microsoft Dynamics 365

Brought to you by:

CARGAS®



Don’t Settle for One Tool–
Succeed with Two

Customer Relationship Management (CRM) software and marketing automation software are two sides of the same coin. Both help your team manage the sales funnel and wow your customers, but the features included in each are vastly different.

That’s why an integration between CRM and marketing automation software is so powerful—it gives your team new ways to evaluate data, streamline sales and marketing processes, and collaborate across business units.

One of the most popular integrations connects Microsoft Dynamics 365 CRM with HubSpot CRM, creating a powerful platform for sales and marketing to work in tandem.

HubSpot + Microsoft

About HubSpot & Dynamics 365



HubSpot is a leading marketing automation platform with applications for sales, marketing, and customer service. HubSpot's software embraces inbound marketing strategies, which focus on generating content to attract leads and transform them into enthusiastic repeat customers.

The most popular integration uses **HubSpot Marketing Hub**

Dynamics 365 is Microsoft's platform for customer acquisition, operations, and productivity. The CRM side of Dynamics 365 includes modules for sales, marketing, customer service, and field service

The most popular integration uses **Dynamics 365 Sales**





Why Companies Integrate HubSpot & Dynamics 365

While HubSpot and Microsoft Dynamics 365 CRM have some feature overlap, the software is complementary, which makes integrating the solutions a worthwhile investment. The most popular integration is between Dynamics 365 Sales and HubSpot Marketing Hub. Here's what the solutions do independently and together.

HubSpot Marketing Hub

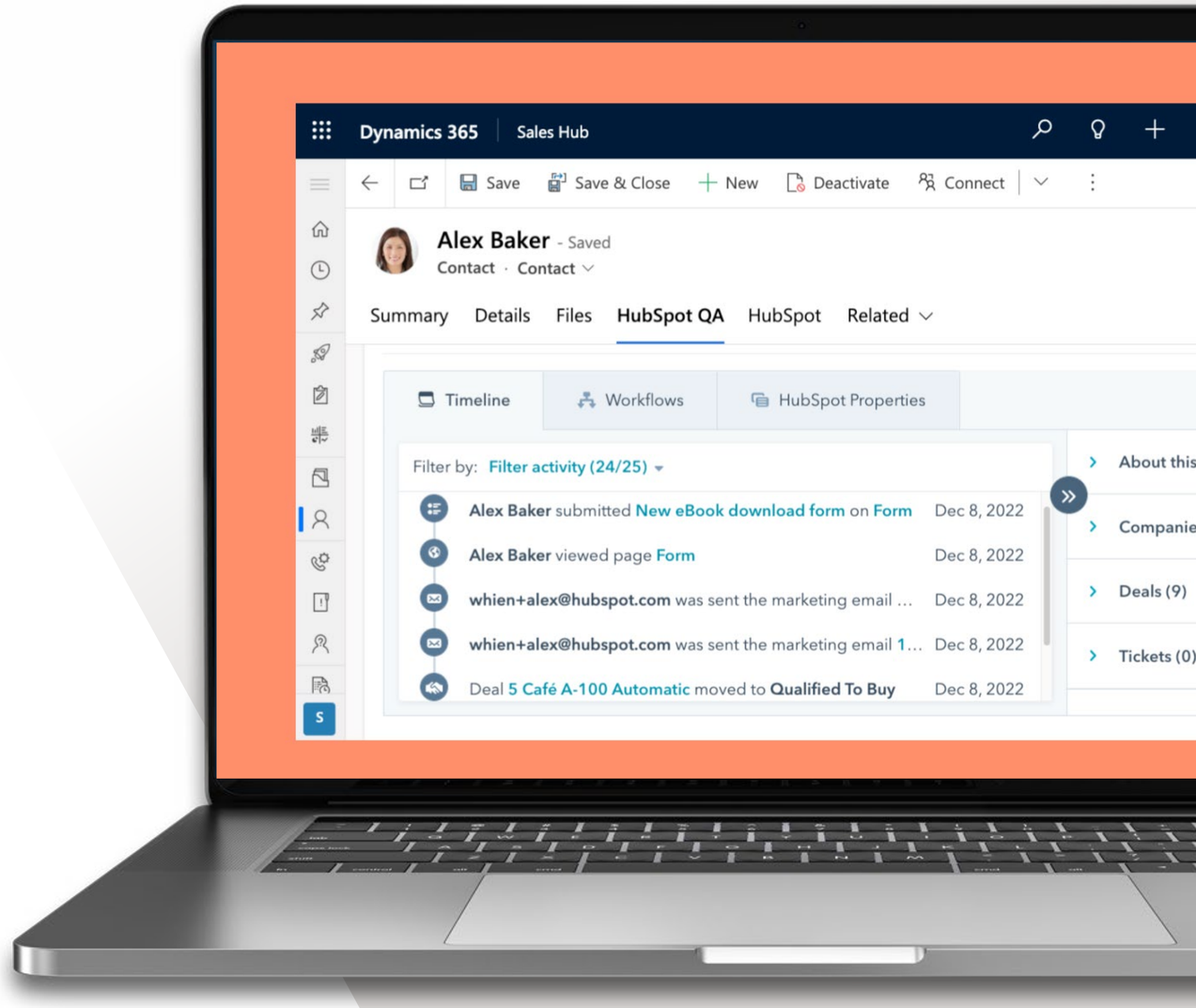
An application for all things marketing. Build SEO strategy, craft content for campaigns across multiple channels, and target segments with unique messaging to maximize the effectiveness of your efforts.

Microsoft Dynamics 365 Sales

Software designed to maximize the efficiency and effectiveness of the sales funnel. Manage leads, opportunities, accounts, partners, tasks, and sales orders. Plus, enjoy powerful sales forecasting to plan your future growth.

HubSpot Marketing Hub & Dynamics 365 Sales Integration

HubSpot Marketing Hub hooks new leads with engaging content. These leads are noted in HubSpot and Dynamics 365 Sales, with qualification progress charted in real-time. Once leads are primed for the pitch, sales teams have access to that valuable data directly in Dynamics 365 Sales, leading to more personalized outreach. And once a sale goes through, marketing and sales can keep customers engaged with collaborative upsell and cross-sell opportunities that use the best features of both applications.





Integration Features & Benefits

Beyond all of the capabilities available from Microsoft and HubSpot as standalone software providers, integrating their solutions offers unique features and benefits for your business.

Two-Way Data Sync

View up-to-the-minute account data, no matter which application you're using. Details are available on page 6.

HubSpot Embed for Dynamics 365 CRM

Access HubSpot directly from your Microsoft solution to see how contacts are interacting with campaigns.

Static and Dynamic Lists

Evaluate existing customer relationships from Dynamics 365 CRM to run personalized renewal, upsell, and cross-sell campaigns in HubSpot.

Expand Visibility and Collaboration for Sales & Marketing

Align disparate teams with real-time data and a clearer view of customer journeys.

Improve Workflows to Save Time & Reduce Stress

Automate redundant data management so that your sales and marketing teams can focus on wowing customers.

Build More Meaningful Customer Relationships

Prioritize and personalize customer outreach to deliver the right message at the right time.

What Data **Syncs?**

The two-way sync between HubSpot and Dynamics 365 CRM communicates valuable customer data in real time. Although the fields go by different names depending on which solution you're using, the content of that data is identical.

HubSpot

- Company
- Contact
- Deal
- Product
- Activity
- Invoice

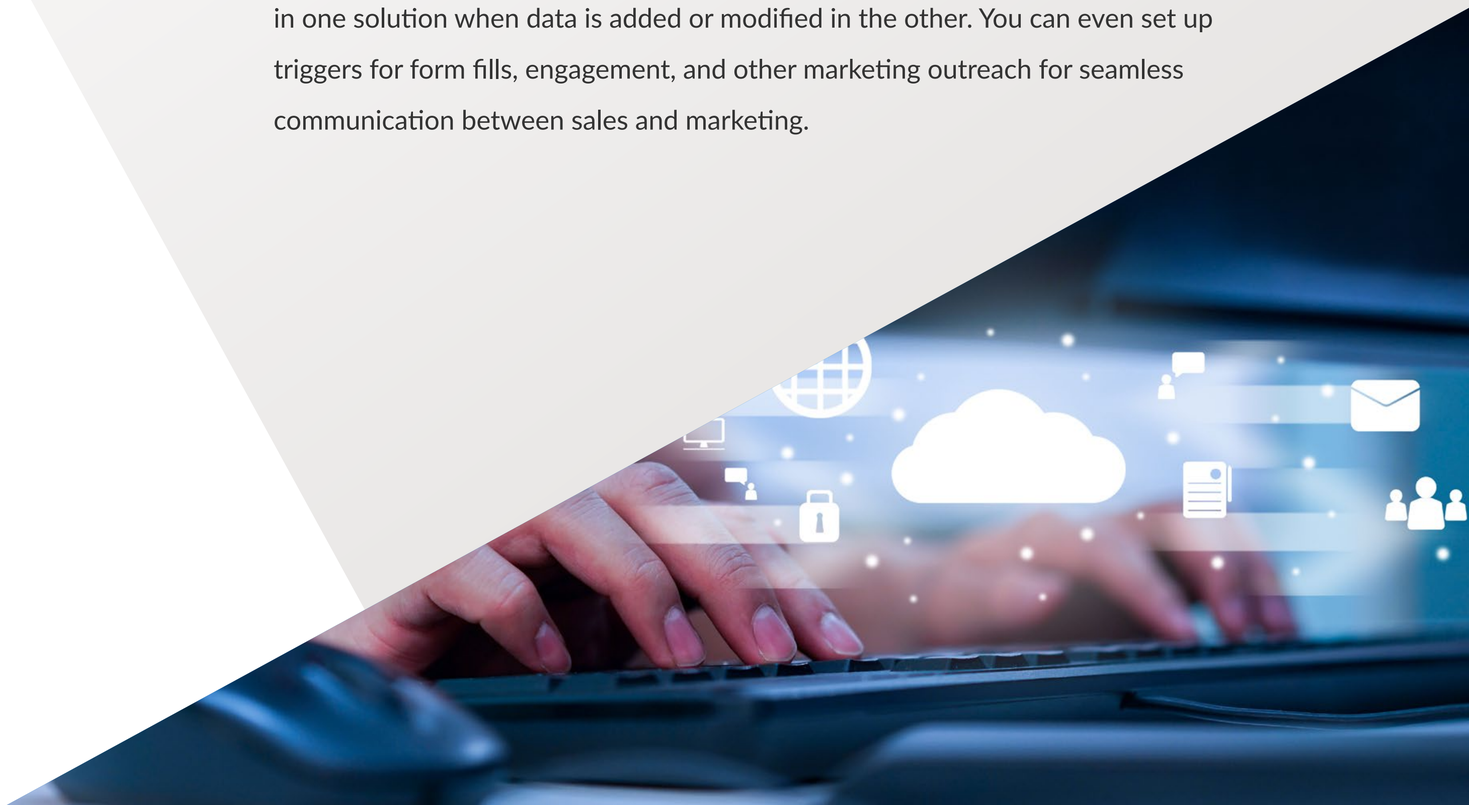
Microsoft

- Account
- Contact
- Lead Opportunity
- Bundles & Products
- Note
- Invoice

Synchronization between HubSpot & Dynamics 365 CRM is **highly customizable at implementation and beyond:**

- **Choose which fields sync automatically**
- **Select whether synchronization is two-way or one-way**
- **Develop custom field mapping for other important data sets**

Choose which data syncs, create workflow triggers, and enjoy real-time updates in one solution when data is added or modified in the other. You can even set up triggers for form fills, engagement, and other marketing outreach for seamless communication between sales and marketing.



Let's Talk **Pricing**

The cost of integrating HubSpot and Dynamics 365 CRM depends on several factors. Companies that don't have either solution will see different costs than companies that already own one of the two solutions. Here's what you need to consider:

Cargas' Recommended Out-of-the-Box Integration:

Dynamics 365 CRM (Sales) + **HubSpot Marketing Hub** (Professional License) + **HubSpot Operations Hub** (Starter License)

If you don't own HubSpot *or* Dynamics 365 CRM	If you own Dynamics 365 CRM *but* not HubSpot	If you own HubSpot *and* Dynamics 365 CRM
Variable Pricing | Contact Cargas for Details	**Starting at $19,500**	**Starting at $6,000**
This pricing includes... • The cost of purchasing and implementing all solutions • The cost of customizing your integration • How many contacts you're marketing to	**This pricing includes...** • The cost of purchasing & implementing HubSpot • The cost of customizing your integration • How many contacts you're marketing to	**This pricing includes...** • The cost of customizing your integration • How many contacts you're marketing to

These prices are based on Cargas' out-of-the-box packages. Software implementation costs vary drastically from business to business, so estimates may not be accurate for everyone. However, an experienced software partner—especially one well-versed in HubSpot and Microsoft products—can help you plan your budget.

Integration Overview

Integrating HubSpot and Dynamics 365 CRM doesn't have to be complicated. Our three-step integration process keeps things simple.

Step 1 Implementation

Implement HubSpot and Dynamics 365 CRM. Many companies opt to partner with a reliable software specialist to handle all of the complexities that come with implementing new software, such as training and customization.

Step 2 Requirements Check

Ensure you meet the integration requirements. The integration is available for free from HubSpot, but to install it, you need to meet a few requirements:

- Be a super admin OR have App Marketplace Access permissions
- Have Read permissions for records in Dynamics 365 CRM
- Have Read and Write permissions for each record type in Dynamics 365 CRM (for two-way sync)

Step 3 Integration

Configure the integration. Even pre-built integrations can be tricky, so it's best to tap an experienced software partner to handle this step.

- Visit HubSpot's App Marketplace by selecting the Marketplace icon in the main navigation bar.
- Search for "Microsoft Dynamics 365 integration" and click "Connect App"
- Input your Dynamics 365 CRM subdomain information and click "Install App"
- Return to your HubSpot account, then select Marketplace > Manage > Connected Apps
- Select Dynamics 365 CRM and click "Set Up Your Sync"
- Select the objects and fields you would like to sync and click "Next"

Need a **Software Partner?**

The benefits of connecting HubSpot and Dynamics 365 CRM are enticing for companies of all shapes and sizes. But whether you're a global enterprise or a small local shop, it's important to know this investment is the best next step for your business. That's where we come in.

Hi, we're Cargas! We've been working with Microsoft products for 30 years and have been recognized as a top HubSpot implementation partner. If you aren't sure how to get started implementing CRM and marketing automation software from Microsoft and HubSpot, we're here to help you find the right software, set up integrations, and optimize your systems so you can make the most of your tech stack.

Contact Cargas today for a free Dynamics–HubSpot integration evaluation!

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