

HUBSPOT DEVELOPMENT CONSULTANCY



- ✓ The power of succinctness in marketing
- ✓ All in one platform for marketing, sales, services and Commerce
- ✓ Bringing a variety of marketing functionalities together
- ✓ Includes content creation, social media sharing, workflow automation, lead capture, customer relationship management, sales pipeline mapping, and performance tracking.
- ✓ Companies are better equipped to manage sales and marketing activities efficiently, and leads can be nurtured through the buyer's journey effortlessly.
- ✓ Siloed information and misaligned departments can be avoided

Cognitive Convergence/MarConvergence Corp

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Review us on the Microsoft website here:
<https://appsource.microsoft.com/en-pk/marketplace/partner-dir/01dec2cc-ce32-4da9-9d33-946f58de01dd/overview>

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<https://ecosystem.hubspot.com/marketplace/solutions/cognitiveconvergencecorp>

👉 Our HubSpot Consulting Service as:
<https://marconvergence.com/hubspot-management.html>

👉 Our HubSpot Consulting Service as:
<https://www.youtube.com/watch?v=C6ybPbXJAt8>

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To see other videos in Cognitive Convergence, please do visit this link:
https://www.youtube.com/channel/UCOdEU8k1L_xC_Zu4yy7ycw/videos

Our Offering:

HubSpot Offshoring – Building a dedicated software development team (complete with office space, administration, and management) in another country. There are many **benefits of offshoring**, most notably cost and access to a massive talent pool. You own the team entirely and they're fully integrated into your business but the administration is managed by your offshore development partner.

HubSpot Outsourcing – Hiring contractors to temporarily cover a lack of capacity. These are more like freelancers — called in when required, but independent from your organization.

About Us

Cognitive Convergence/MarConvergence - is a subject matter expert in HubSpot development consulting. Our certified and experienced consultants will create custom, robust, and scalable apps for different business needs.

Our core **HubSpot consulting** are:

- ✓ Planning marketing campaigns
- ✓ Establishing efficient sales processes
- ✓ Building a customer-first services organization, as applicable.
- ✓ Best practices to set up HubSpot in a way that helps your team achieve optimal results
- ✓ Quantifying the impact of your marketing, sales, and services activities with reporting and KPI tracking

Current Location: Lewes, Delaware-USA/Lahore-Pakistan

Planned Front-end Office: California/Washington States- USA



Review us on the HubSpot website here:

<https://ecosystem.hubspot.com/marketplace/solutions/cognitiveconvergencecorp>

HubSpot



HubSpot is an inbound marketing and sales, and service platform that helps companies to attract visitors, convert leads, and close & retain customers. It does this through a single source of truth, intuitive UX, and a unified codebase.

HubSpot equips companies to better manage marketing, sales, service, and operations efforts.

- ✓ Market your products through HubSpot development
- ✓ Sales departments to manage all your activities in one place.
- ✓ Includes content creation, social media sharing, workflow automation, lead capture, customer relationship management, sales pipeline mapping, and performance tracking.
- ✓ Companies are better equipped to manage sales and marketing activities efficiently, and leads can be nurtured through the buyer's journey effortlessly.
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Development on the HubSpot CMS

- ✓ Fast, Secure, Reliable web site development
- ✓ Handles security, reliability, maintenance
- ✓ CMS Theme creation, Template/modules development
- ✓ Powerful for developers, flexible for content creators
- ✓ Create pages and publish content / Blog
- ✓ Create flexible design systems for content creators to use.

Efficient Development Workflow

- ✓ Help with the working process more effective when building websites on the HubSpot CMS.
- ✓ Customized and personalized workflows depending on the nature of the web development team, or the nature of a specific project
- ✓ Sets enrolment criteria to automatically enrol records and take action
- ✓ Take action on associated records, such as updating an enrolled contact's associated company.





Building with portability in mind

HubSpot enables to grant any access/portability request by easily exporting contact record into a machine-readable format. Engagement data like tasks, notes, and calls that aren't provided in the contact record export can be accessed using the CRM engagements API.

- ✓ Important to recognize portability as a key concept in having an efficient developer workflow
- ✓ Project ensures it is easy to move between environments with little friction and explanation
- ✓ Makes it easy to test and stage changes before taking them live.

HubSpot defined objects

HubSpot-defined objects use the same object framework as the standard CRM objects, which enables to segment or report on them. The following are some of the HubSpot-defined objects

Products

Represent goods or services for sale. Products can be added to deals, generate quotes, and report on product performance.

Line Items

Represent a subset of products sold in a deal.

Feedback Submissions

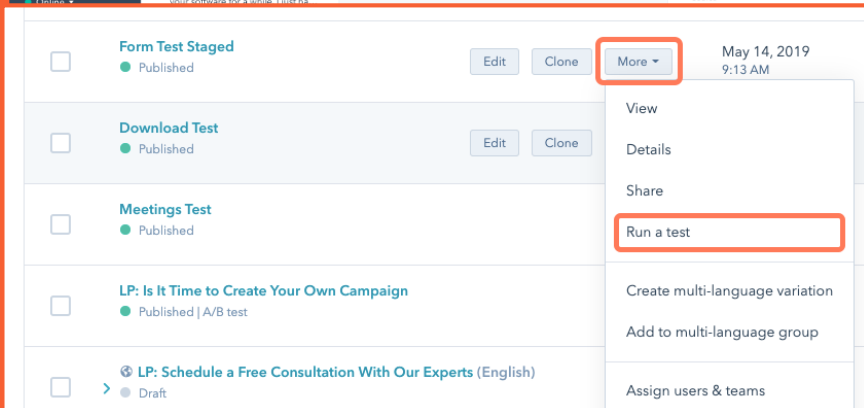
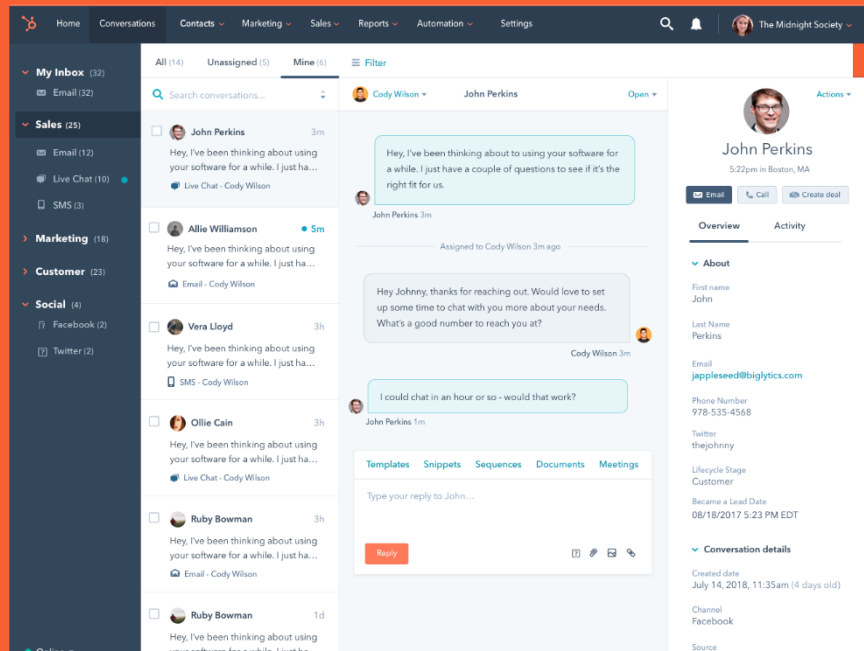
Stores information submitted to a feedback survey.

Marketing events

Represent events related to marketing efforts, including events from connected integrations.

Custom objects

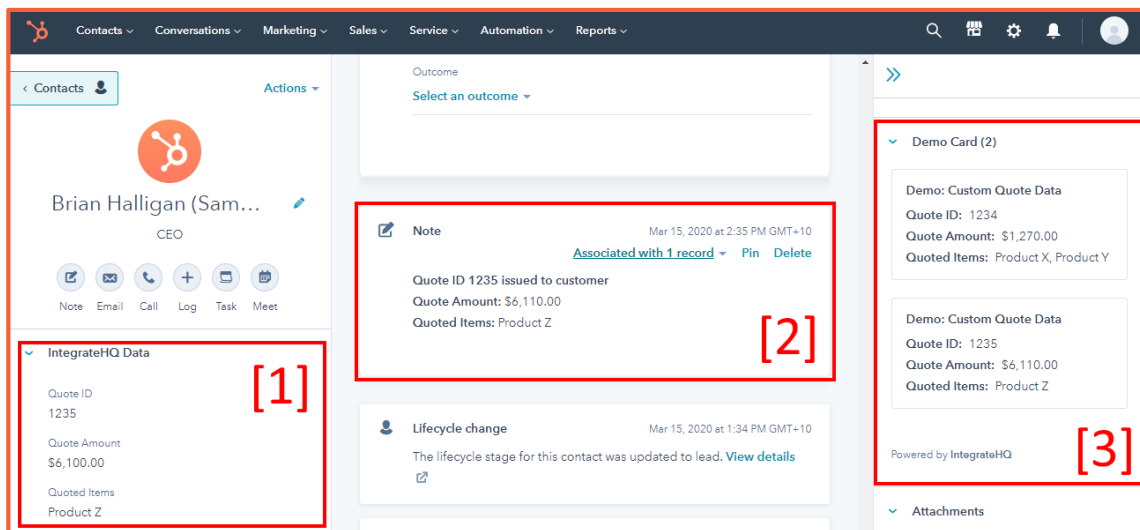
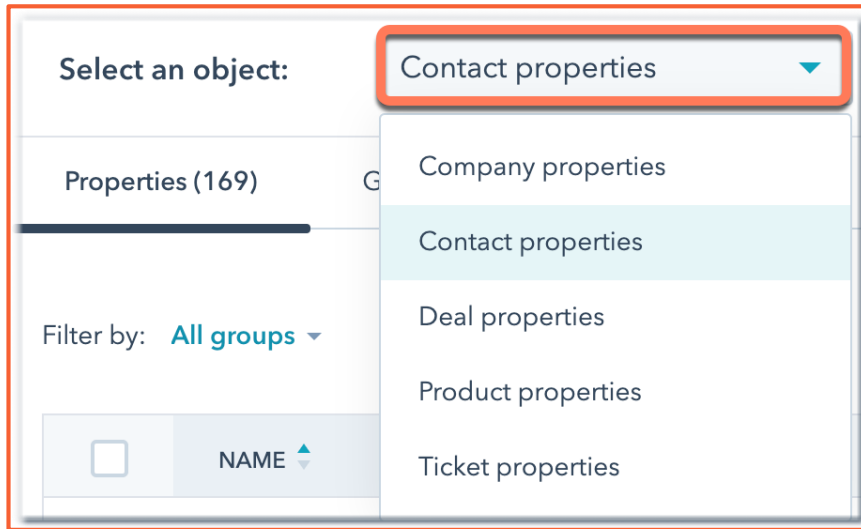
Store any type of data in HubSpot — particularly data that doesn't fit the standard objects.



HubSpot Properties

Properties are fields that store information on HubSpot records.

- ✓ Detailed information (metadata) for HubSpot's CRM objects is stored
- ✓ Organized into groups



Default Properties

- ✓ Defined by a primary type and a set of properties
- ✓ Has a unique set of standard properties
- ✓ Represented by a map of name-value pairs.

01

Custom Properties

- ✓ Store specialized information for an object.
- ✓ Can be managed through the CRM object properties endpoints

Property Groups

- ✓ Group related properties.
- ✓ Integration creates custom object properties
- ✓ Organize in a custom property group

02

Clearing Properties

- ✓ Review anything that was never used, is out of date, shouldn't be updated, and is overdue
- ✓ Can be cleared value via the API by setting
- ✓ Property value to an empty string

Record Owners

- ✓ Assigned to contacts, companies, deals, or ticket records.
- ✓ Multiple owners can be assigned to an object
- ✓ Get identifying details of owners, including IDs and email addresses.

03



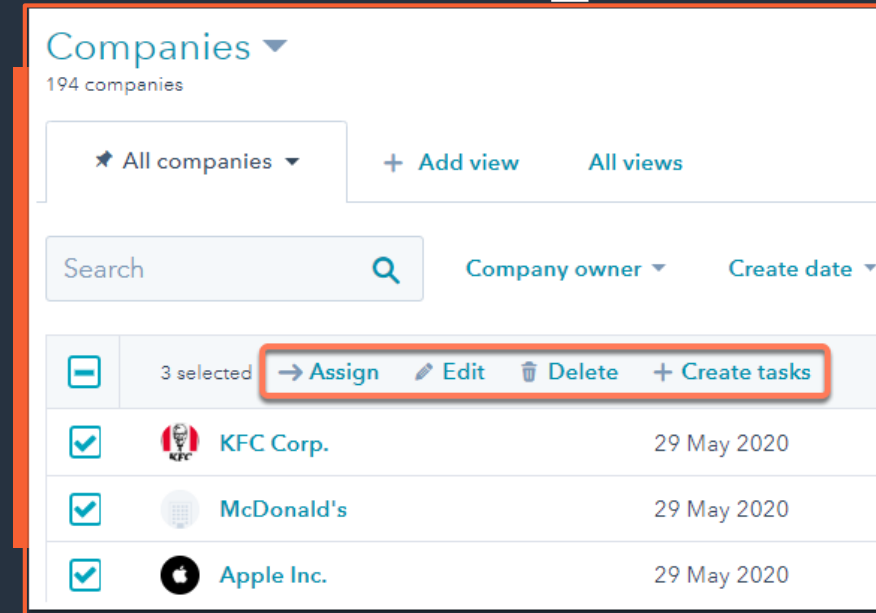
HubSpot Development consultancy.

Record engagements and attachments

- ✓ Engagement index based on how many HubSpot tools a client uses, the more tools in use, the higher their engagement score.
- ✓ Store data from interactions between records and the business, including notes, tasks, meetings, emails, and calls.
- ✓ Attach a file to a note, call, email, or meeting.

Object and Record Associations:

- ✓ Represent the relationships between objects
- ✓ Use of association endpoints



Data Syncing

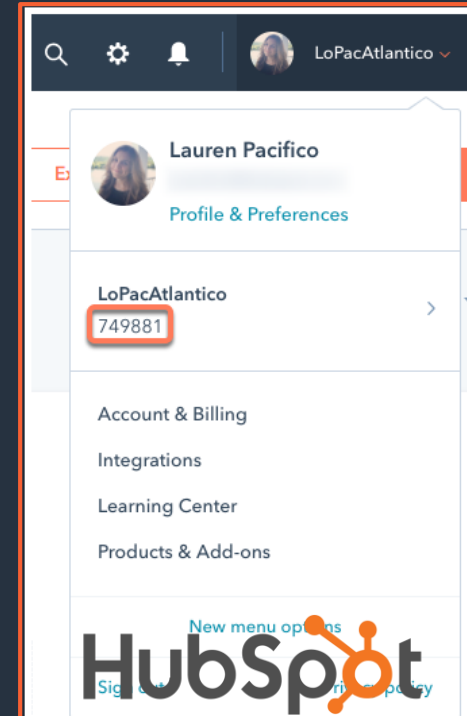
- ✓ Data is not required to sync object data.
- ✓ Can be associated with numerous engagements
- ✓ Important to keep API limits in mind before syncing.
- ✓ Will ensure you have the data you need during the transition.

Batch Actions

- ✓ Provides batch endpoints that let developers create, read, update
- ✓ Archive multiple object records in a single request.
- ✓ Have a limit of 100 records per call except for creating
- ✓ Updating contacts, which are limited to 10 records per call.

Unique Identifiers and Record IDs

- ✓ A value that differentiates one record in a database from another
- ✓ Have otherwise identical information.
- ✓ Are used to send the data to the correct records
- ✓ Manage deduplication.



HUBSPOT APIs.

API stands for application programming interface. In short, the API is a set of programming protocols and tools that specify how your CRM can interact with other software programs. HubSpot Developer platform empowers organizations to grow better through the API support. The APIs are designed to enable teams of any shape or size to build robust integrations that help them customize and get the most value out of HubSpot.

Client libraries are designed to interact with the HubSpot APIs with less friction, written in different languages.



Analytics API

Export analytics and reporting data from HubSpot

Events API

Dealing with different events occurring on HubSpot CRM

Automation API

Automate marketing, sales, and service processes

CRM API

Providing a set of standard CRM objects, as well as additional HubSpot-defined objects

Marketing API

Providing automation for Marketing events and marketing emails

Files API and Conversation APIs

Store files in HubSpot and manage and interact with inbox

Hubspot Integration Guide

Using Hubspot API to Integrate

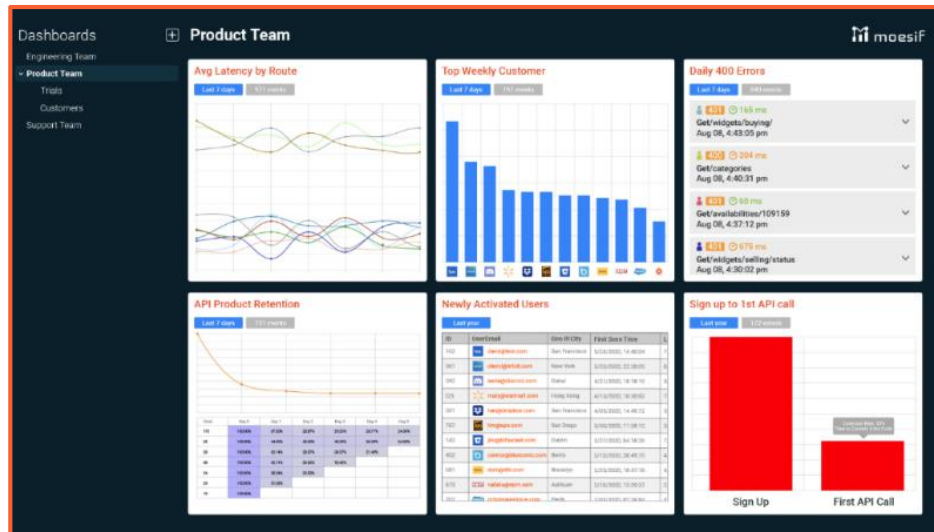
HubSpot



Analytics API.

The Analytics API allows to export analytics and reporting data from HubSpot. It's primarily used to connect metrics tracked in HubSpot to those stored in other business intelligence tools.

- ✓ Providing access to Analytics API
- ✓ Handling HubSpot account's permissions
- ✓ Creating analytics data breakdown by category
- ✓ Handling custom behavioral events – store event details in event properties
- ✓ Automatically populate data with clicked events and visited URL events
- ✓ Manually tracked business events, captured as per your business requirements, through HubSpot integration



Automation API.

Workflows are used to automate marketing, sales, and service processes. A variety of Automation APIs are available to automate marketing tasks.

- ✓ Workflow API with full CRUD access
- ✓ Enrolling contacts in the workflow based on the triggers in the external application
- ✓ Webhooks used in workflows to trigger notifications to external applications
- ✓ Custom Workflow actions to integrate your service with HubSpot's workflows

The screenshot displays the HubSpot Workflow Builder interface. The main workflow canvas shows a 'Contact enrollment trigger' followed by an action card for '1. My Extension'. A sidebar on the right, titled '1. My Extension', provides configuration options for the extension, including static input, object property input, and external options input. At the bottom right, there is a circular graphic with the HubSpot logo and various icons representing different business functions.

CRM API

Settings
Monitoring

Features

CRM cards

Timeline events

Webhooks

Back to all CRM cards

Example CRM object type

Data request

Card properties

Custom actions

Data fetch URL

https:// example.com/crm-extension-fetch-url

HubSpot will poll this URL to fetch details about your card.
[Learn more about the expected data format for CRM cards](#)

Target record types

This card can appear on one or more CRM record types. At least one type is required.

RECORD TYPE	APPEAR ON THIS TYPE?	PROPERTIES SENT FROM HUBSPOT
Contacts	<input checked="" type="checkbox"/>	firstname X apiprop2 X lastname X
Companies	<input checked="" type="checkbox"/>	Select or enter properties
Deals	<input type="checkbox"/>	Select or enter properties
Tickets	<input type="checkbox"/>	Select or enter properties

- ✓ Foundation of HubSpot account
- ✓ A database of user business relationships and processes, called the CRM (Customer Relationship Management).
- ✓ Manages data
- ✓ Provides a set of standard CRM objects, as well as additional HubSpot-defined objects.
- ✓ Each object represents a different type of relationship or process.
- ✓ Create individual records.
- ✓ Associations can also be made between records to understand the relationships between them.
- ✓ Provides access to CRM objects and records.

The following are the standard CRM objects available in HubSpot:

Contacts

- Store information about an individual person.

Companies

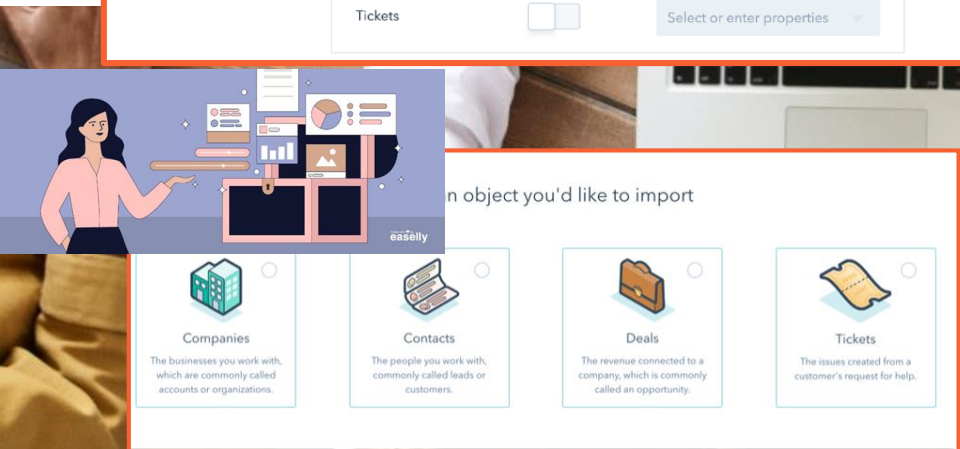
- Store information about an individual business or organization.

Deals

- Represent revenue opportunities with a contact or company.
- Tracked through pipeline stages
- Resulting in the deal being won or lost.

Tickets

- Represent customer requests for help or support.
- Tracked through pipeline statuses
- Resulting in the ticket being closed.



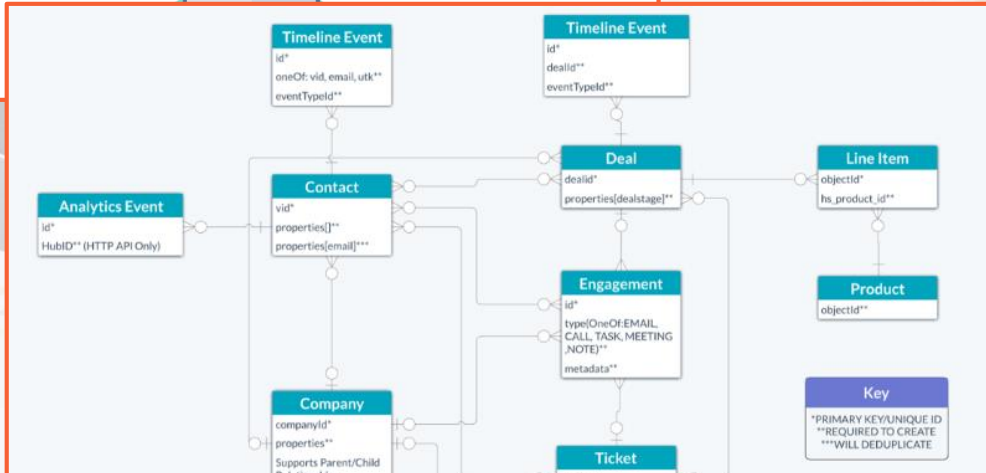
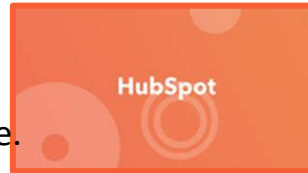


Custom Objects



When a business requires a different object a custom object can be defined. Once defined, properties can be created and customized for the associations between custom objects and other objects.

- Creates a custom object to store any type of data
- Particularly data that doesn't fit the standard objects listed above.
- Custom objects created via the custom object endpoints
- Can be associated with standard objects.



CRM Associations API

- Helps manage and define relationships between objects
- Create a more holistic picture of the customer interactions and improve the ability to market, sell, and serve.
- Common use cases: contact to the company, company to parent or child company, deal with company or contact, and a ticket to contact or company.
- Can also be created between engagements and other objects.
- Several deals open with a company
- Can use the to associate these deals with a contact who has decision-making power
- Make it easier to analyze data and trends



Events API.

Use API to trigger a custom behavioral event using an HTTP GET request. Event completions can be tracked in HubSpot and used to segment contacts, score leads, and more.

Web Analytics

- ✓ Use to fetch events associated with CRM records of any type.
- ✓ Includes standard events, such as website page views and email opens,
- ✓ Custom behavioural events.
- ✓ Timeline can be used to build a dataset for custom analytics or present a contact timeline in an external application.

Event types

- ✓ Queries for the events associated with CRM object.
- ✓ Response will include all event types, including custom behavioural events.
- ✓ During the beta, some standard event types are subject to change.
- ✓ Can be included to only return custom behavioural event completions.

Tracking code API

- ✓ Allows to identify visitors, track events, and manually track page views without reloading the page.
- ✓ Allows to dynamically create events and track event data in HubSpot.
- ✓ Added to a visitor's browser with the cookie banner API.

Create event ×

✓

DETAILS

CONFIGURE

Step 2 of 2

Custom events can be set up using the [Javascript Events API](#) in your code or via the [Events HTTP API](#).

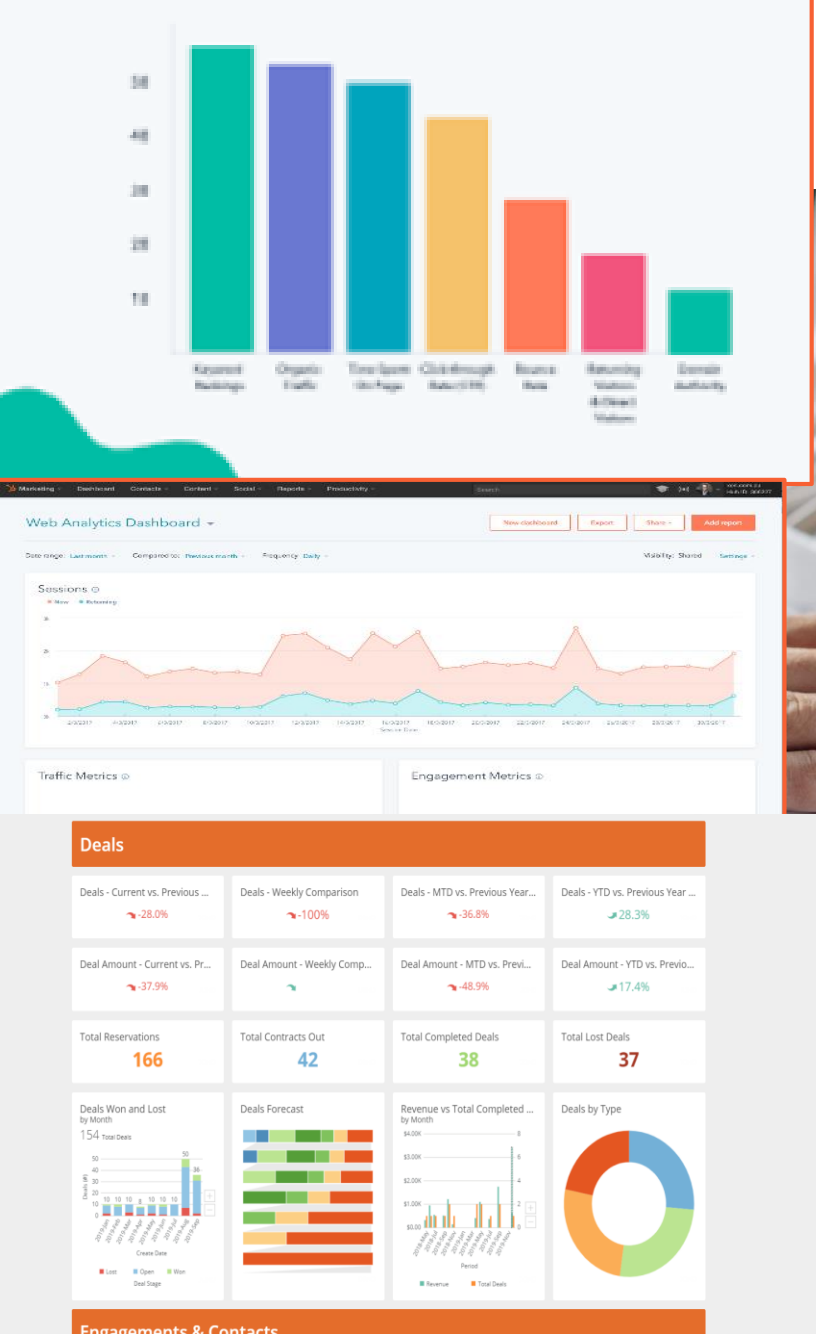
Once your event is saved you'll have an ID. For now you can use the placeholder `EVENT_ID` and it will update when saved.

Custom Javascript (optional)

```
_hsq.push(['trackEvent', {  
  id: '000001371632',  
  value: 120.25  
}]);
```

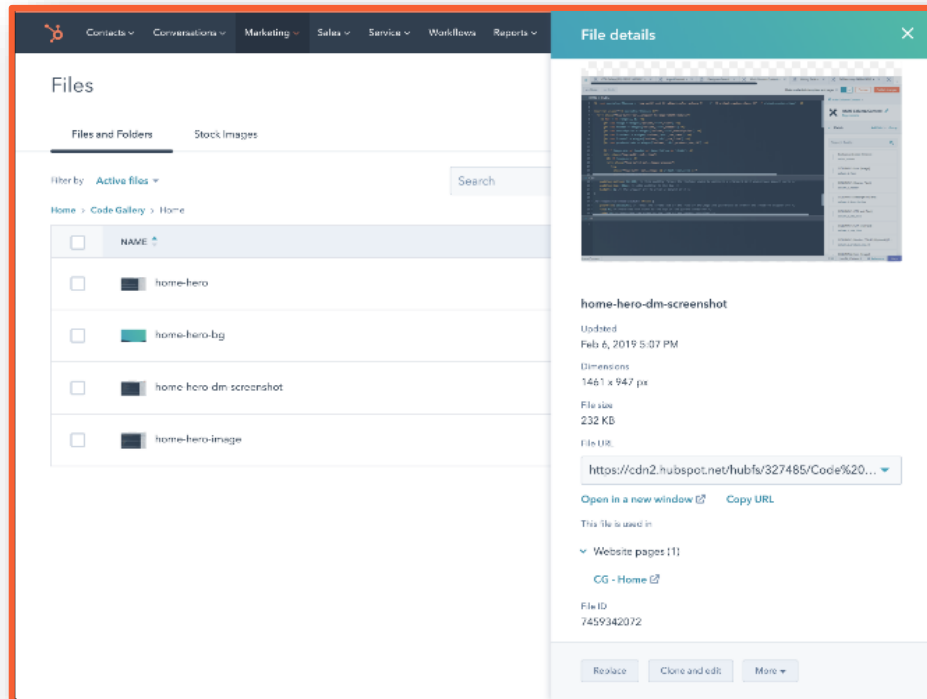
Any code entered above will automatically be run as part of your HubSpot tracking code.

< Back Cancel Save



Files API.

- ✓ Use files tool to manage and store files in HubSpot.
- ✓ Files hosted in HubSpot can be uploaded
- ✓ Used in both HubSpot and external content.
- ✓ Can also be attached to records using the engagement API.
- ✓ Can be used to upload and store assets in HubSpot,
- ✓ Serve it through the HubSpot CMS.



Conversation inbox and messages API

- ✓ Search conversations inboxes, channels, threads, and messages.
- ✓ Update thread statuses.
- ✓ Delete and restore threads.
- ✓ Send messages via existing conversations channels.
- ✓ Send an internal comment to an agent.
- ✓ Retrieve conversation data to create advanced reports and analytics in external tools.

Other Conversation APIs

- ✓ Chat Widgets SDK
- ✓ Visitor identification API
- ✓ Working with chatbots





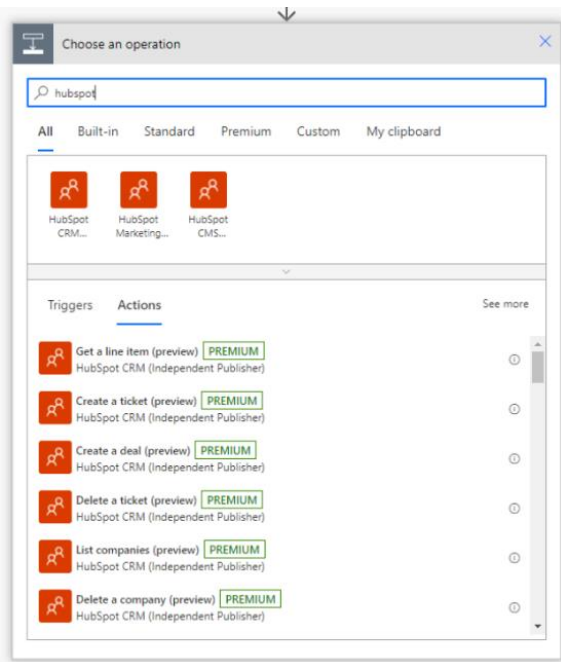
HubSpot Integrations.

In HubSpot, integrations allow data to be passed to and from external/internal systems and the HubSpot COS. Businesses are forced to utilize several different applications at once to serve a singular purpose.

- ✓ Connect your software to third-party applications
- ✓ Can share information with others.
- ✓ Share data from one system to the next
- ✓ Provides you with more features and options while using your software.
- ✓ HubSpot's integrations can be done on following platforms:
 - Power Automate
 - BI & Analytics
 - Zapier
 - Workflow Automation
 - Data Virtualizations



HubSpot Integrations/Automation Consultancy

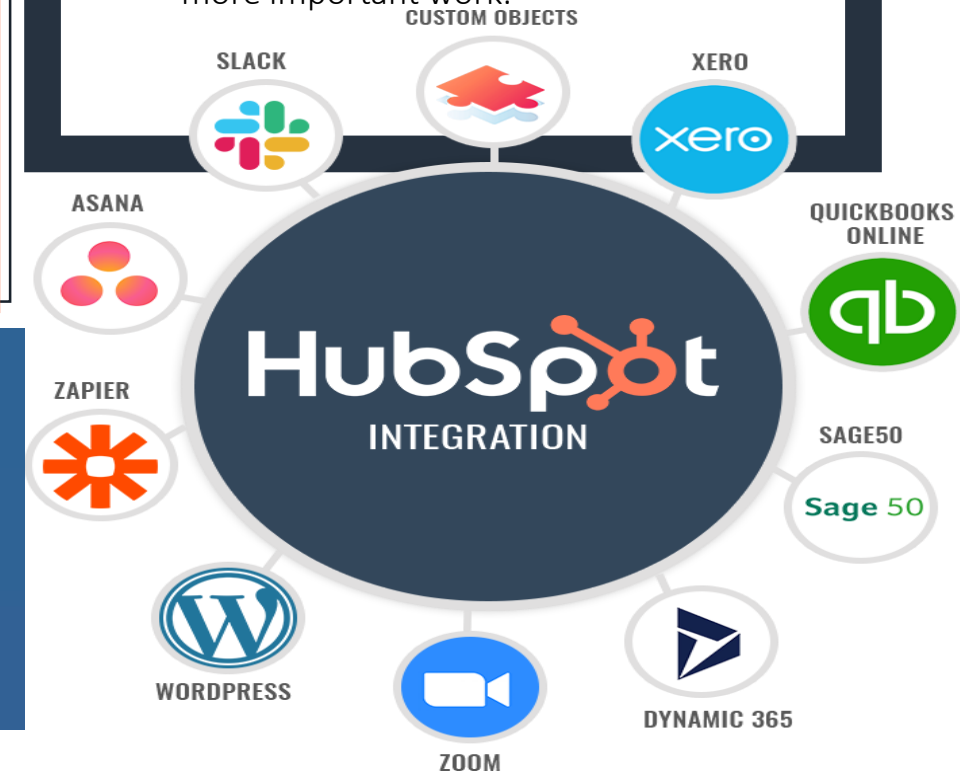


Power Automate/Zapier

An online service that automates events (known as workflows) across the most common apps and services

- ✓ When paired with CData Connect Server, cloud-to-cloud access is granted to HubSpot data
- ✓ Visualizations, dashboards
- ✓ Integrate live HubSpot data into your workflows and tasks.

- ✓ Easy automation for busy people.
- ✓ Moves info between HubSpot and apps automatically
- ✓ Time-saving workflows called Zaps are set up in minutes
- ✓ Manual effort can be cut out and tedious copy-pasting
- ✓ Apply that time to customers and for more important work.



HubSpot Data Visualization/Dashboard.



Power BI

- State of art – Power BI - visualizations based on Sales, Marketing, Service and Commerce entities with external data sources as unified model.



+ a b l e a u®

- Reconcile your Marketing data with your Sales and ERP data.
- Develop complex reports that integrate multiple data sources.
- Create dashboards and visualizations in using your HubSpot data.

looker

- HubSpot data can be queried and edited inside of Looker, without affecting the integrity of the HubSpot database
- Easy-to-use dashboard that contains all of your company's key data

Qlik Sense

- Reconcile your HubSpot data with your other data.
- Works as a data backup with a secure server. Your HubSpot data can be exported to a CSV and manually imported into HubSpot.



Google Data Studio

- Empowering customers to build reports with the most up to date additions from HubSpot including Custom Objects.
- Unlimited Users, Unlimited Storage, No hidden fees or lock in period

Best HubSpot Marketing content analytics tools.



✓ **HubSpot Marketing Analytics and Dashboard Software**

✓ **Buffer**

✓ **Google Analytics**

✓ **SimilarWeb**

✓ **Moz**

✓ **Hotjar**

✓ **Semrush**

✓ **Qunitly**

✓ **BuzzSumo**

✓ **Kissmetrics**

✓ **Databox**

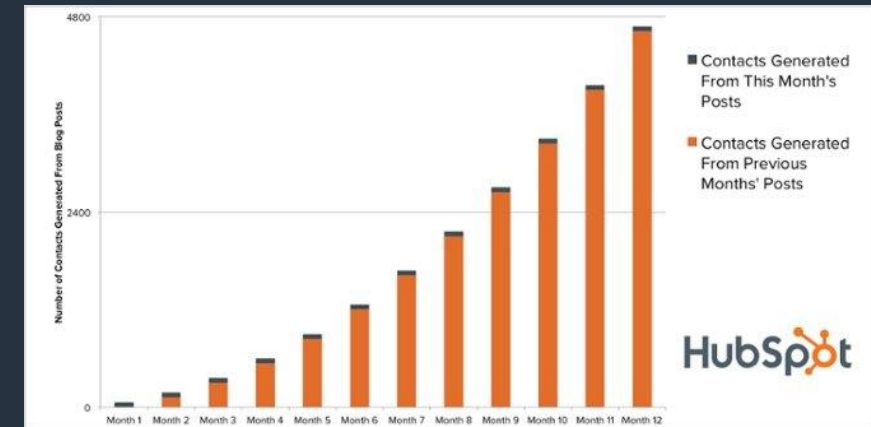
✓ **Supermetrics**

✓ **Demand Sage**

✓ **Grow.com**

✓ **Plecto**

✓ **Adverity**



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HubSpot Development

- ❖ HubSpot Consulting Services of MarConvergence/Cognitive Convergence offers strategic opportunities to clients, investors, and partners that are:
- ❖ Unique and industry defining
- ❖ Mutual interest-centric business approach
- ❖ Turn grow revenues by entering new and exciting
- ❖ Technology Domains, App development ideas, Solution Development, and Joint venture projects
- ✓ 1st mover advantage with
 - ✓ Talent: 100%
 - ✓ Timing: 100%
 - ✓ Technology: 100%
 - ✓ Technique: 100%

MarConvergence/Cognitive Convergence

<https://marconvergence.com/>

<https://marconvergence.com/hubspot-management.html>

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