



## Overview of the integration

Integrating HubSpot with Cradle provides a host of powerful new ways to interact with your customers. You can automate your company's follow up to phone calls, track the journey of your customers after they call, ensuring you meet your SLA's when it comes to customer interaction.

At Cradle, we believe that by integrating with HubSpot we're staying true to one of our core principles: first, make no mess! We want to help you weed the garden that is your customer data. We have built Cradle's integration with HubSpot keeping this in mind. We have some tips under the Automation and Workflows section to help you keep your ducks relatively in a row. We really do believe in having one source of the truth and recognise how hard it can be to maintain a good dataset. We've got your back on this one.

There are several places that Cradle will interact with your HubSpot data.

1. Contacts
2. Companies
3. Engagements
4. Properties

## Glossary

Contact: A contact or person (with an email address) created within HubSpot CRM. Can be associated with one company.

Company: A company contact (with a domain name) created within HubSpot CRM. Can have many contacts associated with it.

Engagement: A record of some kind of activity with a contact or a company, and visible on that contact or company's timeline within HubSpot. E.g. notes, meetings, calls.

Property: A field with information on a contact or a company. E.g. a phone number, an email address or the lifecycle stage of the contact.

Record: Means either a contact or a company or both from HubSpot

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More information can be found on the [Cradle Knowledgebase at help.cradle.io](https://help.cradle.io).

## Contacts and Companies

The Contacts and Companies integration is available on our Standard and Enterprise plans and brings all of your HubSpot contacts into Cradle. This means you can dial any contact or company by typing their name in Cradle (as long as they have a number associated to them in HubSpot). During or after a call you can quickly see who you're talking to and with a click, open that contact record in HubSpot. On the Enterprise plan you can also add new contacts to HubSpot during or after a phone call, directly through the Cradle desktop app.

## Engagements

At the end of each phone call, Cradle will add a *Call Engagement* to the contact or company (see [Contact Matching](#) for more information) with whom you were speaking. This shows which of your customers you're engaging with by phone, how often, and who on your team is engaging the most. The engagement also includes details on the length of calls, the ability to listen to voicemail and space for your team to make notes on the call.

## Properties

To support HubSpot working your way, Cradle also adds additional properties to both Contacts and Companies within HubSpot. These are designed to drive automation (workflows) from your call data. Supporting monitoring of SLA performance, automatic support ticket creation, or any other workflow you want to create to support your business.

## Connecting Cradle to HubSpot

Before starting, make sure you're signed into the [Cradle admin portal](#), and that you're an administrator.

Then use the following link to begin integrating HubSpot.

[Connect HubSpot to Cradle](#)

You'll be asked to log into HubSpot and then to accept connecting Cradle and HubSpot.

Once you do this your integration is all set up.

Note: If you are already integrated, we have migrated you to the new HubSpot integration. This will have the effect of adding new properties to your contacts and companies that will appear in a property group called Cradle.

## Contacts and Companies

The integration between Cradle and HubSpot brings across all of your contacts and companies that have at least one phone number.

We bring in all phone numbers (in the properties listed below) as well as:

- Contact name
- Associated company name
- Contact owner
- Lifecycle stage
- And a link to launch the contact directly in HubSpot

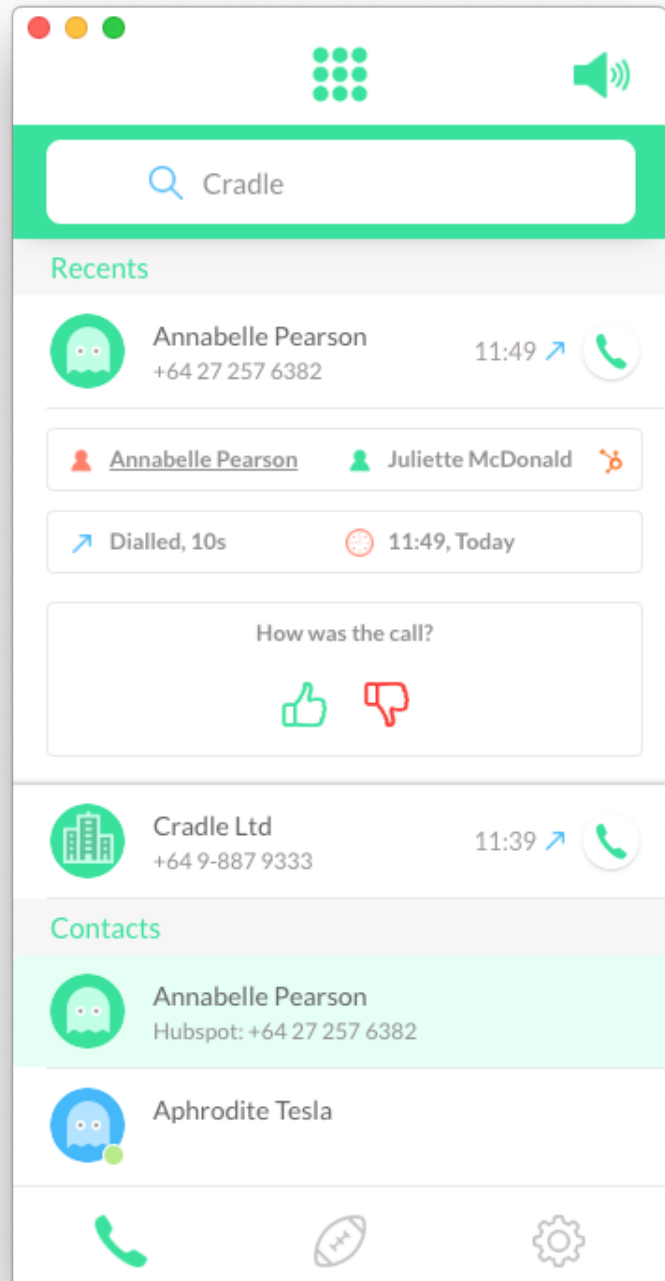
Property name	Internal Property Name	Notes
Phone	phone	This is created by HubSpot
Phone 2	phone_2	This is created by Cradle
Phone 3	phone_3	This is created by Cradle
Phone 4	phone_4	This is created by Cradle
Mobile Phone	mobilephone	This is created by HubSpot on contacts, and by Cradle on companies

**Please do not delete any of these custom properties whilst you have Cradle integrated with HubSpot.**

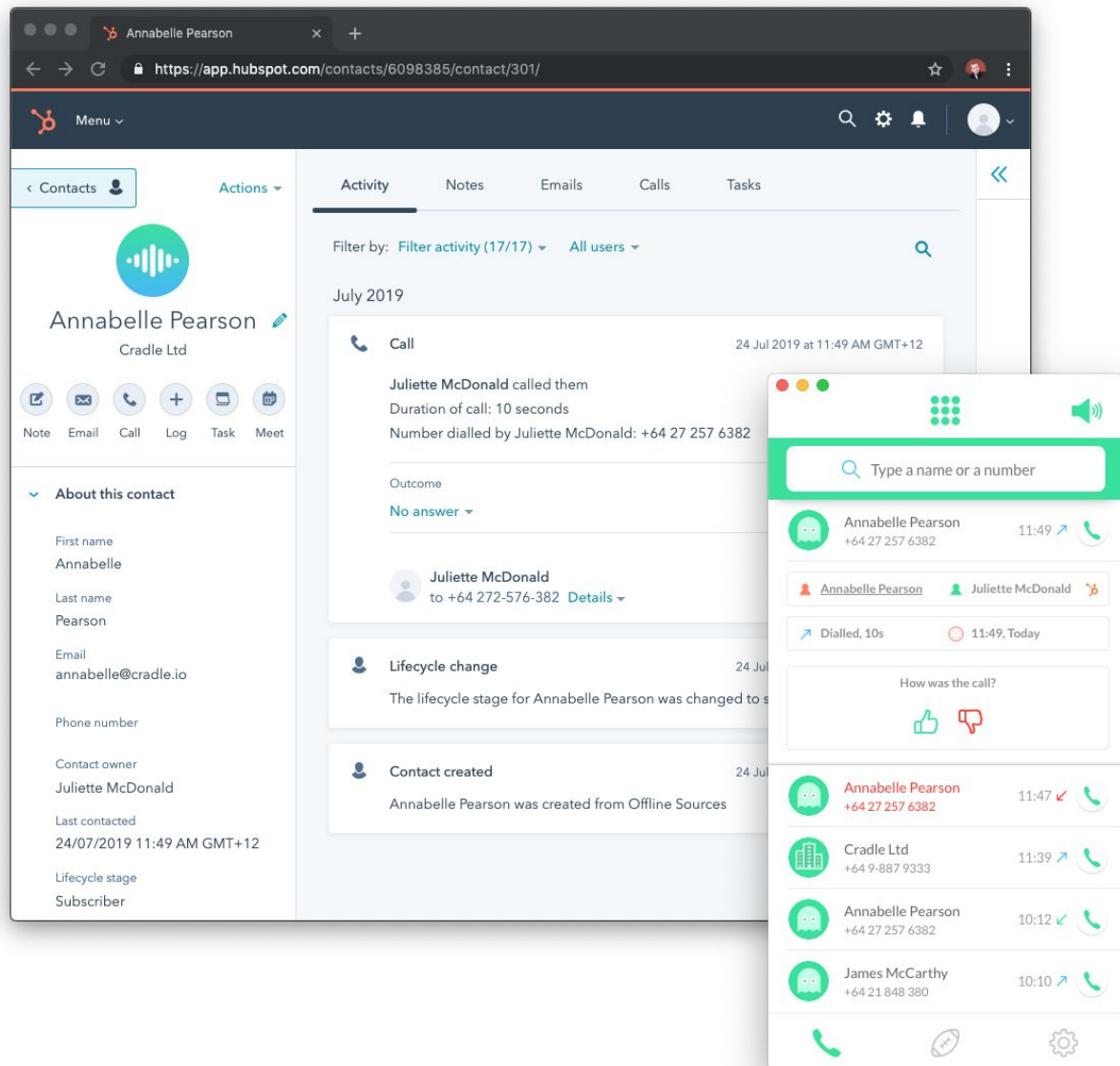
## Searching for Contacts in Cradle

To search for a contact in Cradle for Windows, macOS or iOS, type the name, company name or phone number of the contact in the search box. This will bring up all matching records with phone numbers from HubSpot for you to choose from. (Records without a phone number will be unavailable to search within Cradle). Click on a number to call that contact!

Searching for a company will bring up the associated contacts as well. Companies within HubSpot have a company logo, whilst contacts have a green ghost. Each of the (up to) five numbers on a contact will be available for you to call directly from within Cradle.



Once you're on the call, you can click on the contact's name to open their profile within HubSpot.



## Contact Matching: Handling Duplicate Contacts

We understand that maintaining the data quality of your CRM can be challenging. Data isn't perfect, and sometimes you'll end up with phone numbers associated with multiple contacts or a company.

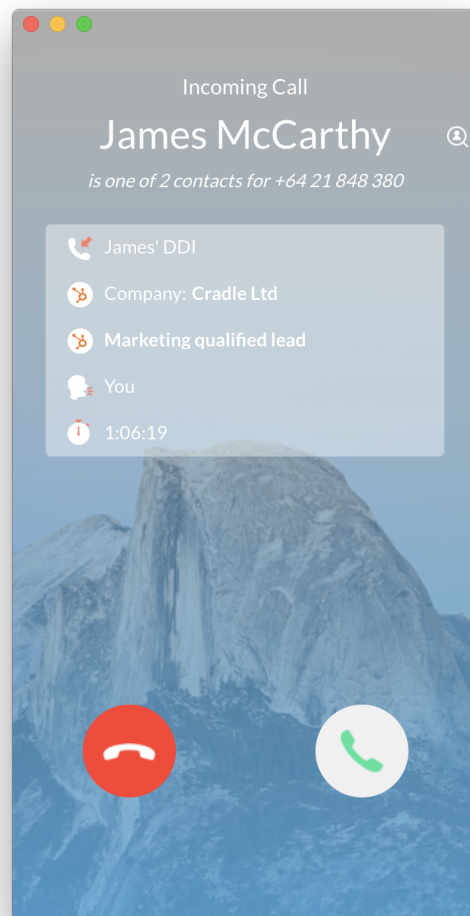
*Best Practice Tip: Add company phone numbers to the company in HubSpot; add personal numbers (DDIs and mobiles) to contacts.*

When you receive a phone call, we look up any matches for the phone number in HubSpot. If we have one match, we show you that contact. If we have multiple matches, the table below will help you understand how we decide which records to display.

Number of <i>Contacts</i> that match the number	Number of <i>Company Contacts</i> that match the number		
	0	1	2 or more
0	N/A	We show the company	We show the first alphabetic company
1	We show the contact	We show the company (and note that there are more matches)	We show the contact (and note there are more matches)
2 or more	We show the first alphabetic contact match (and note there are more matches)	We show the company	We show the first alphabetic company



We are constantly evolving our matching algorithm to ensure the name and phone number match, however given we are dependant on the quality of HubSpot information we may get it wrong from time to time. For those times, please be prepared to talk to someone other than the name on the incoming call.



We also flag that a call was received from a duplicate phone number against the contacts that matched that number inside HubSpot. You can drive automation off this; such as ensuring that you don't send email follow-ups to multiple people following a phone call. ([See Automation and Workflows](#))

## HubSpot Contacts: Drilling Down After A Call

After a call has finished, you can click on an entry in the call log to see more information about the call such as:

- Caller / Contact information (including one-click access to their HubSpot profile)
- Caller's company details
- The employee who spoke with them
- Time of call, and
- Call Duration



The screenshot displays a call log entry for 'Opotiki District Council' with the phone number '+64 7-315 3030'. The call occurred at '11:48' and is marked as successful with a green checkmark and a call icon. Below the header, a bar shows the contact's name 'Opotiki District Co...' and the agent 'Joel Frost' with a green person icon. A teal bar indicates the call was 'Transferred In'. Further details show the call was 'Answered, 1m 20s' at '11:48, Today' and 'Answered by Joel, 40s'. At the bottom, a section titled 'How was the call?' features thumbs up and down icons for feedback.

In this instance, we can see the name of the contact, their phone number (+64 7 315 3030), the contact owner within HubSpot (Joel Frost, always designated with a green person icon), and the other details of the call.

## Adding Contacts to HubSpot

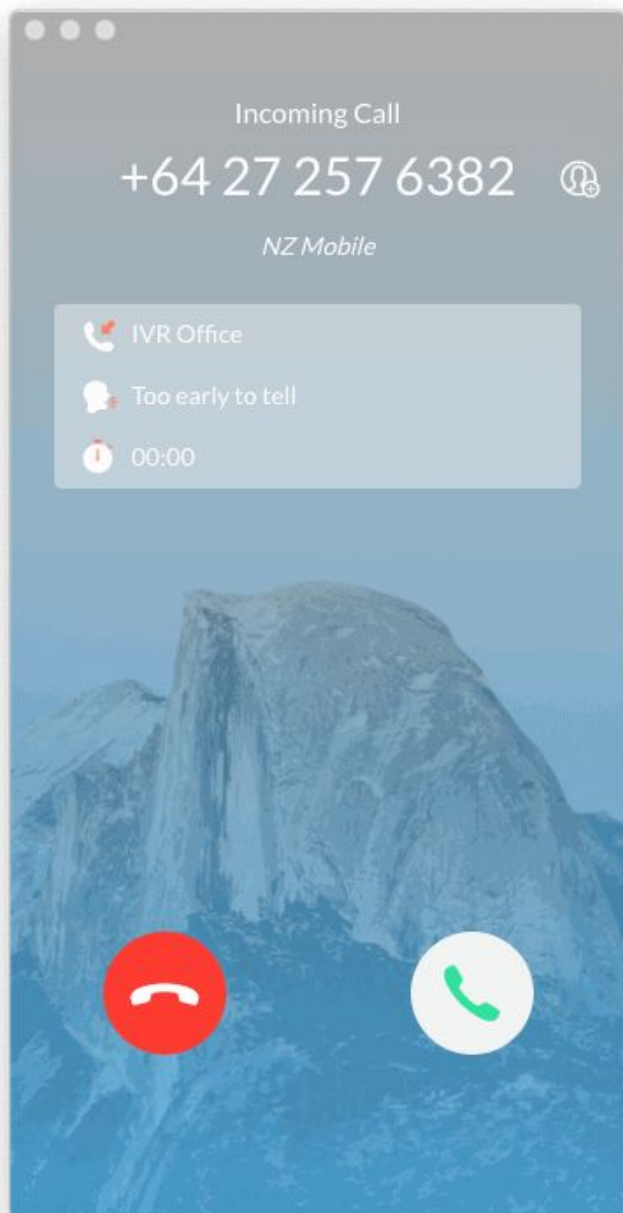
If you receive a call from an unknown phone number you can easily add them to HubSpot, both during the call or after the call has ended from the call log.

To add a contact, you'll need to have either their name or email address. If you provide an email address, we check for any existing contact records to make sure that we're not making a mess in HubSpot.

### Adding Unknown Contacts During A Call

1. Click on the phone number
2. Enter their first and last name
3. Enter their email address
4. Press enter to create or update their records in HubSpot

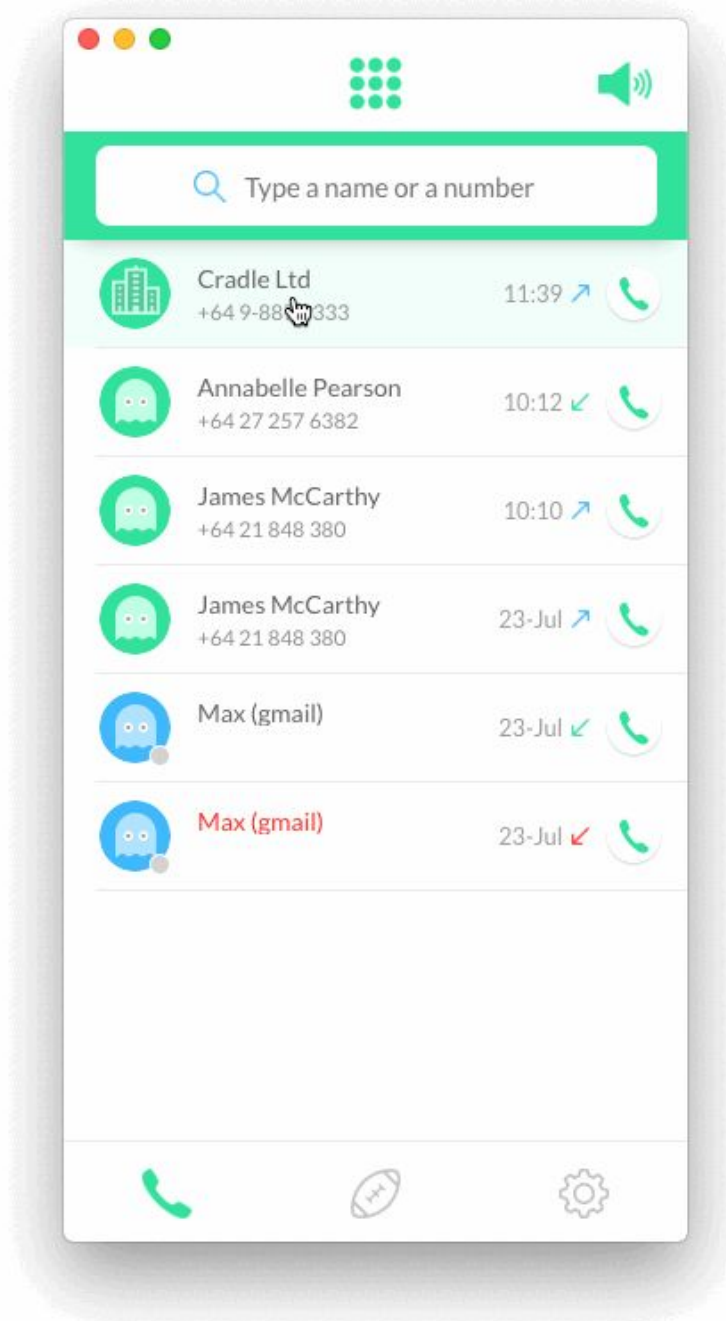
*Note: If you are unable to obtain all of their details at a minimum a single name OR email address is required.*



## Adding Unknown Contacts After a Call

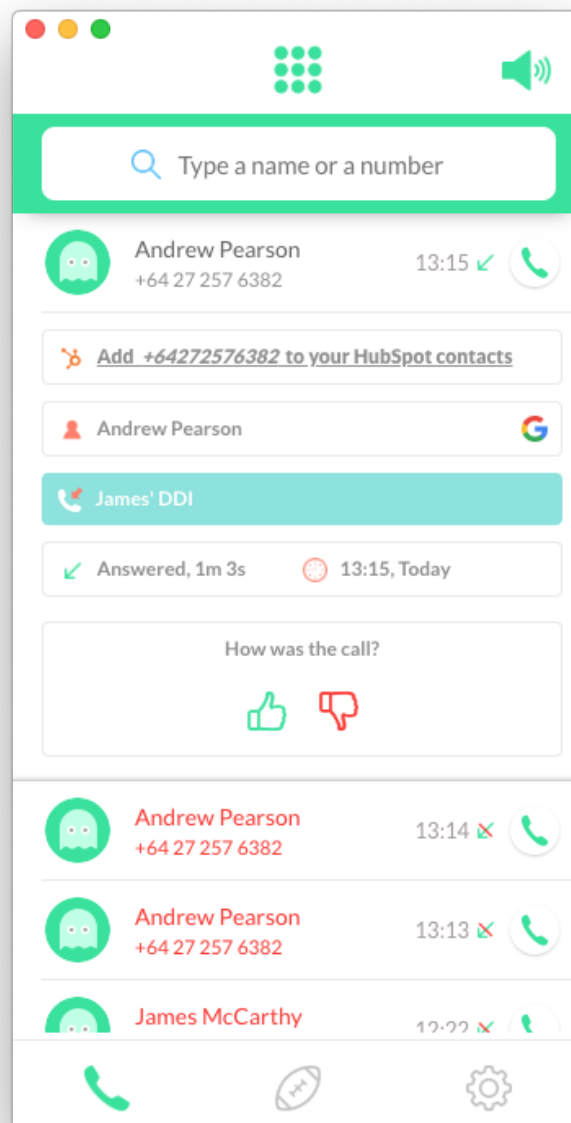
After a call has finished, you can still add the contact to HubSpot by expanding the call record and clicking *Add [phone number] to your HubSpot contacts*.

Click on the phone call in your call log to expand the call, then add the contact details.



## Adding G-Suite/Outlook Contacts to HubSpot

If the contact is in your G-Suite or Outlook contacts, you can add that contact to HubSpot by expanding the call log after the call.



When you add the contact (during or after the call) we will save the call as an engagement on the timeline of the contact you have created. That way you still have a full picture of the contact. We also set some properties on the contact so that you can track where this contact came from in the future. ([See Automation and Workflows](#))

## When won't this work?

If there is already a Contact or Company with that phone number we won't add a new contact. This can happen if someone else on your team has added the contact since your contacts last synchronised or the caller added their details to HubSpot via a form. We then update the call record so that the contact shows up.

If all phone number fields are full for a contact we will not be able to add any additional phone numbers for that contact, if this occurs we will let you know at the time.

The internet has had a moment and something didn't work. We'll let the user know that this has happened. In this instance you can normally try again shortly and it will work.

## Tips

### Prevent Duplicates

If you add a contact via the desktop app without an email address we recommend opening the contact in HubSpot (by clicking on the contact's name) and checking for duplicates in HubSpot. **If there are duplicates, merge!**

### Create Active Lists

You can set up an active list of contacts to see which ones have been created in Cradle. To do this, set up a list for any contacts where `Original source drill down 2` has ever been `177270`. This property is set by HubSpot and can't be changed.

You can further refine these lists by filtering on the `User that created this contact from within Cradle` field in HubSpot. This field contains the email address of the Cradle user that created a contact.

### Add Email To Your Contacts

If possible, we recommend capturing email when you're adding contacts to HubSpot. This will help keep your data clean, as HubSpot does not allow duplicates of an email address.


### Help Your Teammates Out

Adding a contact at the start of a phone call (when introducing the company and understanding the caller's question) allows enough time for the contact to be created in the system so that if the call is then transferred to someone else in your company, the caller's name will be presented instead of a phone number. A great way to give your callers and your teammates a delightful experience.

## Engagements in the HubSpot Timeline


At the end of every phone call, Cradle will add a phone call engagement to any matching contacts or companies within HubSpot.

The engagements will show up on the timeline like this:

 **Call** 15 Jul 2019 at 1:56 PM GMT+12

They called and spoke to **James McCarthy**  
Duration of call: 4 minutes and 45 seconds  
They called +64 9-887 9773

Outcome	Type
Connected ▾	Select call type ▾

 **James McCarthy**  
to +64 988-797-73 [Details ▾](#)

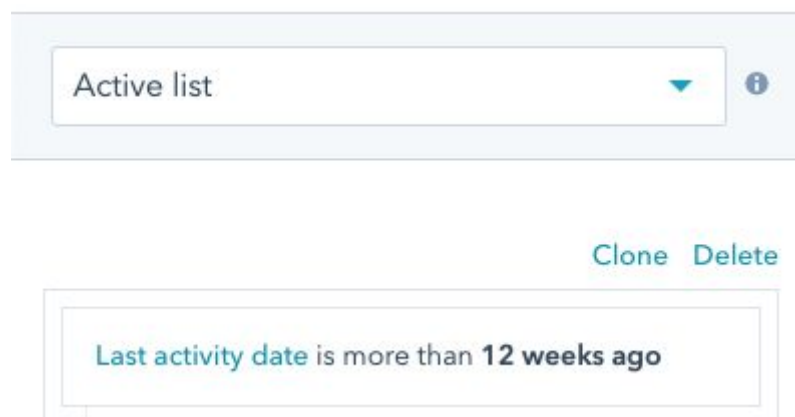
### Details of the engagement

Field	Details
Time	They are time stamped with the time at which the call began
Notes	Contains text that is generated by Cradle and can be used with the <i>Contains any of</i> search field when creating lists or workflows. The Cradle user who called or answered will be listed here, as well as the number dialled.
Outcome	Cradle sets this outcome as best we can. Note: When calling out, most business phone systems answer the call immediately, meaning that outbound calls often show as connected even if the person you called didn't answer.
Details	This shows the to and from phone numbers and call duration. Note that due to a quirk in HubSpot, the from party will always be the HubSpot user (as HubSpot only does outbound calling).

What can I use this for?

Use the engagements to understand who on your team has been in communication with a customer or prospect before reaching out, or alternatively use it to remove a contact from a sequence - nobody likes receiving an automated email asking where they've gone if they called to buy just two hours ago!

You can also create active lists that will show which of your customers your team have been in touch with over a given time period. For example, if you're an account manager who has a once quarterly check-in with each of your customers, make sure that you're meeting that target with an active list such as this (this will show you all the customers you still have to talk to):



Phone calls will be included in here, so you can make sure you've had some contact with your customers every 12 weeks.

### Tips

If we have a Company contact for a phone number, we'd recommend opening the company timeline and adding the person/contact you speak with to the engagement, thereby keeping that contact record up to date. Do this by clicking on the *Associated with [x] records* field on the engagement.



## Properties

This is the part where Cradle and HubSpot really begin to leverage the power that they have together. As you're well aware, HubSpot is built to enable a huge amount of marketing and customer-centric automation, from nurture campaigns for a top of the pipeline subscriber through to follow up emails and phone calls for those opportunities that are about to close.

To give you the tools you need as an administrator of your company's data and toolbox, Cradle has created two properties specifically to drive automation within HubSpot.

### Details of Last Cradle Call

This field has been created to help you initiate and monitor automation and workflows at the end of each phone call. It is only modified by the API however under some circumstances, you may want to clear it using a workflow. Don't manually modify this property or the contents of the property.

What does it contain? This field is updated at the end of each phone call at the same time as an engagement is posted. Posting the same information for the engagement into this property allows a lot of flexibility and power that you can't get from engagements alone.

Field	Values	Example use
direction	in out	Use <code>direction:in</code> to launch workflows after a contact calls you
status	successful completed missed voicemail forwarded	Use <code>status:voicemail</code> in combination with <code>direction:in</code> to set a task for a contact owner to call a contact back. See the table below for more detail on these statuses.
cradle_number	[one of your phone numbers]	Use <code>cradle_number:+14155551234</code> to capture metrics and reporting data from calls to specific phone numbers, such as campaign phone numbers.
cradle_user	[email address of your team]	Use this to isolate which members of your team have spoken to which customers.
unique_contact_match	true false	This tag will help you clean your HubSpot data by flagging contacts that have duplicate phone numbers. Create an active list with the filter <code>unique_contact_match:false</code> to help you identify which contacts have duplicate phone numbers.

*Summary of call detail tags*

## User that created this contact from within Cradle

This field is only populated when a new contact is created in HubSpot through the Cradle app. The email address of the user who created the contact will be added to this field. You can then use this field to create lists of contacts created through Cradle, the number of contacts created by certain team members, and to trigger workflows on newly created contacts.

**Do not manually alter the contents of this property.**

## Cradle Call Statuses

Status	Meaning
successful	This is an inbound call where the caller spoke to a person
completed	This is an outbound call (we don't differentiate between outbound calls that were answered, went to voicemail, or were unanswered/busy)
missed	This is an inbound call where the caller hung up before leaving a voicemail or talking to someone on your team
voicemail	This is an inbound call where the caller left a voicemail because nobody answered their call
forwarded	This is the status for off-net transferred calls (e.g. sent to a mobile number) or calls sent to a third party number due to the routing rules you have set up

## Tips

The history of these properties are kept by HubSpot, so you can look back in time and across merged contacts if you need to find something.

See the section *Automation and Workflows* for some examples of how to use this information to start streamlining your processes and getting more work done in less time.

## Automation and Workflows

There are almost unlimited ways that you can automate tasks after phone calls, but we have put together four examples of workflows that will speed up your working week. *(Please note your access to such features will depend on your subscription level with HubSpot)*

1. Setting a task and sending a notification to a contact owner when a call is missed from one of their contacts
2. Setting attributions fields when leads call one of your campaign phone numbers
3. Ensuring an SLA is met when a phone call is missed or a voicemail is left
4. Sending a contact a welcome email if they call one of your campaign phone numbers

These four examples have been set up for contacts using a blank Contact Workflow, but you will need to do them for both contacts and companies to ensure you're covering all cases.

## Dealing with Voicemail

This situation is great for dealing with voicemail when one of your leads or prospects calls but you're unable to get to the call. You could use an if/then branch to segment contacts based on their pipeline stage, however, we will simplify this today. This example sends a notification to the manager and sets a task for the contact owner to call back a contact, all by using the **Details of Last Cradle Call** property.

### Enrollment and Re-enrollment

Choose the enrollment trigger **Details of Last Cradle Call is known**. Under re-enrollment select *Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs*, and check the box beside **Details of Last Cradle Call is known** to re-enroll contacts every time a call is received.

Enrollment triggers

Trigger

Re-enrollment

Trigger workflow:

☒ Automatically ☐ Manually

Trigger workflow when:

Test criteria

Clone Delete

Details of Last Cradle Call is known

AND

OR

Enrollment triggers

Trigger

Re-enrollment

☒ Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs. [Learn more about re-enrollment.](#)

☒ They are manually enrolled

☒ ★ Details of Last Cradle Call is known

The following enrollment conditions can't be used for re-enrollment. [Learn more.](#)

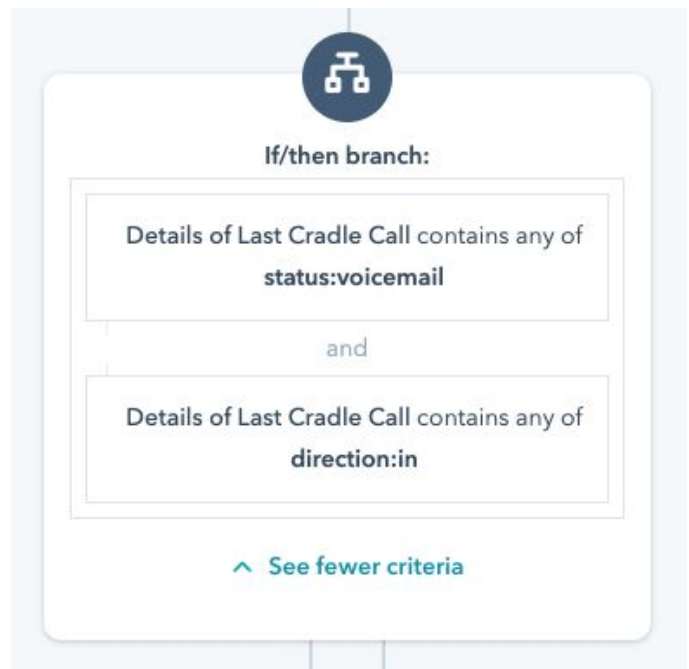
Enroll existing contacts:

Contacts who met these criteria were enrolled when this workflow was activated.

### Selecting the correct calls

Create an if/then branch, with two separate filters as follows:

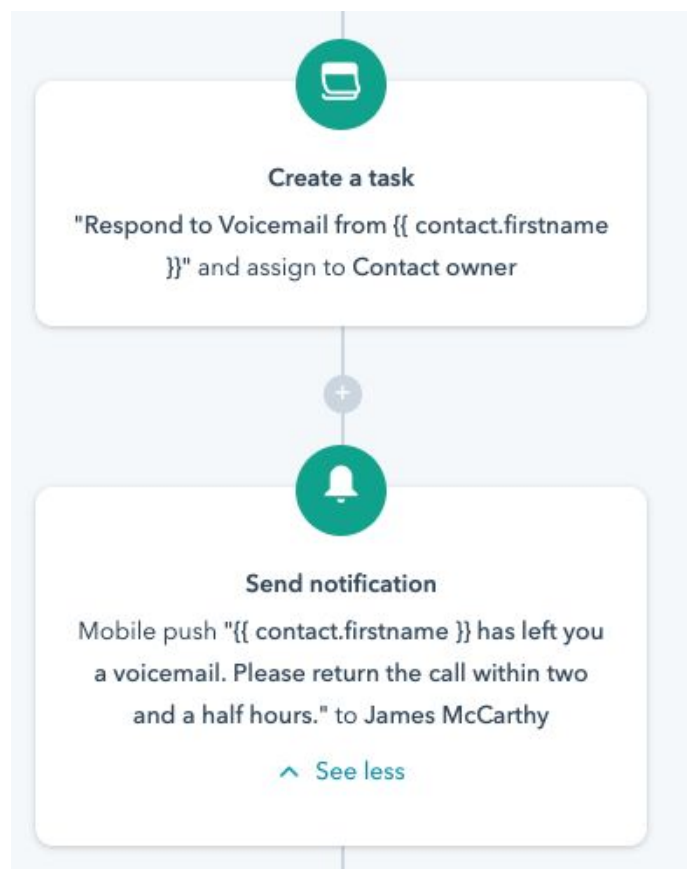
Ensure that you have two separate filters with ***Details of Last Cradle Call contains any of status:voicemail*** and ***Details of Last Cradle Call contains any of direction:in***.



### Setting your desired action

Set any action that you want to perform after this point. In our case, we are going to create a task and send a notification.

Save, and then test your workflow!



## Attributing Phone Call Calls-to-Action

In this instance, we have a campaign phone number, +1 514 613 4590, that we have put into an email nurturing campaign. We want to measure any calls that come through from this campaign.

First, we need to set up custom phone marketing properties<sup>1</sup> to capture attribution of phone calls.

On contacts, create a property called *Converted by phone call CTA* as a Single-line text.

Here, we have added this to a property group called Conversion information although you could add it to the Cradle property group.

The screenshot shows the configuration for a new custom property in HubSpot. The fields are as follows:

- Label:** A text input field containing "Converted by phone call CTA".
- Internal name:** A text input field containing "converted\_by\_phone\_call\_cta".
- Description:** A text input field containing "The campaign name of the phone conversion for this contact". To the right of this field is a toggle switch labeled "Optional", which is currently turned off.
- Group:** A dropdown menu with "Conversion information" selected.
- Field type:** A dropdown menu with "Single-line text" selected.

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<sup>1</sup> HubSpot attribution fields are only accessible to the HubSpot tools for capturing attribution through the website analytics engine.

We suggest keeping a Google Sheet, spreadsheet, confluence page or another document that maps your campaign phone numbers to campaigns for the time periods that they're running. This will give you the ability to reuse phone numbers after a stand down period (we'd suggest one month).

Number	Campaign	Start Date	End Date
+1 514 613 4590	July 2019 Email Nurture	1-July-2019	31-August-2019

*Example table mapping numbers to campaigns*

## Enrollment

Create the following enrollment triggers with an AND between them:

**Details of Last Cradle Call contains any of cradle\_number:+15146134590**

*(substitute your campaign phone number)*

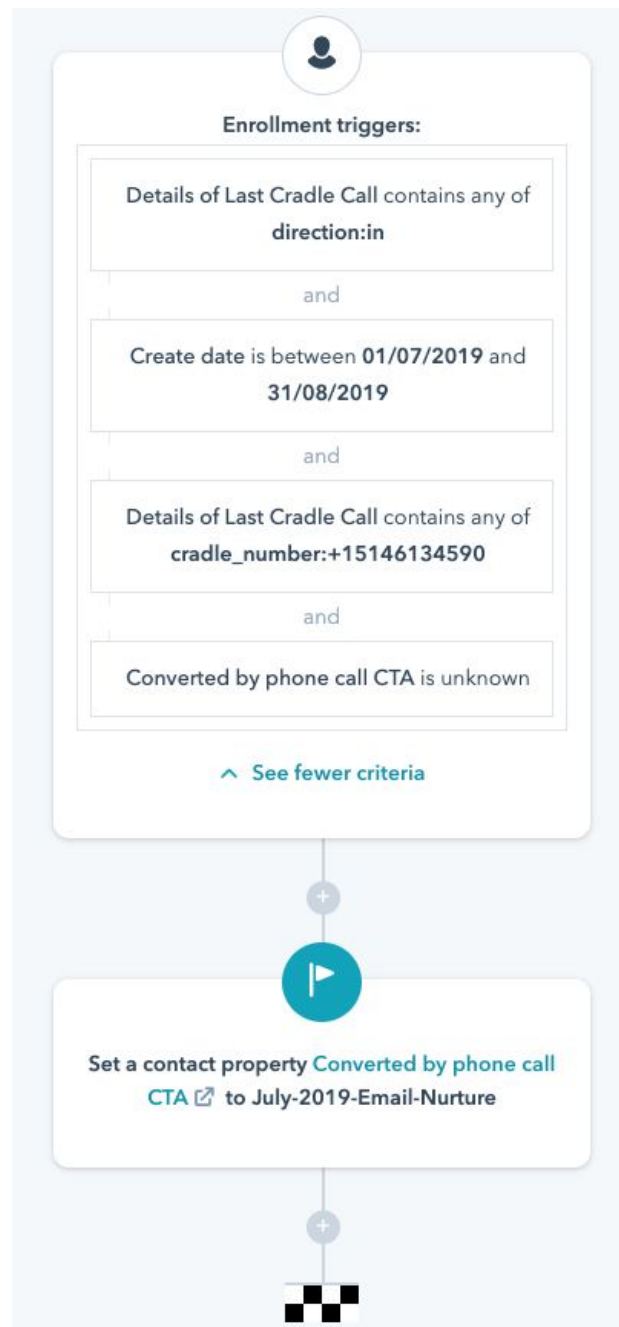
**Details of Last Cradle Call contains any of direction:in**

**Create date is between [your date range]**

**Converted by phone call CTA is unknown**

## Action

If these enrollment criteria are met, you want to set the **Converted by phone call CTA** to be your CTA value. In this case, our campaign is called *July 2019 Email Nurture*.



## Ensuring an SLA is met

If you've committed to returning customer phone calls or voicemails within a certain time frame, how do you make sure your team have their eye on the ball and know which calls are approaching the SLA limit?

Easy! Set up a workflow to start a timer as soon as a voicemail is left, and ring alarm bells if a call isn't returned at the 75% mark.

### Enrollment

Create the following enrollment triggers with an AND between them:

***Details of Last Cradle Call is known***

***Details of Last Cradle Call contains any of **status:voicemail** or **status:missed*****

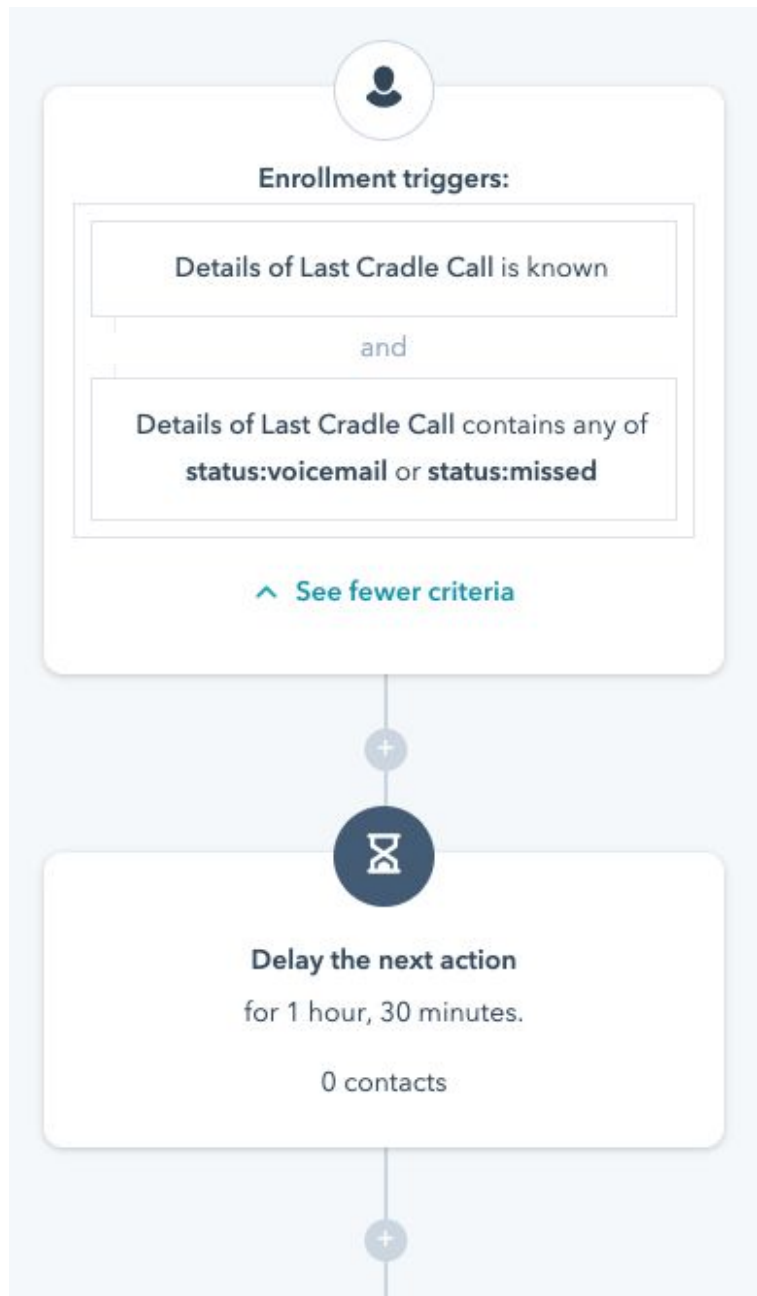
### Re-enrollment

You will need to turn on re-enrollment for this workflow for it to fire more than once.

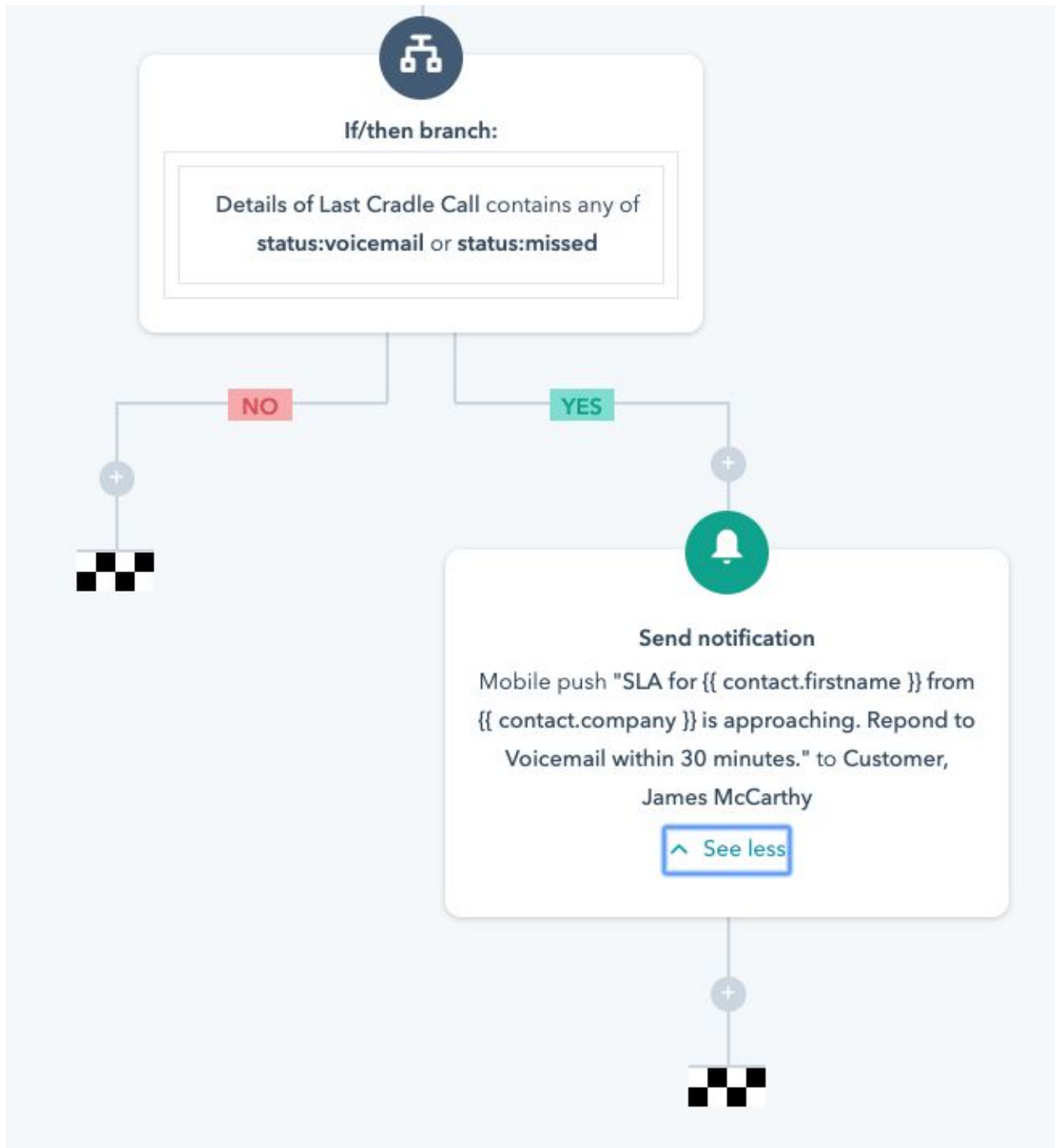
### Action

Wait! Putting a delay into your workflow allows the time for your team to call the customer back. After the delay we will check to see if the situation has changed.

Note that you would probably have other actions in this workflow, such as ticket creation or task creation for the person responsible.







#### Action

At the end of the SLA period, we check to see if the call has been returned (if it has, the status will be completed or successful).

If the last call is still the voicemail or missed call, we will send a notification to the customer care team as well as the manager for that team.

## Sending a Welcome Email

When a new contact is added to HubSpot through Cradle, you might want to send them an email to thank them for their call, or to send them further information following the phone call. For example, you may want to automatically send them more information on how to sign up.

By using the *User that created this contact from within Cradle* property, we can trigger a workflow that emails the new contact a welcome email.

### Enrollment

Create the following enrollment triggers with an AND between them:

***User that created this contact from within Cradle is known***

***Create date is less than 1 day ago***

### Re-enrollment

Do not use re-enrollment for this workflow.

### Action

Wait!

This delay will make your email seem less creepy.

Then send your email.

