HubSpot Academy Transcript: Integrating HubSpot with Slack

Slack is a digital workplace that connects you to the people and tools you work with every day.

Tools like HubSpot!

You live the bulk of your work life communicating with your team within Slack -- but you also use HubSpot to manage your day-to-day marketing, sales, or customer service activities.

Switching back and forth between these tools all day causes friction that can slow down your productivity. But what if I told you your two favorite pieces of software could work *together* seamlessly?

That's where the HubSpot-built integration for Slack comes in.

This integration is *packed* with features like actions, slash commands, and notifications specifically designed to make your daily work processes between HubSpot and Slack as frictionless as possible.

Here's how it works.

Say you're a sales rep that starts your day by checking your Slack channels. You see a colleague Slacked you about a lead that you gave a demo to last week -- her company reached record earnings and she was featured in a daily tech journal.

You decide to check in on your lead later today and congratulate her on her recent success to further build your relationship. Rather than switching out of Slack into HubSpot, you can create that HubSpot task directly within Slack.

To do this, simply hover over the Slack message, click "more actions", then "add a task". You'll then see a HubSpot form appear directly within Slack where you can fill in info like the task title, due date, and more.

Click "save".

You'll then have the option to post the task either within the channel or in a thread.

Once the task is posted, you'll see all of the details you entered, along with an option to "add association" or "update note" if you'd like.

Within the Slack post or thread, click on the task name to see the task within HubSpot.

If you're a customer service rep, the flow of creating a HubSpot ticket within a Slack channel is exactly the same.

Next, let's take a look at how slash commands work.

Guess what? We've got loads of them. Here's a look at all the different HubSpot-related slash commands you can use within Slack. From searching contacts, companies, deals, tickets, knowledge base articles and more -- we've got you covered.

Say you're a customer service rep that needs help from your team to handle a ticket you're stuck on. In a Slack channel, simply type out the slash command and search the name of the ticket.

Then, click "post ticket to channel" to share it with your team.

It gets better. Now I want to show you the *two* ways you can surface notifications from HubSpot in Slack.

First, check out your HubSpot notifications settings. Here, you have a bunch of options for things you can receive notifications about in Slack triggered by activity within HubSpot.

For example, you can set the integration to notify you in Slack when a lead opens a pricing document you sent them in an email earlier that day -- and use that perfect moment to follow-up and close the deal.

Second -- If you have Sales Hub, Marketing Hub, or Service Hub Enterprise -- you can also send notifications in Slack via HubSpot workflows. For example, trigger a workflow each time a sales rep makes a deal that sends a celebratory notification to a sales channel in Slack to boost team morale.

The last thing I'd like to highlight is Conversations. With live chat, team email, and an easy-to-use chatbot builder, Conversations gives you the messaging tools and context to have personalized conversations with prospects and customers at scale.

Get notified within Slack when a customer starts a live chat with your support team and reply directly within Slack -- or, click "reply in Inbox" and get taken to the chat in HubSpot. Either way, the whole conversation will be logged in real time.

Now that I've walked you through some of the features, let's talk installation. It's easy and you'll be ready to go in a few simple clicks.

In HubSpot, click your account name in the top right corner, then click "Integrations".

Click the "Connect an app" button.

Search for the Slack integration, then hover over it and click "View integration".

In the dialog box, click "Connect to Slack".

You'll be redirected to Slack in a new browser tab. Review the requested permissions, then click "Authorize".

You'll get redirected back to HubSpot, with a dialog box informing you that Slack for HubSpot was installed. You'll also receive an email from Slack confirming that you've installed the HubSpot app for your Slack workspace.

You now have all the info you need to get started.

If you need help along the way, feel free to check out HubSpot's knowledge documentation linked on the listing page for this integration. You could also visit us on the HubSpot Community Forum to chat with HubSpot experts. Or, for paying customers, feel free to reach out to our integration support team at "support-integrations@hubspot.com".

The HubSpot-built integration for Slack is available and free to all HubSpot and Slack users.