

Herrmann International Rethinks Its Approach to CRM with LyntonWeb Integration for HubSpot and NetSuite



Herrmann International

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About Herrmann

International: For more than three decades, Herrmann International has been at the forefront of the most progressive research exploring the connection between thinking preferences and business results. With its pioneering Whole Brain® Thinking approach, the company has turned this knowledge into practical, easy-to-apply training programs, tools and methods that help clients increase their thinking agility so they can achieve exponentially higher results. More than 70% of the Fortune 500, including 9 out of 10 of the Fortune 100, rely on Herrmann International's thinking style assessments and learning methods to help them build their competitive advantage.

When your whole business revolves around helping organizations outthink, outperform, and outpace the competition, you'd better be leading by example in all aspects of business operations, including rethinking your approach to customer relationship management.

This was the challenge Herrmann International was facing when they decided that NetSuite wasn't an adequate solution for handling the full range of CRM activities they needed to undertake. Herrmann turned to HubSpot and the LyntonWeb team.

"We continue to use NetSuite for order processing and fulfillment," said Beckie Moses, Digital Marketing Manager for Herrmann International, "but when we made the switch to HubSpot for marketing automation, we decided that we would best serve our customers by using HubSpot as our CRM."

THE OPPORTUNITY

Prior to the introduction of HubSpot and the LyntonWeb team, Herrmann was utilizing NetSuite for CRM and employing a different solution for marketing automation. Herrmann had an integration in place with the other marketing automation solution, but it was clear to the Herrmann team that this integration was not working properly. Records were being corrupted; relationships were getting reclassified; contacts were moving around across accounts; and data wasn't syncing when it was supposed to.

Before long, the Herrmann sales and marketing teams had lost trust in the integration to the point that they were eager to identify a new solution. That new solution arrived in the form of HubSpot and the LyntonWeb team.

The Lynton relationship is truly a consultancy relationship. For me, having a partner that understands HubSpot as well as I do and understands what NetSuite can do and gets what we're trying to do is huge! LyntonWeb takes partnering to the next level.

— Beckie Moses,
Digital Marketing Manager,
Herrmann International

THE CHALLENGE

With no faith in their existing marketing automation solution among the Herrmann sales and marketing teams, Job One for LyntonWeb in facilitating the move to HubSpot was building an integration with NetSuite that everyone could trust.

“It was obvious to everyone on our team that with our old system, the syncing wasn’t working properly. With HubSpot and the new integration that the LyntonWeb team was developing, we wanted to gain back people’s trust, save time, and have better data at our disposal,” said Moses.

“Bi-directional syncing was really important for us. We wanted to be able to bring information back from NetSuite into HubSpot for customer segmentation purposes. For example, we wanted to be able to follow our customers based on product penetration -- who ordered a particular product and when was the last time this product was ordered? We didn’t have reliable, easy access to that information previously.”

THE SOLUTION

The LyntonWeb team sat down with the Herrmann team to listen for key needs for the new integration. It was clear that at the most fundamental business level, Herrmann needed the transfer of data from HubSpot to NetSuite and vice-versa to be reliable. Beyond that, though, Herrmann was looking for a partner they could rely on to figure out the right sync logic and to be available over time to both maintain the integration and make changes as Herrmann’s needs changed.

“I’m technically able, but I’m not in an operations role,” said Moses, “so most of my job responsibilities lie beyond making sure the integration is working

properly on a daily basis. Before LyntonWeb, too much of my time each day was devoted to worrying about whether our data was syncing correctly. I could spend hours trying to track down the source of a problem. But now, if I see something that I question and I need to spend more than a couple of minutes trying to figure it out, I just send the Lynton team an email and go about my business. I know they’re on it and that they’ll solve any issues that come along.

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Headquartered in Houston, Texas, LyntonWeb has been a HubSpot Partner Agency since 2009, having achieved Platinum Partner status. LyntonWeb's developers are certified in HubSpot's Content Optimization System, which demonstrates their knowledge and experience within the platform. Further, LyntonWeb team members are individually certified in the inbound marketing methodology, ensuring that each client has inbound experts contributing to their success.

If you need help with HubSpot integration, contact [LyntonWeb](#) for a consultation.

LYNTON LEADERSHIP

The LyntonWeb team was able to come in, devise a plan, and launch the integration in 60 days. The Herrmann team presented LyntonWeb with a solid business case but not formal technical requirements. The LyntonWeb team advised on the best plan for integrating HubSpot and NetSuite without causing further corruption of data or duplicates within either system. This involved the intermediary step of getting the two platforms connected and allowing for reconciliation of the data and cleaning up each system before the integration was fully rolled out.

The LyntonWeb team advised on the logic for syncing the two systems in each direction and the best approach for taking the integration live, given Herrmann's intended use of HubSpot as its new CRM. Whereas most companies use NetSuite as the system of record to manage all sales activities, Herrmann chose to structure the relationship in the other direction: They wanted to designate HubSpot as the system of record, which required LyntonWeb to develop a different approach to the integration.

LyntonWeb also thoroughly and clearly documented the sync logic that supports the integration. The body of rules governing the transfer of data is complex, but the documentation clearly articulates the intent, making future alterations much easier to implement.

THE RESULTS

Herrmann International found that the reliability of the new integration allowed them to move on from worrying about the integration and actually execute on the integrated marketing capabilities that had been out of reach before their partnership with LyntonWeb. Their ability to analyze product penetration allowed them to understand customer behaviors around Herrmann offerings and be more relevant to both their existing customers and to new prospects with their product marketing.

The newfound stability of their integration also afforded Herrmann time to go in and clean up their data, confident that the validity of the nearly 1,000 company records and several thousand contacts would be preserved throughout the bi-directional syncing delivered by the integration.

"At this point we are poised to undertake full-funnel marketing, from social media and blogging, to content offers and contact forms, to newsletters and emails, strategic lead nurturing and retargeting, and especially analytics – all the things we wanted to be doing before we engaged the LyntonWeb team but couldn't. They have given us back our trust in our data and the time to do our jobs!"

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