04/06/2021

# Connect NPS with Hubspot

Bosbec Workflow Builder

English

Bosbec AB
Färögatan 33
164 51 Kista

Phone: +46 (8) 22 25 25
E-Mail: support@bosbec.com
www.bosbec.com

# Table of Contents

## Introduction

*"How likely is it that you would recommend our product to a friend or colleague?"*

This question is the basis of Net Promoter Score, NPS, which you can use to quickly find out what your customer thinks of your products and services. This survey is based on a scale between 0-10, which is divided into three categories: Detractors (0-6), Passives (7-8), and Promoters (9-10). The NPS score is then calculated by subtracting the share of Detractors from the share of Promoters. Depending on how the customers rate their company from 0-10, the NPS survey will provide a score ranging from -100 to 100 representing the feedback on a company's products.

HubSpot is a cloud-based CRM (Customer Relationship Management) system suited for sales and marketing teams used to assist in sales. This platform aims to help increase revenue, increase ROI (Return of Investment) and provides tools for web analytics, customer support, and social media marketing.

Working in sales, one of the most important processes while using NPS, is to manage dissatisfied customers rapidly. To retain customers, sales representatives need to find out what displeases the customers, and try to entice them with the companies' services. Here, speed is crucial, and it is important to act once a customer has displayed their discontent.

Bosbec has developed a solution that connects NPS replies to a HubSpot account. When a customer has submitted a Detractor score in the NPS survey, a Ticket is created on the HubSpot account which can notify a responsible sales representative who can get in touch with the customer. This guide will entail how this process is possible, and how you can use this on your Bosbec account.

Prerequisites:

- You are logged in as an administrator at www.bosbec.io
    - *You also have the service "NPS" installed on your account.*
- You have an account on Hubspot.
    - *This is the account which will receive the tickets.*

## Configure your Hubspot account

To post a ticket on your HubSpot account for your sales representatives, you need to set up a connection between the Bosbec system and your Hubspot account. For this connection, you need an API-key and the ID of the account owner which will receive the Tickets. This section will guide you on how to obtain these.

### Obtain your API key

On your Hubspot Account, click on the Settings icon in the top right corner in the main navigation bar. Once in the Settings menu, expand the “Integrations” menu in the left sidebar and click on “API key”. If you do not already have an API key, click on “Create key” to create a new one. Copy your API-key and store it for later. We will use this token in the Bosbec Workflow Builder to build the HTTP request to the HubSpot API. See the image below for more.

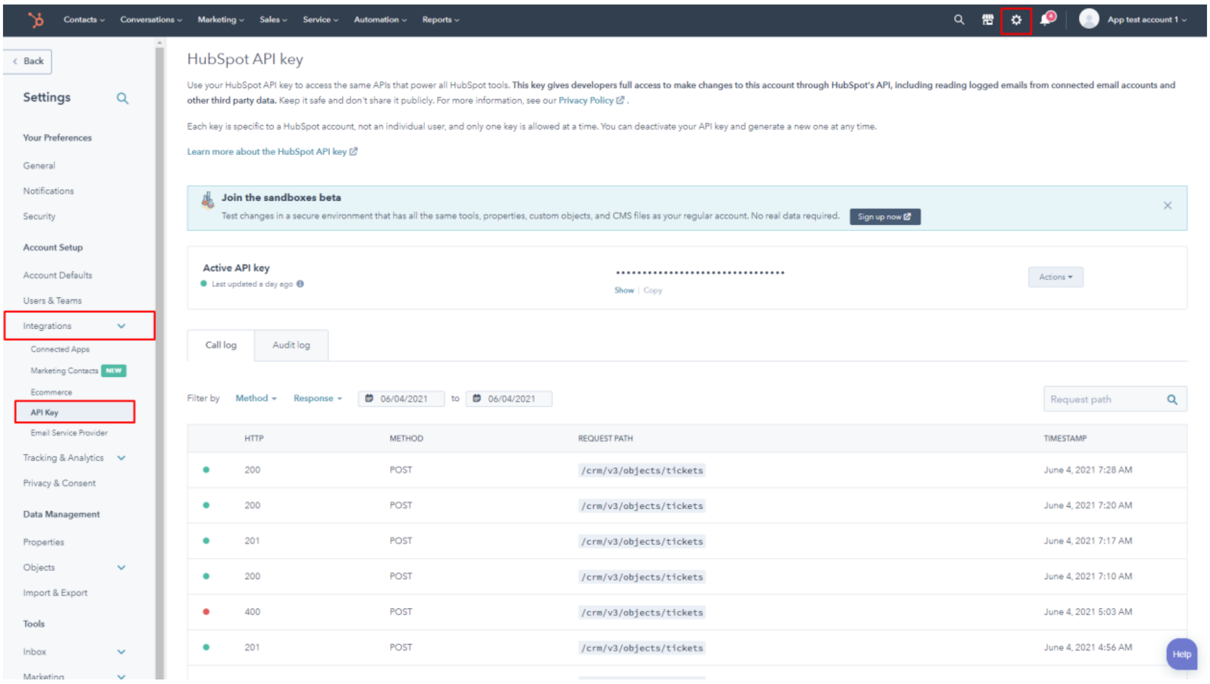


*Image 1: Obtain your API key in the HubSpot interface. Click on the Settings icon in the top right corner, Integrations in the left sidebar and then API key.*

### Find your owner ID

The owner ID is used to specify which owner of the HubSpot who should receive the ticket. This ID is found in your Properties and you can obtain it in your settings. Click on the Settings icon in the top right corner in the main navigation bar. Once in the Settings menu, click on “Properties” and search for “Owner” in the search field. Now, the property “Contact Owner” should appear in the list, go ahead and click on it and your ID should appear in the menu bar expanded to the right. See more in the image below.

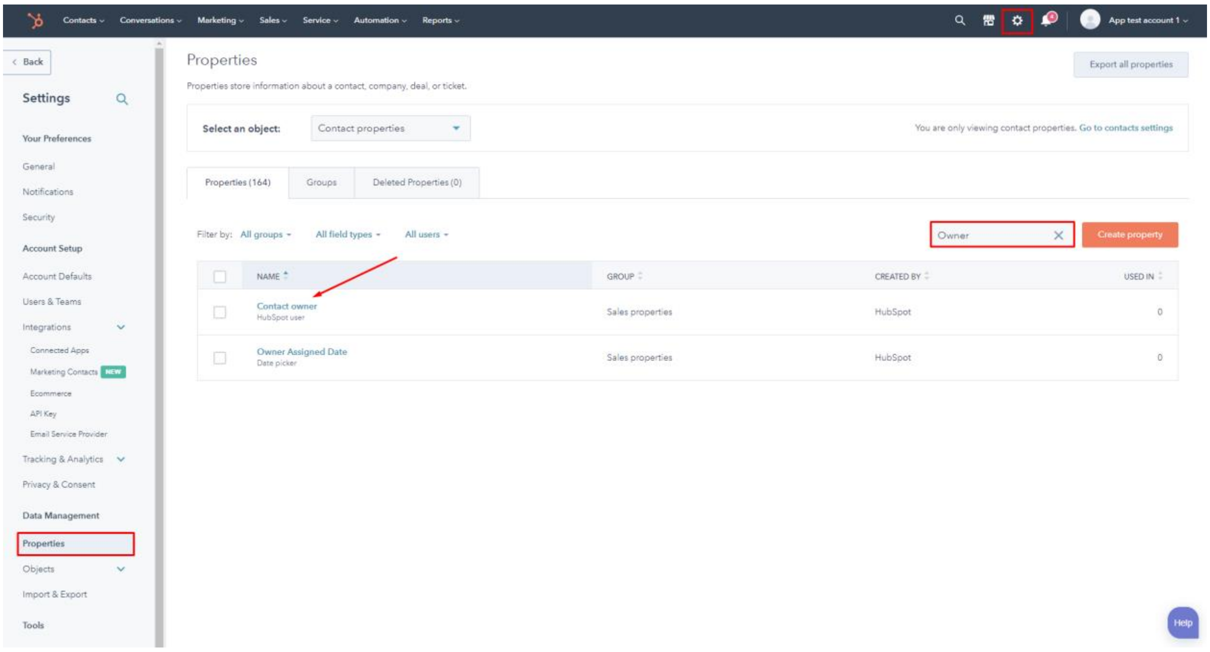


*Image 2: Obtain your API key in the HubSpot interface. Click on the Settings icon in the top right corner, Integrations in the left sidebar and then API key.*

## Modify the NPS service

Now we have all the information we need to modify the NPS service. In your Bosbec administrative interface, click on Workflows and look for your NPS workflow. Either double-click on the workflow or right-click and select “Edit”.

The Hubspot integration is already built so all you have to do is to import it to your workflow. In the navigation bar in the top left corner, click on “Edit” and select “Workflow Library”. This library contains several extensions and pre-built solutions ready to import to your workflow. Expand the “Snippets” folder and select “Hubspot: Post NPS Ticket”.

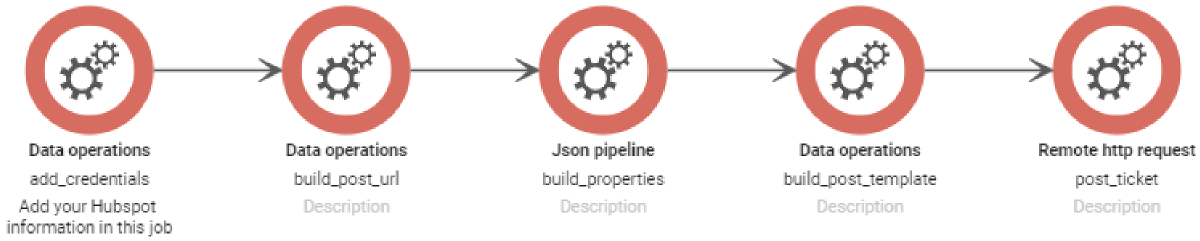


*Image 3: HubSpot integration workflow.*

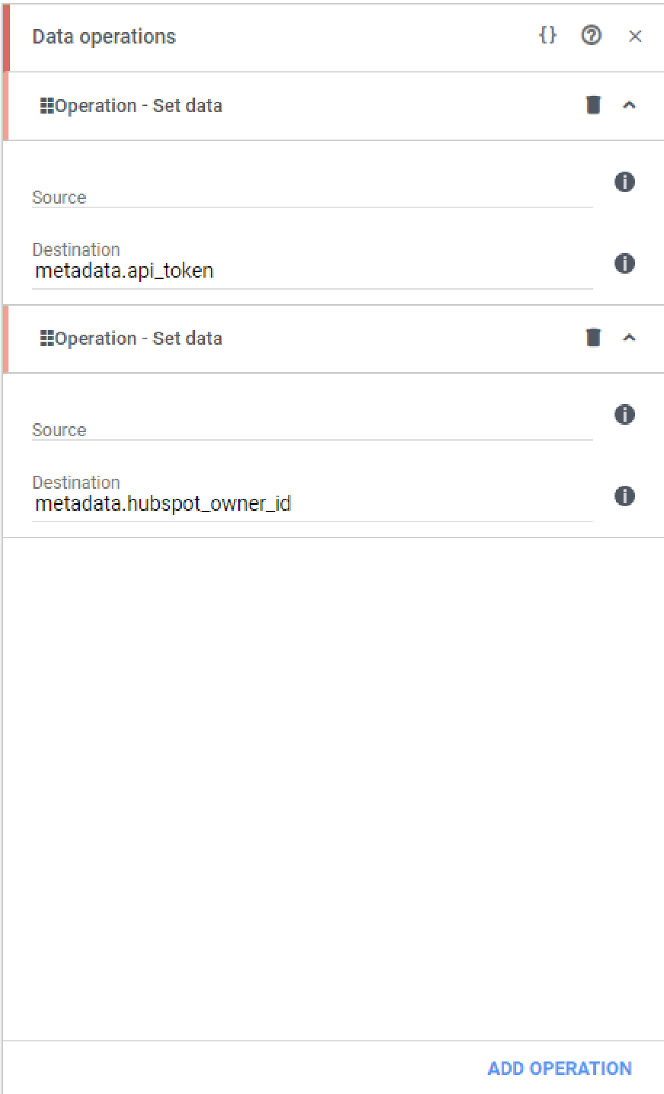


*Image 4: Set the Source-fields with your API-key and the HubSpot owner ID.*

## Add Hubspot credentials

Remember the credentials we extracted from the HubSpot account? This information is necessary to make the API-call to HubSpot from the Workflow Builder. Our workflow-snippet consists of five jobs needed to create the request, but you only need to care about the first job. It is in the first job where we set the API-token (the API-key from HubSpot) and the owner ID. Open the first job called "add_credentials" and paste your key and your owner ID in the corresponding Source-fields.

## Connect the Hubspot snippet to your NPS service

At this point we've almost done all things needed to connect your NPS service to your HubSpot account. All we have to do is to add our new extension to the NPS workflow.

In this case, we want to notify the HubSpot account when a customer has submitted a Detractor score (0-6) on the survey. In your NPS workflow, locate the job "save_to_detractors", which can be found at the end of the workflow which is started by a "Form answer trigger". You can also click "Ctr-+F" on your keyboard to search for the job.

When you have located the job, click and hold on the "Save to group" red border (save_to_detractors). Drag the arrow to the "Data Operations" job named "add_credentials" and release. Now you should have connected the two workflows and an arrow remains in your workflow between the two jobs.

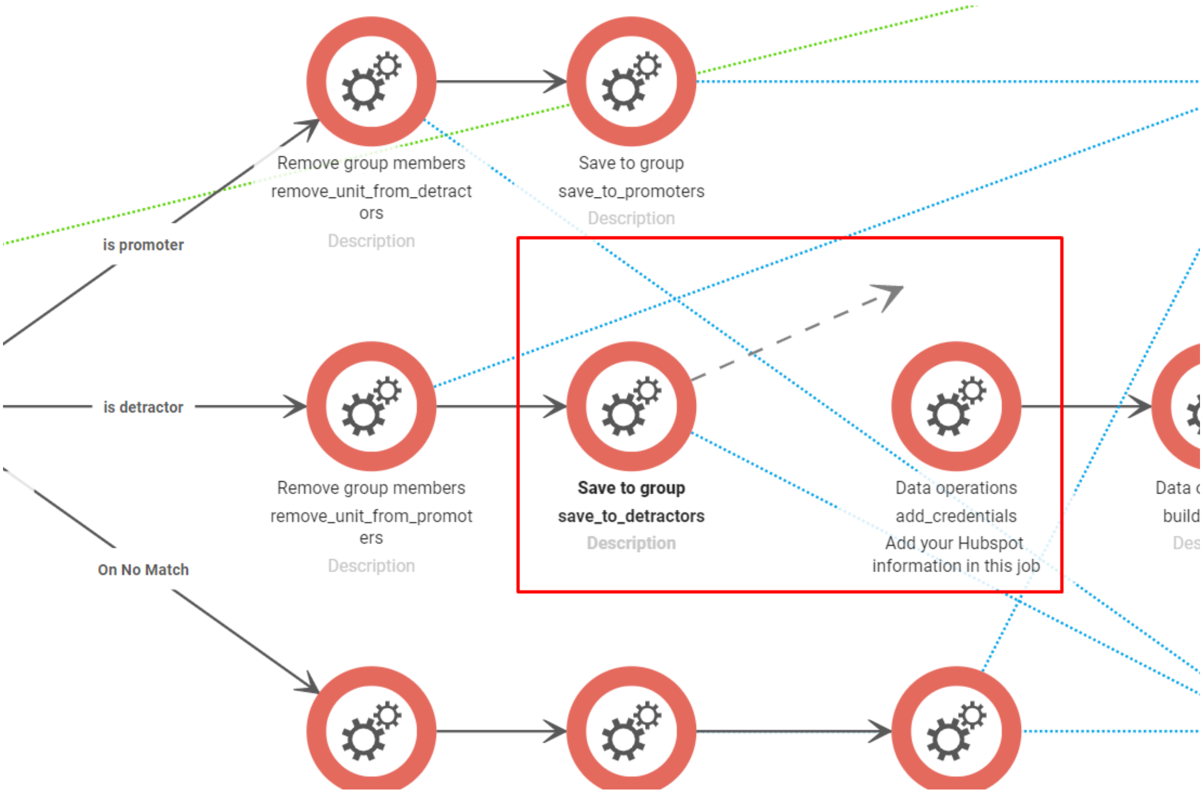


*Image 5: Click and hold on the "Save to group" red border. Drag the arrow to the "Data Operations" job named "add_credentials" and release. Now you should have connected the two workflows and an arrow remains in your workflow between the two jobs.*

Well done, there is now a connection between your HubSpot account and your NPS system! Whenever a displeased customer submits their results, a Ticket is created on your HubSpot account which will notify your sales representative.

## Further reading

This solution is based on the concept of working with incoming and outgoing data in the Bosbec Workflow Builder. If you want to learn more about these concepts, read more at https://help.bosbec.io/.