Alchemer Workflow Hubspot Initiator

> The HubSpot initiator is available for purchase as an add-on. If you are interested in purchasing, please contact us for additional information.

Overview

HubSpot is a leading contact relationship management (CRM), marketing, sales, and customer service software company. This initiator pairs Alchemer's robust Workflow and survey functionality with HubSpot's diverse suite of capabilities.

With this integration, you can initiate personalized customer feedback Workflows in Alchemer after specific events occur in your HubSpot Workflows, ensuring the collection of timely and targeted feedback from your customers.
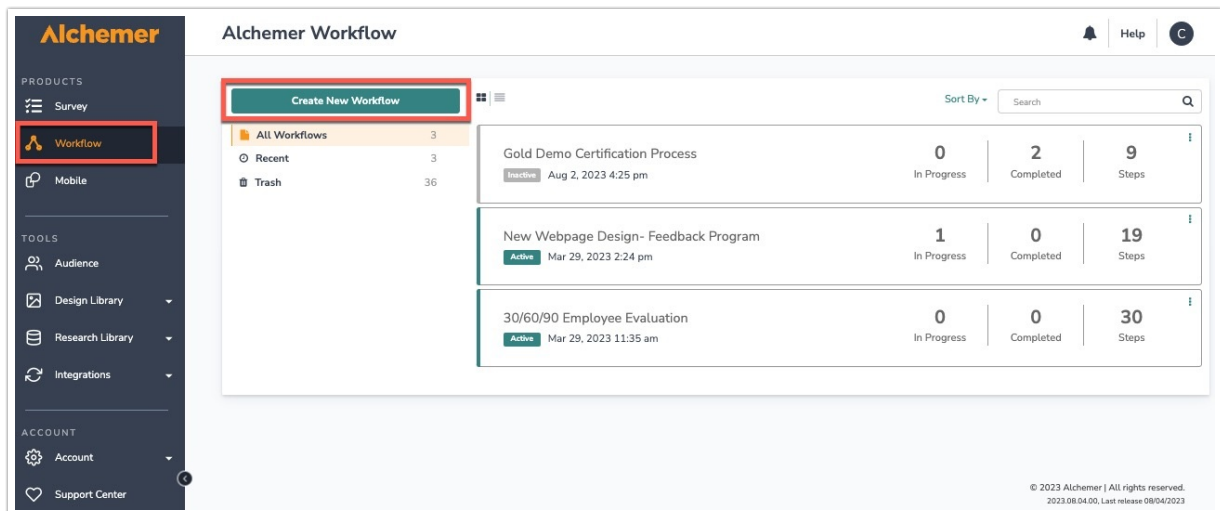
With Hubspot and Alchemer, you and your team can:

- Initiate Workflows after events occur in HubSpot.

> The HubSpot initiator uses webhooks. Learn more about creating webhooks in HubSpot here.

Setup

1. Create a new Workflow

2. Name your Workflow.

Create New Workflow

* What would you like to name this Workflow?

CX Feedback Workflow

Cancel   Start Building

3. After creating a new Workflow, select HubSpot as your Workflow initiator.
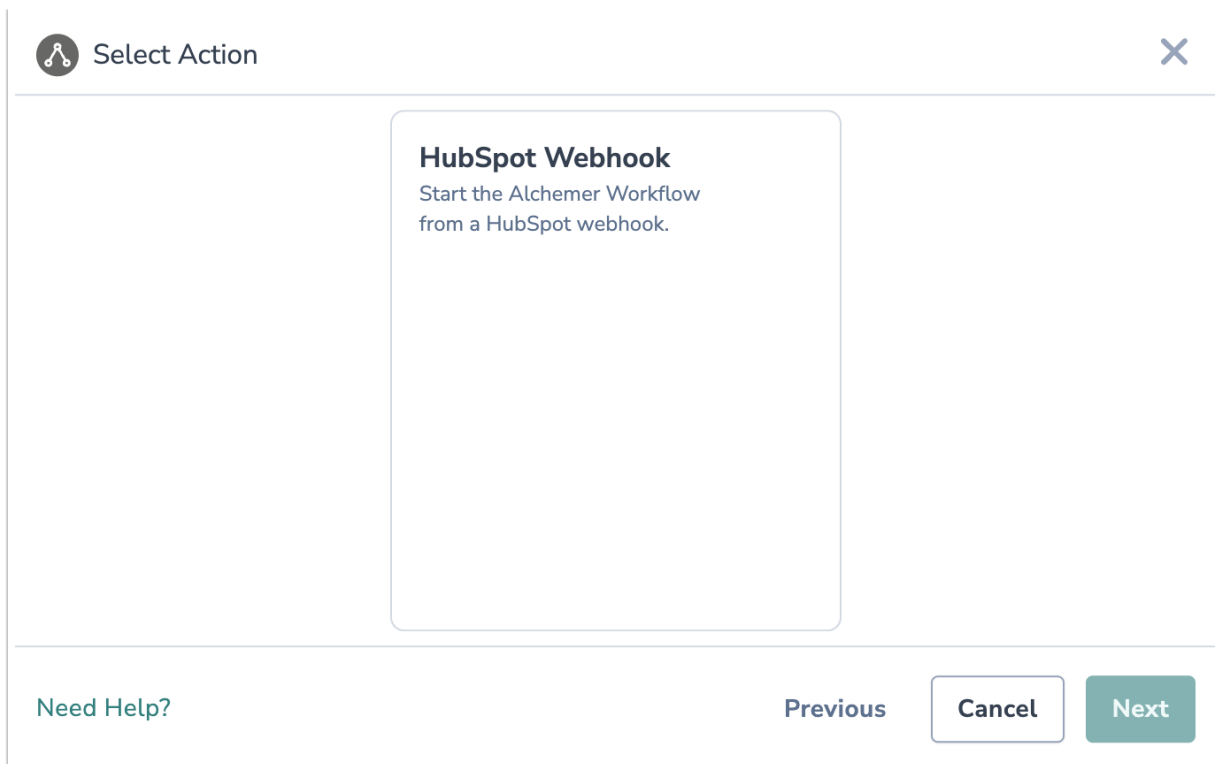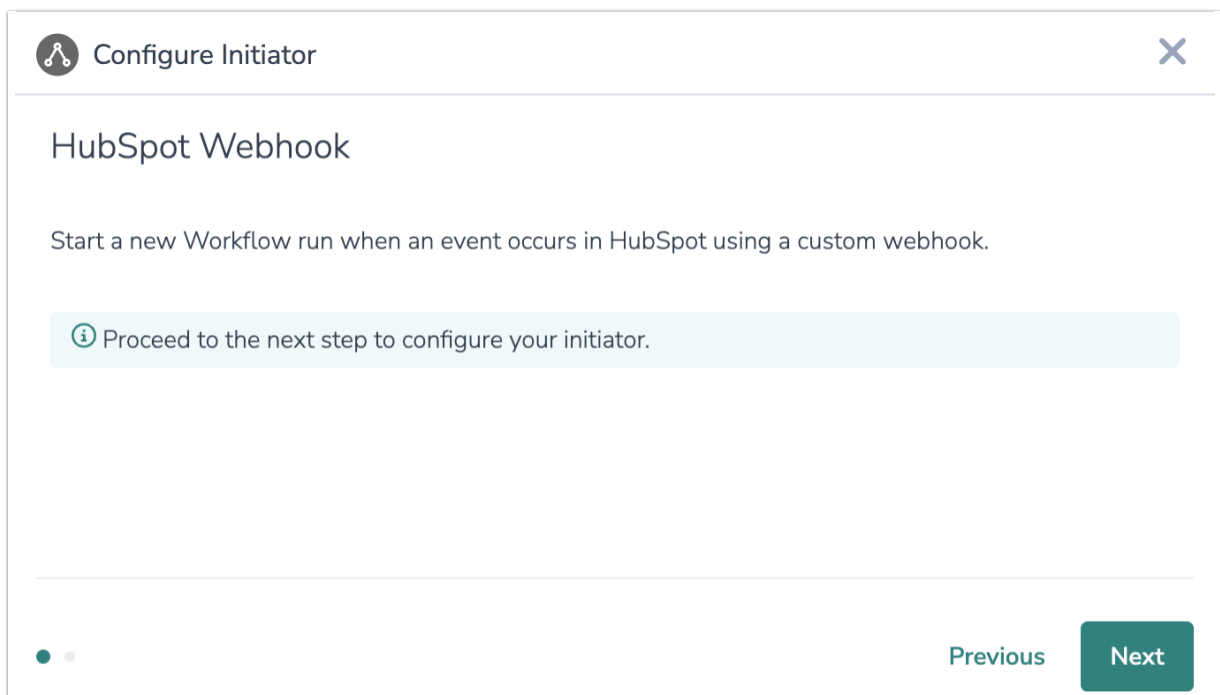
Select Initiator

Asana   Braze

Custom Events   Gladly

HubSpot   Kustomer

Need Help?   Next

4. Select HubSpot Webhook and then click "Next".

Select Action ✕

HubSpot Webhook
Start the Alchemer Workflow
from a HubSpot webhook.

Need Help?   Previous   Cancel   Next

5. Hit "Next" on the initiator overview screen.

Configure Initiator ✕

HubSpot Webhook

Start a new Workflow run when an event occurs in HubSpot using a custom webhook.

ⓘ Proceed to the next step to configure your initiator.

Previous   Next

6. Within your HubSpot account, select a Workflow or create a new one. Then add a webhook that, once fired, will initiate your Workflow in Alchemer.

For more details on this process, you can review HubSpot's documentation here.

7. When composing the new webhook, enter the Webhook URL supplied by Alchemer.

8. Then add any Request Body Keys to the webhook in HubSpot. Whenever the webhook fires, this information will be sent to Alchemer and you will be able to use these values as merge codes in Workflow steps.

For more information on this step, refer to HubSpot's documentation here.

9. Configure the Request Body Keys in Alchemer Workflow, so that Alchemer can receive the keys in the request body. When done, click the "Add to HubSpot Keys" button.

They keys must match exactly in both Alchemer and Hubspot. For example, a key labeled "email" in HubSpot must be added as "email" in Alchemer.

HubSpot Custom Request Body Keys

Set the Request Body in HubSpot to 'Customize request body'.

Add a key below for each key/value pair created in HubSpot. Learn more.

HubSpot Keys*(optional)*

0

email

1

firstname

2

lastname

[Add to HubSpot Keys]

Previous   **Save**

10. Click the "Save" button to complete configuration for this initiator.

Use Case

ABC Software use HubSpot to run complex, cross-channel Workflows. However, the team at ABC Software need the ability to include longer surveys as part of their Workflows. In this specific example, they want to send long form customer experience surveys to their largest enterprise customers after a set of specific events occur in HubSpot.

To accomplish this, ABC Software use the Alchemer Workflow HubSpot initiator to trigger a customer feedback Workflow in Alchemer, after a series of events occur in a HubSpot Workflow. They add a webhook to their workflow in HubSpot that triggers the Workflow in Alchemer when the specified events occur. This integration between HubSpot and Alchemer allows ABC Software to collect in-depth feedback from their largest enterprise customers through extended surveys, enhancing their understanding of customer experiences and ultimately improving their services.

Merge Codes

When the webhook fires, Hubspot will pass any custom fields to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

> For more information on how to use these merge codes in your Workflow, check out this article.

FAQs

▷   What permissions do I need within Alchemer to set-up and use the HubSpot initiator?

▷   Can multiple Workflows initiate off the same HubSpot initiator?

▷   This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles