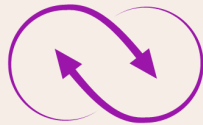




# HubSpot and WhatsApp Integration Playbook

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HubSpot



TIMELINES

# Overview

## Intro Overview:

The HubSpot and WhatsApp Integration Playbook is a guide intended to improve marketing and sales capabilities with the various communication of WhatsApp. This playbook provides step-by-step instructions on [integrating Hubspot and WhatsApp](#) effectively to enhance customer engagement, streamline processes, and drive business growth.

Whether you're a marketer, sales manager, or customer support representative, this integration helps you to revolutionize how you connect with your audience and achieve your business goals. Let's unlock the complete potential of HubSpot and WhatsApp integration.

TimelinesAI WhatsApp and HubSpot integration helps you to:

- Enable your team to interact with customers on HubSpot and maintain communication records.
- Set up automated responses and messages for sales, and customer support, whether it could be personalized welcome messages, appointment reminders, follow-ups, or sales outreach.
- Sync WhatsApp messages as notes within HubSpot, providing a view of customer interactions.
- Automatically import WhatsApp contacts into HubSpot, allowing you to manage and track leads.
- Gain insights into message open rates, responses, and other metrics.

## Best Practices of WhatsApp and HubSpot integration

### Who Can Benefit:

- Marketing professionals seeking to enhance customer interactions
- Sales teams aiming to improve lead conversion and relationship management
- Business owners and managers to track team's performance

- Businesses looking to create a seamless and efficient communication strategy

**Use-cases of Hubspot & WhatsApp integration:**

- Handle all tasks within HubSpot, avoiding the need for various separate tools
- Create personalized messages based on customer information and previous interactions stored in HubSpot
- Use HubSpot workflows to automate message sending based on specific triggers, such as new deals, updated deal stages, purchases, or any other event triggers
- Segment your contact lists in HubSpot and send personalized mass messages
- Ensure that communication history is accessible to the entire team, so even if the responsible agent is unavailable, their chats will be handled by other agents without any misunderstandings.

<b>Aspects</b>	<b>Businesses use HubSpot&amp; WhatsApp Integration</b>	<b>Businesses don't use HubSpot&amp; WhatsApp Integration</b>
Customer Engagement	Seamless, personalized interactions right from CRM, real-time support	Limited communication options, delayed responses
Customer	Collaboration with team	Limited support

Support	members and automated processes	options, potential delays, loss of customers
Sales Outreach	Personalized mass outreach on WhatsApp	Limited sales interactions
Lead Management	Sync contacts from WhatsApp to Hubspot and track the sales funnel	Long conversion process due to manual enrolling leads to HubSpot
Automation	Workflow automation triggered actions based on any events from HubSpot	Manual and time-consuming processes
Personalization	Personalized messaging based on data from HubSpot	No personalized messages
Efficiency	Streamlined processes, reduced manual tasks	Manual data entry and sending messages
Customer Satisfaction	Enhanced customer experience through seamless interactions	Potential frustration due to communication gaps
Collaboration	Connect unlimited team members and WhatsApp numbers	Difficult to collaborate due to

# Features

## 1. Automatic syncing of Contacts and Deals from WhatsApp to Hubspot

The screenshot shows the HubSpot interface for the 'Contacts' section. At the top, there is a navigation bar with tabs for 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reporting'. Below this, the 'Contacts' section is active, showing '132 records'. There are two tabs: 'All contacts' (selected) and 'My contacts'. Below the tabs are several filter options: 'Contact owner', 'Create date', 'Last activity date', 'Lead status', and 'Advanced filters (0)'. A search bar is present with the placeholder text 'Search name, phone, em'. The main content is a table with the following columns: 'NAME', 'EMAIL', and 'PHONE NUMBER'. Each row represents a contact record with a checkbox on the left, a phone number icon, and the phone number itself. The phone numbers listed are: 78120002117, 78120002116, 78120002115, 78120002114, 78120002113, 78120002112, 78120002111, 78120002110, and 78120002109. The email column shows '--' for all records, and the phone number column shows the full international format: +7 812 000-21-17, etc.

<input type="checkbox"/>	NAME	EMAIL	PHONE NUMBER
<input type="checkbox"/>	7 78120002117	--	+7 812 000-21-17
<input type="checkbox"/>	7 78120002116	--	+7 812 000-21-16
<input type="checkbox"/>	7 78120002115	--	+7 812 000-21-15
<input type="checkbox"/>	7 78120002114	--	+7 812 000-21-14
<input type="checkbox"/>	7 78120002113	--	+7 812 000-21-13
<input type="checkbox"/>	7 78120002112	--	+7 812 000-21-12
<input type="checkbox"/>	7 78120002111	--	+7 812 000-21-11
<input type="checkbox"/>	7 78120002110	--	+7 812 000-21-10
<input type="checkbox"/>	7 78120002109	--	+7 812 000-21-09

It means that all your customer interactions, whether through WhatsApp or HubSpot, are stored in one place. This allows you to avoid

switching between platforms, enabling teams to respond quickly and provide strong support.

- Never lose your Leads
- Handle all WhatsApp business communications from Hubspot
- Forget manual data entry into HubSpot

**Benefit for business:** Sync unlimited business Contacts from WhatsApp to Hubspot.

## 2. Automating Workflows

The image shows a HubSpot automation workflow and its configuration. The workflow, titled "Send WhatsApp Message", consists of two steps: "Contact enrollment trigger" and "Send WhatsApp Message through TimelinesAI". The first step is currently inactive, displaying the message "No triggers set. Contacts can still be enrolled manually." The second step is active and contains the text "Send WhatsApp Message through TimelinesAI." To the right, a configuration panel for the "Send WhatsApp Message through TimelinesAI" step is shown. It includes fields for "Sender Phone \*" (set to +551232312321), "Recipient Phone \*" (set to +549113242323234), "Message \*" (set to "Hi **Contact: First name**, your product will be delivered soon"), and "Media URL" (set to "Enter a value"). Each field has a "Contact token" dropdown menu next to it.

Automated workflows remove the need for manual intervention in repetitive tasks, allowing your team to focus on high-value activities rather than routine actions.

- Personalize automated messages with any Contacts properties
- Save time on routine tasks
- Reduce delays in engagement with customers

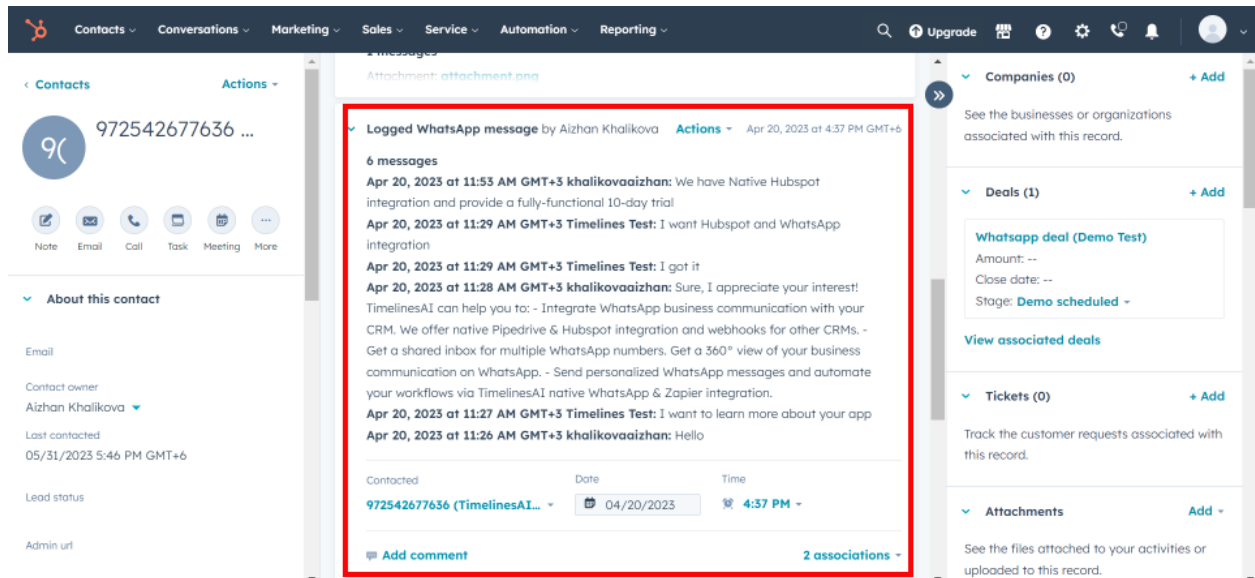
Instructions for the most popular Workflow requests:

- [Send personalized automated messages whenever you have a new Deal](#)
- [A Comprehensive Guide to sending WhatsApp marketing outreach to your contact list from Hubspot](#)
- [Create a HubSpot In-App Notification When a WhatsApp Message is Received](#)

**Benefit for business:** Automated WhatsApp communication processes ensure consistent communication with customers, saving time for your team to focus on higher-value tasks.



### 3. Sync WhatsApp Chat History

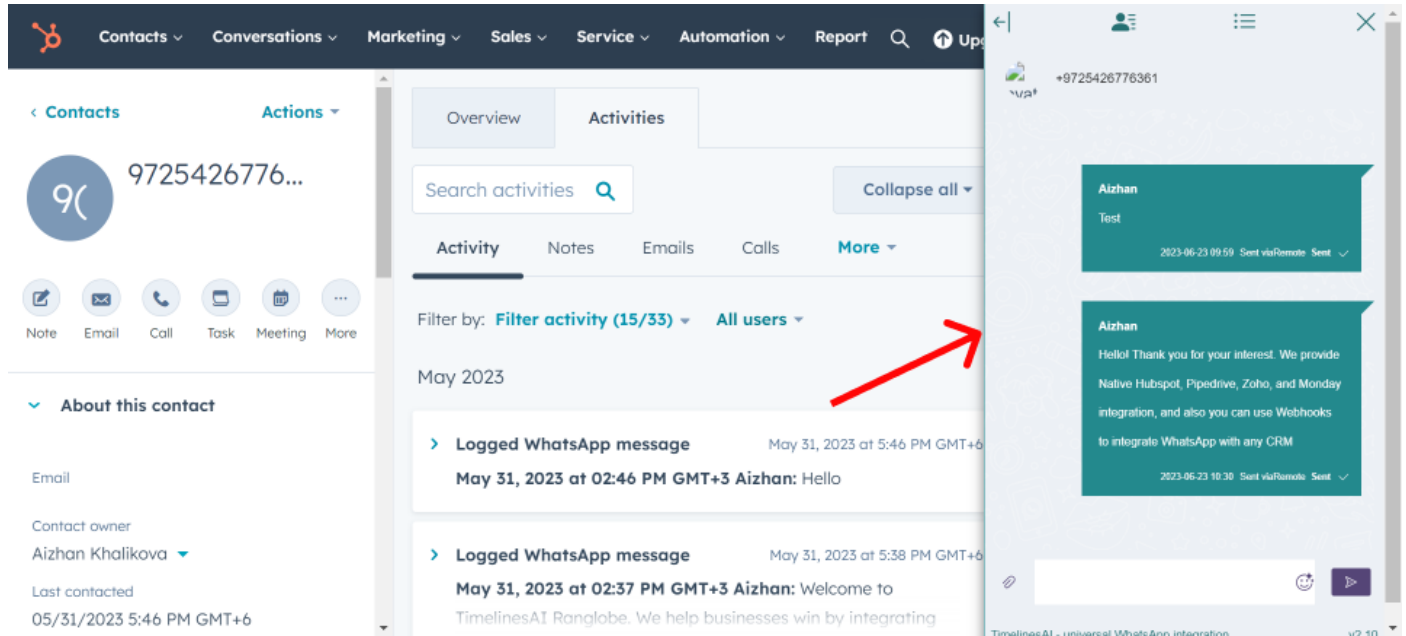


Access to WhatsApp chat history within HubSpot provides teams with proper context when engaging with customers and leads to more personalized and effective conversations. Even when your sales agents are on vacation, you can still manage and track WhatsApp chats through HubSpot. You can access and view all WhatsApp communication history there. Having a preview of message history allows you to quickly catch up on previous conversations, enabling more context-aware follow-ups.

#### **Benefits for business:**

- Store all data about your customers in one tool
- Get real-time WhatsApp messages syncing to HubSpot
- Stay informed about the complete client history.

## 4. Sending WhatsApp messages right from Hubspot



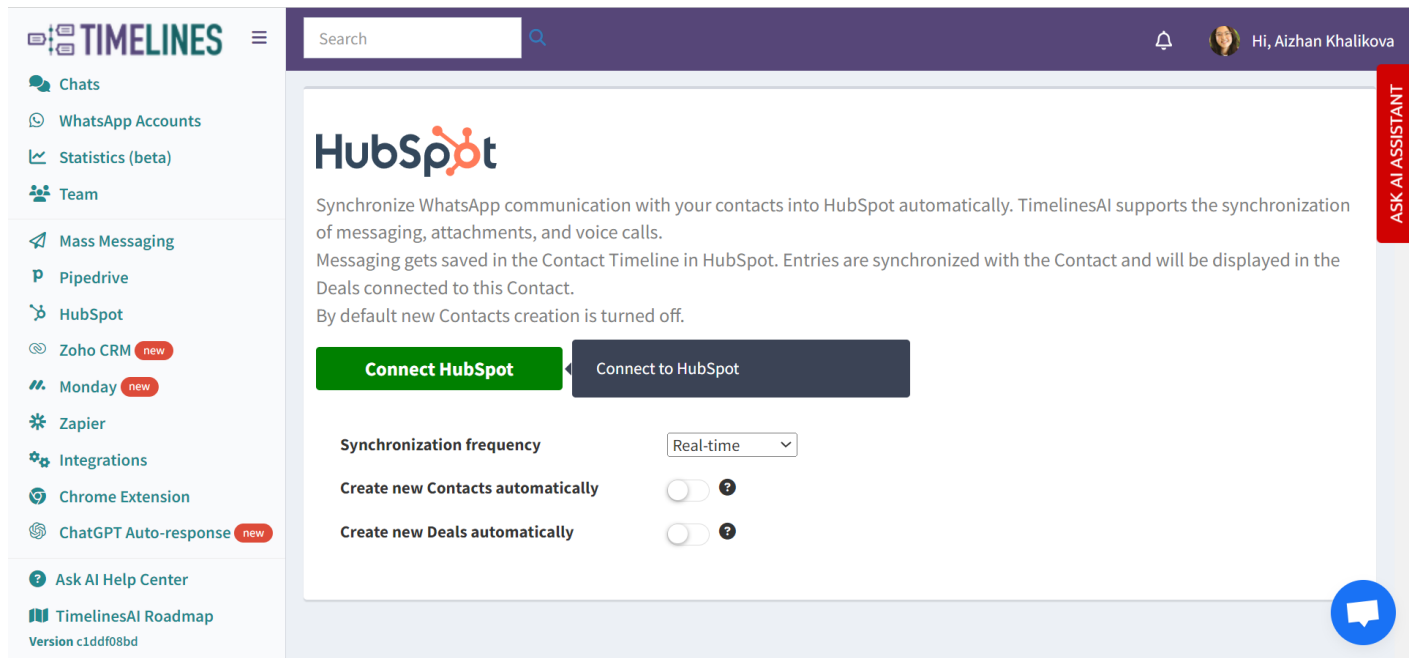
Respond quickly to customer inquiries and support requests via WhatsApp without leaving Hubspot, ensuring quick issue resolution and maintaining a high level of customer service.

In order to send WhatsApp messages without leaving Hubspot, install our Chrome extension.

### **Benefits for business:**

- Sending WhatsApp messages directly from HubSpot makes it easier to manage and track interactions
- The ability to send messages without switching tabs saves time and streamlines the communication process

# Setting Up HubSpot and WhatsApp Integration



- 1) Begin by registering a free TimelinesAI account.
- 2) Connect your WhatsApp number by simply scanning the provided QR code.
- 3) Navigate to the Team tab and invite your team members. Each member can then connect their personal WhatsApp number to TimelinesAI.
- 4) In the HubSpot tab, click the connect button.
- 5) Access your HubSpot account and activate the Activity filter to start syncing WhatsApp messages.
- 6) With these steps complete, all messages will automatically sync from WhatsApp to HubSpot. Contacts are matched based on their WhatsApp number. In cases where a match isn't found, you can create contacts automatically.

This integration process requires only a few clicks and you don't need any coding skills. Following these straightforward steps will seamlessly [connect your WhatsApp communication with your HubSpot account](#) via TimelinesAI.