DIGITAL REACH
ONLINE SOLUTIONS

Exploring the Lead Object

HubSpot VS salesforce

What is the Lead Object?

INTEGRATED ENTITY

The HubSpot Lead object is a dedicated space within HubSpot that offers users a consolidated view of their active prospects.

The Lead object is an extension of the Contact or Company object, not a standalone object. Having the Lead object integrated with other objects allows for the smooth transition of leads through the sales pipeline.

INDEPENDENT PRIMARY ENTITY

The Salesforce Lead object is a distinct primary entity that operates independently from Contacts and Accounts, providing a dedicated space for managing new potential customers.

This separation allows for specific workflows and processes tailored to leads, though it can lead to complexities in lead conversion and potential duplication in records.

How Does the Lead Object Relate to Contacts?

INTEGRATED

In HubSpot, Leads are closely linked with Contacts and Companies, forming a unified object in the Sales Hub. This integration enables a streamlined experience, providing a comprehensive view of sales interactions and contact information.

Sales reps benefit from tracking a lead's progress in tandem with Contact details, fostering a more cohesive understanding of the customer journey.

Uniquely, HubSpot allows for the creation of multiple Lead objects for a single Contact, enabling tracking of various outreach campaigns without duplicating records. The Lead status, continuously attached to the Contact or Company, offers insights into the effectiveness of campaigns and the journey from lead to opportunity. This is great for efficiency and prevents the issue of redundant data found in the Salesforce system.

SEPARATE OBJECTS

Salesforce distinguishes Leads and Contacts as separate entities, mirroring different phases in the customer's journey. Initially, Leads represent preliminary interactions, which evolve into Contacts as purchase intent becomes clear.

This separation offers clarity in tracking a lead's progress but can complicate the management of customer relationships due to a lack of an integrated view. Tracking multiple campaigns becomes challenging as they are disconnected from Leads and Contacts.

Since Leads are considered individual records, continuity can be a challenge when converting these Leads to Contacts.

How is Lead Conversion Handled?

INTEGRATED

Lead conversion into Deals is a highly integrated and customizable process in HubSpot.

Users can automate the creation of a Deal based on Lead stages by either requiring Deal creation when a specific Lead stage is reached or by automatically creating them.

The integrated approach to Leads minimizes the risk of duplicates and makes automation or mandated deal creation at a specific stage easy. Best of all, it allows everything to be closely associated - the Lead, Contact, Company, and Deal.

SILOED PIPELINE

In Salesforce, the transition from a Lead to an Opportunity involves stages in the Lead pipeline. When a Lead makes it through the pipeline, the user then converts the Lead into a Contact or Account and then must create a Deal and associate it.

While Salesforce excels at managing complex sales processes and large data volumes, its approach to deal management can be challenging. A notable issue is the potential creation of duplicate records during Lead-to-Contact conversion. Salesforce does offer warnings to address these duplicates, but addressing duplicates adds an extra step to the lead management process.

Can I Sync Leads Between HubSpot & Salesforce?

YES, BUT WITH LIMITATIONS

Currently, syncing Leads from HubSpot to Salesforce is not straightforward. This limitation arises from the fundamental difference in how each platform handles Leads – HubSpot as integrated objects and Salesforce as standalone objects.

When syncing from HubSpot to Salesforce, it's possible to include HubSpot Leads, but with significant limitations. The sync is driven by HubSpot's Lead status, and you're constrained because the user must choose whether the contacts from HubSpot are synced to Salesforce as Leads or Contacts. There's no flexibility for multiple conditions.

This approach can complicate workflows, especially in environments where sales teams are divided between HubSpot Sales Hub and Salesforce. Consequently, any detailed reporting or tracking of HubSpot Leads needs to be managed solely within HubSpot.

YES, BUT THERE'S A CATCH

Salesforce Leads and Contacts are created in HubSpot when a sync is triggered. The sync can be tailored using an inclusion list in HubSpot, and Contact properties can be mapped to Salesforce fields. While HubSpot's Salesforce integration allows for robust control over the sync process, differences in handling duplicates and creating new Contacts may pose challenges.

To address these challenges, be sure you regularly review and adjust sync settings, ensure consistent field mapping, and consider using specialized tools or consulting for more complex syncing needs.