



# How CanvassingHub Integrates with HubSpot to Streamline Canvassing Data



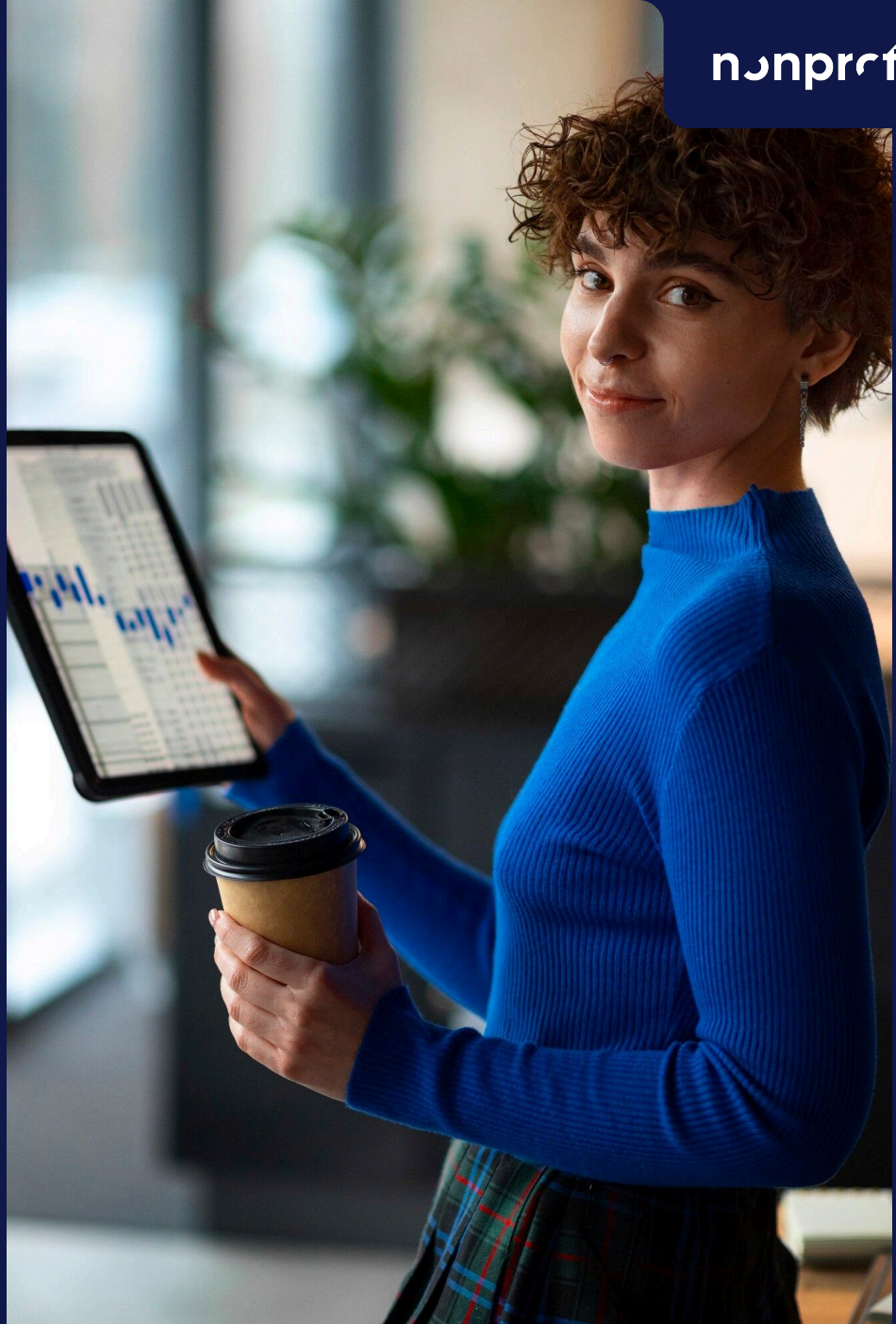
*A Comprehensive Resource by Nonprofit Tech Shop*

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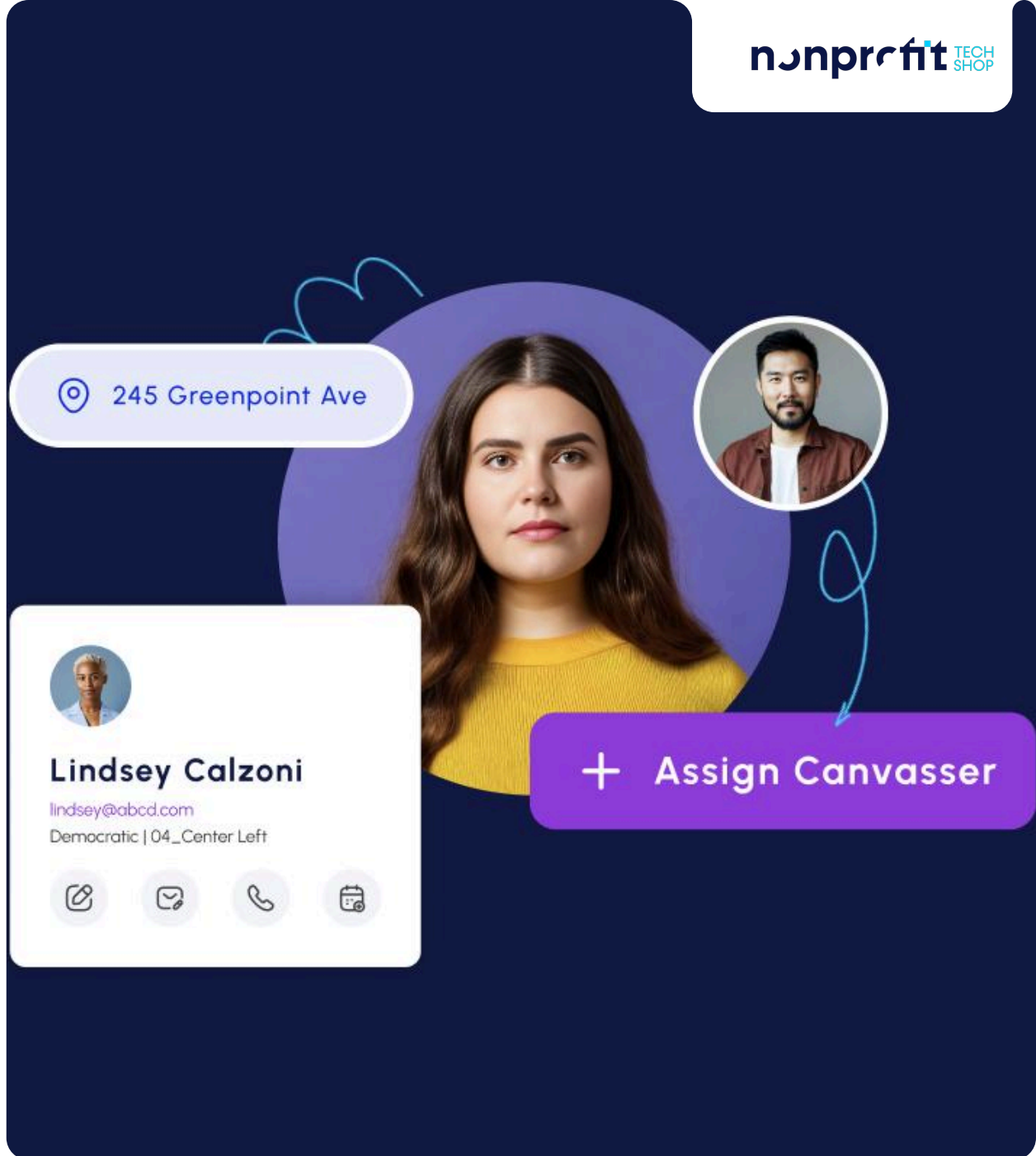


# Introduction



Managing canvassing data efficiently is crucial for nonprofit organizations, particularly those relying on field outreach. Whether you're working with political campaigns, advocacy groups, or fundraising teams, integrating canvassing data with a CRM system like HubSpot offers significant benefits. This guide is designed to help you streamline your canvassing efforts by **optimizing data collection, synchronization, segmentation, follow-up, and reporting with HubSpot CRM**. Let's walk through the best practices that will help you enhance your outreach efforts.

## Overview: Why HubSpot?



While many nonprofits use HubSpot as their CRM to manage donor relationships, supporter journeys, and campaign communications, CanvassingHub brings a new dimension by taking that digital power and embedding it directly in the field. This bridge between HubSpot and grassroots action empowers organizations to maintain the integrity of their data and amplify the effectiveness of their field teams, ensuring that every face-to-face interaction is captured in real-time.



# How Integration Works Key Technical Functions



## 1. Two-Way Syncing with HubSpot CRM

CanvassingHub connects directly with HubSpot using a secure API-based integration. This means data flows both ways:

- **From HubSpot to CanvassingHub:** Contact records, including custom fields, household relationships, and demographic data, are pulled directly into CanvassingHub. This allows canvassers to start with rich, pre-existing knowledge of the individual and their context.
- **From CanvassingHub to HubSpot:** As canvassers log new information (whether it's contact updates, survey results, or meeting details) it is immediately pushed back into HubSpot. This eliminates the need for time-consuming manual updates or spreadsheets.
- **Data Integrity and Accuracy:** CanvassingHub eliminates syncing delays or issues with data integrity. Users are notified in real-time when any syncing issues arise, and CanvassingHub provides an error log for admins to resolve data mismatches efficiently.

No spreadsheets, no manual imports, and no syncing delays.

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## 2. Household-Level Data Management

Unlike traditional canvassing tools that treat each contact as isolated, CanvassingHub groups individuals into households using shared address data from HubSpot. This allows teams to:

- **Track Household Engagement:** See all members of a household's interactions and engagement history.
- **Customize Outreach:** Tailor messaging based on the shared context of the household, ensuring more relevant and targeted conversations.
- **Streamlined Reporting:** Assess collective engagement status (e.g., "Canvassed," "Not Home," "Follow-Up Needed") for each household, improving follow-up accuracy.

## 3. Custom Field Mapping

HubSpot's custom properties offer nonprofits the flexibility to track exactly what matters. CanvassingHub's integration ensures that custom fields such as **Political Leanings**, **Volunteer Interest**, and **Issue Preferences** are mapped to the appropriate fields, ensuring field canvassing teams collect targeted, campaign-specific data. This is vital for:

- **Personalized Campaigns:** Fine-tune campaigns based on each supporter's unique profile and past interactions.
- **Granular Data Collection:** Tailor data collection forms in the field to reflect the nuances of your campaigns, ensuring that every interaction is captured with the utmost relevance.

## 4. Survey Integration & Submission Logging

Surveys and feedback from the field are automatically synced back to HubSpot's CRM, which helps:

- **Immediate Logging:** Survey responses are recorded instantly under the corresponding contact's HubSpot profile.
- **Automation Triggering:** Responses can trigger workflows, segmentation, and other automations, enabling timely, context-sensitive follow-ups with minimal manual intervention.
- **Multi-Device Flexibility:** Whether canvassers use tablets, smartphones, or paper-based forms, data from all survey methods is captured and synced seamlessly.



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## 5. Activity Logging & Timeline Syncing

Each canvasser action, whether it's logging an engagement, scheduling a meeting, or marking a follow-up, is captured as an Activity within HubSpot. This results in:

- **Complete Interaction History:** Each contact's timeline is updated with detailed, real-time actions.
- **Enhanced Segmentation:** These activities provide deeper insights into engagement, enabling more targeted follow-up communications or appeals.

## 6. Permissions & Access Control

CanvassingHub adheres to the same permission structure set in HubSpot, ensuring that sensitive data is protected and only accessible to the appropriate team members.

- **Role-Specific Views:** Field canvassers, organizers, and admins each have customized views of the platform based on their role and responsibilities.
- **Data Security and Compliance:** Integration with HubSpot's security framework ensures compliance with data protection regulations, protecting donor and supporter information.



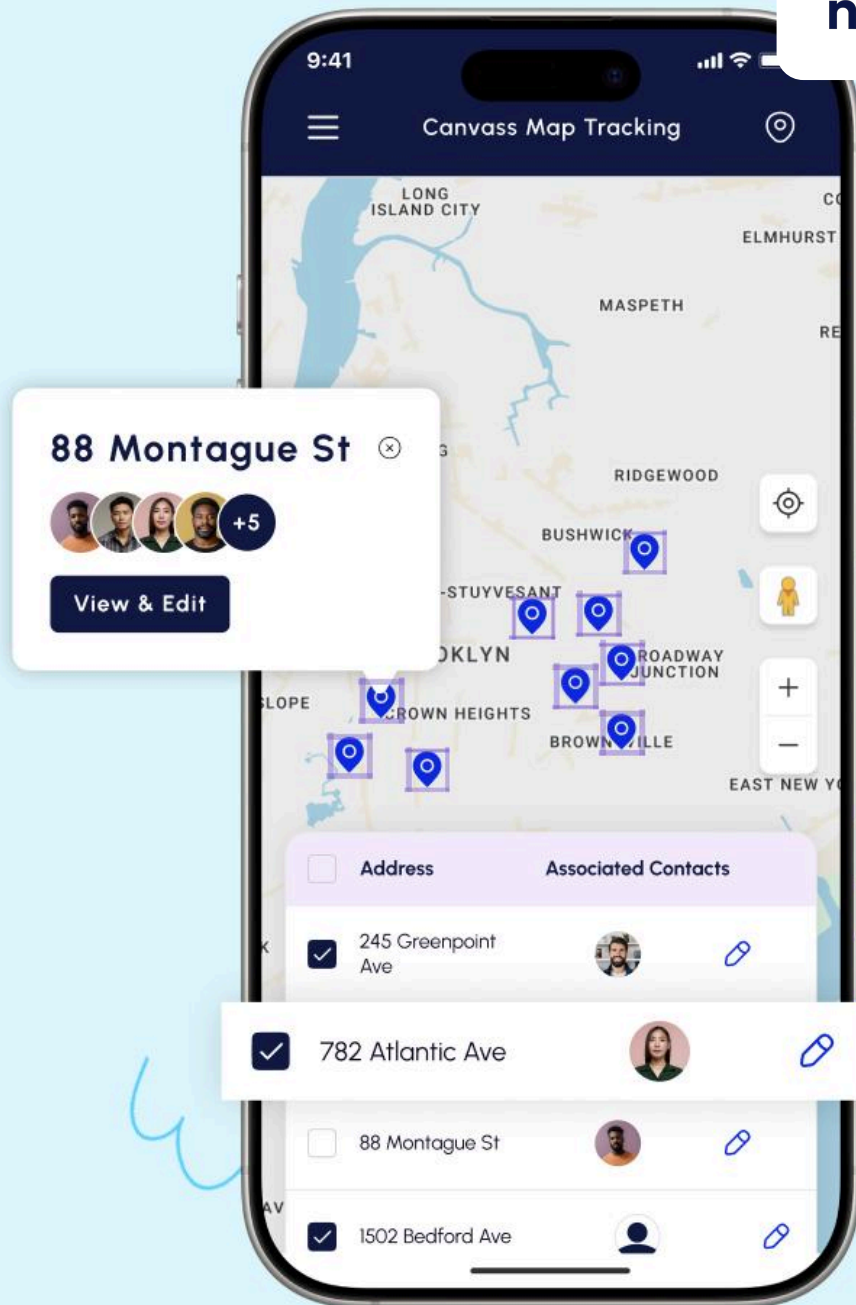
## Behind the Scenes: Tech Stack Notes



- **API Usage:** CanvassingHub uses HubSpot's RESTful APIs (Contacts, Engagements, Custom Properties) to sync data efficiently.
- **Sync Frequency:** Near real-time for most updates; sync status is shown in the CanvassingHub admin dashboard.
- **Error Handling:** Failed syncs (e.g., due to internet issues or field mismatch) are flagged in the backend and re-attempted or logged for review.



# Conclusion and Next Steps



With CanvassingHub, every door knock, every conversation, and every survey response instantly becomes part of a smarter engagement strategy directly within HubSpot. No copy-pasting. No syncing headaches. Just clean, actionable data that helps you reach people more effectively.

## What's Next?

Want the full picture of how CanvassingHub works?

[See CanvassingHub in action.](#)

Explore features, benefits, and real-world use cases — all in one place.