



Enhancing Hubspot messaging capability with the new SMSIt app

Case Study

Overview

Industry: Technology

Location: Bucharest, Romania

Output: SMS Application for Hubspot

Date: 2023



About OPTI

✓ Over 15 years of excellence

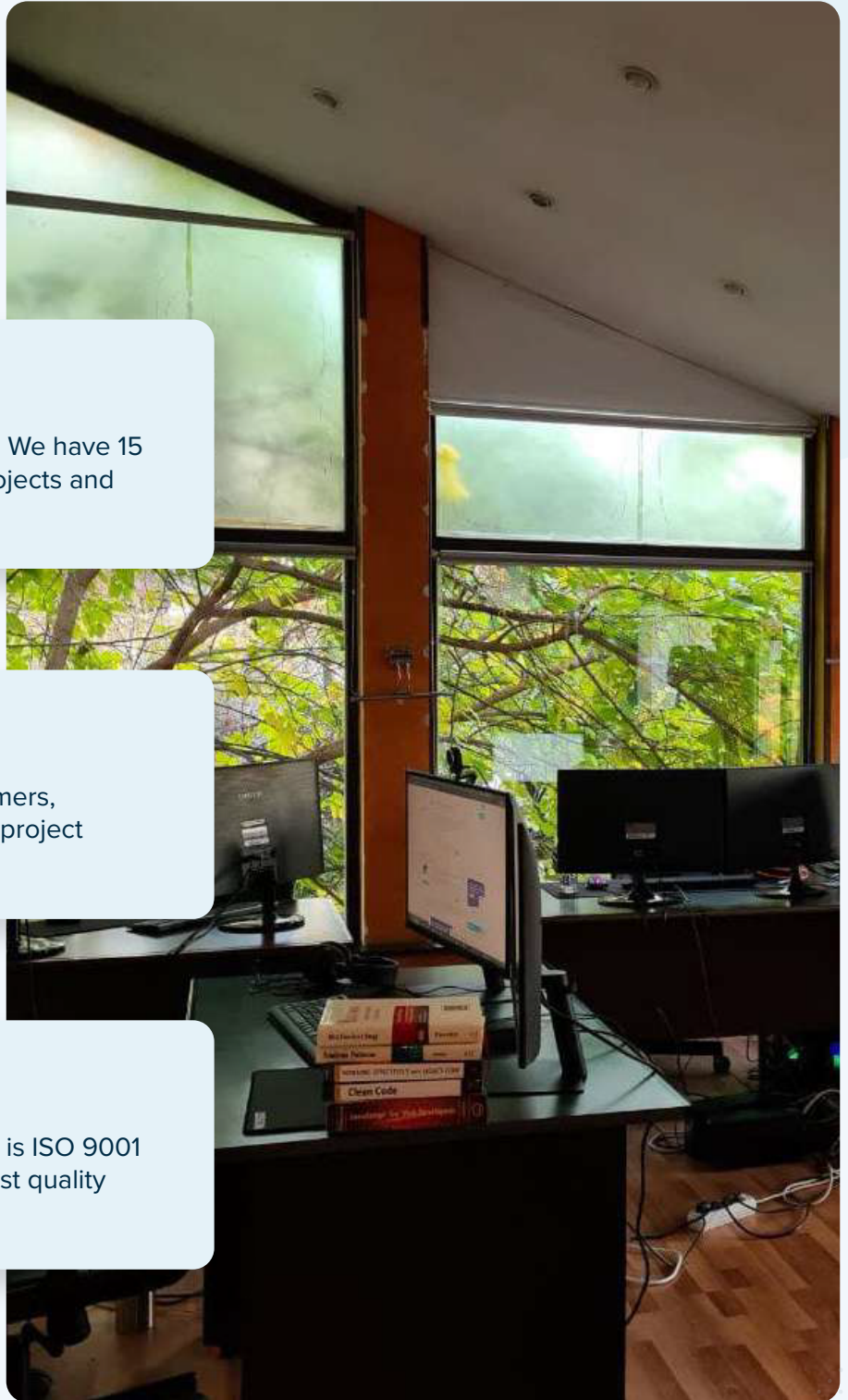
OPTI Systems was founded in 2005. We have 15 years of experience, hundreds of projects and satisfied clients.

✓ Team of specialists

Our team include analysts, programmers, database and server administrators, project managers and QA engineers.

✓ Based in Bucharest, Romania

Romania is a renowned IT hub. OPTI is ISO 9001 certified and competes for the highest quality standards.



We do software focused on



Digital Transformation



Medical



Educational



Gaming



Challenge

Glare Marketing is a forward-thinking marketing company that sought to modernize the messaging strategies of its customers, in the quickly changing communication and marketing industries, and on the Hubspot CRM platform. OPTI had to determine how to effectively include SMS communication in HubSpot workflows and Hubspot screens, while maintaining optimal performance, error management, and dependability of software.



Solution

The intricacy consisted in establishing a **synchronized connection** between **the mobile carrier platform and HubSpot, a customized web application**, to facilitate **batch SMS delivery** and real-time updates on all messages sent, which can run into millions.

1. HubSpot Application

Contact Screen Cards

Upon installing the application, we made an option displayed in the right sidebar of the contact screen, enabling users to send an SMS to the current contact directly. Only under specific circumstances can this smart card function: the contact must have a mobile number, and the installing HubSpot account must have a user and token filled in the web app, which needs to be installed and functional on the Hubspot account

- ✓ Upon installation, an SMS option appears in the right sidebar of the contact screen
- ✓ Users can directly send SMS to the current contact using this feature
- ✓ Activation is conditional and intelligent

Timeline events

The HubSpot app ensures quick feedback by displaying any mobile carrier issues on the screen in the event of an unsuccessful SMS transmission. On the other hand, when an SMS dispatch is successful, it says “congratulations” and starts the 'SMSIt!' timeline event generation process. This creates a complete history that is updated continuously as the mobile carrier platform confirms that the message was delivered to the recipient.

- ✓ Any unsuccessful SMS transmissions are notified in Hubspot
- ✓ Initiates the 'SMSIt!' timeline event generation process
- ✓ This process creates a comprehensive history of SMS actions
- ✓ History is updated in real-time



Workflow

- Our method requires the creation of the text message and the selection of a target contact field, introducing the **"SMSIt!"** action.
- After the workflow step is executed, we developed a sequence of events in which HubSpot makes contact with our web application, designating the SMS for batch delivery.
- The application was optimized using **multi-threading** in order to improve the sending speed between messages.
- The application quickly sends the SMS to the cell carrier network.
- Upon success, timeline events are created on the HubSpot Contact page, indicating that the activity is finished and providing useful information for further automatic activities.
- Our approach reaches maximum workflow efficiency and communication with HubSpot components.

2. Web Application

The web application runs using private credentials in the PHP programming language. We set up cron jobs with regular schedules that automate necessary processes, like clearing logging data, updating HubSpot timeline events, ensuring prompt dispatch of any pending SMS sent through HubSpot workflows. This system ensures the efficient, secure and automated operation of the application.



The application operates using confidential credentials to ensure security



Cron jobs with regular schedules automate essential processes

To manage message sending, we connected the PHP application with the mobile carrier platform via API. We've refined the procedure based on an abundance of testing, and now it takes milliseconds to send SMS from Hubspot to the carrier network. Also, to ensure efficiency, the app employs a batch mechanism. Other settings were chosen to integrate perfectly with the business needs of the Hubspot end customers.



Stable and fast connection between the application and mobile carrier platform



Employing a batch mechanism for efficiency



Client-specific settings to integrate with their business needs



Results

Contact Screen SMS Option

Implemented an intuitive option in the contact screen's sidebar for users to send SMS directly to the current contact.

Efficient Batch SMS Delivery

Implemented a batch mechanism within the web application to further enhance efficiency in sending SMS through mobile carrier platform

Automated Web Application Operations

The application is supported by automated cron jobs for clearing data, updating HubSpot timeline events and dispatching pending SMS

Workflow Action

Introduced a workflow action, allowing users to choose the contact field and text message for SMS.

API Integration

Successfully implemented and integrated the API to connect the web application with the mobile carrier platform

Client Curated Settings

Integrated client-curated settings for the API, ensuring seamless alignment with their business needs and preferences

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