

CUSTOMER STORY

# Improving Data Visibility for Marketing and Sales

Data visibility between your sales and marketing teams is crucial for creating targeted marketing, developing a strong pipeline, and closing more deals. When OBP Medical implemented HubSpot for marketing automation, there was an immediate need for an integration with Zoho CRM. They turned to Formstack Sync for help setting up this data integration.



OBP Medical is the leading global developer of single-use, self-contained, illuminating medical devices. Founded in 2006, OBP enables simpler, safer, and more cost-effective procedures that lead to better patient outcomes.

**Industry**  
Healthcare

**Customer Since**  
2010

**Use Case**  
Bi-Directional Integration

**Products**  
Sync

**Features**  
No-Code Integrations

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## Challenge

When OBP Medical added HubSpot to their tech stack, they needed a way to easily sync data between HubSpot and Zoho CRM. Their goal was to sync important data from Zoho to HubSpot to enable more strategic and targeted marketing campaigns. They also wanted all marketing interactions to populate in Zoho to drive outreach and conversations from sales.

**No-Code Sync**  
needed for bi-directional data  
between HubSpot and Zoho CRM

## Solution

Formstack Sync provided OBP Medical with software that easily integrated Zoho CRM and HubSpot, without needing to develop a single line of code. This bi-directional integration syncs important lead data from their marketing forms into their CRM, as well as sends CRM data about product interest and lead source to marketing to inform campaigns. As leads are interacting with sales and marketing, their information is updated across Zoho and HubSpot, ensuring sales and marketing have clean, clear, and accurate data at all times.

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**The Zoho CRM - HubSpot integration from Formstack Sync is extremely important to our marketing efforts. It allows us to keep critical data from our CRM up-to-date in HubSpot, which constantly informs our marketing campaigns.**



**Matthew Traub**  
CMO at OBP Medical

## The Results



Gave sales and marketing teams easy access to clean data



Automatically updated leads, contacts, accounts, and opportunity data across systems



Improved email list curation and targeting capabilities



Automated more marketing campaigns in HubSpot using Zoho CRM data



Strengthened marketing thanks to improved data



Created accurate lead lists across HubSpot and Zoho CRM