Introduction

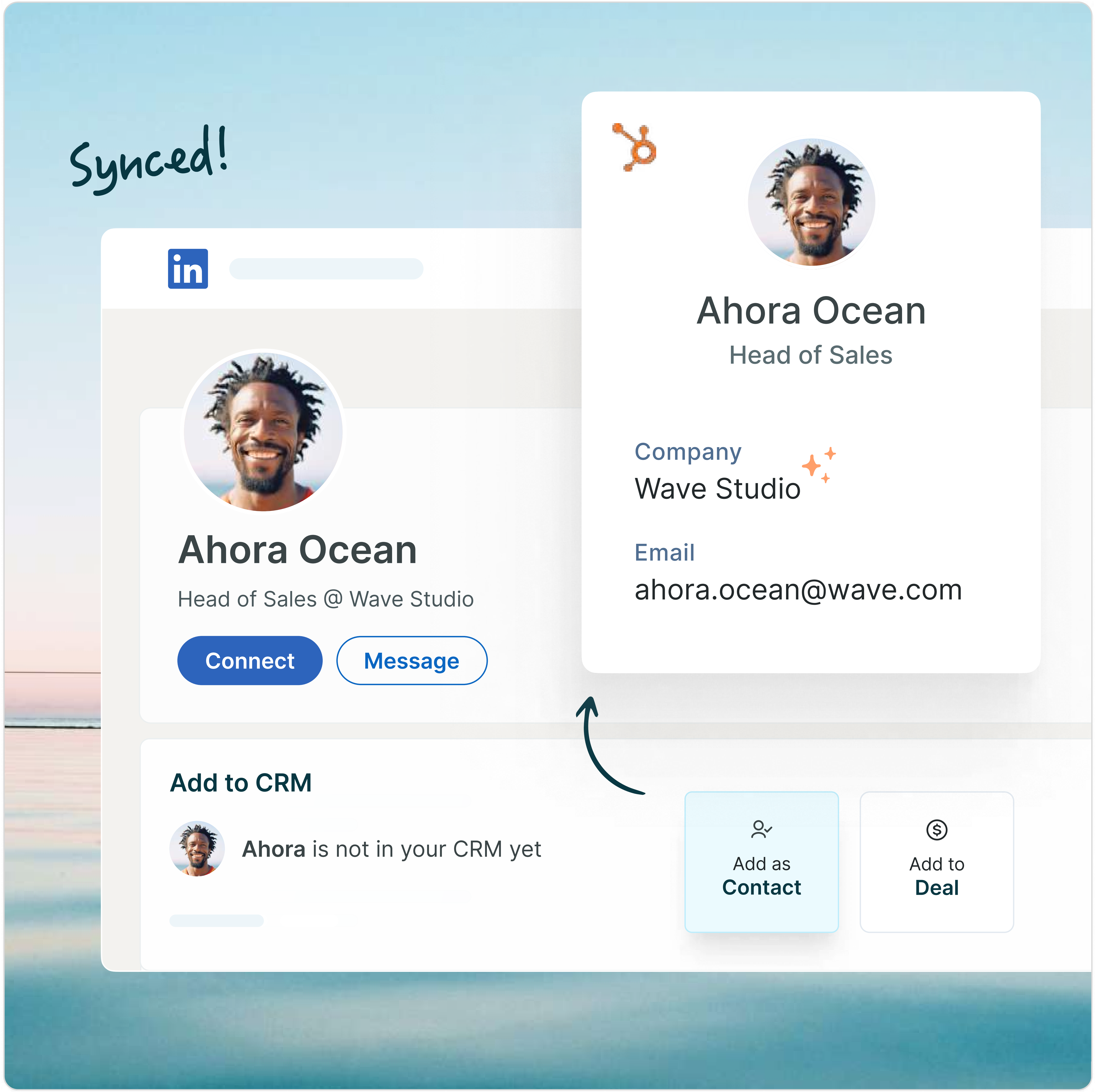
Surfe × HubSpot

What Surfe does?

Contact enrichment through **combining multiple databases**

What is Surfe?

- A way to get contacts from LinkedIn into HubSpot, **replacing all your current email enrichment tools.**
- A Google Chrome extension which **brings your HubSpot interface directly on top of LinkedIn.**
- Provides a **faster way to add your prospects into your CRM** and maintain reliable contact information, plus more...



Benefits of adopting Surfe

→ **Save manual data entry time** and remove data entry errors

→ Add LinkedIn and Sales Navigator **data to HubSpot in one click**

→ **Find verified emails, landline and mobile phone numbers** for your prospects

→ **Leverage multiple email finder tools in one** (Apollo, RocketReach, Dropcontact, Hunter and more)

→ **Bulk enrich up** to 200 Sales Navigator prospects per day

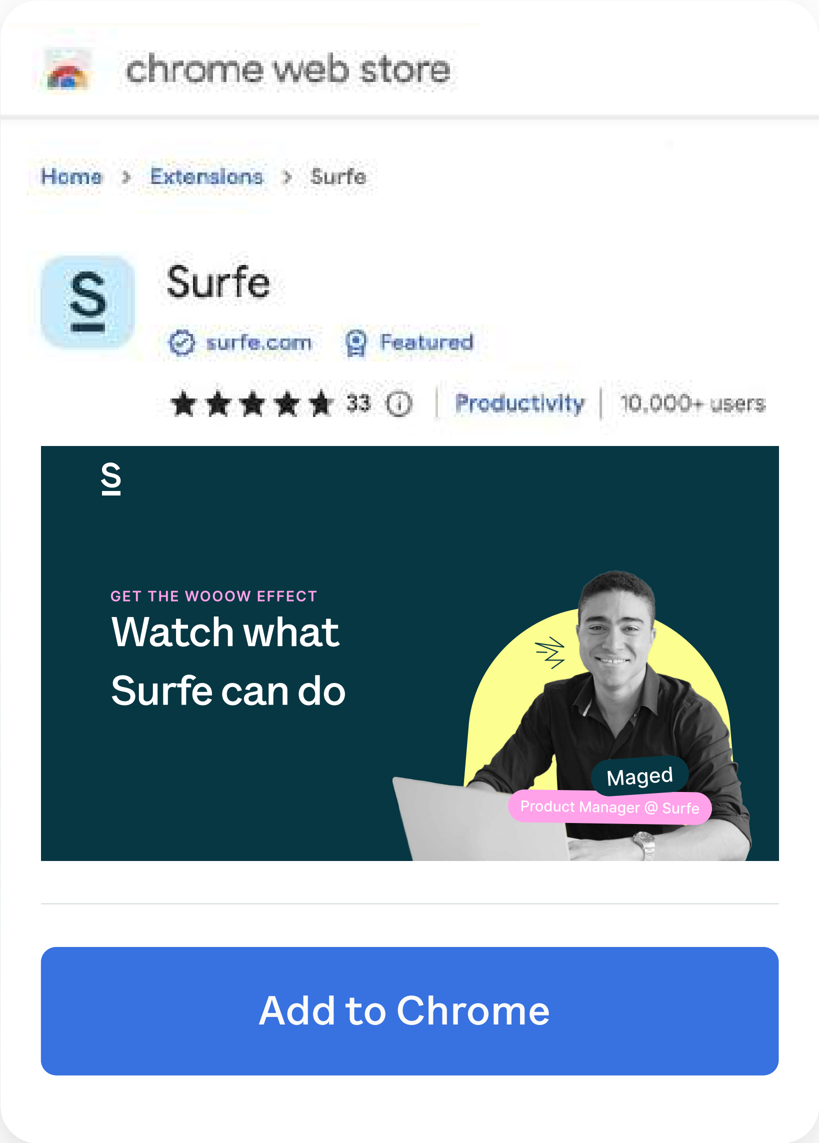
→ **Manage all your prospects** without having to leave LinkedIn or Sales Navigator

How to connect LinkedIn to HubSpot

[Connect to HubSpot](#)

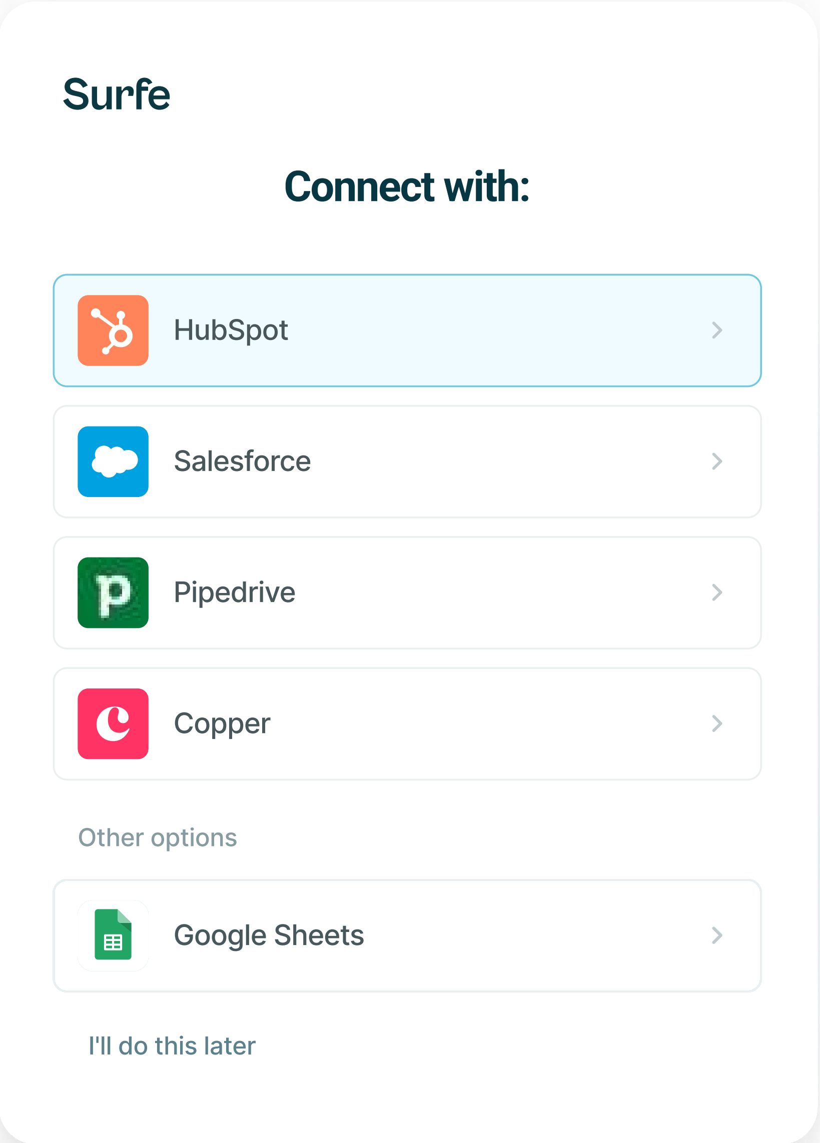
CRM admin and the first to connect?
See this article for the exact permissions
that need to be granted to each user

1



Download the Surfe Chrome extension

2



Select HubSpots from the list

3 Accept all the requested authorisations

CONGRATULATIONS!
YOU ARE CONNECTED!

Surfe automatically opens LinkedIn

Adding contacts to HubSpot

1 Visit profile page on LinkedIn

2 Find the Surfe overlay

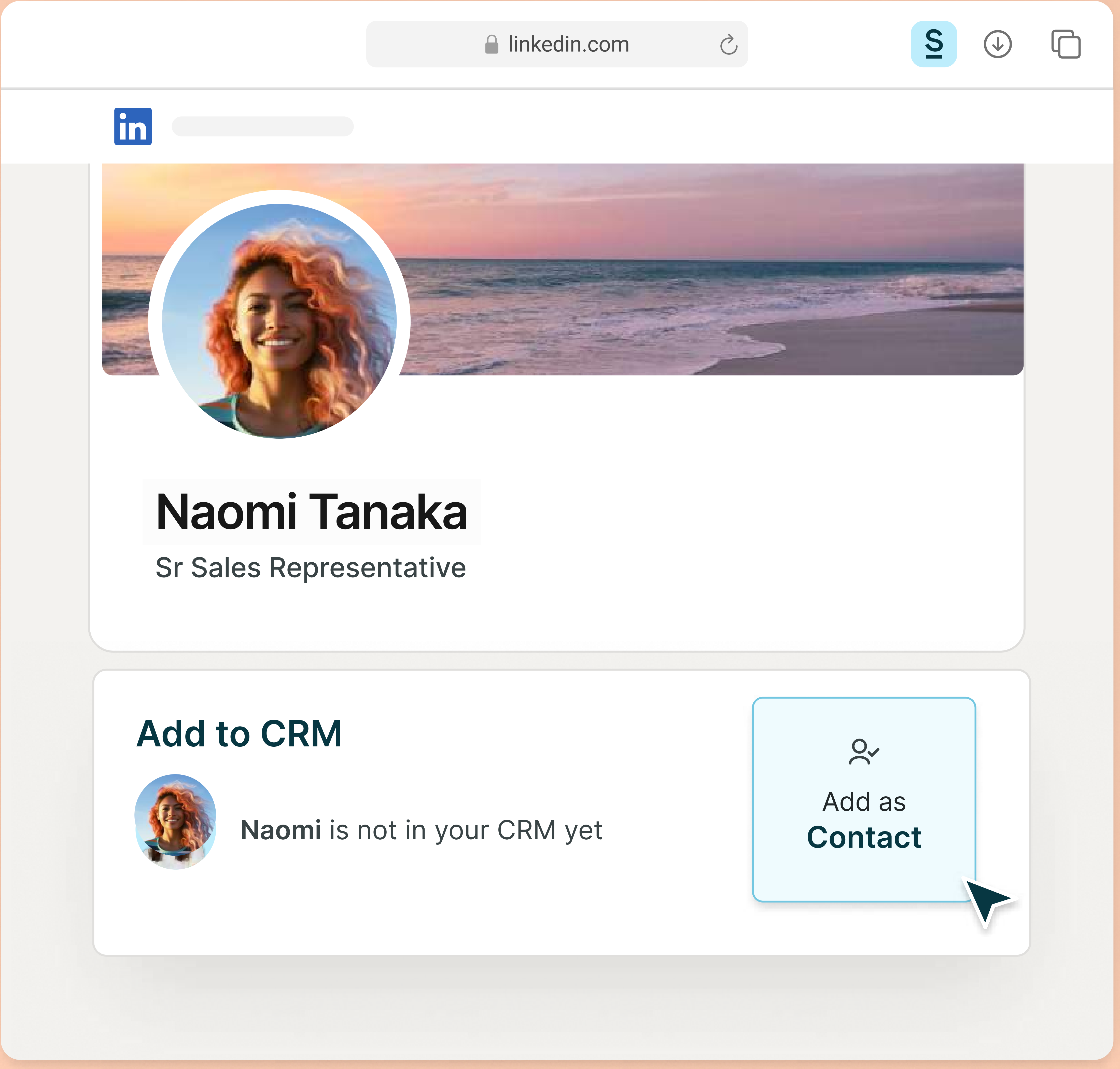
3 Click “Add as Contact”

Notice

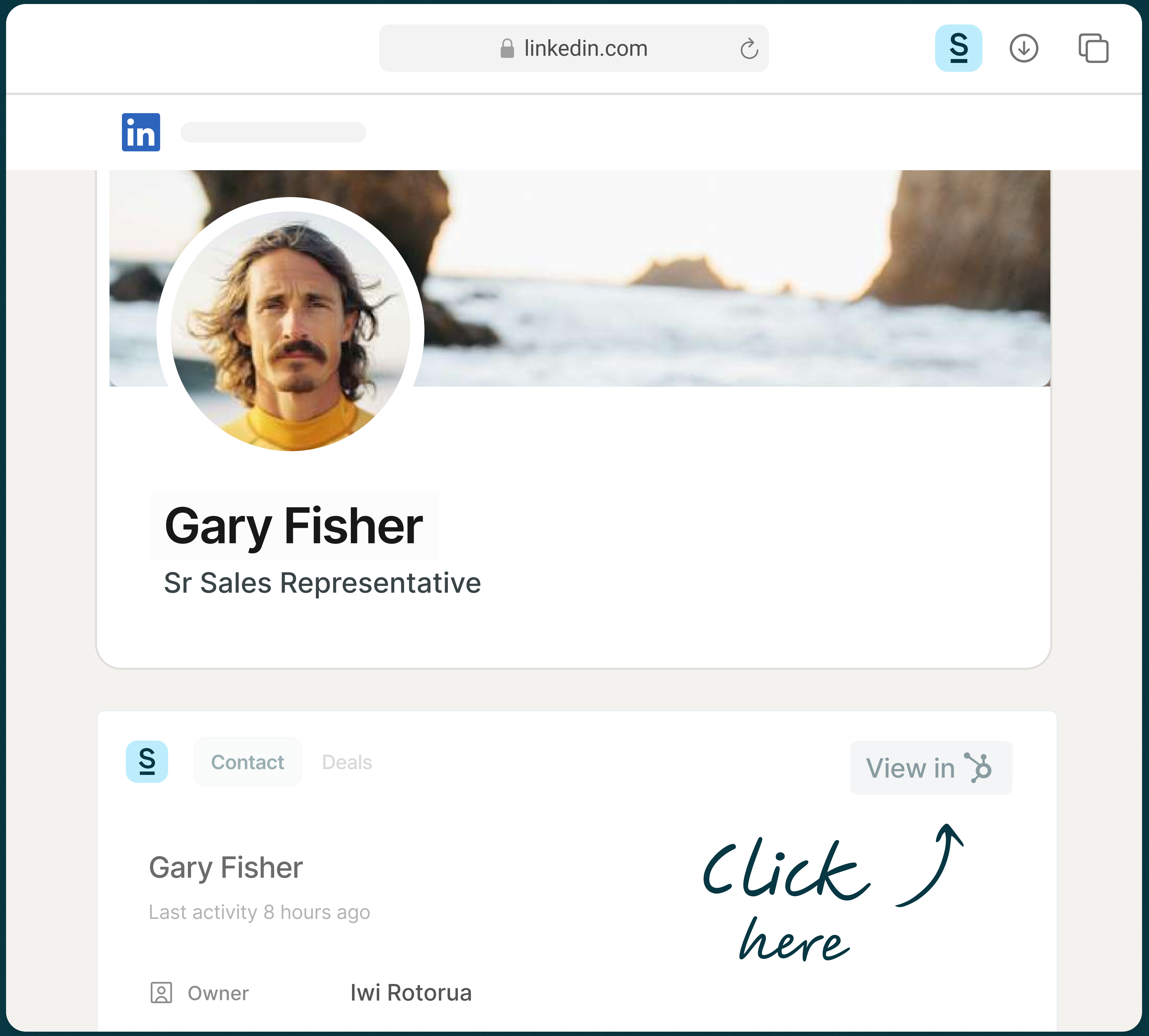
All contacts you and your team have added are now highlighted in blue.

UPCOMING FEATURE

Clean up of your CRM data in bulk



Locate your contact in HubSpot



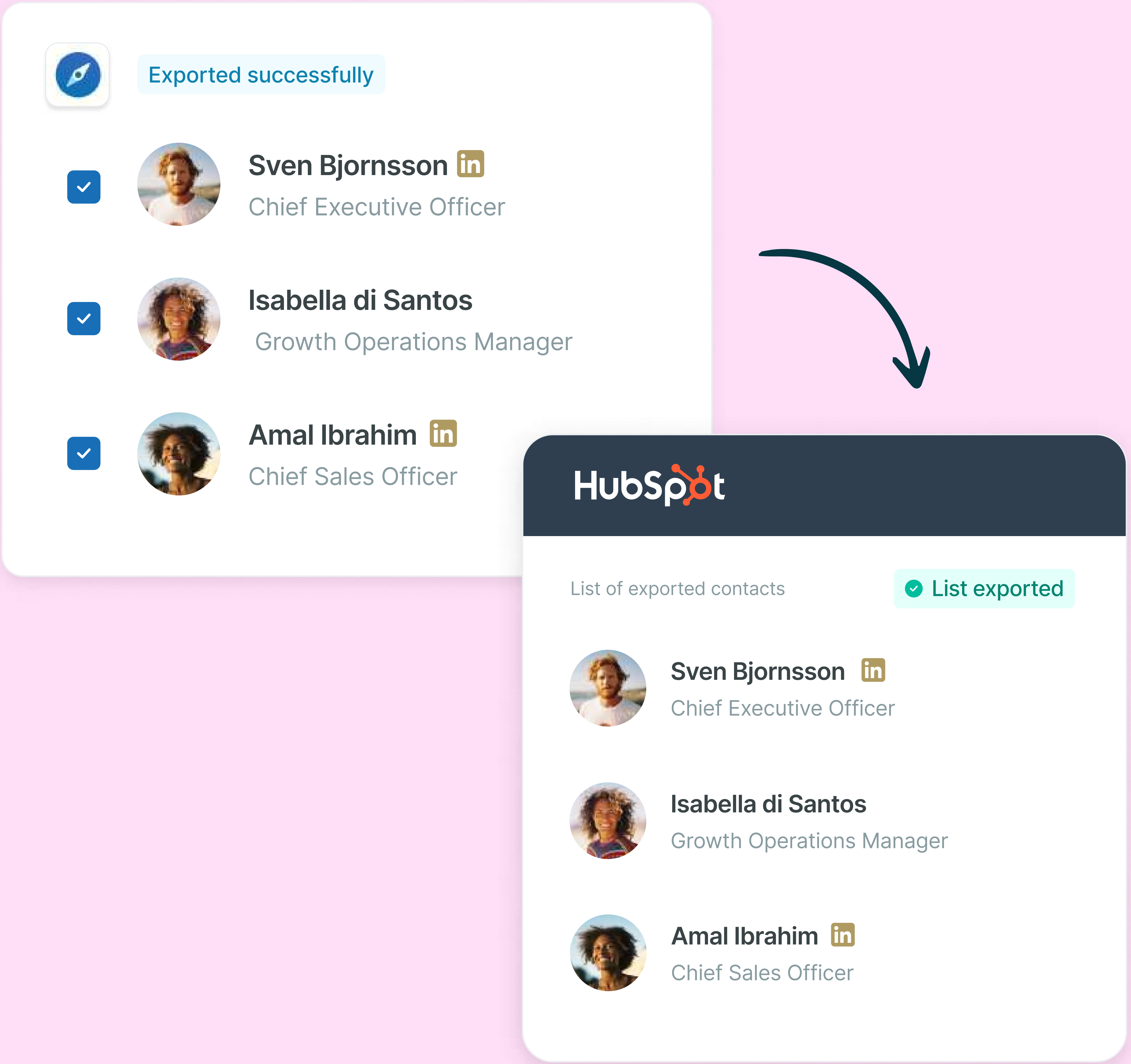
Once your prospect or company has been added, feel free to check them in HubSpot by clicking on the "View in" buttons

Sales Navigator - Bulk export a Lead list

1. Go to Leads list
2. Select the Leads you want to export (or Select All)
3. Hover over the "Export to CRM" button and press "Add as Contact"

🎉 **Congratulations!**

The export has started and you will see each Lead highlighted in blue.



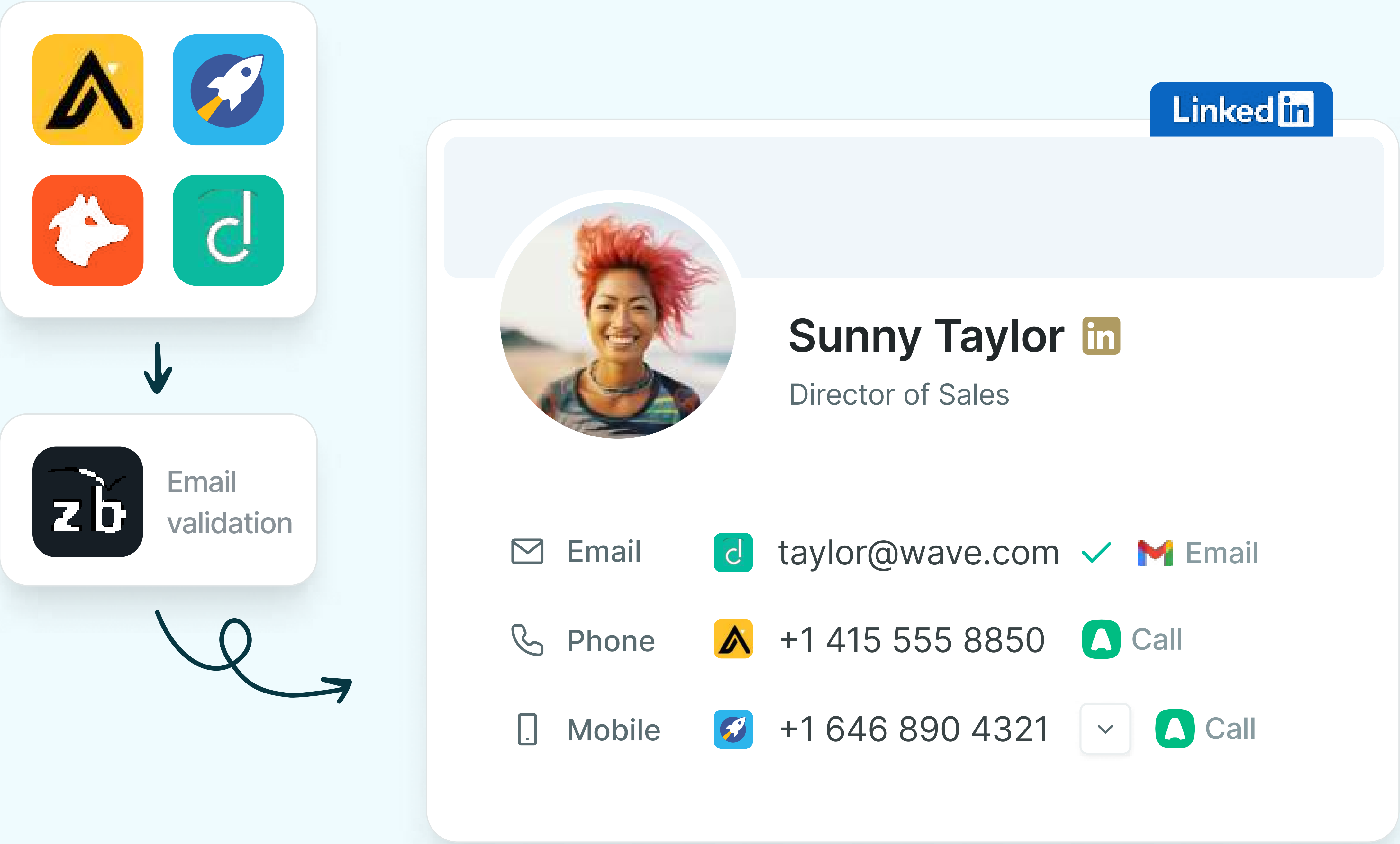
Please note, this feature is limited to up to 200 contacts per day.

Finding valid emails and phone numbers

[Surfe side panel](#)
View how many finder credits you have left

[Remaining credits](#)
Read more here

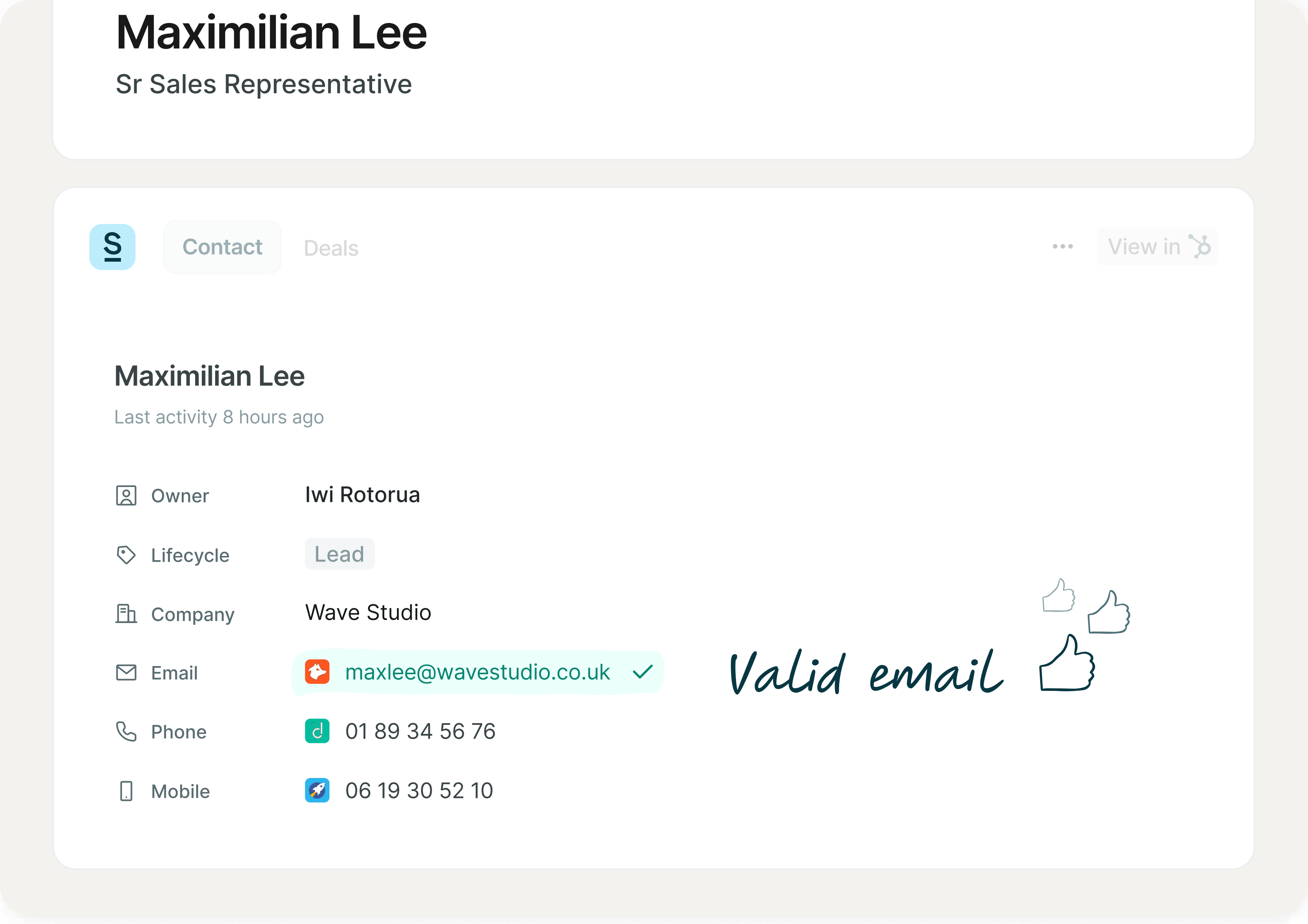
1. Visit contact's LinkedIn profile
2. Find the Surfe overlay
3. Click "Add as Contact"
4. Watch us search our combination of enrichment tools for email and phone number(s)



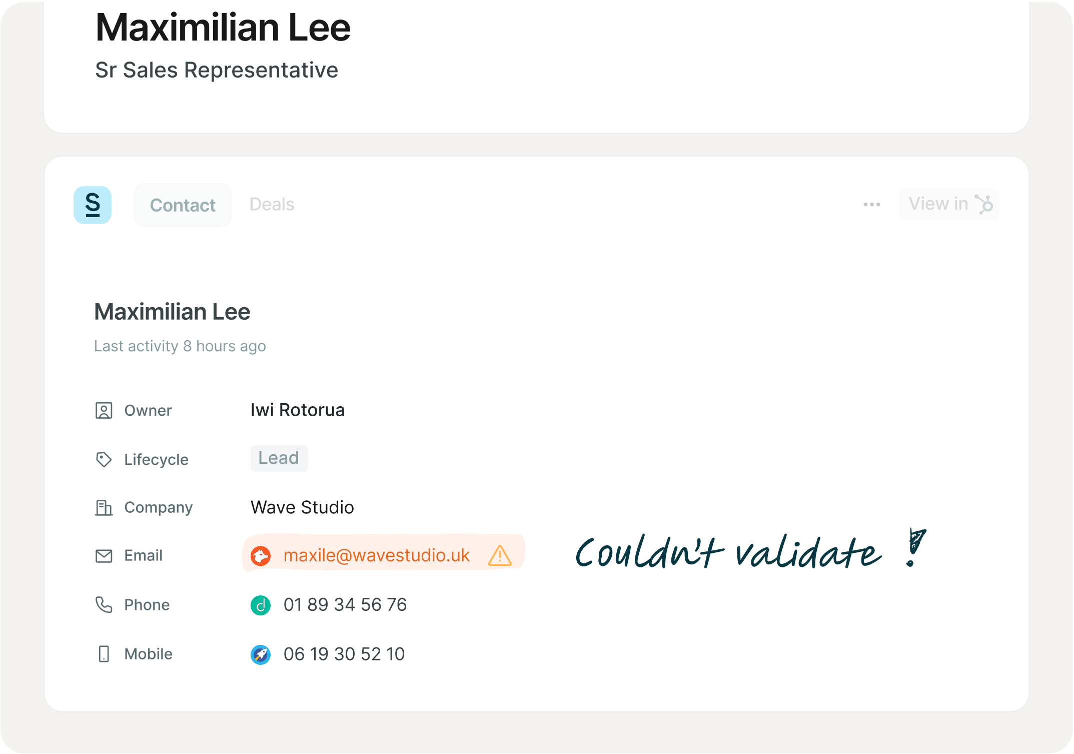
No need to use any other enrichment provider, since **our finder is powered by**:

Apollo Hunter RocketReach Dropcontact Lusha LeadIQ & more

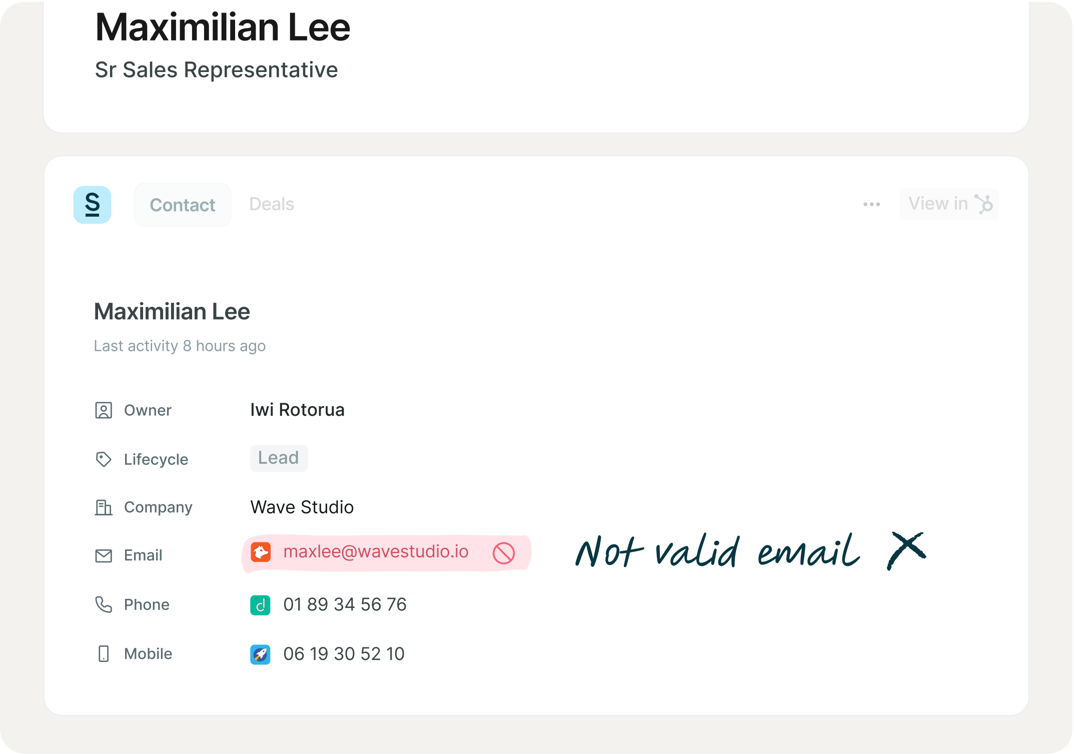
No bouncing email or phone number



Sync to HubSpot



Will NOT Sync to HubSpot



Will NOT Sync to HubSpot

Surfe does not just find your prospects' email addresses. **We also ensure any results synced to your HubSpot are valid and reachable!**

How so?

When enriching contacts, **we simultaneously query a top-tier email validation system** - Zerobounce - ensuring **emails you retrieve will not bounce.**

GET THE WOOOW EFFECT

Watch what Surfe can do

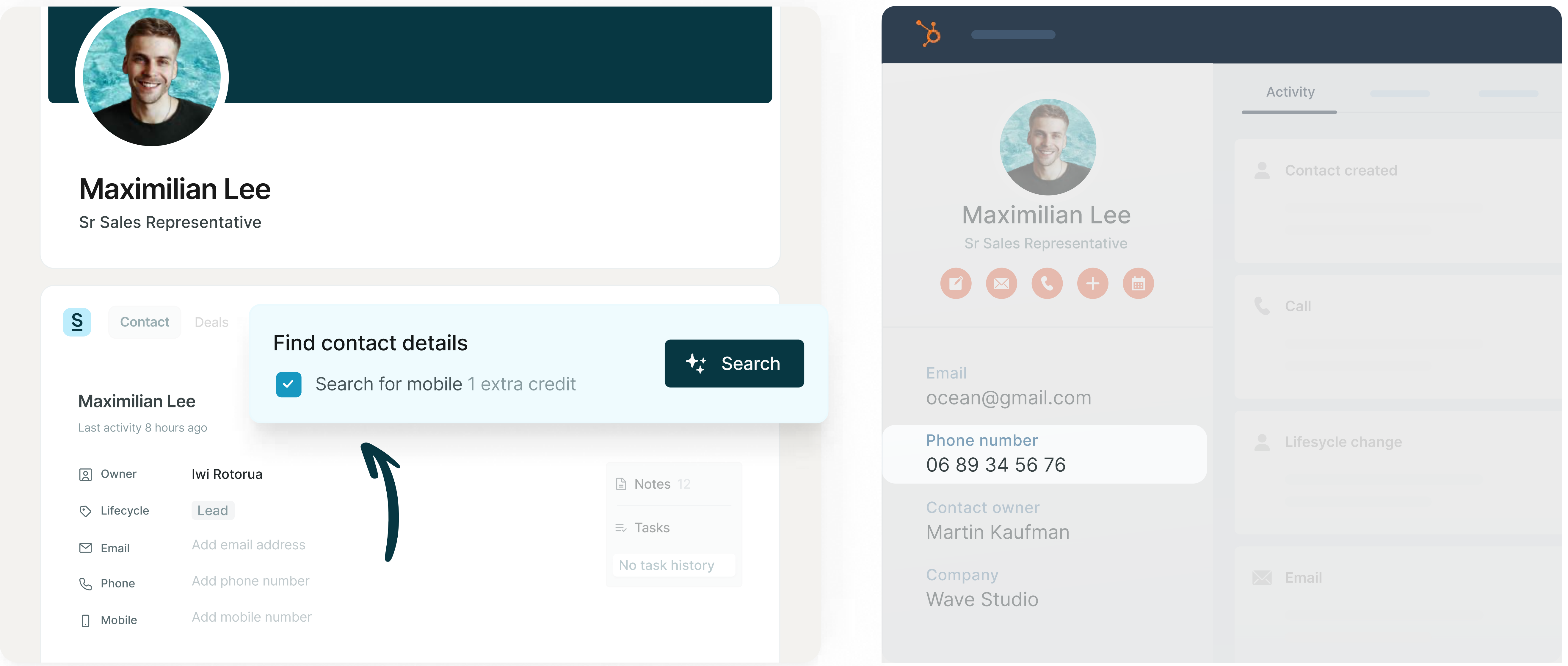
CLICK HERE TO WATCH OUR YOUTUBE VIDEO about email address and mobile phone number

Finding mobile numbers

Benefit from an extra level of prospect enrichment by searching for mobile numbers.

By default, **we will search for a mobile number through all our databases.**

But if you only need email, you can uncheck the “Search for mobile” box.



When you click "Search", we will add the result to the "Mobile" column in your HubSpot"

Dreaming of a way to...

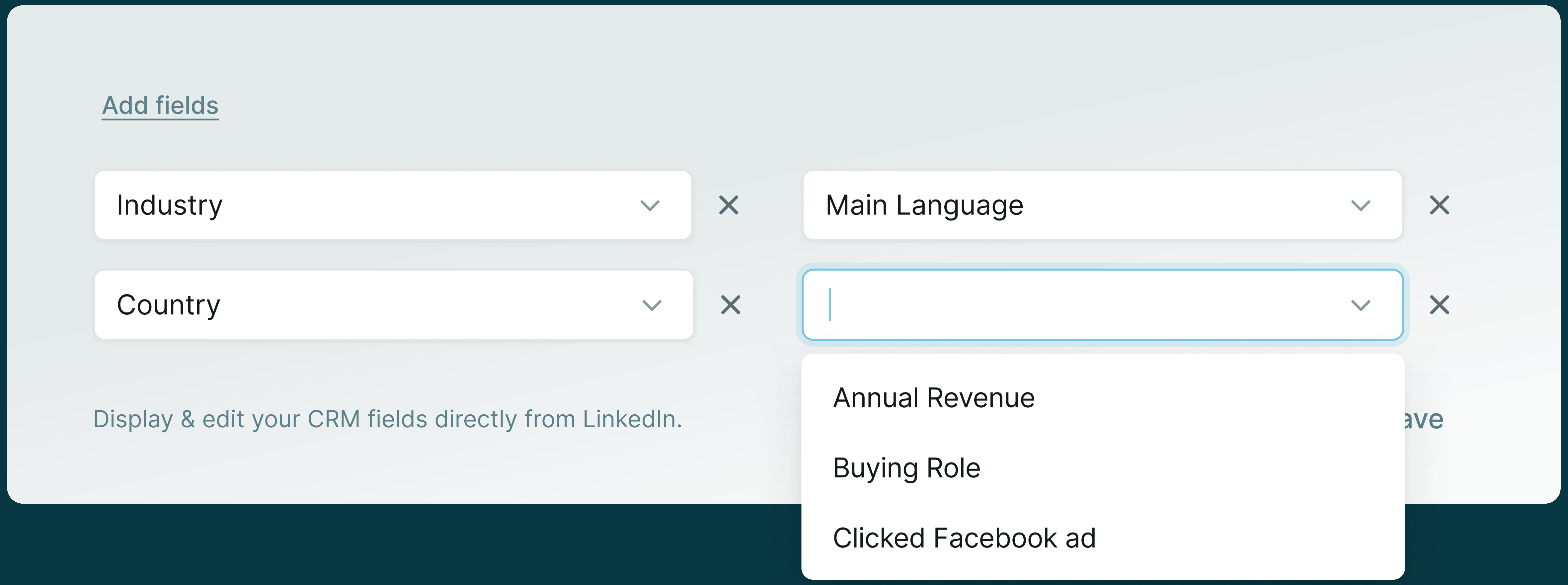
- → Add prospects directly into Salesloft cadences from LinkedIn
- → Validate email and phone numbers of your Salesloft contacts
- → Edit Salesloft information from LinkedIn to **keep your cadences up to date**
- → **Track prospects' cadence** stage from LinkedIn

Add and Edit LinkedIn contact fields

1. Open HubSpot
2. Create a new contact/company property (ensure it is 'TEXT' type)
3. Visit LinkedIn profile page
4. Find Surfe overlay
5. Locate “Additional fields”
6. Click on “Edit fields”
7. Click on “Add fields”
8. Click on the dropdown and select the title of your new column
9. Click “Save” and let LinkedIn refresh

Congratulations!

You have linked a new field with your HubSpot! Any information you key in this field on LinkedIn **will be automatically synced to your HubSpot.**



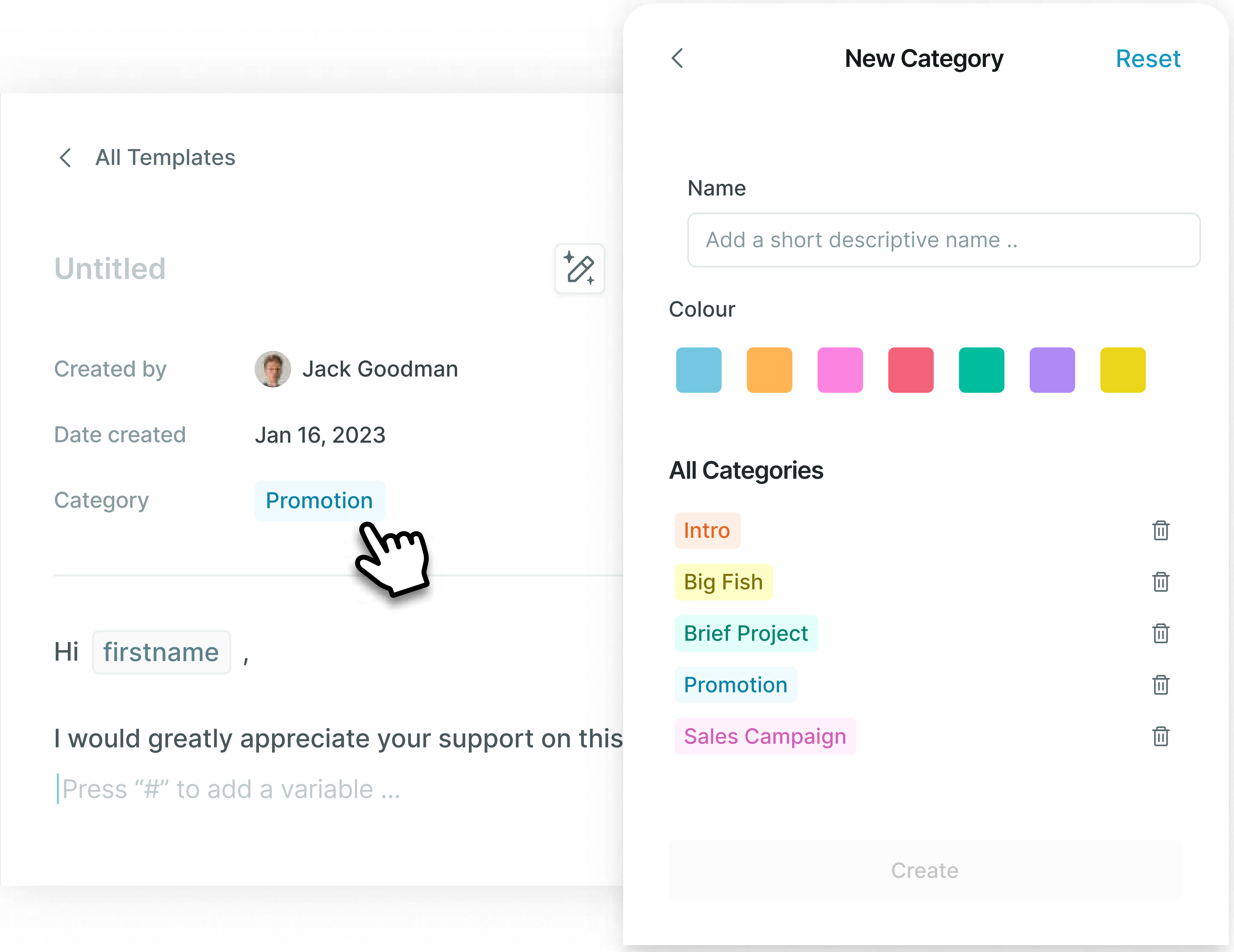
Improve your outreach using Message Templates

[Message Templates](#)

Personalized messages to your prospects

Set up different templates based on who you are reaching out to and the region!

1. Open a chat bubble within LinkedIn
2. Click on the templates symbol
3. Click “+ New”
4. Give your template a Name, Category, Content (including placeholders), and even define a Shortcut
5. Return to the template list and select one to place it in your chat, ready to send



See above for how to boost your outreach and share templates

Quick & Easy personalisation

CLICK HERE TO WATCH OUR YOUTUBE VIDEO about personalized message templates on LinkedIn

Admin Considerations

Key settings

Analytics

Here's the full article

Need to **know which of your team members' outreach are most effective?**

Go to your Dashboard and check out the Analytics section to view the live data on which templates are popular and working best

Template Analytics

Template	Top user	Times used	Reply rate
Intro message Owner name	William Harris	30	60%
Demo message Owner name	Alex Ugulia	24	52%
Opt-in message Owner name	Eric Hills	28	45%
Opt-out message Owner name	Kathy Powels	10	22%

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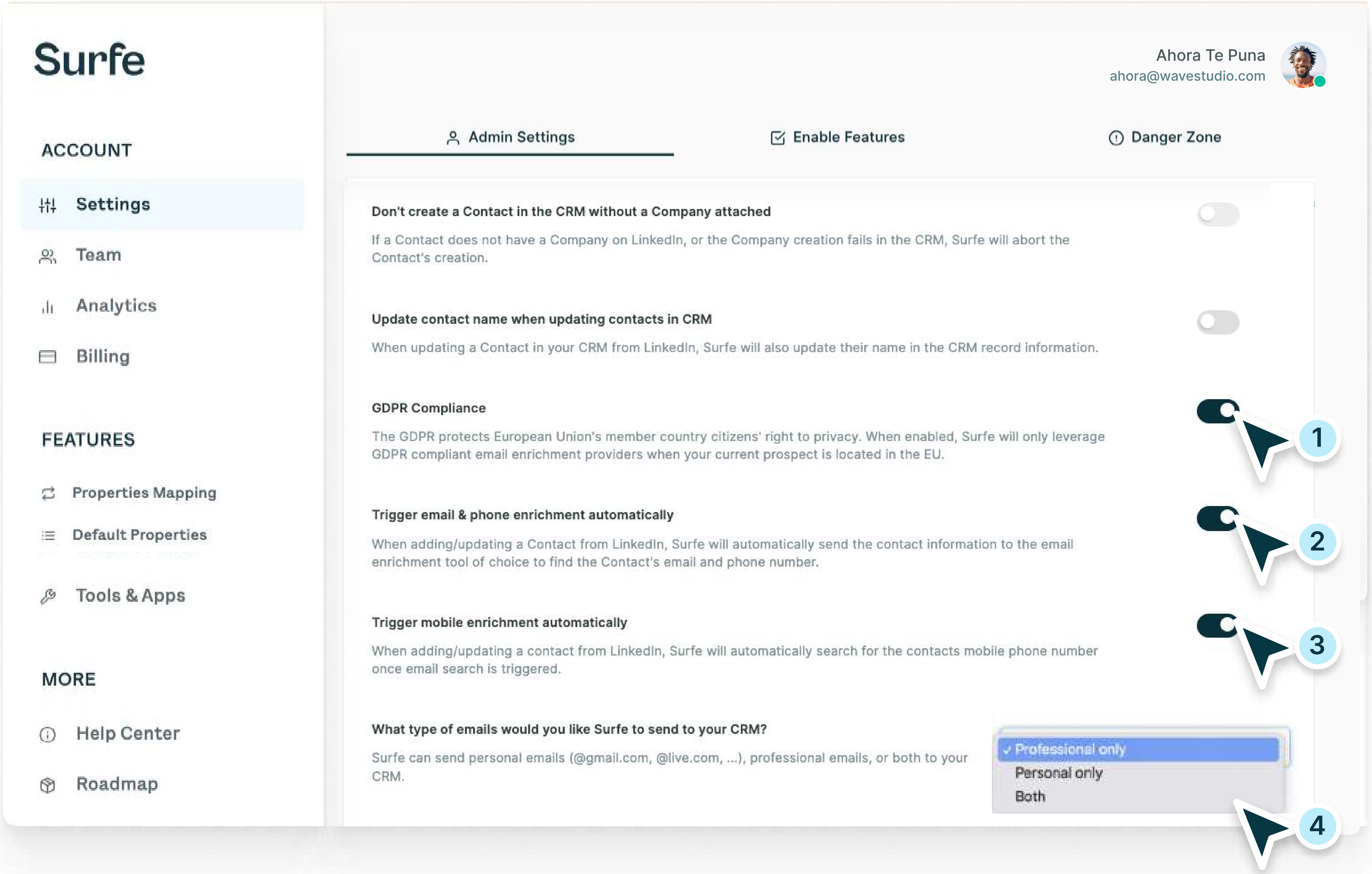
Customise your settings

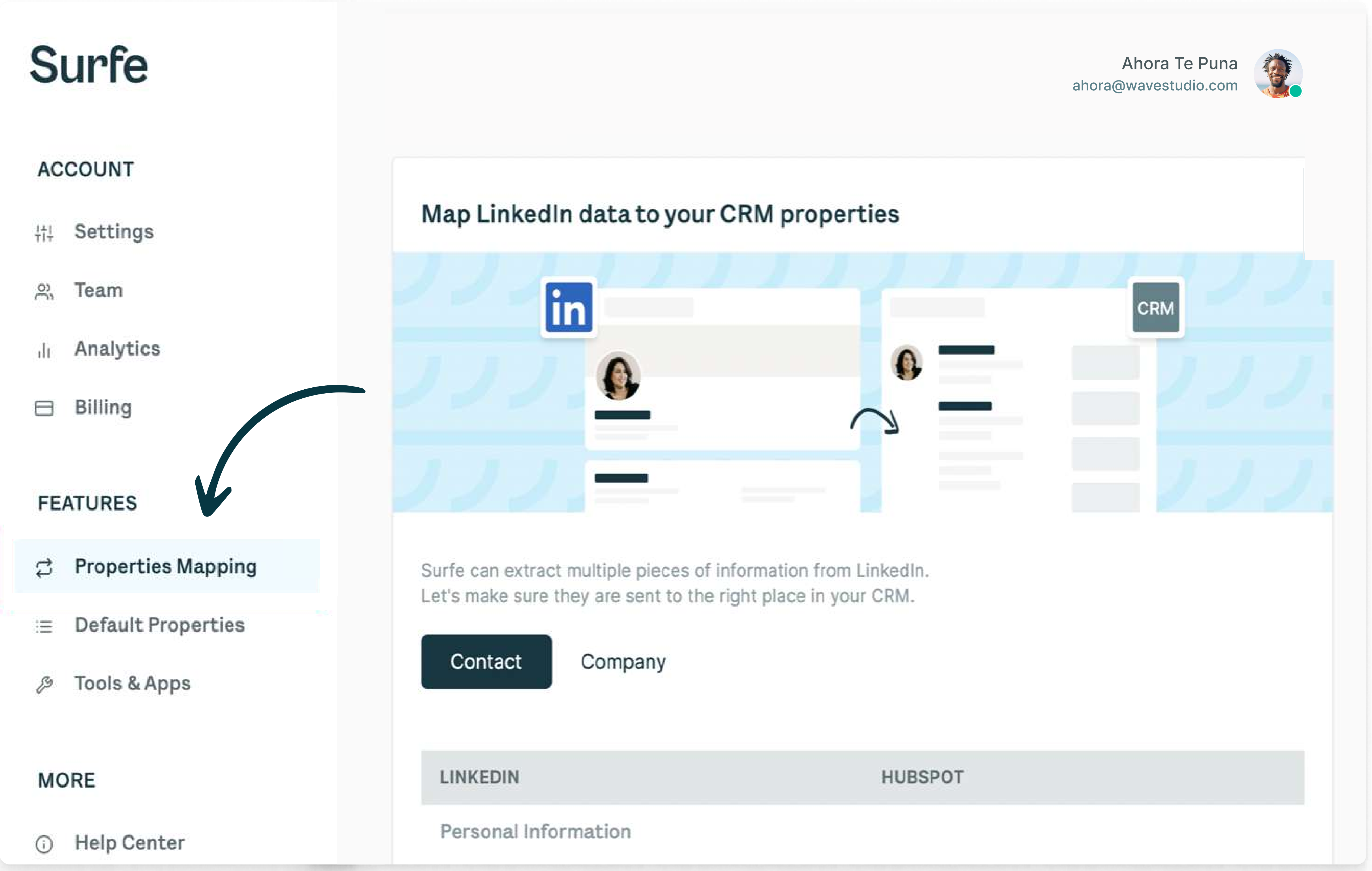
Changes made here are account-based, affecting all users



1. Stay GDPR-compliant when enriching prospects based in the EU!
2. Toggle to search for valid email automatically
3. Toggle to search for phone numbers automatically
4. Send Professional and/or Personal email addresses to your CRM

Properties Mapping

Show me how



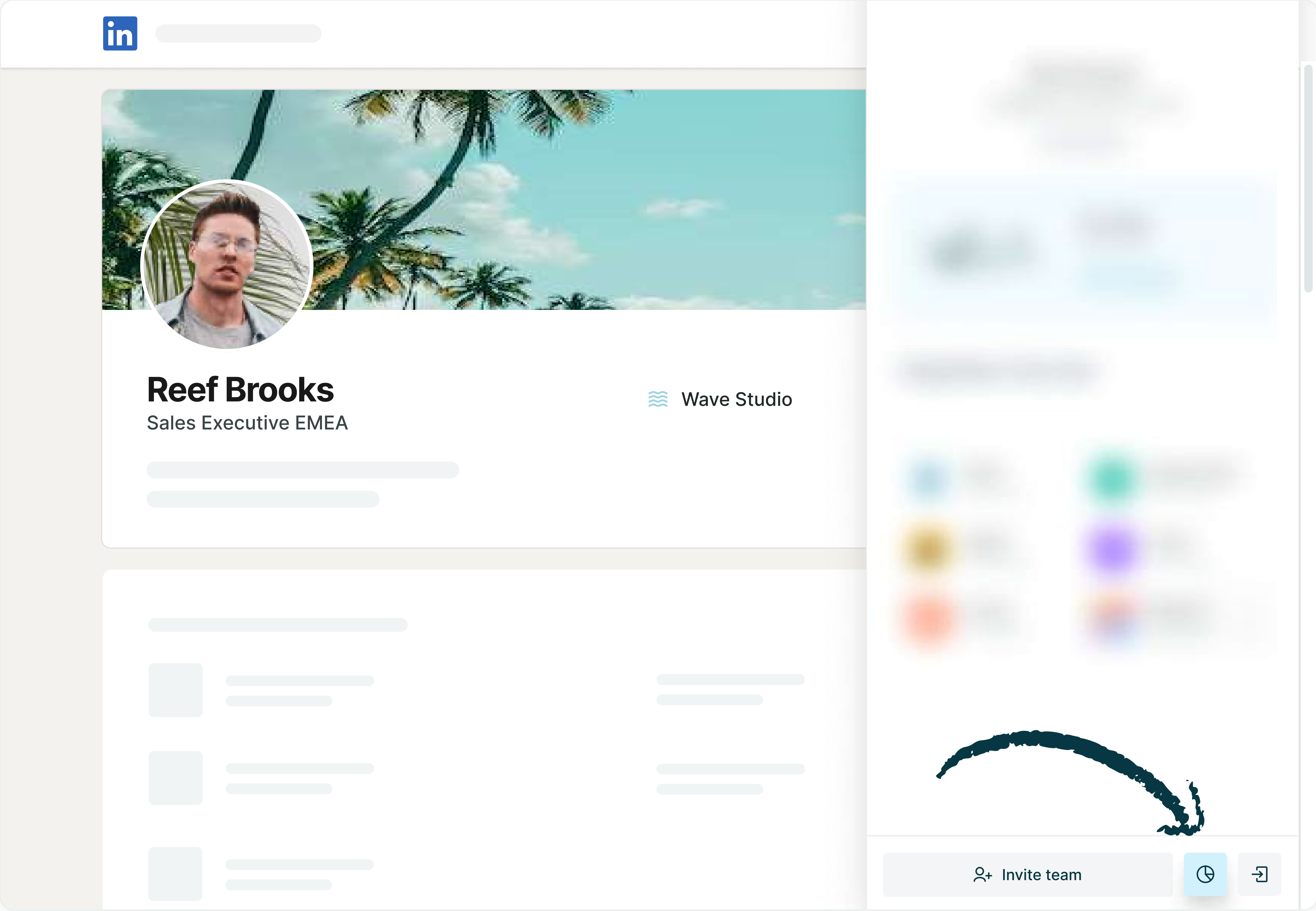
1 Decide which data is transferred to your CRM with you add a prospect and exactly where it is placed

2 Create the fields you need in your CRM as 'TEXT' or 'DATA" types, and Surfe will find them to map

💥 **Must do**

Map the 'LinkedIn URL' field for contacts and companies to your CRM (helps prevent duplicates and powers Surfe features)

Switching your users' licences



Easily choose which members of the team should benefit from the paid Surfe features.

1. Access your Dashboard from the side panel
2. Locate the "ACCOUNT" section
3. Click on "Team"
4. Scroll down to your "SURFE USER" list
5. Under the "PAID" column, check the users who should have a licence
6. Uncheck the users who should only be using a limited version of Surfe

F.A.Q.

Am I using a trial version?	Check if you have a licence assigned to you from the Surfe side panel or the 'Team' tab in the dashboard. Your admin will be the one responsible for assigning you a licence.
Can I add contacts into a HubSpot email sequence?	Yes you can! But you need to have workflow automation setup inside HubSpot. Link a HubSpot property value to the action of adding this contact to a given email sequence. Then through Surfe, you just need to update the HubSpot property to the correct value and that person would be added to the correct sequence (provided they have their email address).
I work from multiple LinkedIn accounts. Do I need a separate Surfe account for each one?	No. You can use your Surfe features with more than one LinkedIn account. However, if you work with more than one HubSpot account, each one will need its own Surfe subscription and settings.
I already have an account with the enrichment/email finder provider Apollo, and it works well. Why would I change this?	Not only does Surfe's enrichment cascade leverage the same Apollo database to find your prospects' email addresses, but in the case Apollo cannot find a valid result, we also query more than three of the other main enrichment provider databases until we achieve a result. You even have the option to plug in your own enrichment tool and use the finder credits you have with them first, before searching with Surfe. Just visit the **"Tools & Apps"** section of your Dashboard.
Is Surfe safe?	Surfe is totally safe for our customers as we do not store any data on our side. We also do not support any kind of automation and have never spotted any cases of accounts being blocked account because of our tool.