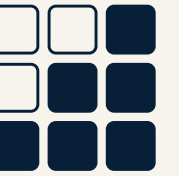


HubSpot CRM + TEG Exchange Integration

**A Complete Guide for Transport
& Logistics Companies**





Introduction

The transport and logistics industry is undergoing rapid digital transformation. Companies that leverage integrated technology stacks are seeing dramatic improvements in customer acquisition, operational efficiency, and revenue growth.

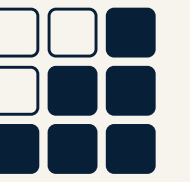
This guide demonstrates how combining HubSpot CRM with TEG Exchange creates a powerful bidirectional integration that transforms how logistics companies manage their entire customer lifecycle - from initial lead capture through load delivery and beyond.

At Plus Your Business, we specialise in connecting HubSpot with industry-specific systems like TEG Exchange. As a HubSpot Elite Partner with ISO 27001, ISO 9001 & ISO 42001 certifications, we bring the expertise needed to implement these integrations securely and effectively.



Cert No. 26170





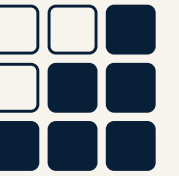
Why CRM Matters for Transport & Logistics

Customer relationship management (CRM) provides transportation and logistics companies a centralised system to manage shipper interactions across sales, customer service, and marketing. In an industry where speed, reliability, and communication are paramount, having a single source of truth for all customer information is the foundation of competitive advantage.



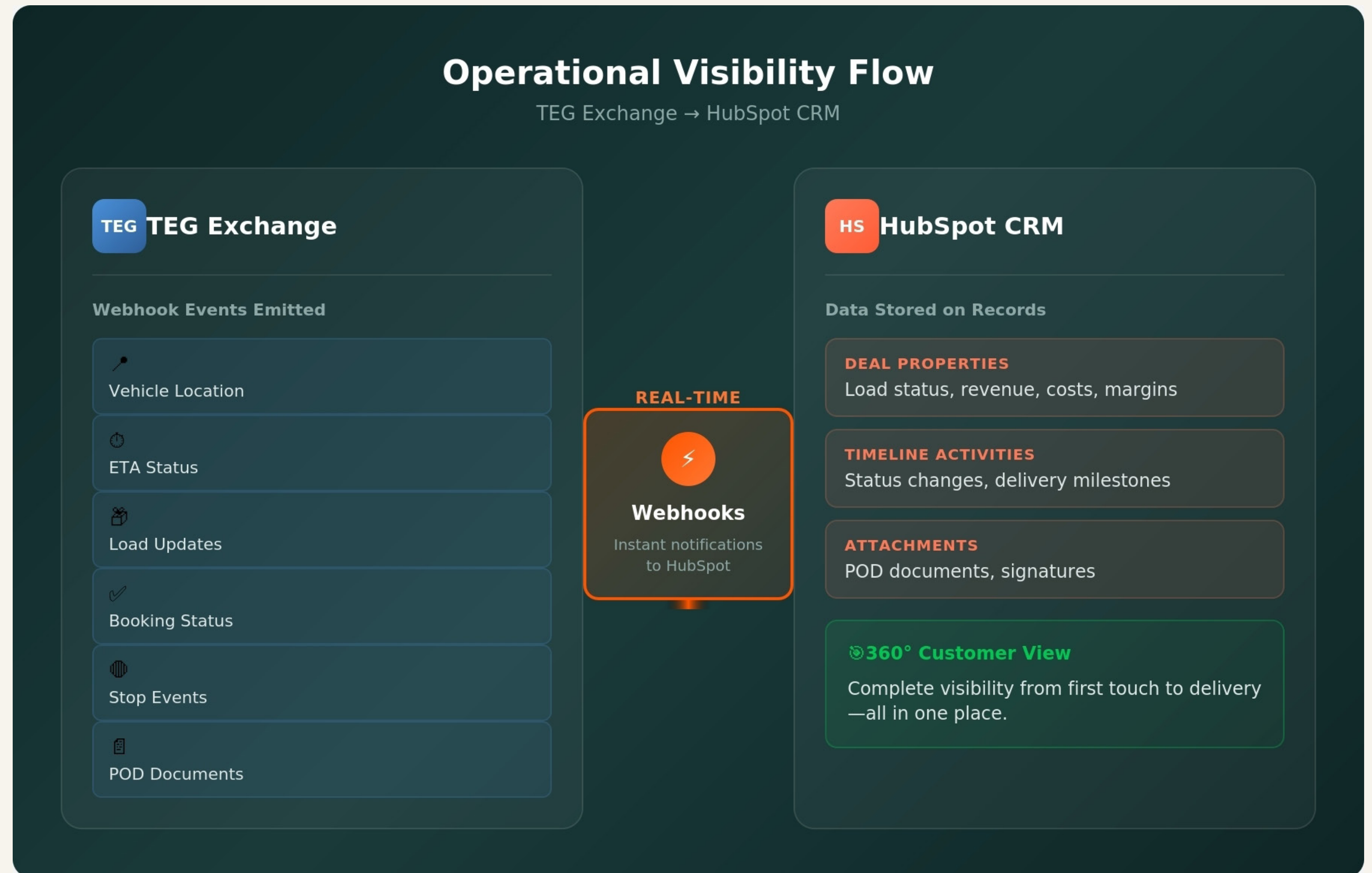
Transport companies face unique challenges that generic CRM solutions fail to address:

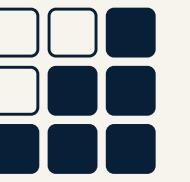
- Fragmented systems creating data silos between sales, operations, and dispatch
- Manual data entry consuming valuable time that could be spent on revenue-generating activities
- Inability to track customer journey from initial enquiry through delivery completion
- Lack of real-time visibility into load status and customer communications
- Difficulty attributing revenue to marketing sources and calculating true ROI



TEG Exchange Integration: The Bidirectional Sync

The true power of this solution lies in the seamless integration between HubSpot CRM and TEG Exchange. This bidirectional sync eliminates duplicate data entry, ensures consistency across systems, and enables end-to-end visibility from initial customer contact through load delivery.



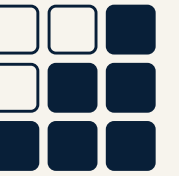


HubSpot to TEG: Pushing Load Data

Driver & Subcontractor Management

Use HubSpot's company record structure to manage carrier relationships. A haulage company might have multiple drivers operating different vehicles. Structure this in HubSpot with the parent company as the main record and individual drivers as associated contacts. Sync this hierarchy to TEG Exchange, where drivers become subcontractors responsible for moving loads between locations.



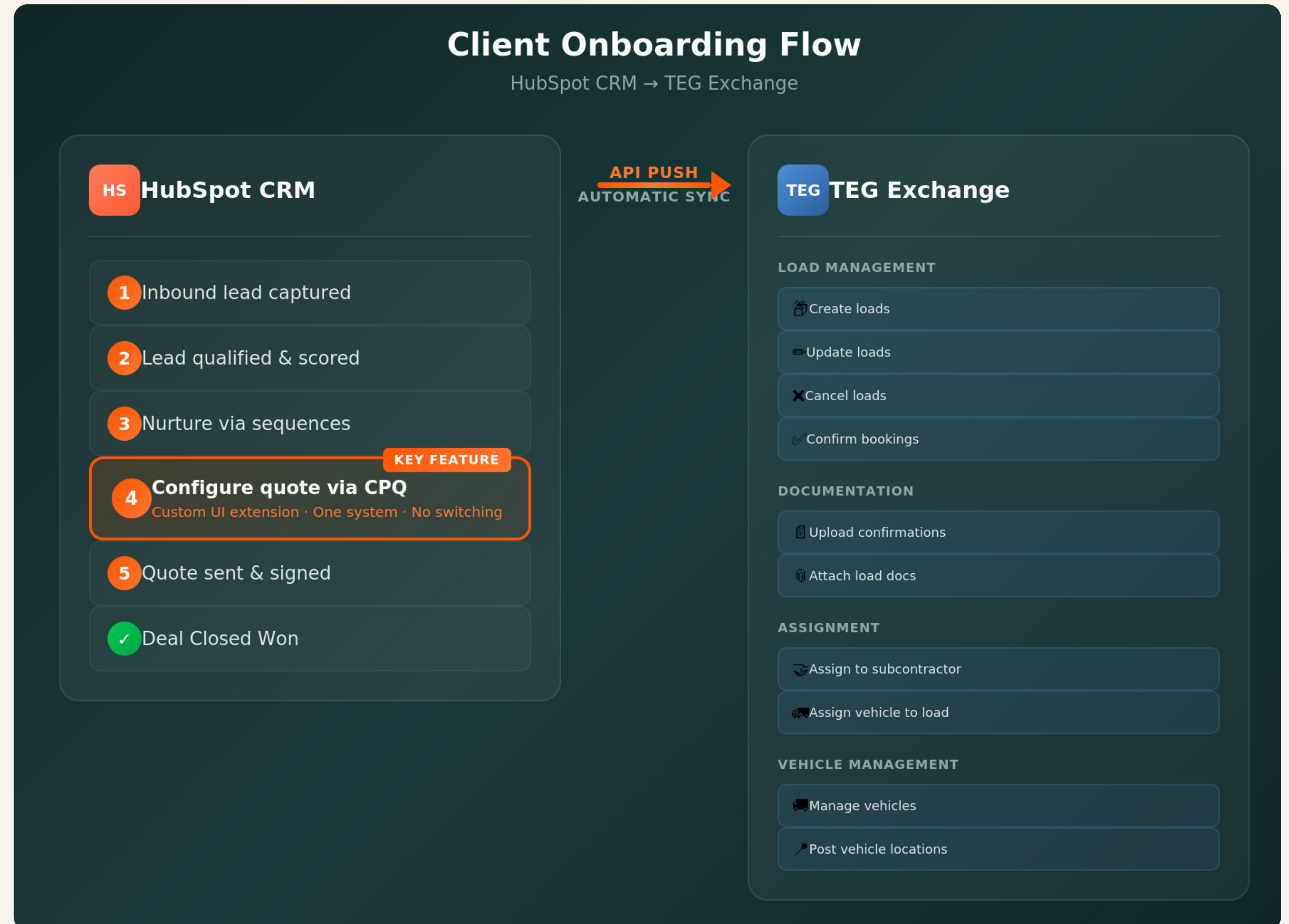


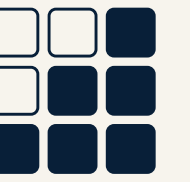
HubSpot to TEG: Pushing Load Data

Load Creation from HubSpot

When a customer confirms interest in a shipment, your team can create loads directly from the HubSpot interface:

1. Deal reaches 'Closed Won' stage in Sales Hub
2. Integration triggers load creation in TEG Exchange with deal details
3. Load is assigned to the appropriate company or subcontractor
4. Team continues operating within HubSpot while logistics execution happens in TEG



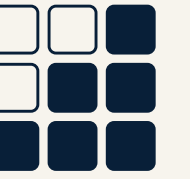


TEG Exchange API Capabilities

The TEG API provides comprehensive functionality:

- **Load Management:** Create, return, update, and delete loads; manage bookings and status
- **Proof of Delivery:** Create PODs, retrieve signatures, download delivery documents
- **Documentation:** Upload, download, and manage load documentation
- **Assignment:** Assign loads to vehicles or subcontractors
- **Stop Management:** Add stops, track status, upload stop-specific documentation
- **Vehicle Tracking:** Get vehicle locations, post location updates, manage vehicle records
- **Company Data:** Access subcontractors, drivers, vehicles, and company information



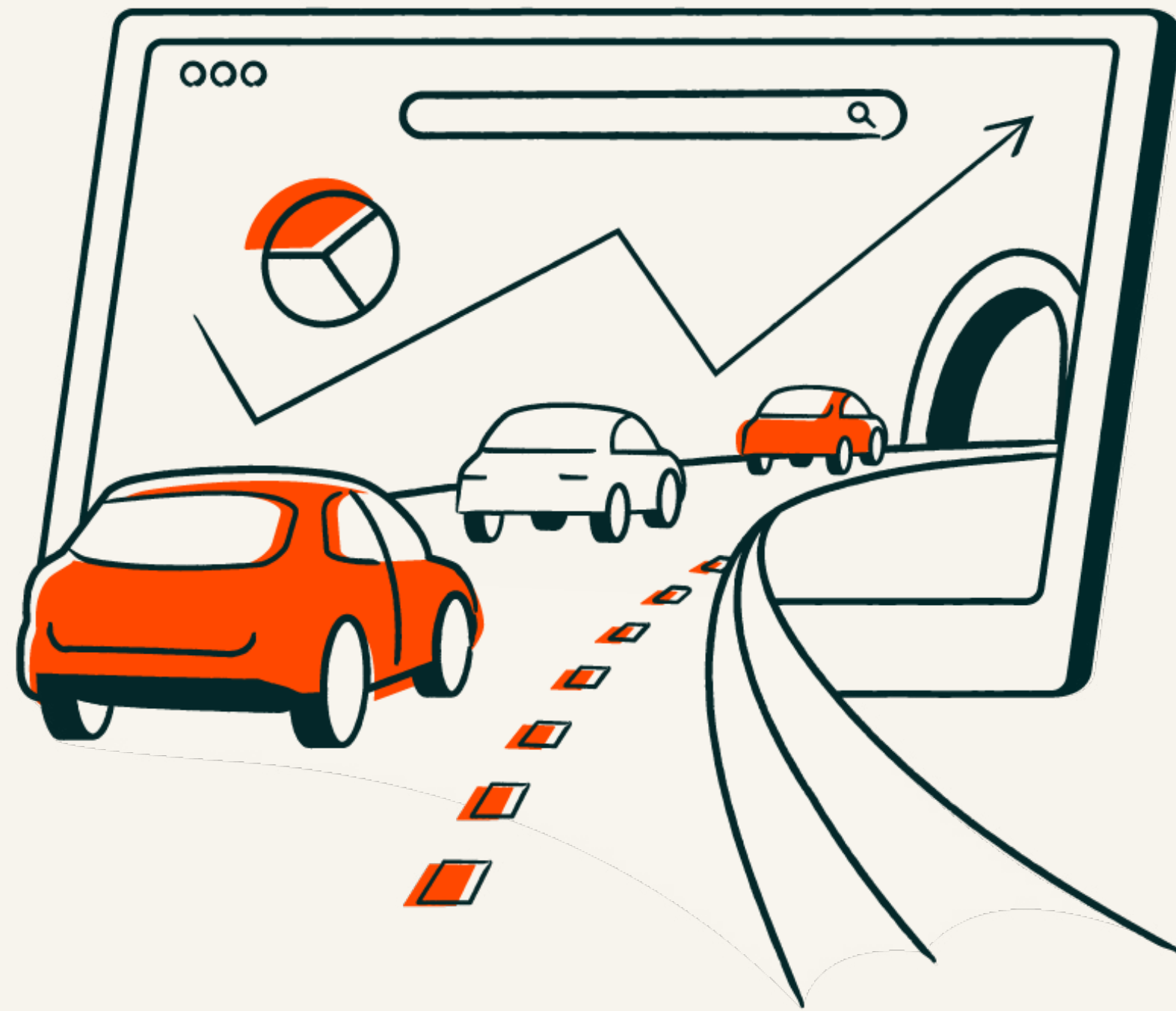


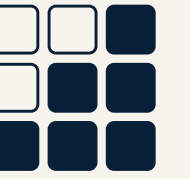
Real-Time Updates: TEG Webhooks

The integration's true value emerges through TEG's webhook system, which keeps HubSpot updated with real-time logistics data. Once a load is created in TEG Exchange, webhooks ensure your CRM stays informed of every status change.

Available Webhook Events

- **Add Stop Event:** Notifies when a new stop is added to a load
- **Update Stop Event:** Notifies when a stop in a load is updated
- **Load Edits:** Notifies when a load is updated with full load JSON
- **Booking Status Update:** Notifies when booking status changes
- **Vehicle Location:** Provides driver location when a job has started
- **ETA Status:** Provides driver's estimated time of arrival
- **Quote Events:** Quote posted, cancelled, or dismissed notifications
- **POD Documents:** Stop POD and signature document notifications

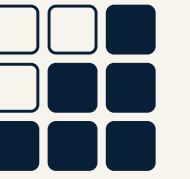




Using Webhook Data in HubSpot

- Update custom properties on deal or company records with current load status
- Trigger automated customer notifications when loads reach key milestones
- Log revenue and costs against customer records for profitability analysis
- Create service tickets automatically if delivery issues are detected
- Feed ETA data into customer-facing portals for real-time visibility





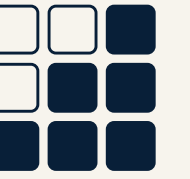
Reporting & Analytics

With all data flowing through HubSpot—from initial marketing touchpoint through lead completion—you gain unprecedented visibility into your entire operation.



Complete Customer Journey Tracking

- **Marketing Attribution:** Know whether a customer came from paid traffic, organic search, referral, content marketing, or AI-powered answer engines like ChatGPT
- **Sales Process Metrics:** Track deals, communications, tasks, and time-to-close by sales representative
- **Operational Data:** View lead information, revenue, costs, and margins via TEG webhook data
- **Customer Lifetime Value:** Calculate total revenue by customer over time, segmented by acquisition source



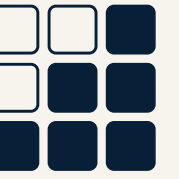
Revenue Attribution & ROI

Connect marketing spend directly to revenue outcomes. Report on revenue generated by source, campaign, or channel. Calculate true return on investment for your marketing efforts by tracking from initial click through to completed leads and collected revenue.

Commission & Bonus Tracking

Leverage HubSpot's reporting infrastructure to manage internal compensation. Track sales performance against targets, calculate commissions based on closed revenue, and structure bonus programmes tied to specific metrics. All data lives in one system, eliminating spreadsheet reconciliation.





Finally...

Transport and logistics companies that embrace integrated technology stacks position themselves for sustainable growth. The combination of HubSpot CRM and TEG Exchange creates a unified platform that addresses the complete customer lifecycle.



Key Benefits

- **Increased Lead Conversion:** Smart forms, chatbots, and AI-powered tools capture and qualify more prospects
- **Accelerated Sales Cycles:** Email templates, sequences, and automation enable faster, more consistent follow-up
- **Operational Efficiency:** Bidirectional sync eliminates duplicate data entry and manual processes
- **Enhanced Customer Experience:** Real-time visibility and proactive communication build trust and loyalty
- **Data-Driven Decisions:** Complete attribution and ROI tracking inform strategic investments
- **Scalable Foundation:** System grows with your business without proportional increases in overhead

Get in Touch

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