

CLIENT REFERENCE GUIDE

Clay × HubSpot Integration Guide.

A practical reference for The GTM Studio clients deploying Clay alongside HubSpot — architecture, data flows, and The GTM Studio operating model.

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Clients**

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01 · INTRODUCTION

About The GTM Studio

The GTM Studio is a specialist Go-To-Market infrastructure agency. We design, build and operate revenue systems that connect data, tooling and process into a single, coherent engine. Every engagement is grounded in three principles: transparency, precision and accountability.

This document is produced for The GTM Studio clients who are deploying the Clay × HubSpot integration as part of their GTM stack. It explains what the integration does, how it is architected, what data flows where, and how The GTM Studio operates it on your behalf.

02 · FOUNDATION

Your Dedicated Clay Instance

Every The GTM Studio client receives a dedicated, individually provisioned Clay workspace. This is a fundamental architectural decision — not a feature option. It has direct implications for data governance, GDPR compliance and operational transparency.

What 'dedicated instance' means for you

- Complete isolation. Your Clay workspace contains only your data. No other The GTM Studio client can access it.
- Full visibility. You have direct login access to your Clay workspace. You can see every table, column and record.
- Workspace ownership. If you choose, you can hold the Owner role. The GTM Studio operates as an administrator.
- GDPR compliance by design. Your data never enters a shared environment, eliminating cross-client data risk.
- Auditable data flows. Every enrichment run, every HubSpot push and every field mapping is visible and auditable.

When The GTM Studio sets up your Clay × HubSpot integration, the OAuth credentials connecting Clay to HubSpot belong to your workspace exclusively. No other client's workflows share your HubSpot connection, your property schemas, or your API rate limit allocation.

03 · CONNECTION

How to Integrate HubSpot with Clay

This section explains the technical steps required to connect HubSpot to Clay. The GTM Studio manages this process on your behalf, but understanding it ensures full transparency over what access is being granted and why.

Prerequisites

Before the connection can be established, two requirements must be met:

- **HubSpot Super Admin access.** The OAuth authorisation flow requires Super Admin or App Marketplace permissions in HubSpot. A standard user account cannot complete it.
- **Clay Pro plan (minimum).** The HubSpot connector is only available on Clay's Pro tier and above. The GTM Studio provisions and manages the Clay workspace, so this is handled on your behalf.

Connecting HubSpot to Clay: Step by Step

The connection uses a standard OAuth 2.0 flow. The entire process takes five to ten minutes once prerequisites are confirmed.

Step 1: Access the Clay integration marketplace. Inside your Clay workspace, navigate to Integrations in the left sidebar. Search for HubSpot.

Step 2: Initiate the OAuth flow. Click 'Connect'. Clay redirects to HubSpot's authorisation page. Sign in using HubSpot Super Admin credentials.

Step 3: Confirm the portal. Before granting access, confirm the HubSpot Portal ID shown on the authorisation screen matches your production HubSpot portal.

Step 4: Return to Clay. HubSpot redirects back to Clay. The HubSpot integration card shows 'Connected' with a green indicator and displays your Portal ID.

Step 5: Scope validation. The GTM Studio reviews the granted scopes against the requirements of your specific workflows. Any missing scopes are requested at this stage.

Step 6: Sandbox connection. A second connection is established to your HubSpot Sandbox account. All workflow validation occurs in the Sandbox before production data is touched.

Step 7: Property creation. HubSpot does not auto-create properties when Clay writes data. The GTM Studio creates every required custom property in both Sandbox and Production before any workflow runs.

Step 8: First import test. The GTM Studio imports a small sample of HubSpot records (typically 20–50) into a test Clay table, validates field mapping, and confirms the connection is operating correctly.

Maintaining the Connection

The OAuth token Clay holds expires periodically. The GTM Studio monitors token validity and refreshes credentials before expiry — this process is seamless and requires no action from you.

You can audit or revoke Clay's access at any time by navigating to HubSpot Settings > Integrations > Connected Apps. Revoking access immediately terminates all Clay workflows writing to your HubSpot portal.

04 · CONNECTION

Authentication & Permissions

The Clay × HubSpot connection uses OAuth 2.0 exclusively. An authorised HubSpot user authenticates via the standard HubSpot OAuth flow, and Clay receives an access token scoped to that user's permissions. Unlike the Salesforce connector, HubSpot does not support a server-to-server Client Credentials flow — a named user must initiate the authorisation.

The OAuth flow requests a defined set of scopes. The GTM Studio configures these scopes to match the exact requirements of your workflows — no more, no less. The table below lists all HubSpot scopes relevant to the Clay integration and their status in a standard The GTM Studio deployment.

OAuth Scope	Status	What it allows
crm.lists.read	Required	View HubSpot list membership — essential for list-based imports.
crm.objects.contacts.read	Required	View Contact properties and records.
crm.objects.companies.read	Required	View Company properties and records.
crm.objects.leads.read	Required	View Lead properties and records.
crm.objects.owners.read	Required	View HubSpot user and owner data.
crm.schemas.contacts.read	Required	Discover Contact property definitions (field names and types).
crm.objects.companies.write	Optional (on)	Create, update or delete Company records.
crm.objects.contacts.write	Optional (on)	Create, update or delete Contact records.
crm.objects.leads.write	Optional (on)	Create, update or delete Lead records.
crm.objects.custom.read/write	Optional (on)	Read and write Custom Object records (Enterprise only).
crm.objects.deals.read/write	Optional (on)	View and write Deal properties and records.
automation.sequences.read	Optional (off)	View Sequence details and check enrollment status.
automation.sequences.enrollments.write	Optional (off)	Enrol Contacts in HubSpot Sequences from Clay.

The GTM Studio enables only the scopes required for your specific workflows. Write scopes are enabled selectively. The Sequence enrollment scopes are disabled by default and require explicit client approval before activation.

05 · DATA

Importing Records from HubSpot into Clay

Before Clay can enrich or act on HubSpot data, it must import the relevant records into a Clay table. The GTM Studio configures these import sources during workspace setup. The following HubSpot objects can be used as import sources:

- Contacts
- Companies
- Deals
- Leads (HubSpot's native Lead object, distinct from Contact)
- Custom Objects (HubSpot Enterprise only, requires `crm.objects.custom.read` scope)

List-Based Import

Rather than importing all records of a given object type, Clay can pull only the records that are members of a specified HubSpot Active List or Static List. This is the preferred import method for most The GTM Studio workflows, as it provides precise control over which records enter Clay.

Active Lists are dynamic: as new records meet the criteria in HubSpot, they are added to the list and automatically picked up by Clay on the next import run. This makes Active List imports the natural foundation for continuous enrichment workflows.

Import Options

- **Include read-only properties.** HubSpot calculates a set of analytics and lifecycle properties automatically. Enabling this option makes them available as columns in Clay, though they cannot be written back.
- **Exclude empty properties.** Enabling this keeps Clay tables clean by omitting blank fields from the import. The GTM Studio enables this by default for Contact and Company imports to reduce table noise.

06 · DATA

Clay Actions for HubSpot

Clay provides seven actions for HubSpot. These are the building blocks from which The GTM Studio assembles every HubSpot workflow. Each action corresponds to a specific API operation and is configured at the column level within a Clay table.

Action	Description / When The GTM Studio uses it
Import Objects	Source action. Pulls HubSpot records into Clay as rows. Configured with object type, property selection and list filter.
Lookup Object	Read-only. Searches HubSpot for a record matching specified criteria — email, domain or HubSpot Object ID. Returns the record ID and selected properties into Clay.
Create Object	Write. Creates a net-new HubSpot record. Used when Clay has identified a record that does not exist in HubSpot.
Update Object	Write. Updates one or more properties on an existing HubSpot record. Matched by HubSpot Object ID. The workhorse of CRM enrichment workflows.
Create Association	Write. Creates an association link between two HubSpot objects — for example, Contact to Company or Deal to Contact. Maintains relational integrity in HubSpot.
Retrieve Associated Objects	Read-only. Fetches all objects associated with a specified source object. Used to pull Deal–Contact associations for attribution workflows.
Find Owner	Read-only. Resolves a HubSpot Owner by ID or email address. Used to validate rep routing and assign ownership on created records.

The Lookup-then-Create Pattern

Clay does not provide a single-action create-or-update operation for HubSpot (equivalent to Salesforce's Upsert). The GTM Studio replicates this outcome through a four-step pattern that every write workflow follows:

The GTM Studio Lookup-then-Create Pattern

- Step 1 — Lookup Object: search HubSpot by email (Contacts) or domain (Companies).
- Step 2 — Conditional column: IF(record found, 'Update', 'Create').
- Step 3 — Create Object: fires only when Step 2 = 'Create'. Creates the net-new record.
- Step 4 — Update Object: fires only when Step 2 = 'Update'. Updates the existing record by Object ID.

07 · DATA

HubSpot Objects: What Can Be Written

Clay can read from and write to the following HubSpot objects. For each object, The GTM Studio creates the necessary custom properties in HubSpot before any Clay workflow runs, documents every field mapping in a workflow specification, and validates the output in Sandbox.

Contact

- All standard Contact properties (First Name, Last Name, Email, Phone, Job Title, Company, Website, Lifecycle Stage, Lead Status, and more).
- Custom Contact properties created by The GTM Studio: LinkedIn URL, Verified Email, Mobile Number, Seniority Level, Department, ICP Score, Persona Score, Intent Topic.
- Clay-sourced enrichment fields: recent LinkedIn activity, technology stack signals, intent topic, job change flag, company headcount.
- Campaign attribution field (clay_campaign_source): maps each Contact to the specific The GTM Studio workflow that sourced or enriched it.
- HubSpot Owner assignment: routes enriched Contacts to the correct rep based on territory, segment or enrichment outcome.

Company

- All standard Company properties (Name, Domain, Industry, Annual Revenue, Number of Employees, HQ City, HQ Country, and more).
- Custom Company properties: ICP Score, Headcount Growth Rate, Technology Stack, Funding Stage, Funding Amount, G2 Rating, Intent Signal.
- Clay-enriched firmographics: standardised industry classification, employee range bucket, revenue range bucket — used to power Smart Lists and segmentation in HubSpot.
- Last Enriched Date (clay_enrichment_date): written on every enrichment run, enabling conditional logic that skips recently-enriched records.

Deal

- Stage, Amount, Close Date, Deal Name, Pipeline.
- Custom Deal properties: Account Research Summary, ICP Fit Indicator, Intent Signal at Creation.
- Associations to Contacts and Companies created via the Create Association action, maintaining relational integrity in HubSpot.

- Deal creation from Clay is typically triggered by a qualification workflow: a Contact reaches a score threshold in Clay and a Deal is created automatically.

Lead (HubSpot Native Lead Object)

HubSpot's Lead object is distinct from Contact. A Lead represents a potential buyer who has expressed interest but has not yet been qualified as an active Contact. The GTM Studio uses the Lead object in HubSpot orgs that have enabled it.

- All standard Lead properties including Lead Status, Lead Label (Hot, Warm, Cold), associated Contact, associated Company.
- Enriched Lead properties written back by Clay: enrichment timestamp, persona score, intent signal, qualification flag.
- Note: in HubSpot, a qualified Lead progresses to an active Contact via a HubSpot workflow triggered by a status change. Clay does not manage this transition directly.

Custom Objects (HubSpot Enterprise)

- Any custom object created in HubSpot Enterprise is accessible to Clay, provided the appropriate custom object scopes are enabled.
- Common use cases: Intent Signal objects, Account Scoring objects, Competitor Tracking objects, Product Usage objects.
- Because HubSpot requires properties to be created before data is written, all custom object property schemas are finalised and created by The GTM Studio before workflow build begins.

08 · OPERATIONS

Property Management

Property management is one of the most important operational steps in setting up the HubSpot integration. HubSpot custom properties must exist before Clay can write to them — unlike some CRM platforms, HubSpot will not auto-create properties on the fly. The GTM Studio treats property architecture as a formal deliverable, not an afterthought.

The GTM Studio Property Naming Convention

The GTM Studio uses a consistent naming convention for all Clay-managed HubSpot properties: a **clay_** prefix on the internal name, and a descriptive display label. For example: internal name **clay_enrichment_date**, display label **Clay — Last Enriched Date**. This convention makes Clay-sourced data immediately identifiable in HubSpot and separates it from native HubSpot properties and properties created by other tools.

Property Types and Formatting

- **Text properties.** Clay string outputs map directly to HubSpot single-line or multi-line text properties.
- **Number properties.** Employee counts, revenue figures and scores map to HubSpot Number properties. Clay formulas ensure values are numeric before write.
- **Date properties.** Clay outputs dates as Unix timestamps (milliseconds) for HubSpot Date properties. The GTM Studio formulas handle this conversion.
- **Dropdown/Select properties.** HubSpot dropdown properties require values that match the configured options exactly. The GTM Studio defines and locks the option set before workflow build begins.
- **Checkbox properties.** HubSpot boolean properties accept true/false. Clay formulas normalise Yes/No and 1/0 variants before the write action fires.

The 'Ignore Blank Values' Setting

Every Update Object action The GTM Studio configures for HubSpot has the 'Ignore blank values' toggle enabled by default. This prevents Clay from overwriting an existing HubSpot property with an empty string when an enrichment source returns no data for a given field. Without this setting, a failed enrichment lookup could erase previously populated data.

09 · OPERATIONS

Deduplication Strategy

Preventing duplicate record creation is one of the most operationally sensitive aspects of any CRM integration. Because Clay uses a Lookup-then-Create pattern rather than a native Upsert action, The GTM Studio implements deduplication at the workflow design level, with consistent logic applied across all object types.

Contacts — Email Match

A Lookup Object action searches HubSpot for an existing Contact with the same email address before any Create action fires. The lookup returns the HubSpot Contact ID, which is then used by all subsequent Update actions in the workflow. If no match is found, the Create action proceeds. If a match is found, only the Update action fires.

Companies — Domain Match

For Company records, the website domain is the deduplication key, normalised before lookup (removing protocol, www prefix and trailing slash). The Lookup checks for an existing Company with a matching Domain property. The GTM Studio normalisation formula handles variations such as `https://www.example.com` and `example.com` as the same domain.

Deals — Association Check

Deal deduplication is more contextual. The GTM Studio checks for open Deals already associated with the matched Contact and Company before creating a new one. A Retrieve Associated Objects action fetches existing Deals, and a conditional formula evaluates whether a qualifying open Deal already exists before a Create action fires.

HubSpot Object ID as the Canonical Identifier

Once a record has been imported from HubSpot into Clay, its HubSpot Object ID is available as a column. All subsequent Update actions use this ID as the match key — it is the most reliable and fastest way to target a specific record. The GTM Studio stores the Object ID in a dedicated Clay column for every object type the workflow touches.

Deduplication checklist — The GTM Studio standard

- Every Contact create workflow includes a pre-create Lookup by email.
- Every Company create workflow includes a pre-create Lookup by normalised domain.
- Every update workflow uses HubSpot Object ID as the match key.
- 'Ignore blank values' is enabled on all Update Object actions.
- All deduplication logic is documented in the workflow specification.

10 · OPERATIONS

HubSpot Sequence Enrollment from Clay

Clay can interact with HubSpot Sequences — HubSpot's native sales engagement tool for automated, personalised email outreach — directly from within a Clay workflow. This capability is available only when the relevant scopes are enabled and requires explicit client approval before The GTM Studio activates it.

Checking Enrollment Status

Clay can check whether a Contact is currently enrolled in any HubSpot Sequence using the **automation.sequences.read** scope. The GTM Studio uses this in qualification workflows as a guard condition: if a Contact is already enrolled in a Sequence, the workflow skips re-enrollment to avoid duplicate outreach.

Enrolling Contacts in Sequences from Clay

With the **automation.sequences.enrollments.write** scope enabled, Clay can enrol a Contact in a specified HubSpot Sequence as an action step within a workflow. The enrollment action requires the Contact's HubSpot Object ID and the Sequence ID. The GTM Studio configures the Sequence ID as a fixed parameter — enrollment targets a specific, pre-approved Sequence, not a dynamic one.

Sequence enrollment — The GTM Studio approach

- The **automation.sequences.enrollments.write** scope is disabled by default.
- The GTM Studio enables it only after explicit client approval of the target Sequence.
- A conditional formula always checks enrollment status before the enrollment action fires.
- Enrollment actions are logged in the Clay table with a timestamp for auditability.

11 · USE CASES

GTM Use Cases by Function

The following use cases represent the workflows The GTM Studio most commonly builds for clients using the Clay × HubSpot integration. Each is a production-tested pattern that The GTM Studio has deployed, iterated and refined across multiple client engagements.

Inbound Lead Enrichment

- **Form-fill enrichment.** A new HubSpot Contact is created when a prospect fills out a form. Clay enriches it with firmographic data, seniority, technology stack and intent signals, and writes the enriched properties back to HubSpot within minutes.
- **Lead scoring.** Clay computes a composite Lead Score from enriched signals and writes it to a custom Contact property. A HubSpot workflow fires when the score exceeds a threshold, routing the Contact to the appropriate sales queue.
- **Automated disqualification.** Clay evaluates enriched firmographic signals against your ICP criteria. Contacts from companies outside your target profile are automatically flagged with a disqualification reason and removed from active sequences.

Outbound Prospecting

- **ICP account enrichment.** The GTM Studio builds a Clay table sourced from a HubSpot Company list based on ICP criteria. Clay enriches each Company with headcount, funding, technology stack and intent data, and writes the enriched firmographics back to HubSpot.
- **Campaign attribution tagging.** Every Contact processed by a Clay workflow is tagged with a campaign identifier written to the `clay_campaign_source` property. This tag persists through the funnel and connects Clay activity to HubSpot deal and revenue data.
- **Personalisation data for sequences.** Clay enriches Contacts with specific conversation hooks — recent company news, LinkedIn activity, job change signals — and writes them to HubSpot properties that feed dynamic content in HubSpot Sequences.

CRM Hygiene & Data Quality

- **Contact data completeness.** A HubSpot Active List identifies Contacts missing key properties (Job Title, Mobile, LinkedIn URL). Clay imports this list, enriches the gap fields, and writes them back. The Active List shrinks as records are completed.
- **Company firmographic refresh.** Clay re-enriches HubSpot Company records on a defined schedule, updating headcount, revenue range, funding status and HQ location. The `clay_enrichment_date` property ensures recently-enriched records are skipped.
- **Job change monitoring.** Clay cross-references HubSpot Contact records against live employment data. Contacts who have changed employer are flagged in a custom property and surfaced in a HubSpot Smart

List for rep review.

Account-Based Marketing (ABM)

- **Target Account List enrichment.** Clay enriches HubSpot Company records in the Target Account List with buying intent signals, technology stack overlaps and recent hiring data, and writes the enriched signals back to custom Company properties.
- **Multi-thread contact discovery.** For each target Account, Clay identifies multiple decision-makers across relevant departments and creates them as Contacts in HubSpot, associated to the correct Company record.
- **Deal intelligence.** When a Deal is created in HubSpot, a Clay workflow enriches the associated Company with account intelligence — open job roles, technology stack, recent news — and writes a summary to a custom Deal property for the rep.

Product Sign-Up Activation

- **Webhook-triggered enrichment.** When a prospect signs up for a product trial, the event is sent to Clay via webhook. Clay enriches the Contact and Company and writes enrichment data to HubSpot before the rep's first outreach.
- **Sales alert for high-value sign-ups.** Clay evaluates enriched sign-up data against high-value criteria (company headcount, funding, technology stack match). Contacts that meet the threshold trigger a HubSpot notification task assigned to the relevant rep.

12 · OPERATIONS

Sync Settings & Cadence

Clay tables connected to HubSpot can be configured to run on different schedules. The GTM Studio selects the appropriate cadence for each workflow based on the business requirement and the cost of enrichment credits.

- **On-demand.** Triggered manually or via Clay's API. Used for ad-hoc enrichment runs or event-triggered workflows via webhook.
- **Scheduled.** Clay re-runs the import and enrichment on a recurring schedule. Appropriate for daily CRM hygiene or weekly company enrichment refresh cycles.
- **List-trigger cadence.** Because HubSpot Active Lists update dynamically, Clay's list-based import automatically picks up new members each time the table runs. This creates a near-real-time enrichment loop for inbound workflows.
- **Conditional run logic.** Individual enrichment columns within a Clay table can be configured to run only when specified conditions are met — for example, only when the `clay_enrichment_date` field is empty or older than 90 days. This prevents unnecessary enrichment credit consumption.

13 · USE CASES

Campaign Attribution & Revenue Reporting

Because HubSpot is a full-funnel platform — marketing, sales and service in a single system — enriched data from Clay can be traced from first touch all the way through to closed revenue. The GTM Studio builds attribution into every workflow from day one.

How Attribution Works

The GTM Studio writes a campaign identifier to a custom Contact property (**clay_campaign_source**) on every record that passes through a Clay workflow. This identifier is set at workflow build time and persists on the Contact record permanently. It is never overwritten by subsequent enrichment runs.

In HubSpot, a Smart List is built for each campaign identifier. This list captures every Contact associated with a specific Clay workflow. HubSpot's standard reporting then shows how those Contacts progress through lifecycle stages — from Lead to MQL, SQL, Opportunity and Closed Won.

Deal Association for Attribution

For attribution to be complete, Contacts enriched by Clay must be associated with Deals in HubSpot. The GTM Studio uses the Create Association action to link Clay-enriched Contacts to Deals at the point of Deal creation. Once the association exists, HubSpot's revenue attribution reports can connect Clay-sourced Contacts to closed revenue.

14 · GOVERNANCE

Security, Compliance & Data Governance

Clay Platform Security

- **SOC 2 Type 2 certified.** Clay has completed SOC 2 Type 2 audit, confirming security controls for availability, confidentiality and privacy are operational and effective.
- **Data encryption.** Data in transit is encrypted via TLS 1.2+. Data at rest is encrypted using AES-256.
- **Least-privilege scopes.** The GTM Studio enables only the OAuth scopes required for each workflow. Write scopes are granted selectively and reviewed quarterly.

GDPR Compliance

- **Dedicated instance architecture.** Each client operates in an isolated Clay workspace. Your HubSpot data is never commingled with another client's data.
- **Data processing agreement.** The GTM Studio can provide a Data Processing Agreement (DPA) covering the Clay × HubSpot integration for clients who require it for GDPR or contractual compliance.
- **HubSpot GDPR tools.** HubSpot's built-in GDPR tools — consent tracking, communication subscription management and Contact deletion — are not overridden or bypassed by Clay. Clay writes enrichment data only; consent and subscription state remain under HubSpot's control.
- **Right to erasure.** Records can be deleted from Clay tables on request. Because Clay is the enrichment layer and HubSpot is the system of record, deletion from Clay does not affect the HubSpot record. Clients manage HubSpot deletion directly.

Sandbox Testing

The GTM Studio builds and validates all Clay × HubSpot workflows against a HubSpot Sandbox account before any production data is touched. This ensures that property schemas, field mappings, conditional logic and deduplication patterns are verified in a safe environment. No workflow is promoted to production without successful Sandbox validation.

15 · GOVERNANCE

How The GTM Studio Operates Your Integration

The GTM Studio does not build Clay × HubSpot workflows and hand them over. We operate them on your behalf as an ongoing managed service, with full transparency at every stage.

Build Phase

- **Property architecture:** The GTM Studio defines every HubSpot property the Clay integration will write, creates them in both Sandbox and Production, and documents the full property schema before workflow build begins.
- **Workflow specification:** each workflow is fully documented — object type, source list, enrichment columns, field mappings, conditional logic, deduplication steps and expected outputs — and shared with the client before build begins.
- **Sandbox validation:** all workflows are built against the HubSpot Sandbox. Test records validate every action and property mapping before production promotion.
- **Production promotion:** validated workflows are promoted to the production Clay workspace and connected to your live HubSpot portal. OAuth credentials are verified and initial import tests are run with a controlled record sample.

Operate Phase

- **Ongoing monitoring:** The GTM Studio monitors all active workflows for enrichment failures, API errors and HubSpot sync failures.
- **Property maintenance:** when HubSpot property schemas change (renamed properties, updated dropdown options), The GTM Studio updates the relevant Clay workflow formulas to maintain data integrity.
- **Credential management:** OAuth tokens are refreshed proactively and access is audited against the HubSpot Connected Apps panel on a defined schedule.
- **Conditional logic review:** The GTM Studio reviews enrichment match rates and conditional run effectiveness quarterly, adjusting logic to maintain credit efficiency.

Reporting

Each client receives a monthly workflow performance report covering: records processed, enrichment match rates by provider, HubSpot push success rates, credit consumption, and any workflow exceptions with root cause and resolution. Reports are delivered directly to the client contact on a fixed schedule.

The GTM Studio · Intelligent GTM Infrastructure

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