



CRM Sync

By Axios HQ Solutions • Nov 20, 2023

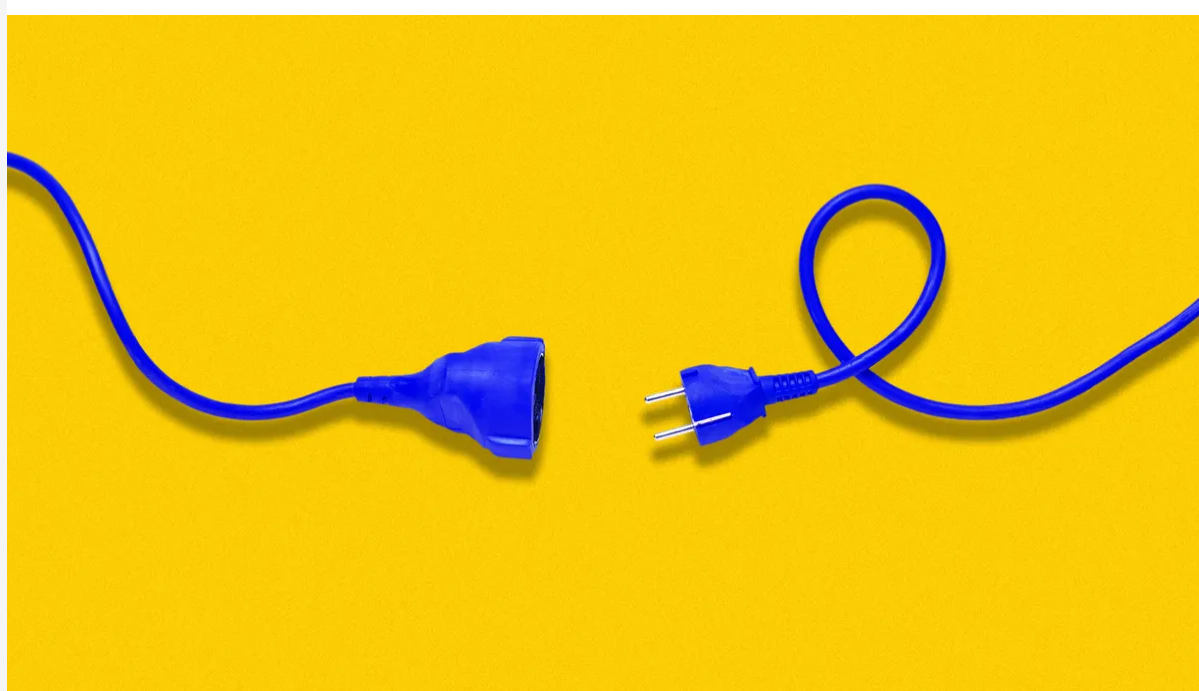
Smart Brevity® count: 1.5 mins...350 words

Axios HQ invites you to bring in your outreach audience in a few different ways: you can manually add individuals one-by-one, upload a CSV spreadsheet of recipients' emails and names, or connect your existing CRM contacts and have them automatically sync!

Setting up a CRM sync allows you to bring in your current contact lists and sync them to Axios HQ.

As your email lists change, you won't have to worry about updating your audience to match in Axios HQ, because everything will be automatic!

1. Connecting your CRM



Currently, Axios HQ only supports [HubSpot connections](#), but we're working on more! Interested in a different CRM? Let your account manager know, or fill us in at help@axioshq.com.

2. Setup options



Axios HQ will provide your team with a set of instructions specific to your CRM sync. Once connected, we can bring your recipients into the platform in one of the following configurations.

Recipients will sync to HQ:

- As individuals, unaffiliated with a group (**All Contacts**)
- In segments based on the company they are part of (**All Companies**)
- In segments based on their industry (**All Industries**)
- In segments based on your custom lists, developed in your CRM (**All Contact Lists**)

Once these groups are synced to the platform, you can leverage any of the available segments or individuals you'd like in order to craft your audience!

Let us know how you'd like to organize your contacts and we'll be sure to set up your sync accordingly!

⚠ Keep in mind



- **Your CRM recipients will update** once every 24 hours.
- **Permissions in the platform** are currently managed alongside our directory sync integration. Give HQ collaborators access to the CRM connection by giving them directory sync access when adding new collaborators for the first time.
- **Want to adjust existing permissions?** Reach out to your account manager, or contact us at help@axioshq.com so we can help get your team where they need to be!

Axios HQ partners with hundreds of clients, Fortune 500 companies, and small nonprofits alike. We have a dedicated security specialist on staff and have completed a SOC2 Type 2 audit.

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