

The Zero Footprint Data Solution

Secure, Automated Data Integration for HubSpot

You need your marketing data to be automated. You also need your core banking system to remain secure.

Historically, Credit Unions have had to choose between manual CSV uploads (safe but slow) or invasive API integrations (automated but risky). The **Zero Footprint Data Solution** eliminates that compromise. We provide a fully automated "smart" pipeline that moves member data from your Core to HubSpot without the risks, costs, or maintenance of a traditional heavy integration.

How it Works: The "Outbound Only" Approach

Most vendors ask to reach in to your system, which requires opening holes in your firewall or installing software on your servers. We take a different approach.



Outbound Only

We never touch your internal network. Instead, your system securely "pushes" data out via an automated, encrypted batch process.



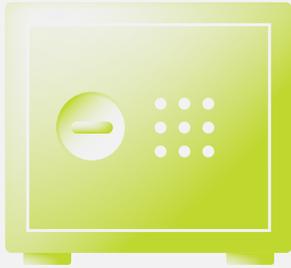
Air-Gapped Security

Your sensitive data remains air-gapped behind your firewall until you decide to send it.



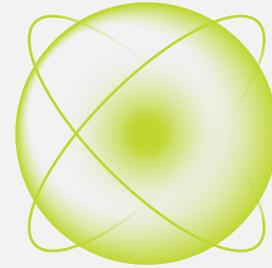
The "Logic Layer"

We don't just move raw data. Our pipeline acts as a filter. It structures the data in a way that makes the data make sense to users working in HubSpot and allows credit unions to get the most out of the reporting and marketing, sales, and service tools HubSpot provides. To do this, we make sure the data is clean, and each type of data has unique identifiers before it ever enters HubSpot.



Unmatched Security (IT Friendly)

We install nothing inside your environment. There are no 3rd-party agents to manage, no SQL servers to spin up, and no open ports to monitor. Your firewall remains completely untouched.



Universal Compatibility & Stability

Direct API connections to legacy Cores (like Symitar or Jack Henry) can be fragile, and can break during system updates. Our solution is decoupled, meaning your data pipeline continues to run smoothly even when your Core system updates.



Higher Data Quality for Marketing

Raw APIs can dump duplicate or unorganized data into HubSpot. Our “Logic Layer” automatically structures the data for marketing teams and fixes formatting errors. This ensures your marketing budget is spent on reaching the right people with the right message.



No “API Taxes” from Core Vendors

Many Core providers charge significant licensing fees or metered costs for every API call you make. Our approach avoids these Core vendor fees entirely, ensuring your budget goes toward member engagement rather than third-party infrastructure fees.

Feature	Traditional “Heavy” API Integration	Our Zero Footprint Data Solution
Installation	Invasive: Requires installing software, agents, or databases inside the CU	Zero Footprint: Nothing installed
Network Risk	High: Requires Open Ports or VPN Tunnels	None: Air-Gapped / Outbound Only
Compatibility	Inconsistent: Often requires purchasing specific API modules; only works if the Core supports it	Universal: Works with 100% of Cores & LOS systems
Stability	Fragile: Often breaks during Core updates or patch cycles	Decoupled: Never breaks on “Patch Tuesday”
Core Vendor Costs	High: Risk of metered data fees or per-call licensing charges from the Core vendor	Zero: No metered data fees or licensing charges from the Core vendor

A Note on “Real-Time” vs “Zero-Footprint”

Clients often ask us, “Don’t we need a real-time API?”

While real-time APIs are powerful, they are often the wrong tool for marketing data.

- **The Cost:** Real-time APIs typically cost 3x-4x more and require a heavy IT footprint.
- **The Risk:** Direct APIs require a permanent, open connection to your most sensitive database.
- **The Value:** For marketing, “Real-Time” has diminishing returns. Sending a marketing email three seconds after revisiting the CU’s website offers little advantage over an hourly sync.

Our Promise: We deliver 99% of the **marketing value** at a fraction of the risk and ongoing cost.