HubSpot

Scaling the CRM for Organizational Growth

Maximizing HubSpot's Advanced Functionality & Flexibility for Growing Organizations

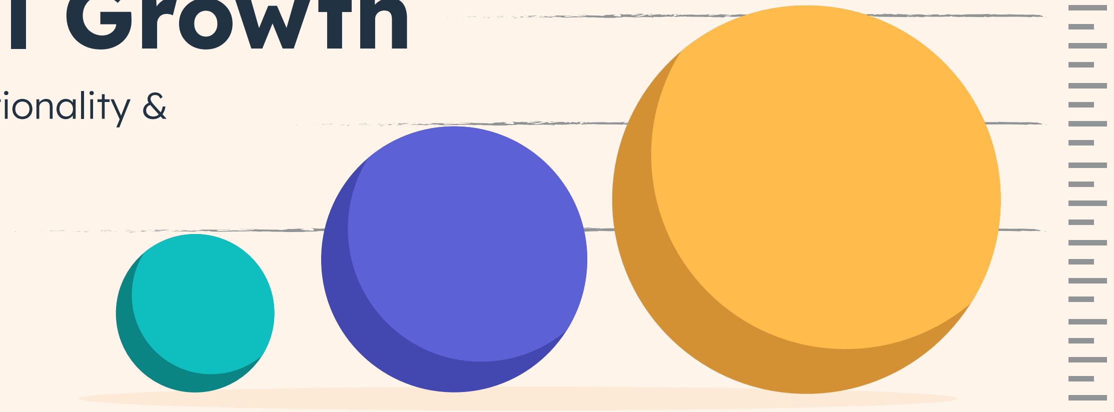


Table of Contents

Overview

Background:

Scaling organizations are in a phase of rapid growth. They make technology purchasing decisions to help them more easily make money, save money, and comply with regulations.

How HubSpot Can Help you Scale to Spin your FlyWheel

- CRM flexibility
- Power over your data
- Efficiency and productivity in doing more with less
- Compliance

Goal

Grow revenue faster than headcount.

How

Using an effective systems strategy for scaling and aligning teams to achieve efficient growth.

A growing number of brands are growing and scaling better with HubSpot CRM Platform.

ClearVoice
World Vision
SUZUKI
AccuWeather For Business
nubox
Newcastle University
Docplanner
Kahoot!
LIQUIDITY SERVICES
A Better Future for Surplus
Amplitude
KUNTZE
TutorOcean
SANDLER[SM]
Gymlib
inloco
AGICAP
Babbel
LIFE FITNESS FAMILY OF BRANDS
agoda
wayflyer

If you are contemplating HubSpot as your CRM, stop thinking about it and do it. We were a Salesforce-heavy organization and recently made the switch to HubSpot's Sales Hub Enterprise. It's an out-of-the-box solution that's easy to use and intuitive, while also offering powerful automation tools and robust reporting. With HubSpot, we can see the complete lifecycle of a customer from lead to close, and our teams can own the customizations needed to get their job done.

We have had 100% user adoption and couldn't be happier.

LegalZoom,
HubSpot Customer

LEGALZOOM

How We Aim to Help You Solve Your Scaling Challenges

In this resource, we present a well-structured framework and a detailed background on a specific customer named **"Breezy"** who is aiming to scale their operations with HubSpot.

We delve into the flexible HubSpot functionality that this customer leveraged to meet goals as they focused on gaining efficiency to grow revenue faster than headcount.

- ★ **Access Control:** To manage user access and permissions, Breezy needs a centralized system to provide visibility into user activities.
- ★ **Quoting Process:** As Breezy launches a new B2B business, they need systems that support this initiative, a key challenge will be effectively quoting and invoicing new bulk orders from their new B2B customers.
- ★ **Unlock ERP Data:** As Breezy is expanding their tech stack, they aim to increase productivity by centralizing data from their ERP system and accounting tool.
- ★ **Personalized CX:** Breezy aims to enhance customer journey and increase cross-sells by offering personalized recommendations based on customer interests as their product line expands to cover more smart devices.
- ★ **Advanced Reports:** Breezy aims to utilize the data they collect to enhance customer service, identify opportunities for their loyalty program, and strengthen their business.
- ★ **CRM Customization:** Breezy expands internationally (B2B & B2C) and needs to deeply customize their CRM to assign leads to appropriate sales rep.
- ★ **Data Quality:** Breezy wants to create an integrated tech stack through a data flywheel that begins with an integration strategy, focuses on democratizing data, and enables employees and systems to action data for results.
- ★ **Data Security:** Breezy needs to ensure compliance and security are top priority.

Take your insights to the next level with these examples and use cases from HubSpot Solution Architecture.

BREEZY THERMOSTATS

Meet Breezy: A Scaling Organization

Breezy, started 3 years ago as a B2C business selling smart thermostats. They have been using HubSpot as their main CRM for marketing, sales, and services. However, with recent growth and expansion into serving B2B customers, Breezy's executives are wondering how HubSpot can scale to meet their needs, recommend products, and gain deeper insights on where to invest for future growth. They aim to centralize their systems to get a complete view of their business.

Time on HubSpot
2 years

Previous Platforms
Four siloed CRMs

Hubs:

- **Sales Hub™**
- **Marketing Hub™**
- **Operations Hub™**
- **CMS Hub®**
- **Service Hub™**

*Example Case Study

Challenge

Breezy worries HubSpot cannot achieve:

- A centralized system to provide visibility into user activities.
- Quoting and invoicing new bulk orders from their new B2B customers.
- Centralizing data from their ERP system and accounting tool.
- Increase cross-sells by offering personalized recommendations
- Loyalty Program & Lead Assignment
- Data Quality Automation

Solution

With our strategies we'll demonstrate how to:

- Manage Users and Teams with robust capabilities and UX at your fingertips.
- Generate Custom Quotes to reference Custom Object Data in HubSpot
- Integrate ERP and Billing Information Seamlessly
- Offer Mass-Personalization to Customers
- Develop a Strong Loyalty Program in HubSpot
- Automate and Routinely Clean Data

Breezy's Plan for Scaling Operations with HubSpot

ACCESS CONTROL
Slides 9-12

- **Goal**
  - Breezy needs to efficiently manage system controls for growing headcount
- **Solved with:**
  - Users & Teams
  - Admin Permissions
  - Single Sign-On

QUOTING PROCESS
Slides 13-17

- **Goal**
  - Breezy needs an effective quoting & invoicing process for expanded product lines
- **Solved with:**
  - Automated quote creation
  - Integrations with DealHub & Quickbooks

UNLOCK ERP DATA
Slides 18-20

- **Goal**
  - Breezy needs a central view from multiple systems
- **Solved with:**
  - Customized CRM record layouts
  - Native & Custom Integration capabilities

PERSONALIZED CX
Slides 21-25

- **Goal**
  - Breezy knows great CX leads to accelerated revenue growth
- **Solved with:**
  - Product qualified leads using Custom Behavioral Events
  - Personalized messaging

ADVANCED REPORTS
Slides 26-30

- **Goal**
  - Breezy needs insight into which initiatives drive results
- **Solved with:**
  - Unified Data Model Reporting
  - Customer Journey Analytics
  - Custom report calculations
  - Easy Business Intel. Exports

CRM CUSTOMIZATION
Slides 31-34

- **Goal**
  - Breezy needs to decrease friction in marketing & sales processes
- **Solved with:**
  - Tailored experience by team
  - Multiple sales pipelines
  - Customized record layouts including UI extensions

DATA QUALITY
Slides 35-38

- **Goal**
  - Breezy knows decision quality & CX mirrors data
- **Solved with:**
  - AI powered duplicate management
  - Automated data formatting

DATA SECURITY
Slides 39-41

- **Goal**
  - Breezy needs to ensure compliance and security are top priority
- **Solved with:**
  - Memberships
  - Custom Domains
  - GDPR

An **Access Control Strategy** that helped a B2B/B2C Thermostat Company Scale

Business Objective

Manage system controls for growing teams

Business Impact

Operations processes and headcount remains stable while other areas of the business may be growing

Customer Story

As the Breezy business grows, their headcount grows, and they need a way to centrally manage their users and their access management and what those users have permissions to do, and visibility to know what these users are doing. With HubSpot, they can:

Key Efficiencies to Manage Employees at Scale

- Create user profile, permission sets and teams to assign each user to a team with their appropriate permission level.

Ease of Provisioning with Single Sign On & Users API

- Set up SSO to give users one account for across all supported business apps in your tech stack.

Maintain Compliance Tracking Access via Audit Log

- Monitor changes via API with Private App Logs to review for errors and mitigate potential data loss.
- Centralise audit log of user actions => view and filter various user actions that have taken place in the portal.

Key Efficiencies to Manage Employees at Scale

Goal: Scaling Access Controls & Data Governance

Management Tools for Data Access Governance

Effortless Deployment

Ability to Scale

1 User Presets

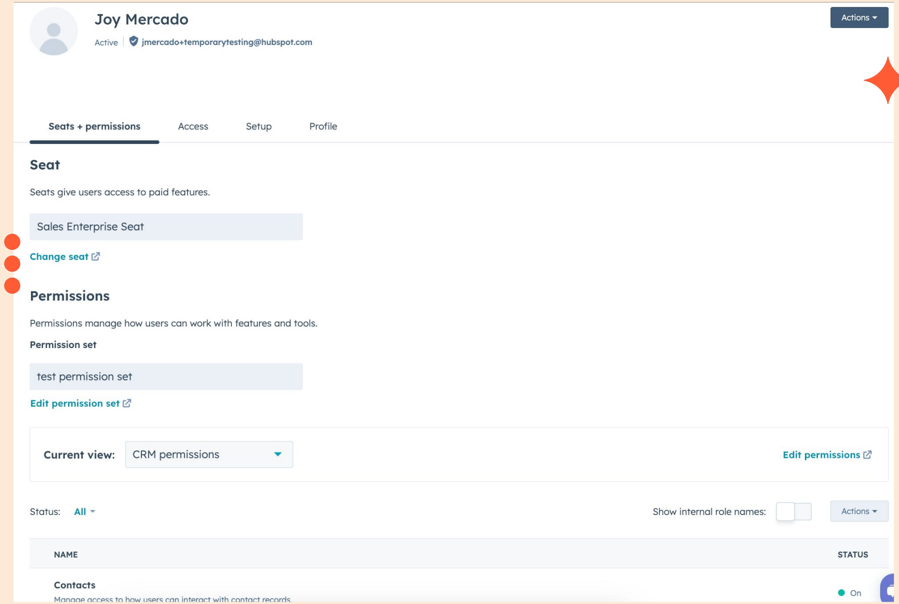
- Dynamically apply default presets for B2B Sales Reps and B2C Call Center Reps to standardize each teams' default user experience.

Example:
Set a Default Homepage of "Calls" for Call Center Team and a Default "Call Metrics" Dashboard

2 Permission Sets

- Apply permission sets or roles to users at scale programmatically via the API (discussed in next slide).

Example:
Onboarding a new group of users en masse can be done with ease with saved permission sets that standardize access controls across large groups of employees.



3 Hierarchical Teams

- Organize groups into teams to help partition access between B2B/B2C and/or regions to develop reporting efficiencies.

Example:
If you want to measure performance and goal attainment it's easier than ever with Teams to manage on auto-pilot.

4 Limit Edit Access

- Set property access rules that can limit that property to super admins or a specific team or users and/or keep it view only.

Example:
If a Super Admin has a process in HubSpot for compensation that relies on a property - they'll want to make sure they can enforce rules to disable access to certain or all employees.

Ease of Provisioning with Single Sign On & Users API

Goal: Ease Of Automated Onboarding & Offboarding

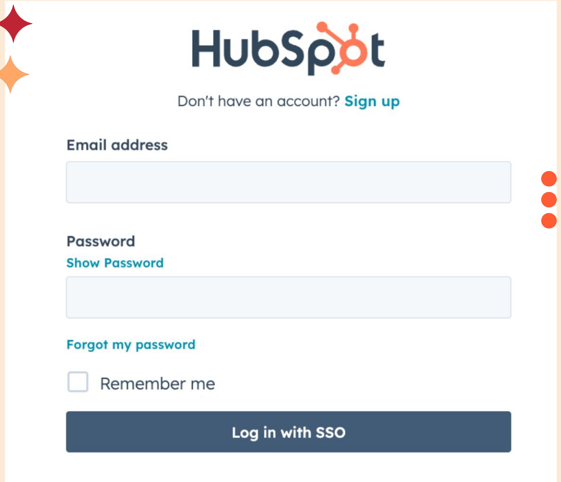
Streamlined Automated User Account Control Options

Simplified Authentication

Integrated Provisioning

SINGLE SIGN ON (SSO)

CUSTOM APIS



Create • Edit • Delete

Users via HubSpot API

```
curl --request POST \
  --url https://api.hubapi.com/settings/v3/users/ \
  --header 'authorization: Bearer YOUR_ACCESS_TOKEN' \
  --header 'content-type: application/json' \
  --data '{
  "email": "newUser@email.com",
  "roleId": "100",
  "primaryTeamId": "101",
  "sendWelcomeEmail": true,
  "secondaryTeamIds": [
    "102"
  ]
}'
```

1 | Single Sign On (SSO)

✔ *Simplified Access with Consolidated Credentials*

✔ *Automated Creation and Management of HubSpot Users Using Okta (SCIM)*

2 | HubSpot User Provisioning API

✔ Sync New Users from Internal System Database

✔ Modify Access Permissions Directly via API

✔ Remove/Offboard User Accounts via API

Maintain Compliance Tracking Access via Audit Log

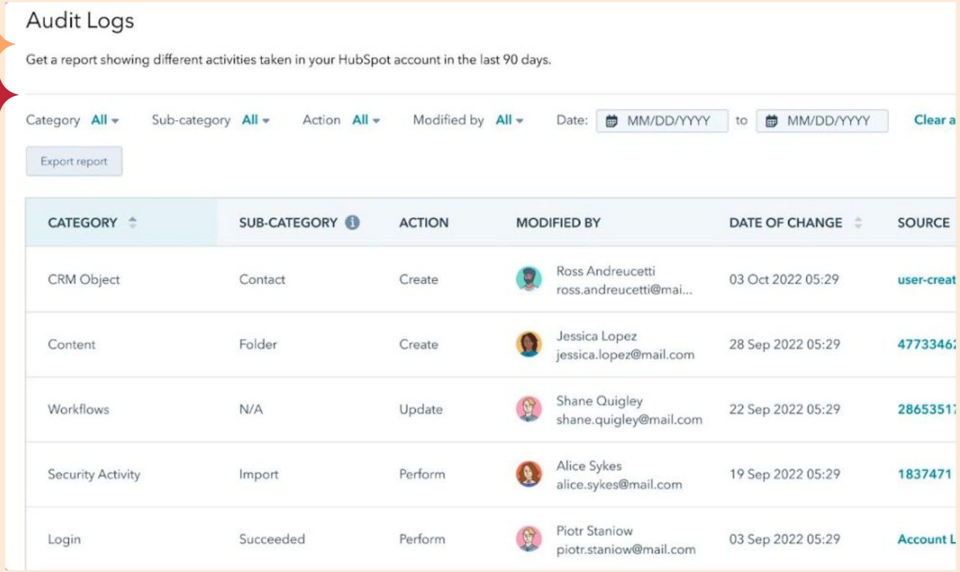
Goal: Stay in Compliance and Generate Audit Reports with Ease

1 Audit Log

- Enhance Compliance and Access Risk Management with User Action Monitoring and Analysis to increase the visibility of the activities happening in your portal
    - **Improved Troubleshooting for Admins:** Super Admins can now easily determine which user performed a specific action and the date/time it occurred.
    - **Third Party Compliance Requests:** There is also an export report option if required for further analysis or to provide details to external third-parties.

2 Private App Logs

- Monitor the Activity of your Private App Authenticated API Requests in HubSpot or Export for Analysis
    - **Proactive Monitoring for Potential Data Loss** The Private App Log is an efficient tool that allows admins to monitor API performance and any potential issues to proactively mitigate data loss.



Audit Log Tool | *Centralized Audit Log Available with any Subscription at the Enterprise Level*

A **Quoting Process** that helped a B2B/B2C Thermostat Company Scale

Business Objective

Create an efficient quoting and invoicing process that scales with growing product lines

Business Impact

Empower reps to build and share complex quotes quickly while reducing the number of manual hand-offs to other teams

Customer Story

As Breezy launches a new B2B business, they need systems that support this initiative, a key challenge will be effectively quoting and invoicing new bulk orders from their new B2B customers. With HubSpot they can:

Personalize Quotes & Invoices:

- Quotes can be personalized to manage the business growth needs from Breezy. CRM data can be added using to quotes or invoices using the Quotes templates features.

Automatically Manage Quotes

- Auto-generate quotes using custom coded actions in Workflows or define CRM cards to automate quote management. Automation can used to send reminders and assigns tasks for follow up regarding invoices or quotes.

3rd Party Apps / Custom Integration

- Apps like DealHub can help you automate even further your processes. In addition, a custom integration can easily be develop to integrate with other systems.

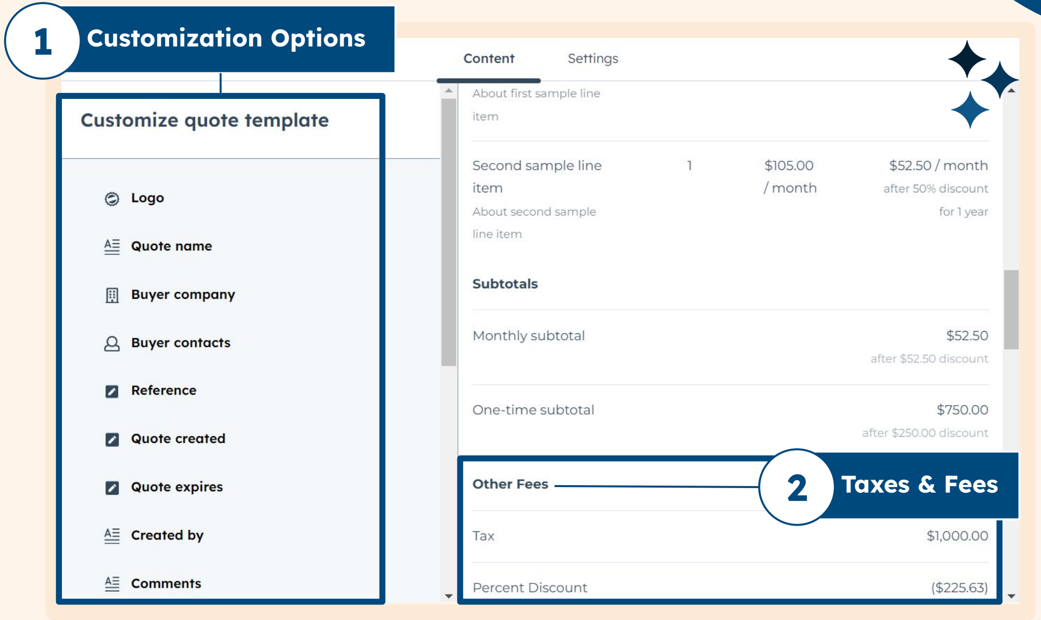
Personalize Quotes & Invoices

1 Personalize Quotes with CRM Data

- Use the Quote Tool to personalize your template using data from your CRM. Such as the buyer company and contact; the payments definition can be defined.
- For advanced customization, modify the quote template in the design manager to display custom object data ([see below](#)).

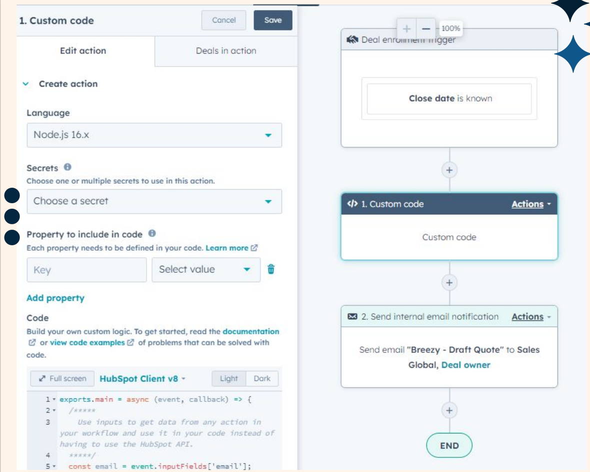
2 Add Extra Quote Level Benefits

- Add discounts, taxes, and additional fees can be calculated on each quote and configured directly via our API.
- Add and integrate payment links in the quote



HubSpot Quote Editor | *Customize the Quote Template in the UI or with HubL in the Design Manager*

Automatically Manage Quotes

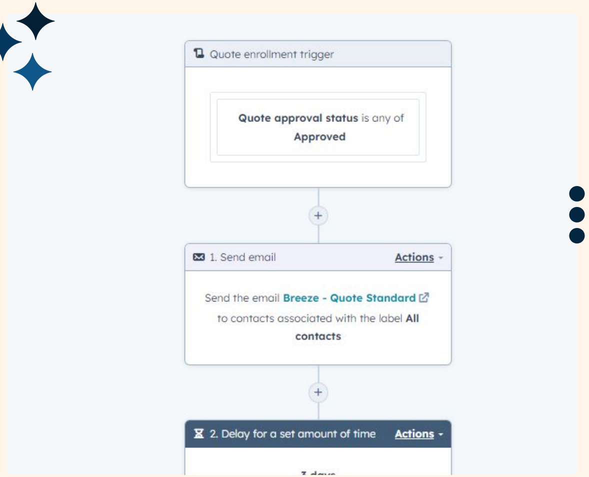


Automated Quote Generation via Custom Code

1 Use Custom Coded Actions to:

Auto-generate quotes using custom coded actions and the HubSpot Quotes API.

Example:
A quote can be auto-generated when a Deal has reached a specific stage. An email can then be sent to an internal user for them to take action on the deal and quote.



Build Custom Quote Approval Workflows

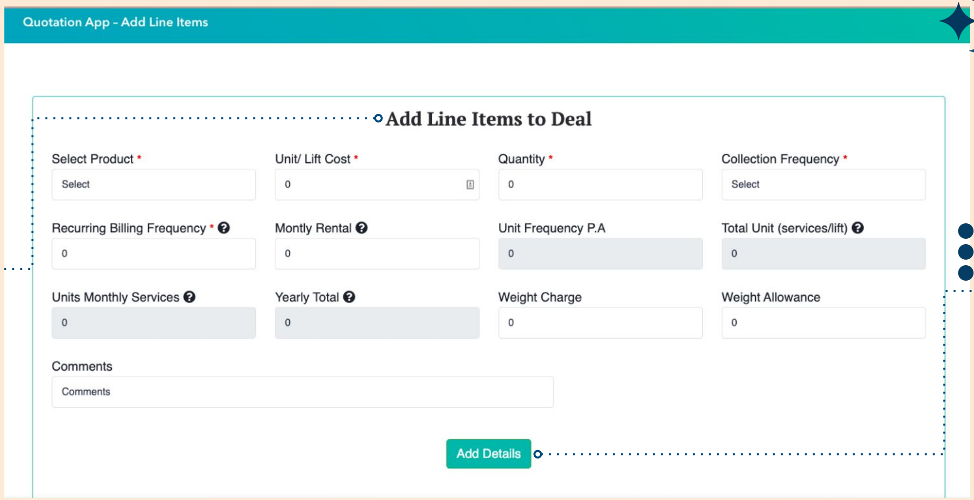
2 Create Quote Approvals:

Use workflows to automatically send reminders and assign tasks for follow-up.

Example:
If a quote has been approved an email can be sent to a customer for them to review and sign. Then if after sometime there is not reply a new follow up email can be sent.

HubSpot

Use CRM Cards to Automate Quote Management



1 Customize Line Item Inputs

- Use a custom CRM Card to render and style the inputs in the order to help train your reps so they can easily input sales orders.
- Collect all the custom line item data needed with HubSpot's flexible custom line item properties.

2 Use CRM Cards to Create a Deeper Level of Customization

Use CRM cards to customize the interaction with Quotes, Deals or Line Items. They are also useful when you want information from other systems to appear/surface on HubSpot contact, deal or ticket records.

Example:
Sales reps want to quickly manage adding line items to their deals. You can build a custom CRM Card to manage the items faster and add them to the deal. This can be even more customized by adding an action that can create an custom quote directly from the CRM card.

3 Send Line Items via API

- Set a button on your CRM Card to send the Line Items via API and have them visible on the associated Deal record.
- Easily navigate through your added Line Items so you can complete and send the quote with all the context that your buyer needs.

Deeper Quote Personalization with Third Party Tools

Use a 3rd Party App to Extend Your CPQ Process

DealHub (a 3rd Party App) can lead your sales reps through the configuration process using a unique configuration process to ensure optimal product fit.

Example:
Sales Rep don't know what are the new products that can be use in cross/selling efforts. *Dynamic Playbook* from **DealHub** can help trigger automatically, upgrade, upsell and cross-sell suggestions.

Highly Configurable

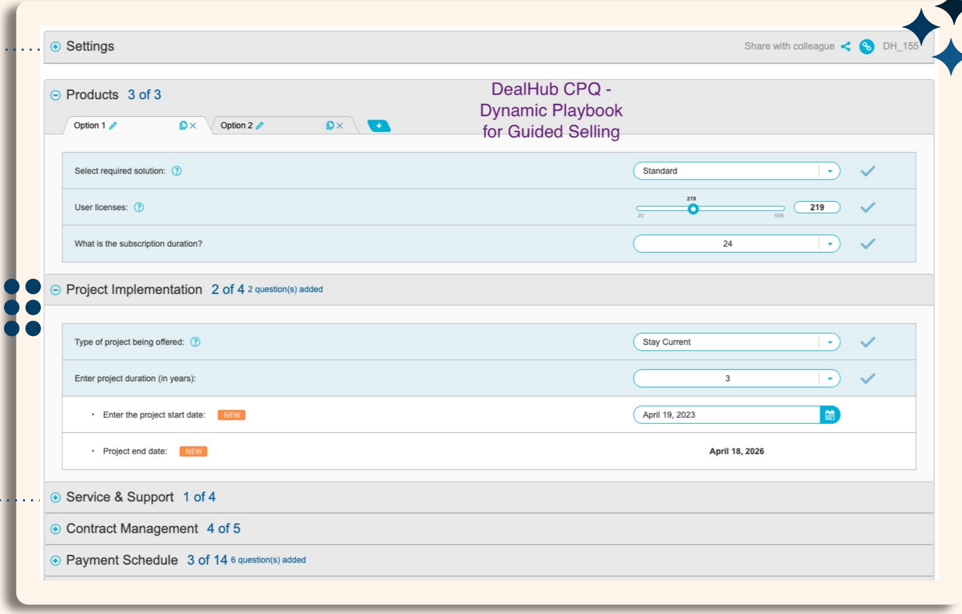
Cross-Sell Suggestions

Primary Integration Features

Digital DealRooms
- *A centralized real-time sales hub for important details, files, and updates.*

Subscription Management
- *Automatically create renewal opportunities*
- *Track and manage current customer subscriptions, additional products, and amendments*

Approval Workflow
- *Ensure consistent pricing and discounting across the organization.*



Deal Hub CPQ | *Multiple Sales Playbooks and Scenarios to Suit any Stage in the Sales Cycle*

A **ERP Data Strategy** that helped a B2B/B2C Thermostat Company Scale

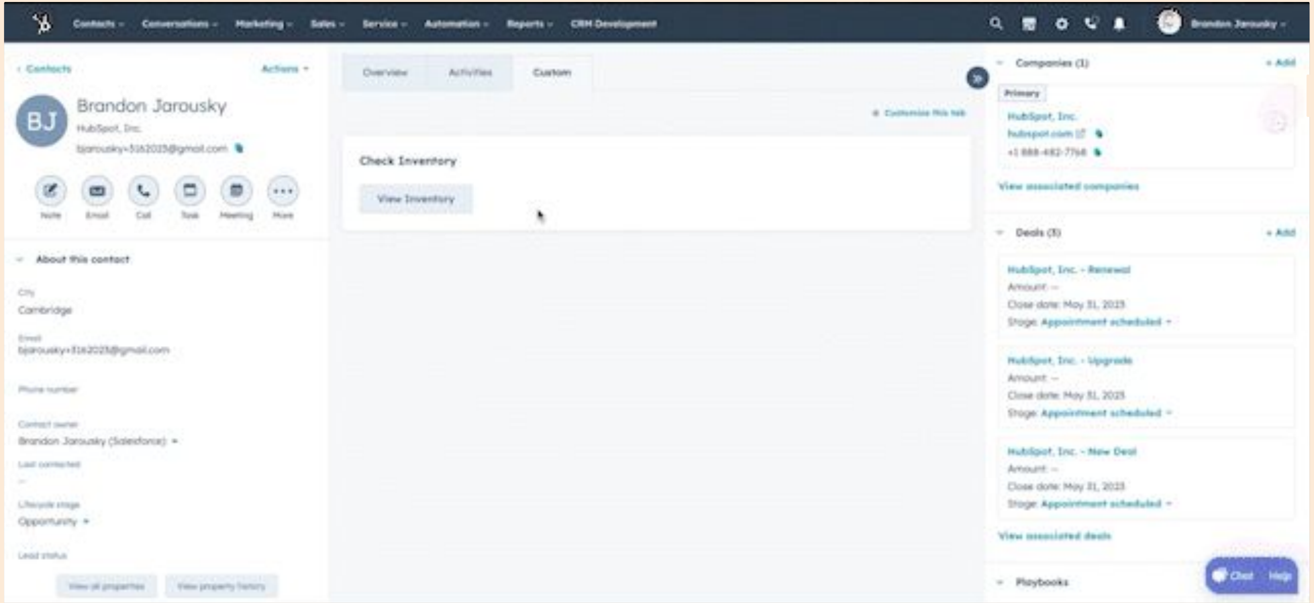
Business Objective	Centralized view of data that may span across multiple systems
Business Impact	**Improve team productivity and customer experience**
Customer Story	As Breezy is expanding their tech stack, they want their teams to have more visibility to better increase their productivity and centralize this info in one place. They have data in their ERP system and data in their accounting tool that are not being leveraged yet. With HubSpot they can:

Display Third-Party Data on HubSpot Records

- Create a custom UI card on product records to surface the ERP data, for example show inventory information to the corresponding product, a graph on the product performance
- Create a custom UI card for contact records to surface accounting info, like invoice status/ manage approvals

Display Third-Party Data on HubSpot Records

Custom CRM Card | *External Inventory Checker with an iFrame Button on a Custom CRM Card*



Build Clean UX on Top of HubSpot Records to Extend the Flexibility of your CRM

Easily Check Inventory from an ERP to Increase the Productivity of your Reps

1 Use 3rd Party Data within HubSpot

- Use Custom UI Cards to display third-party data and reduce the need for reps to navigate between different systems to increase their productivity

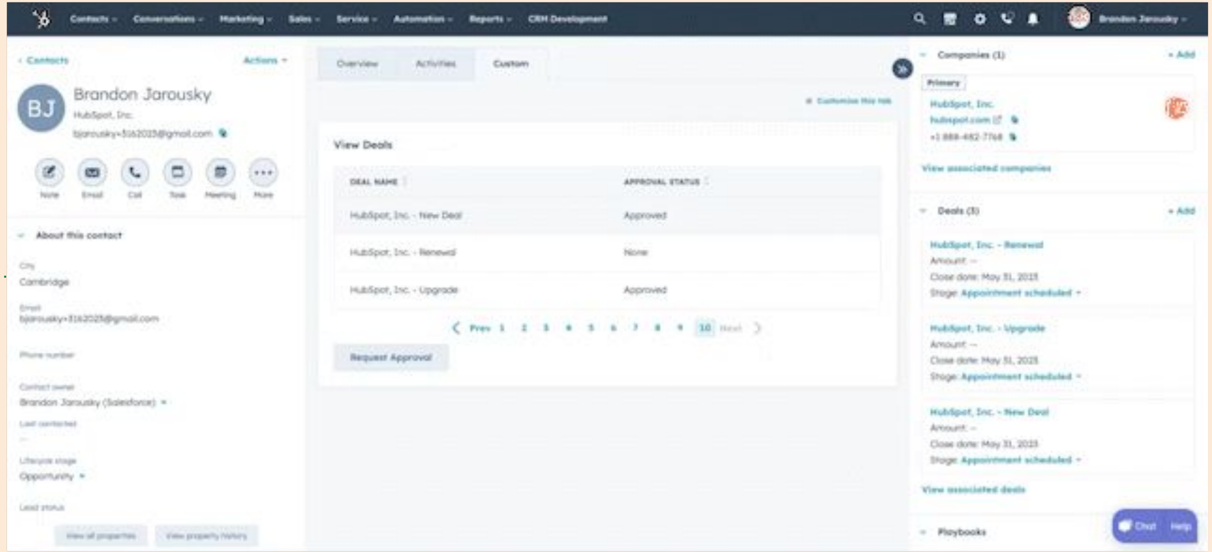
2 Consolidate Single Source of Truth

- Make HubSpot into the central hub for users, even though the teams may utilize many different systems

HubSpot

Create Customized Rep Driven Experiences

Custom CRM Card | *At-a-glance view of Associated Deals to Submit for Approval with an Index Table Embedded*



Build Clean UX on Top of HubSpot Records to Extend the Flexibility of your CRM

Use Custom Buttons to Take Action in the CRM

1 Create Custom UX

- Use Custom UI Cards to create tailored user experiences.
- For Example, showcase associated deals in a index table view.

2 Better Handoffs

- Increase productivity by reducing manual handoffs between teams
- For Example, provide full context on deals in a single view.

3 Create Custom Elements

- Create buttons and forms that can trigger specific business processes.
- For Example, a custom button “Request Approval” that automates a process.

A **Personalized CX Approach** that helped a B2B/B2C Thermostat Company Scale

Business Objective

Create a deeper customer experience personalization as product lines and customer base are growing (segmenting audiences on their behaviors)

Business Impact

Identify opportunities for upsell/cross-sell leading to increased revenue

Customer Story

As Breezy expands their products and services and looks to introduce cross-sell/upsell opportunities, they have started to focus on offering a more personalized customer experience. This includes recommending products that match a customers' interests and introducing a more scalable way to track service subscription information. With HubSpot they can:

Track Customers' Product Interest

- Use Custom Behavioral Events to track page views and website clicks that are associated with specific product categories
- Dynamically serve recommended products using product relationships defined in HubDB

Personalize Customer Communication at Scale

- Use programmable emails to dynamically fetch recommended properties using a customer's past purchase history
- Use Smart Content to personalize content based on viewer categorization

Store, Automate and Report on Software Subscriptions

- Track recurring subscription data using a custom object with important information, such as start date and end date, and use that data to trigger workflows and build reports

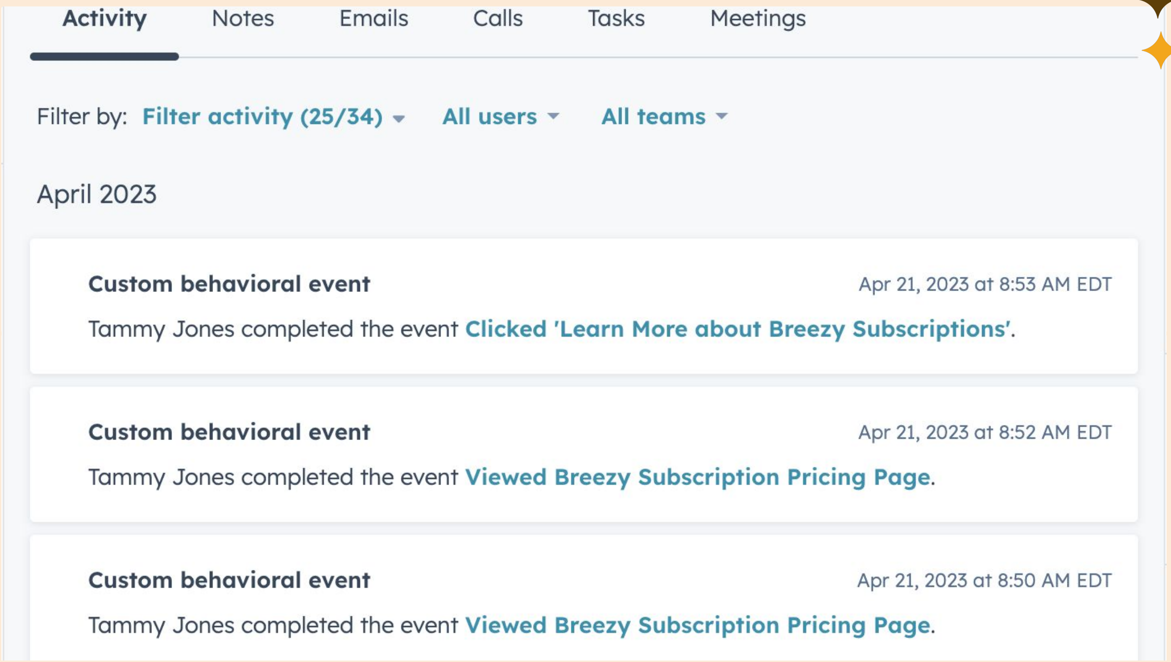
Track Customers’ Product Interest

1 Track Pages & Clicks

- Create Custom Behavioral Events for page views & clicks associated with particular products to track your users behaviours
- For Example, fire a CBE when a customer clicks a more info button on a product.

2 Leverage in Lists

- Incorporate custom events into list building to better segment your customers
- For Example, add filters for a list to include CBE completion activity.



CBE | *Custom behavioral events appear on a contact timeline and have various uses across the HubSpot platform.*

3 Trigger Automation

- Trigger automation based on custom events to capitalize on customer interest in the moment
- For Example, trigger a workflow to email a customer immediately after a CBE click.

4 Customer Journey

- Report on event completions over time, and include custom events as interactions in Customer Journey Analytics to unlock new insights and trends
- For Example, show each touchpoint that resulted in a purchase.

Define Related Products for Recommendations

1 Capture Product Details

- Leverage HubSpot's product object to capture product details associated with each Deal

2 Capture Product Category

- Create custom Product properties to capture product category, such as device type, subscription level etc… and recommended products.

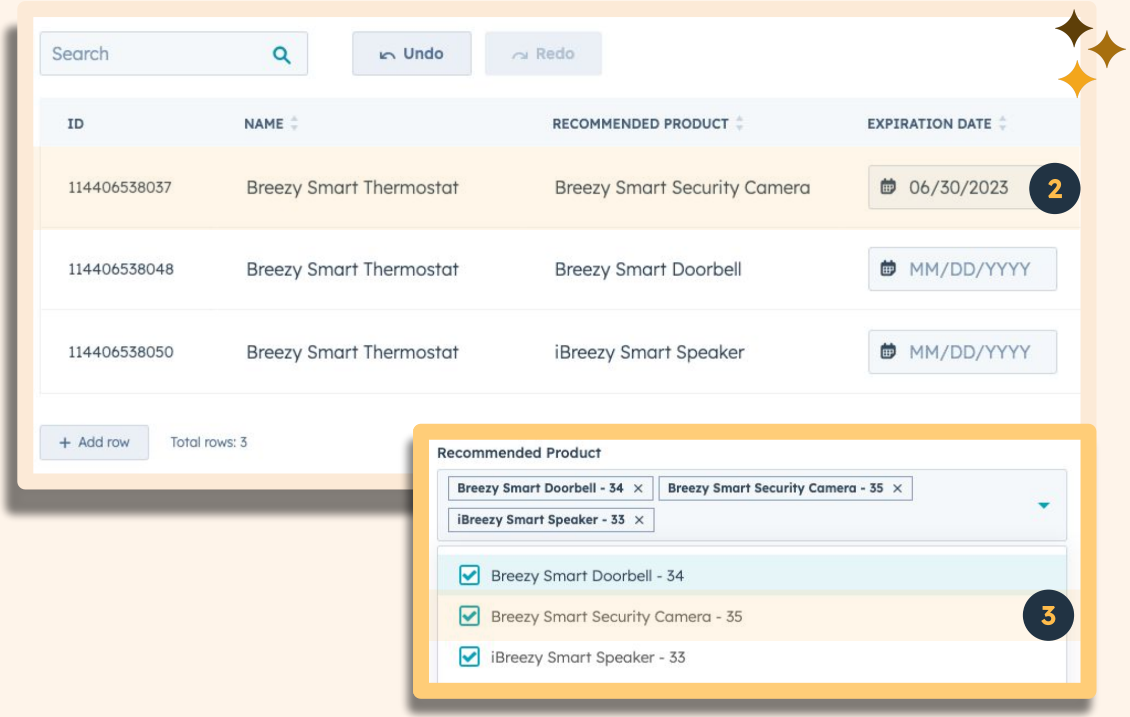
3 Store Additional Data in HubDB

- Use HubSpot's HubDB to store all product recommendations information

4 Develop Custom Reports

- Build custom reports on product purchase history, including performance by product name & segment, products purchased per transaction, and products purchased by customer

HubDB | *A view showing additional product level information in a HubDB table for reference within other parts of HubSpot.*



Personalize Customer Communication at Scale

Segment Your Customers based on their behaviours (i.e Custom Behavioral Events, purchases..) and send them personalized **Targeted Marketing Emails**

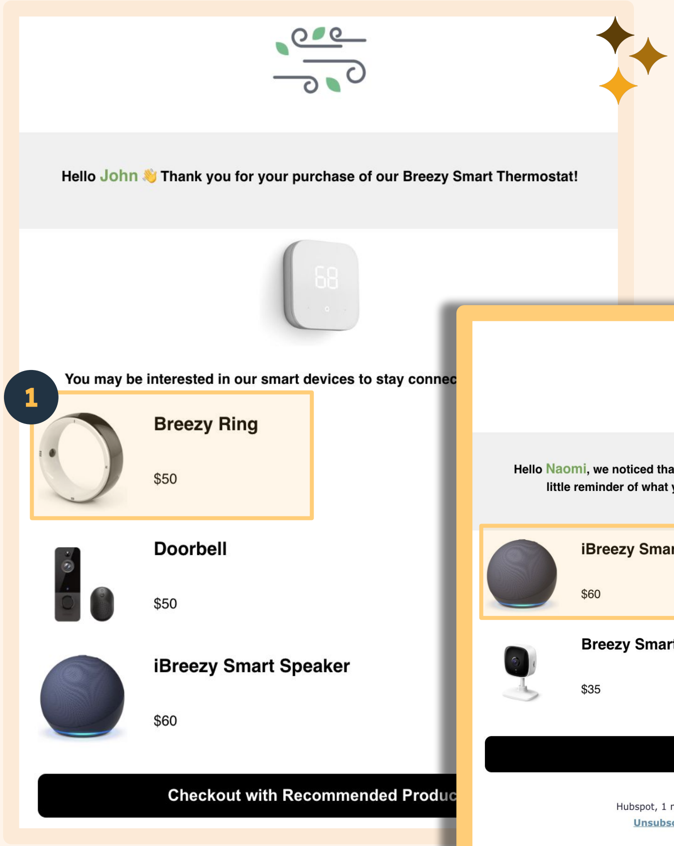
1 Programmable Email

- Use Programmable Email to recommend potential Cross-Sell that matches a customer's previous purchase by querying CRM data.

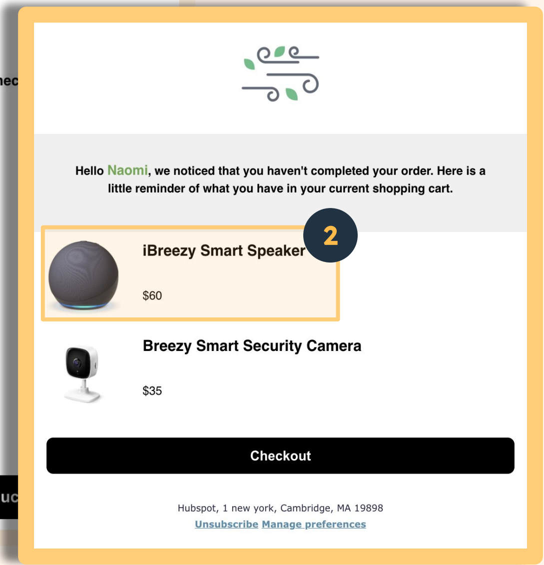
2 Dynamic Cart

- Build a Dynamic Cart to remind customers about their current cart items with custom modules or Programmable Email.

Programmable Email | *Create your own*

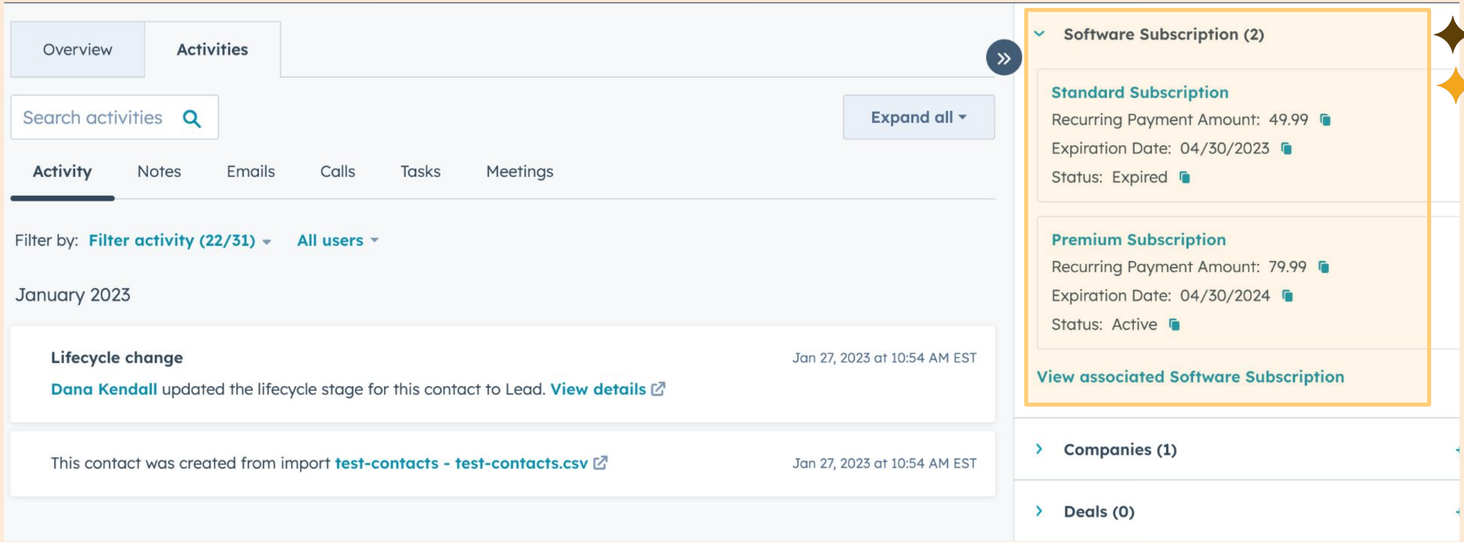


Abandoned Cart | *Create your own*



Manage Software Subscriptions

Custom Object Record Associations | *A Contact record showing the corresponding software subscriptions (which is a custom object)*



1 Track Subscription Details

- Manage subscription types, levels, start dates, and end dates using a custom object to keep track and have visibility on every user's subscriptions.

2 Better Subscription Reports

- Report on expiring subscriptions, upgrades, subscription length and more to understand how your business is performing.

3 Automate Your Renewals

- Manage subscription expirations and renewal processing automatically with workflows to enhance your customer experience.

An **Advanced Reports Strategy** that helped a B2B/B2C Company Scale

Business Objective

Leverage customer data for business intelligence

Business Impact

Identify areas in your processes that may be inefficient. Identify additional business opportunities that are the most effective uses of your team's time to pursue.

Customer Story

As Breezy is tracking and collecting more data, they want to get insights from this data, identify gaps and new opportunities to better service their customers (especially for their loyalty program) and empower their business. With HubSpot they can:

Business Impact

- Use custom report builder to cross multiple objects and report on them like checking the source of their customers grouped by product category they purchased
- Use Datasets to create more advanced reporting with custom expressions and conditional logic for example: *(Shipment Duration, Customer Loyalty, Product Performance & Insights)*

Optimize Campaigns

- Use Snowflake to unlock more insights through queries directly on their CRM data and visualize this data on Looker or Power BI

Budget Decisions with Better Certainty

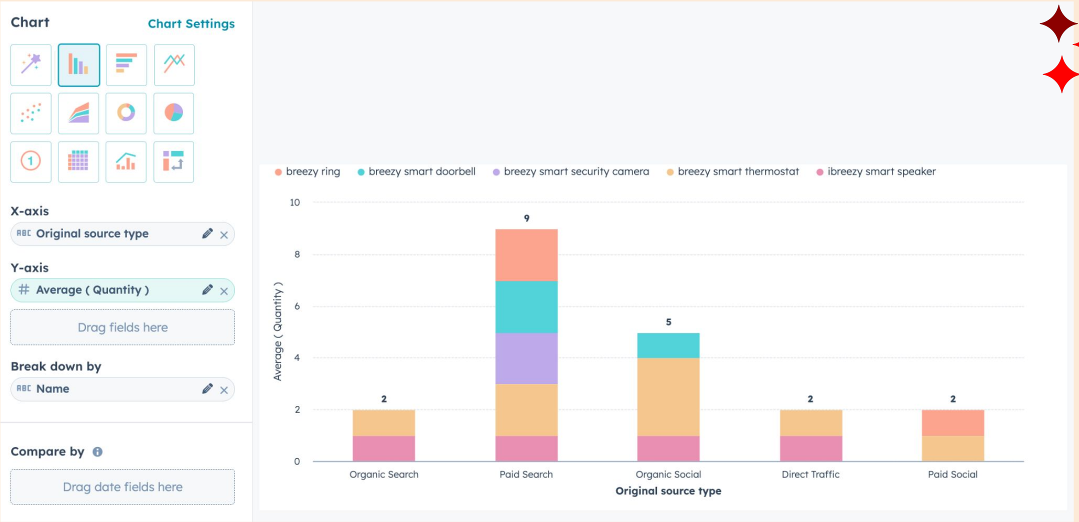
- Use Customer Journey Analytics to identify pain points and opportunities in the customer experience journey across multiple touchpoints *(e.g. page views, cart status, and checkout)*

Custom Reports Tool Builder

Use multiple data sources from different objects in reporting to get more meaningful insights

1. Harness the custom report builder's power to drive business impact. Cross and join multiple objects together to gather more meaningful insights.

2. **Example:**
Use Deals and Line items data sources together to analyze customer traffic sources by product categories. This example shows from where the customer are coming from and which products they are buying.



Reporting | *Custom Report Builder Tool Example*

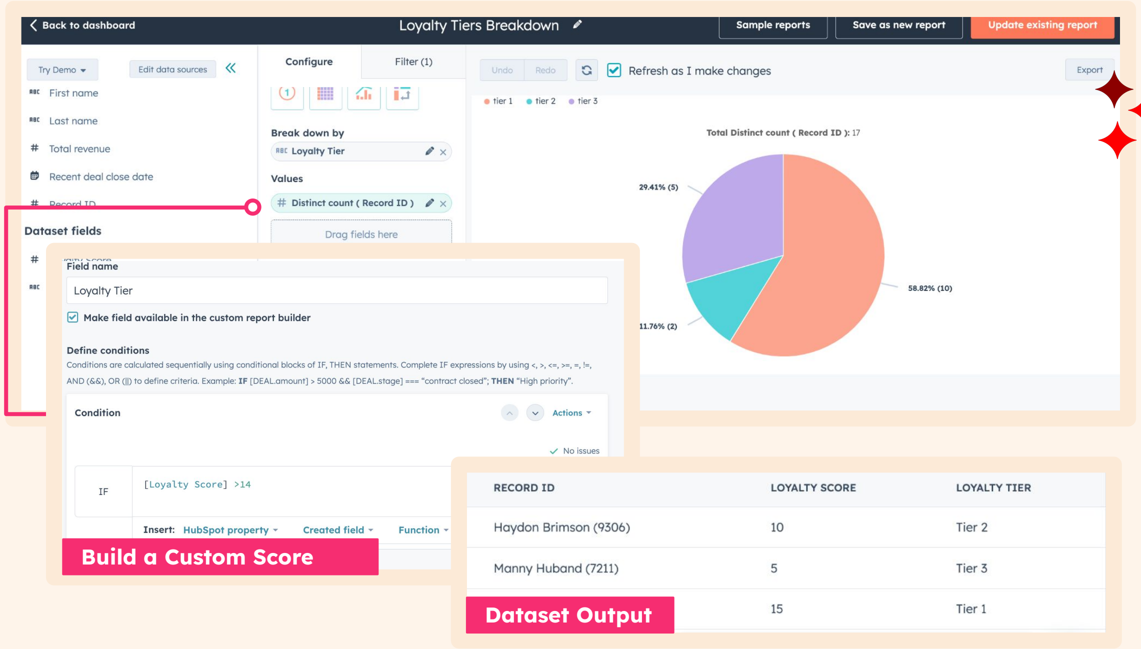
Datasets with HubSpot Reporting

Create advanced reporting with DataSets and leverage its calculations and conditional expression to extend HubSpot reporting capabilities.

For example, you can:

1. Define your own criteria to calculate a score that measure how loyal a customer is ***(i.e number of closed orders, total revenue, average # of website visits…)*** and use this score not just for reporting but for segmentation as well.
2. Report on new subscriptions (ARR and MRR) or calculate Churn Risks
3. Create a report that shows a breakdown of your product performance
4. Use time to calculate duration it takes for deal to move between stages or the duration an order takes to get shipped.

Dataset | *Datasets Report "Customer Loyalty"*

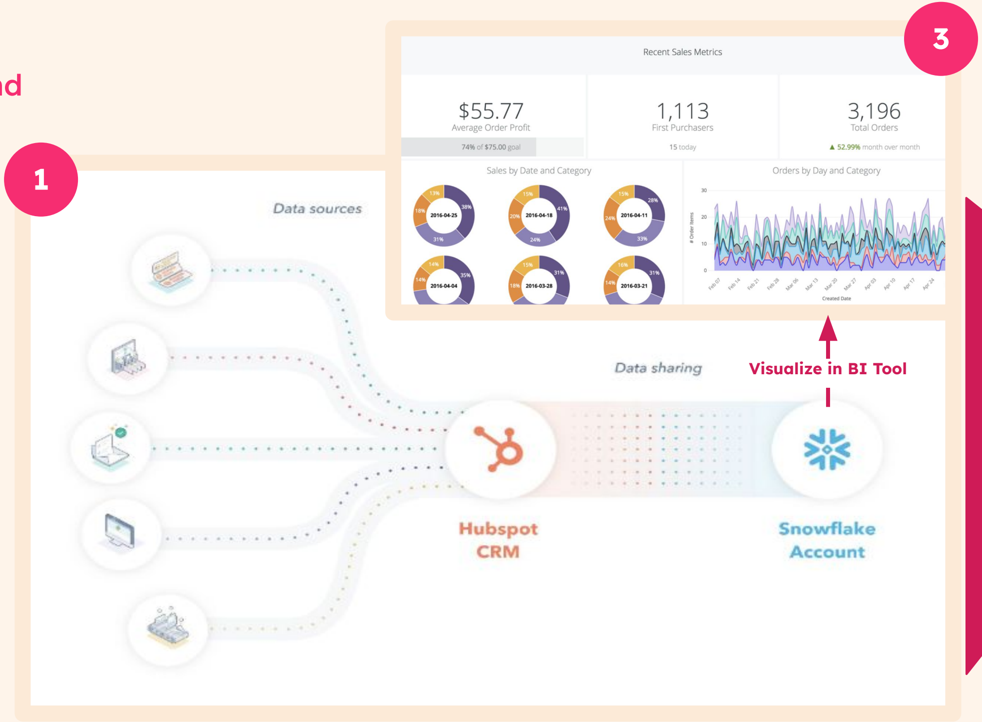


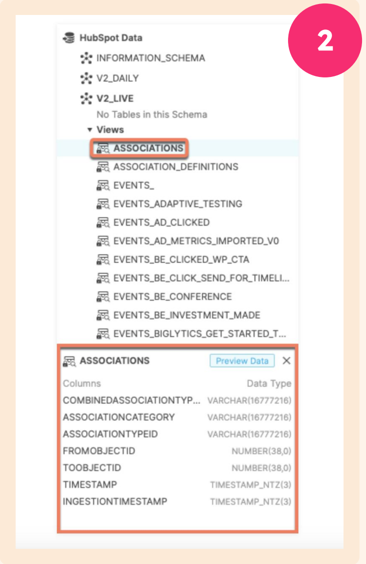
Maximize data insights with Hubspot CRM, Snowflake, and cutting-edge BI tools.

1 Accelerate your data transfer from HubSpot to Snowflake with the seamless, secure, and lightning-fast capabilities of Snowflake Data Share.

2 Write your own queries to unlock enhanced insights and drive faster decision-making as you scale your business to new heights.

3 Effortlessly combine and curate external data in your preferred data warehouse and BI tool like Looker, expanding the reporting capabilities beyond HubSpot.





Snowflake Data Share | *Access all your HubSpot data in Snowflake by running SQL queries.*

Multi Touch Points in Buyers Journey Using CJA

Driving Budget Confidence Through Customer Journey Analytics

1 Customer Journey Analytics

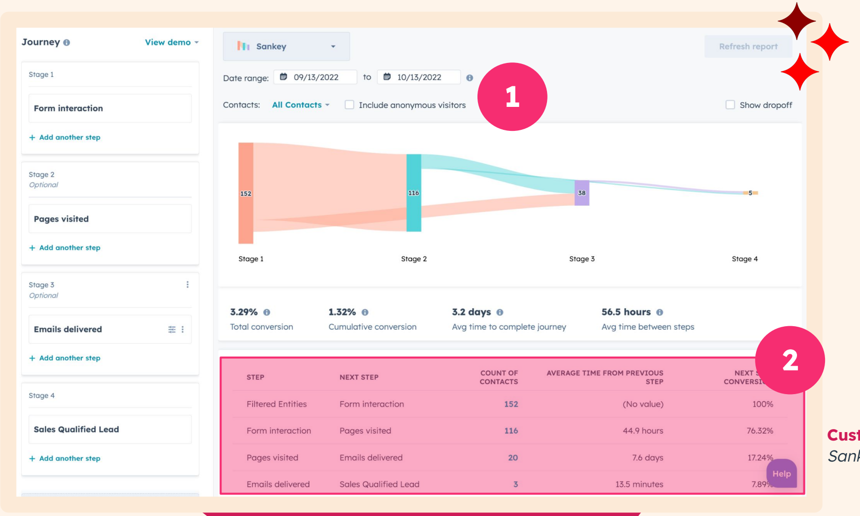
- Create a report with Customer Journey Analytics (CJA) to view the impact of every interaction a contact has with your business.

2 Analyze Touchpoints & Drop Off

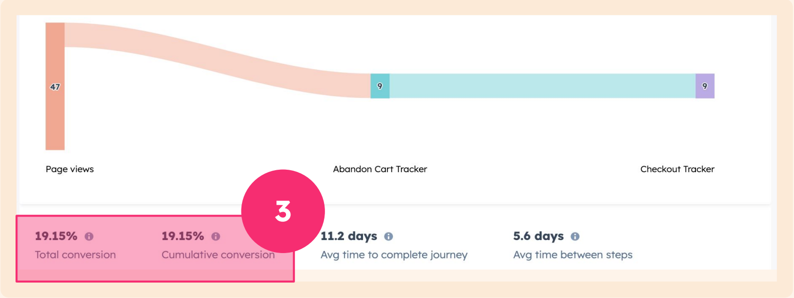
- Identify the touchpoints that work best for attracting customers to get better insights on what's working well and where to improve.

3 Measure Conversion Rates

- Use your Custom Behavioral Events in the Customer Journey Analytics and get the conversion rates between the custom steps of your customer journey



Customer Journey Analytics |
Sankey Flow Example of CJA



Customer Journey Analytics |
Using CBE in Journey Analytics

A **CRM Customization Strategy** that helped a B2B/B2C Company Scale

Business Objective

Tailor the CRM experience to each team's processes and needs

Business Impact

Decrease friction for sales reps working across different areas of the business

Customer Story

As Breezy serves both B2B and B2C customers and has two separate sales teams to correspond with each type. They are expanding internationally and want to ensure the correct leads are assigned to the appropriate reps. HubSpot provides the flexibility to customize the CRM to empower both sales teams.

Pipeline Automation & Create Logic

- They can create a different pipeline for each type with its own custom stages.
- On record create, sales reps can use conditional logic to show properties based on other property values.

Customization Use Cases

- They can customize the properties that will be shown on the deal pipeline
- Create a view for each team to customize tabs, sidebars, and card information. It enables hiding/showing properties on the left pane of the deal record based on the accessing team.

Automation

- Use custom code action in workflow to create a custom lead rotation (i.e. Territory, etc).

Pipeline Automation and Create Logic

1 Create Multiple Deal Pipelines

- Create multiple Deal Pipelines with read access permission on Pipeline and Stages to better manage and organize your deals.

2 Add Conditional Logic on Create

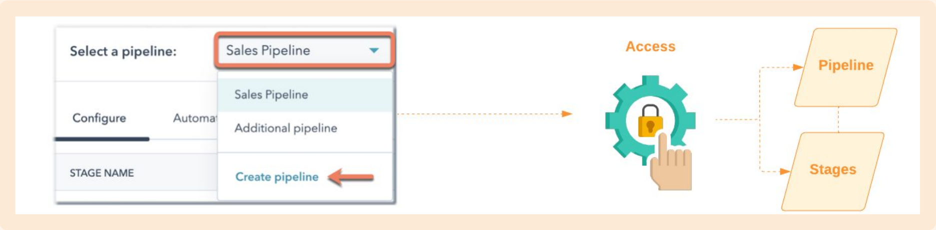
- Use Pipeline dynamic based conditions to create to give more flexibility when creating a Deal.

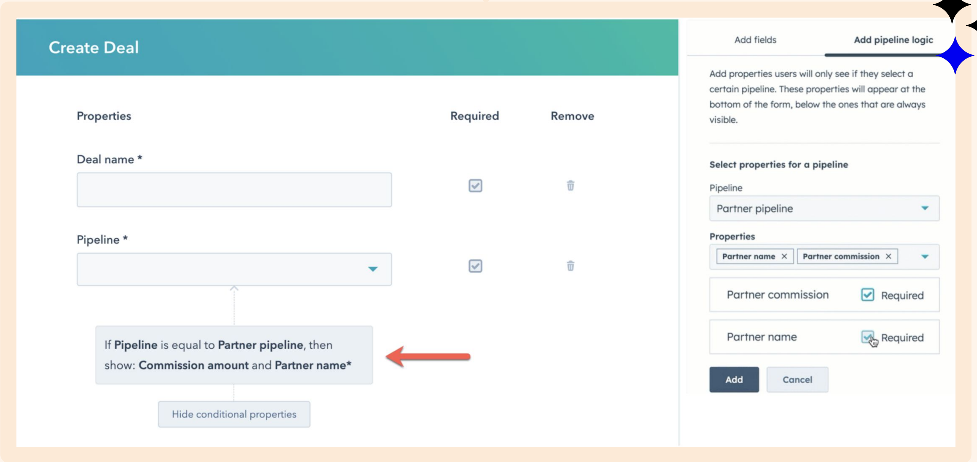
3 Customize Properties by Deal Stage

- Set up Stage based properties that are prompted when updating Deal Stage to make sure the Deal info are clean and always updated.

4 Customize the Deal Card

- Customize the Deal card of the pipeline to show only the relevant information to your teams.





HubSpot

Customization Use Cases

2 Middle Pane

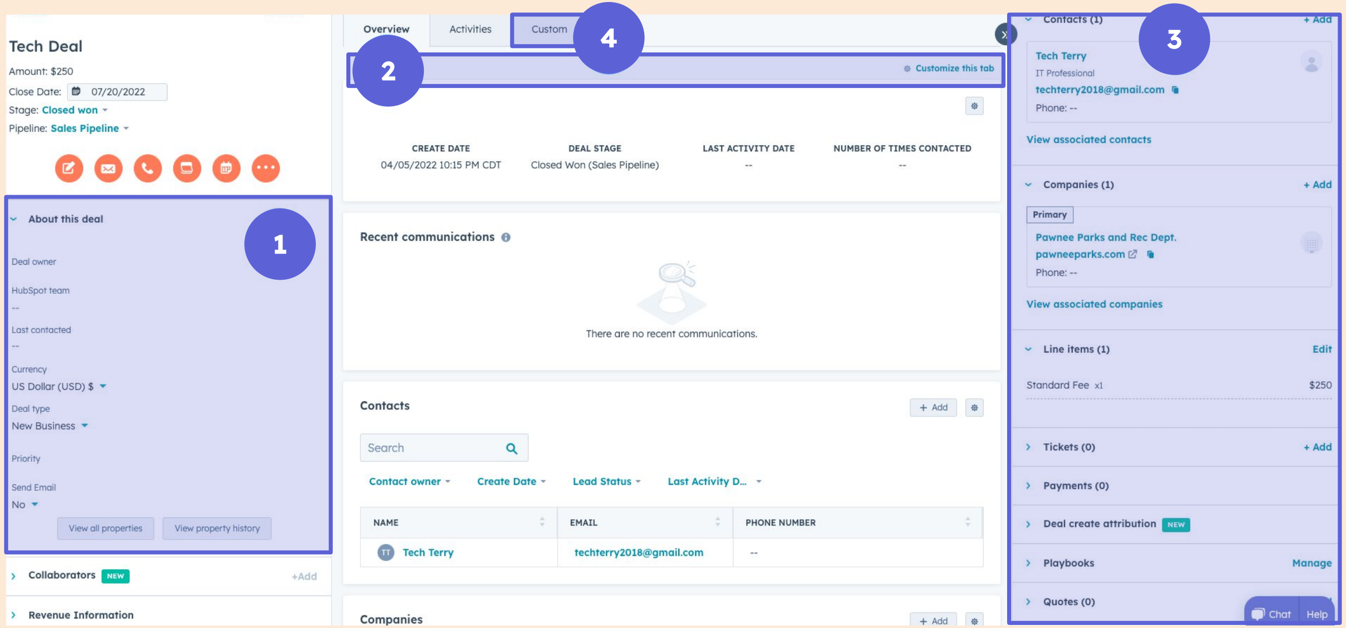
- Use the Middle Pane to Display a summary of record information from properties, associated data and activities
- **For Example,** customize the associated data that appears in the table.

3 Right Sidebar

- Use the Right SideBar to visualize associated data, attachments and integration cards.
- **For Example,** show a custom card iFrame to an external tool.

1 Left Sidebar

- Use the Left SideBar to manage record properties categorized by team sections for example
- **For Example,** organize properties and views by function or role.



4 Custom Tab

- Use the Custom Tab to Extend the CRM UI capabilities through custom data presentation, user processes and reports
- **For Example,** on the Custom tab have a user input data to an external system.

Customizable UX | *Customize how each Sales Team/User visualizes a Deal based on Record Customization features*

Automation

1 Custom Coded Actions

- Use Custom Coded Actions to programmatically execute complex business processes and increase efficiency.

Today's Date Example

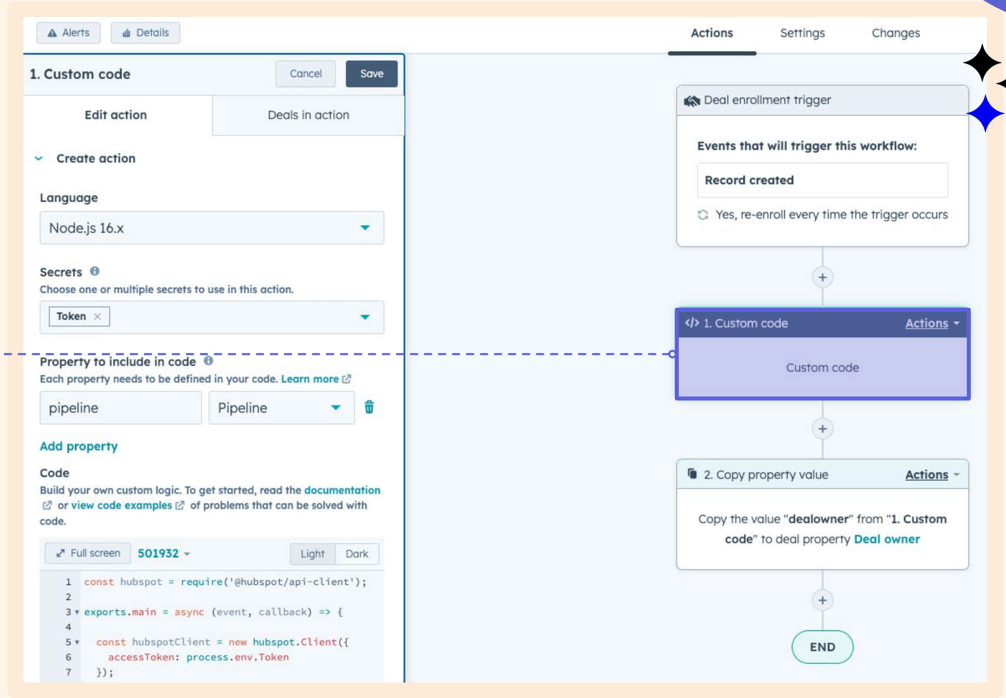
```
//Create a webhook listener in an iPaaS service
axios.post('https://SOME_WEBHOOK_URL', {
recent_salesforce_campaign: recent_salesforce_campaign,
email: data.email,
salesforceleadid: data.salesforceleadid
```

2 Lightweight API Data Appends

- Integrate HubSpot with other tools to leverage data points through Rest API in Custom Coded Actions or Webhooks.

3 Scheduled Workflows

- Use Workflow Schedule to run business processes based on a time period



Custom Coded Actions | *With pre-built or personally written code - add additional data from external systems to HubSpot*

A **Data Quality Strategy** that helped a B2B/B2C Thermostat Company Scale

Business Objective

Enhance decision-making and operational efficiency through a robust data quality strategy ensuring reliable and consistent data

Business Impact

More agile, competitive, and customer-centric organization across the flywheel

Customer Story

As Breezy started to have more complex data architecture in the CRM with many custom properties, workflows and data duplication, they want to make sure their crm data is always clean and updated. With HubSpot:

- **Keep Your Data Healthy with Regular Monitoring**
  - Check if any properties on the CRM objects are duplicated, not being used, or don’t have values (AI-Powered)
- **Programmable Automation to Customize Your Data Quality Strategy**
  - Check for contact duplicates and take actions to merge same contacts
  - Format Contact record to have clean data like email address firstname, last name
- **Manage Workflows to Reduce Error Rate and Further Automate Data Hygiene**
  - Check which workflows have issues, or which workflows are not being used to remove them and maintain a cleaner CRM
  - They can use format action in workflow to automate data cleansing on their records

Keep Your Data Healthy with Regular Monitoring

Powered by AI & ML

1 Identify Duplicate Data

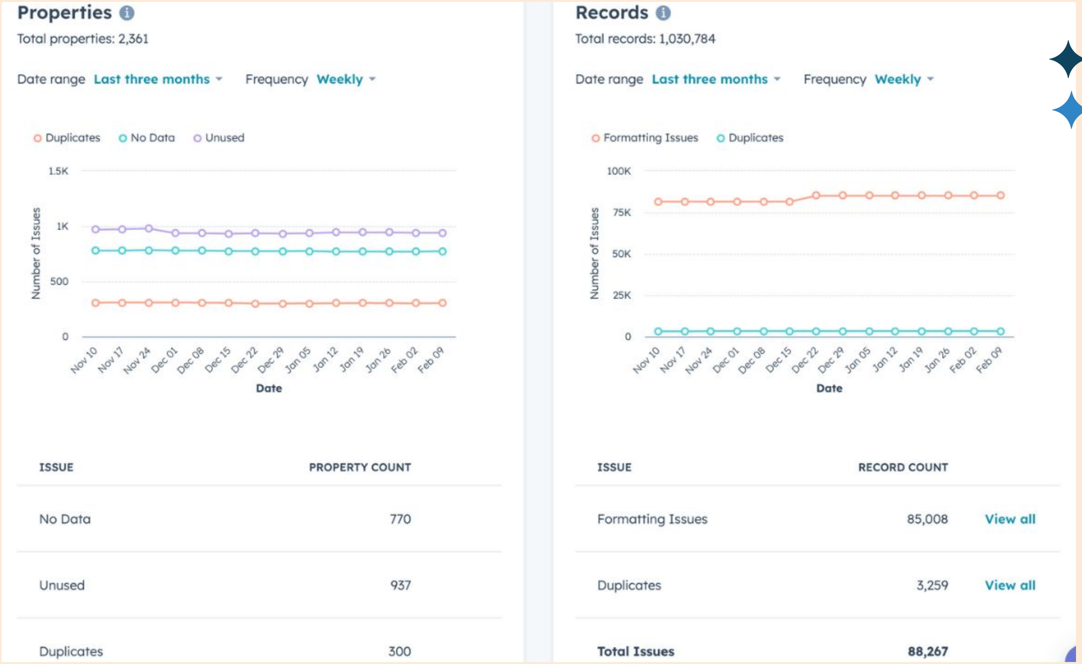
- Identify stale and duplicate properties to keep your customer data clean, clear, and under control — so you can be confident in your setup, retain trust in your data, and make data-driven decisions as you scale.

2 Find Formatting Issues

- Detects Contacts and Companies duplicate records and key formatting issues automatically.
- Admins will have an option to accept or reject the suggestions in bulk and also turn on automation to take care of the suggestions - so you can let the system complete the tasks of monitoring and fixing the data.

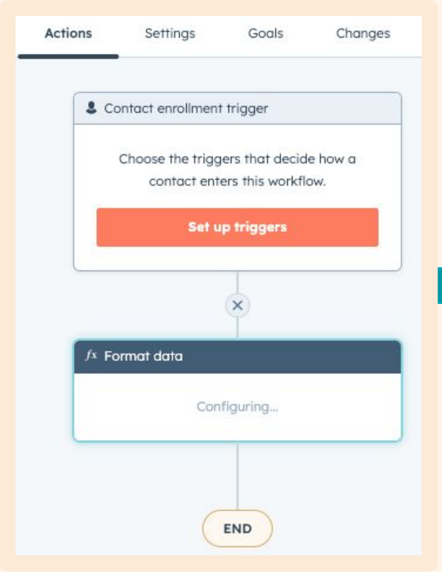
3 Data Sync & Workflow Health

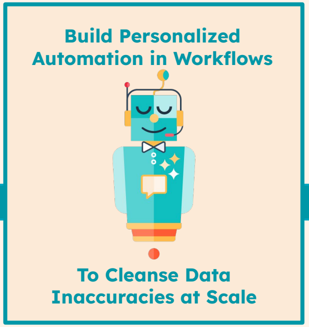
- Monitor and take action on Data Sync and Workflows that show insights and issues about your integrations and workflows.



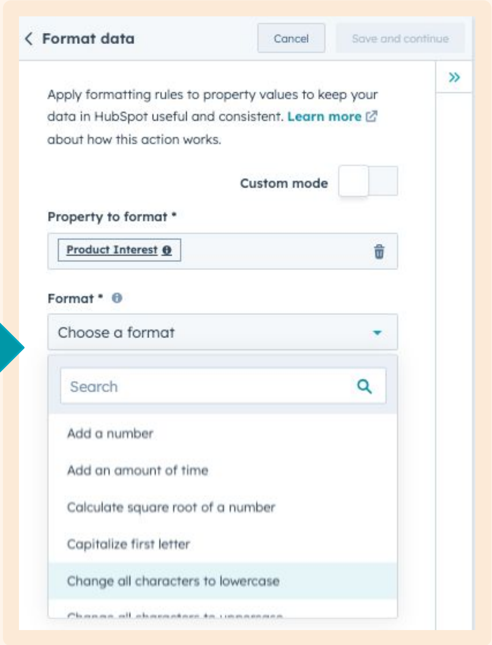
Data Quality | *HubSpot built Data quality reports for Properties, Records, Data Sync and Workflows*

Programmable Automation to Customize Your Data Quality Strategy





Programmable Automation | *Native HubSpot 'Format Data' step gives users the ability to programmatically automate data formatting based on different rules*



1 Advanced Data Formatting

- Leverage HubSpot workflows to create more advanced data formatting processes for complex data structures with the "Format Data" action.

2 Custom DeDuplication

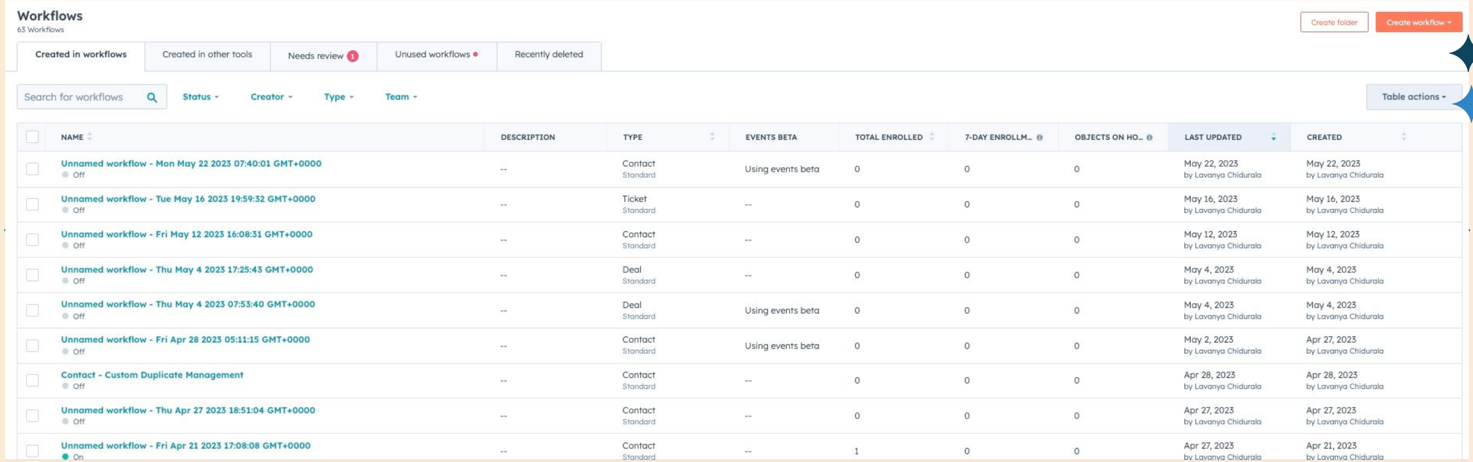
- Create custom processes with like your own deduplication method with custom coded action to extend your data quality strategy.
- Sample custom coded action to deduplicate contact

3 Prevent Bad Data Entry

- Use HubSpot features such as conditional properties on Forms, customizable create record panels and property validation rules to prevent bad data from entering into HubSpot and reduce any data quality issues

Workflows Dashboard to Automate Data Hygiene

Dashboard | *View all the workflows and health of workflows at a glance*



Workflows
63 Workflows

Create folder | Create workflow

Created in workflows | Created in other tools | Needs review 1 | Unused workflows | Recently deleted

Search for workflows | Status | Creator | Type | Team | Table actions

NAME	DESCRIPTION	TYPE	EVENTS BETA	TOTAL ENROLLED	7-DAY ENROLLM...	OBJECTS ON HO...	LAST UPDATED	CREATED
Unnamed workflow - Mon May 22 2023 07:40:01 GMT+0000 Off	--	Contact Standard	Using events beta	0	0	0	May 22, 2023 by Lavanya Chidurala	May 22, 2023 by Lavanya Chidurala
Unnamed workflow - Tue May 16 2023 19:59:32 GMT+0000 Off	--	Ticket Standard	--	0	0	0	May 16, 2023 by Lavanya Chidurala	May 16, 2023 by Lavanya Chidurala
Unnamed workflow - Fri May 12 2023 16:08:31 GMT+0000 Off	--	Contact Standard	--	0	0	0	May 12, 2023 by Lavanya Chidurala	May 12, 2023 by Lavanya Chidurala
Unnamed workflow - Thu May 4 2023 17:25:43 GMT+0000 Off	--	Deal Standard	--	0	0	0	May 4, 2023 by Lavanya Chidurala	May 4, 2023 by Lavanya Chidurala
Unnamed workflow - Thu May 4 2023 07:53:40 GMT+0000 Off	--	Deal Standard	Using events beta	0	0	0	May 4, 2023 by Lavanya Chidurala	May 4, 2023 by Lavanya Chidurala
Unnamed workflow - Fri Apr 28 2023 05:11:15 GMT+0000 Off	--	Contact Standard	Using events beta	0	0	0	May 2, 2023 by Lavanya Chidurala	Apr 27, 2023 by Lavanya Chidurala
Contact - Custom Duplicate Management Off	--	Contact Standard	--	0	0	0	Apr 28, 2023 by Lavanya Chidurala	Apr 28, 2023 by Lavanya Chidurala
Unnamed workflow - Thu Apr 27 2023 18:51:04 GMT+0000 Off	--	Contact Standard	--	0	0	0	Apr 27, 2023 by Lavanya Chidurala	Apr 27, 2023 by Lavanya Chidurala
Unnamed workflow - Fri Apr 21 2023 17:08:08 GMT+0000 On	--	Contact Standard	--	1	0	0	Apr 27, 2023 by Lavanya Chidurala	Apr 21, 2023 by Lavanya Chidurala

Increase Success Rate and Take Action on Workflow Failures

Monitor and take appropriate action on all the automation built for the portal in the "Workflows Dashboard"

Review workflows with issues, which we may want to fix or ignore in the "Need Review Tab" to ensure that automation processes do not fail causing issues to the users.

Keep your library clean of any workflows that are no longer useful to you and your team in the Unused Workflows tab

Restore any workflows that were accidentally deleted or re-needed from the "Recently deleted tab"

Keep Operations Moving with a Clean CRM

A **Data Security Strategy** that helped a B2B/B2C Thermostat Company Scale

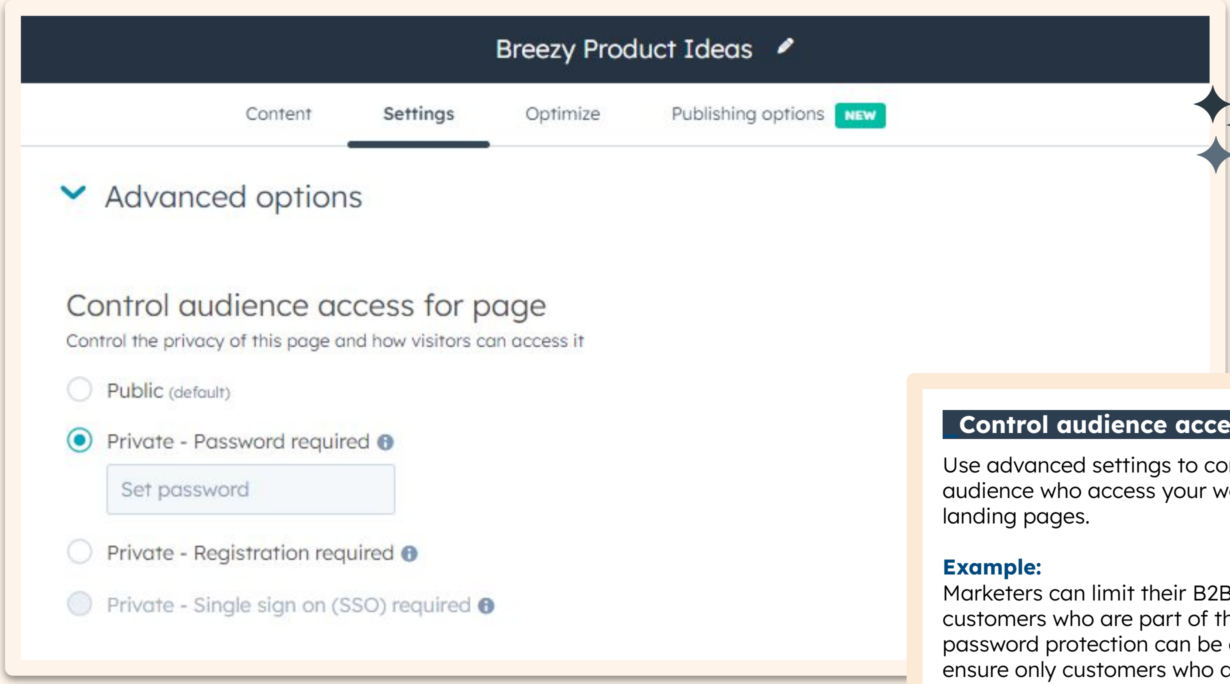
Business Objective	Data security, privacy and control
Business Impact	Have a secure system that allows you to have full control over your data and privacy

Customer Story

As Breezy expands and gathers more complex data, security becomes a top priority. Cyberattacks or data loss could be detrimental to their growth. Breezy aims to implement the best security standards, maintain control over their data and privacy, and comply with regulations in different territories:

- **Member Registration to Access Private content and password protection for pages:**
  - Breezy can create blog or knowledge base posts that are direct to a selected customer in their B2B segment. They can do this by setting up member registration for pages. This can be useful when you want to share data or communication with one customer only.
- **Custom Domain Security Settings:**
  - Breezy can customize the security setting for each subdomain connected to HubSpot. These specific domain security settings are needed so they can remain compliant within their industry, a useful feature when your work with corporate customers.
- **Manage GDPR Compliance:**
  - Consent for GDPR can be enabled for forms, documents, or scheduling pages. This allows customers to give their consent to receive communication and to have their data processed and stored.

Member Registration to Access Private Content

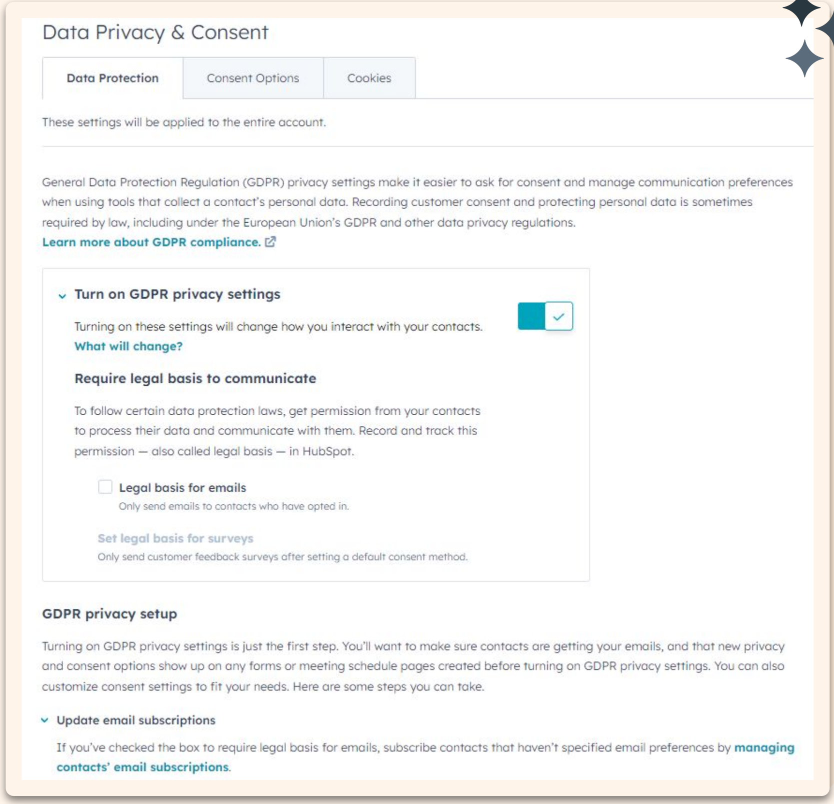


Control audience access for pages

Use advanced settings to control the audience who access your websites and landing pages.

Example:
Marketers can limit their B2B content just for customers who are part of this space. A password protection can be enabled to ensure only customers who are in the B2B segment can access this space..

Manage GDPR Compliance



Set GDPR privacy setup

GDPR consent can be set for your HubSpot account. You can manage consent for emails, forms, meetings, and customize cookies and language consent.

Example:
As you start expanding to other countries, you can enable consent in multiple languages. Enable this by using the data privacy & consent options in HubSpot

The Results

Results

Using HubSpot's most advanced features and combining all the different features together, Breezy succeeded in aligning their teams, leveraging their data in the platform, customizing their platform the way they need and relying on automation to help achieve efficiency and increase productivity leading to growing revenue without the need to increase their headcount.

That's great, but what about real results from an actual customer?

Why Choose HubSpot

AAXIS

When AAXIS conducted a major reorganization of its sales team, Executive Director Andy Wagner had the opportunity to rebuild — and move away from their costly Salesforce subscription.

Challenge

Before switching to the HubSpot CRM platform, Andy had five concerns:

- Implementation
- Minimizing disruption
- User adoption
- Ease of use
- Integration with his existing tech stack

Solution

Upgrading to Sales Hub, Marketing Hub and CMS Hub:

- Increased productivity through automation
- Increased user adoption with customization
- Aligned Sales and Marketing
- Created one ecosystem

$250K
In estimated annual savings

2,750%
Increase in call-to-action clicks

25%
Increase in sales qualified leads

Time on HubSpot

4 years

Previous Platform

Salesforce

Hubs

HubSpot Marketing Hub Pro

HubSpot Sales Hub

HubSpot CMS Hub

Full Case Study →

Some people think you have to move to Salesforce once you reach a certain maturity, but that's not the case. HubSpot can do everything you want to do in Salesforce and more.

Andy Wagner
AAXIS Digital, Executive Director

Conclusion

Meet with a Solutions Architect at HubSpot to Receive Personalized Insights on Scaling

Get tailored recommendations for your systems, tech stack and business strategy.

- Webhooks
- Custom Objects
- Custom Behavioral Events
- Programmable Automation
- Advanced Reporting
- Data Modeling
- Data Sync Apps
- Custom Coded Actions
- Integration Architecture
- Quote Customization
- Permissions Improvements
- Single Sign On
- Data Governance
- Complex Quote Approvals
- Custom CRM Cards
- CPQ Integrations
- ERP Integrations
- Customer Journey Analytics
- HubDB & HubL
- Subscription Management

“Art of the Possible”

“Unique Solutions”

“Portal Health Check”

“Tech Stack Audits”

Schedule a Meeting with a Solutions Architect & Success Manager