DISCOVERCRM

HUBSPOT CRM EXTENDED PROFILE

HubSpot

OVERVIEW

HubSpot CRM is a free, cloud-based CRM package developed for companies who either use or are planning to use inbound marketing techniques. It is suitable for small to medium-sized businesses with established or growing digital presence.

HubSpot CRM emphasizes ease of installation and intuitive interface. Inbound marketing is the central theme of HubSpot and so integration with the other HubSpot packages (Marketing and Sales) is a major feature of the CRM software. HubSpot will also integrate with Google Apps and Microsoft Outlook to automate administrative and documentation tasks.

One of HubSpot CRM’s major selling points is that its core features are free for an unlimited number of users and storage space. Interaction tracking, activity logging, and a pipeline dashboard are all included in this as does integration with the HubSpot Sales packages. Professional package features like sales automation and prospecting tools can be bolted on for a fee.

HubSpot is a web-based CRM and so can be accessed via any device with an internet browser installed. Native Android and iOS mobile apps are available.

HubSpot

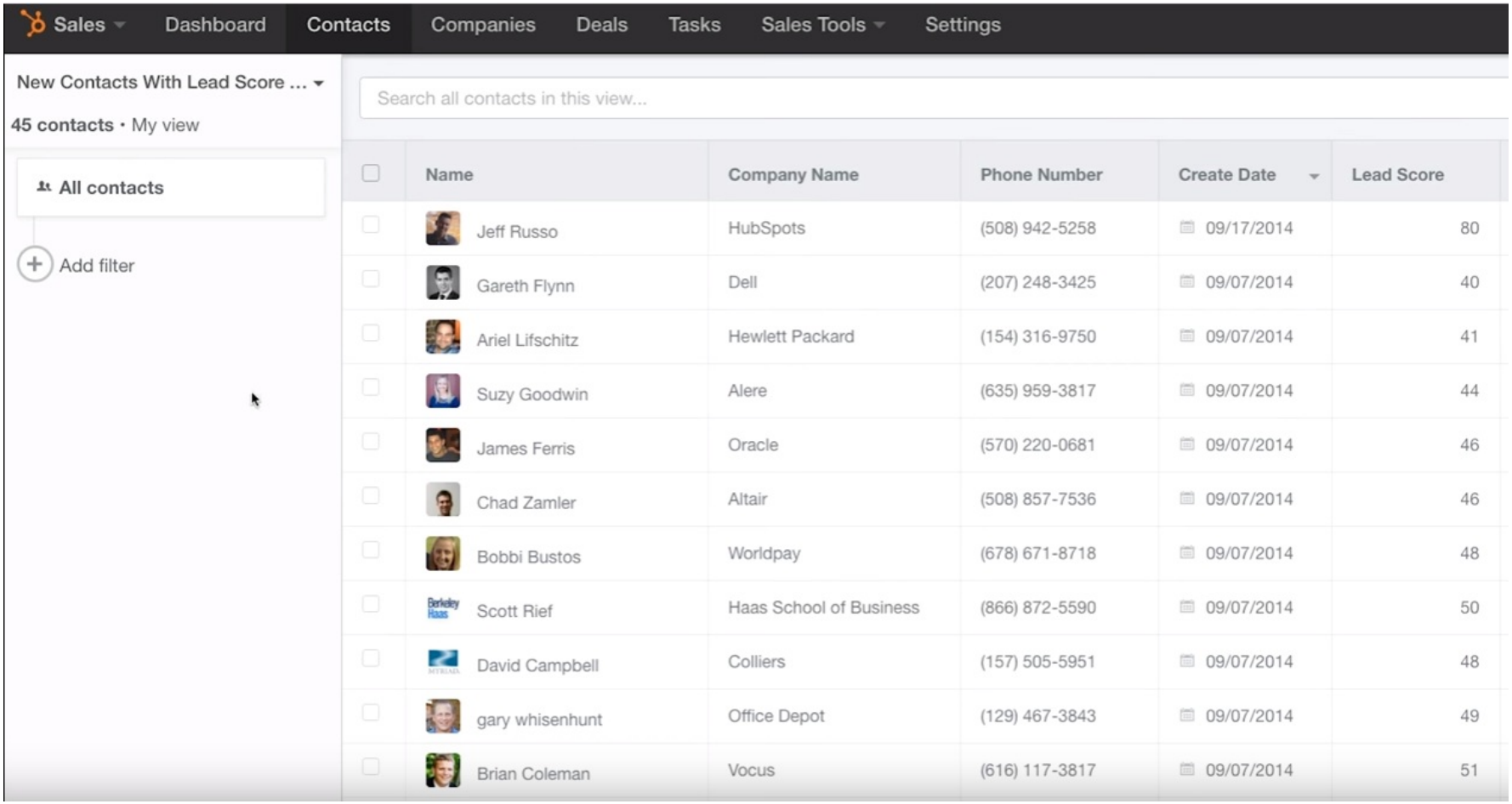
SOFTWARE SPECIFICATION

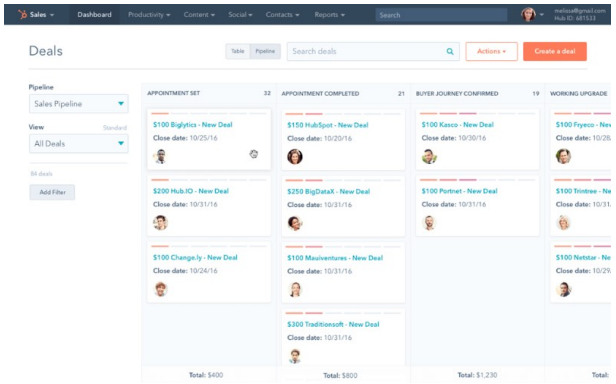
OVERVIEW	
PRODUCT NAME	HubSpot CRM
SOFTWARE FEATURES	
API ACCESS	✔
CADENCE	✔
CONTACT MANAGEMENT	✔
CONTRACT MANAGEMENT	✘
DATABASE MANAGEMENT	✔
FUNNEL REPORTING	✔
INTEGRATIONS	✔
PARTNER TRACKING	✘
PERFORMANCE REPORTING	✔
PIPELINE MANAGEMENT	✔
PRODUCT & PRICE CONTROL	✘
SALES GAMIFICATION	✔
QUOTATION HANDLING	✘
TASK ASSIGNMENT	✔
TERRITORY/QUOTA MANAGEMENT	✘
SUPPLEMENTARY FEATURES	
CPQ	✘
CUSTOMER SERVICE AUTOMATION	✔

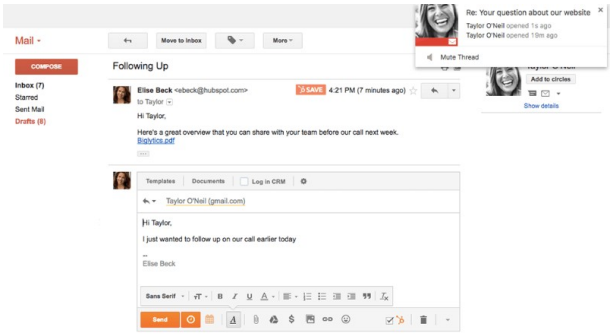
MARKETING AUTOMATION	✔
SOCIAL RELATIONSHIP MANAGEMENT	✔
CUSTOMER SIZE	
SMALL (1-50 USERS)	✔
MEDIUM (51-200 USERS)	✔
ENTERPRISE (201+ USERS)	✔
OTHER FEATURES	
MULTIPLE LOCATIONS	✔
MULTIPLE CURRENCY	✔
CUSTOMIZABLE	✔
MOBILE FEATURES	
IOS APP	✔
ANDROID APP	✔
NATIVE WEB APP	✔
HOSTING METHOD	
CLOUD	✔
ON-PREMISE	✘
FURTHER INFORMATION	
PRICING	From Free

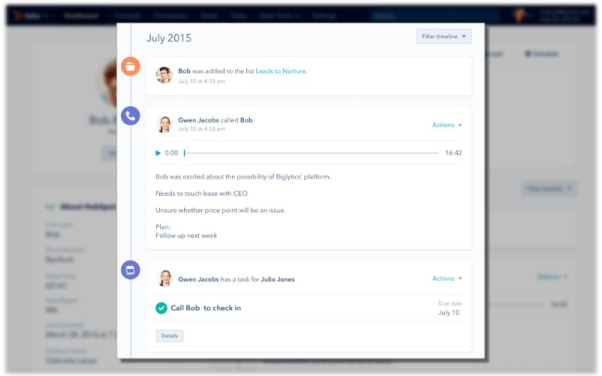
HubSpot

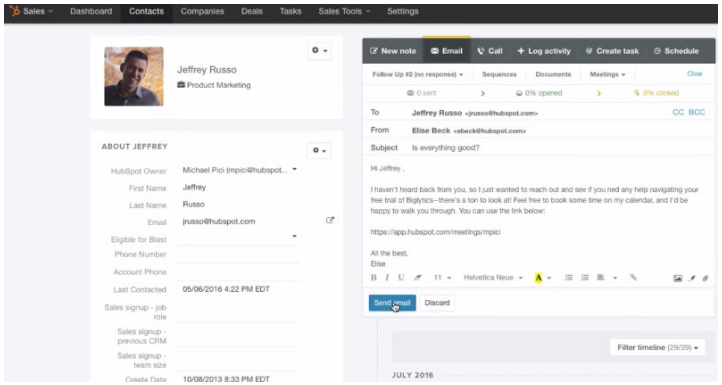
SOFTWARE SCREENSHOTS




Sales
Dashboard
Productivity
Content
Social
Contacts
Reports
Search
Deals
Table
Pipeline
Search deals
Actions
Create a deal
Pipeline
Sales Pipeline
View
Standard
All Deals
84 deals
Add Filter
APPOINTMENT SET
32
$100 Biglytics - New Deal
Close date: 10/25/16
$200 HubJO - New Deal
Close date: 10/31/16
$100 Change.ly - New Deal
Close date: 10/24/16
APPOINTMENT COMPLETED
21
$150 HubSpot - New Deal
Close date: 10/20/16
$250 BigDataX - New Deal
Close date: 10/31/16
$100 Mauiventures - New Deal
Close date: 10/31/16
$300 Traditionsoft - New Deal
Close date: 10/31/16
BUYER JOURNEY CONFIRMED
19
$100 Kasco - New Deal
Close date: 10/30/16
$100 Portnet - New Deal
Close date: 10/31/16
WORKING UPGRADE
$100 Fyreco - New
Close date: 10/26
$100 Trintree - Ne
Close date: 10/31
$100 Netstar - Ne
Close date: 10/29
Total: $400
Total: $800
Total: $1,230
Total:


Mail
Move to Inbox
More
COMPOSE
Inbox (7)
Starred
Sent Mail
Drafts (8)
Following Up
Elise Beck <ebeck@hubspot.com>
to Taylor
SAVE
4:21 PM (7 minutes ago)
Hi Taylor,
Here's a great overview that you can share with your team before our call next week.
Biglytics.pdf
Templates
Documents
Log in CRM
Taylor O'Neil (gmail.com)
Hi Taylor,
I just wanted to follow up on our call earlier today
--
Elise Beck
Sans Serif
Send
Re: Your question about our website
Taylor O'Neil opened 1s ago
Taylor O'Neil opened 19m ago
Mute Thread
Add to circles
Show details


July 2015
Filter timeline
Bob was added to the list Leads to Nurture.
July 10 at 4:33 pm
Gwen Jacobs called Bob
July 10 at 4:33 pm
Actions
0:00
16:42
Bob was excited about the possibility of Biglytics' platform.
Needs to touch base with CEO
Unsure whether price point will be an issue.
Plan:
Follow up next week
Gwen Jacobs has a task for Julia Jones
Actions
Call Bob to check in
Due date:
July 10
Details


Sales
Dashboard
Contacts
Companies
Deals
Tasks
Sales Tools
Settings
Jeffrey Russo
Product Marketing
ABOUT JEFFREY
HubSpot Owner
Michael Pici (mpici@hubspot...
First Name
Jeffrey
Last Name
Russo
Email
jrusso@hubspot.com
Eligible for Blast
Phone Number
Account Phone
Last Contacted
05/06/2016 4:22 PM EDT
Sales signup - job role
Sales signup - previous CRM
Sales signup - team size
Create Date
10/08/2013 8:33 PM EDT
New note
Email
Call
Log activity
Create task
Schedule
Follow Up #2 (no response)
Sequences
Documents
Meetings
Clear
0 sent
0% opened
0% clicked
To
Jeffrey Russo <jrusso@hubspot.com>
CC BCC
From
Elise Beck <ebeck@hubspot.com>
Subject
Is everything good?
Hi Jeffrey ,
I haven't heard back from you, so I just wanted to reach out and see if you ned any help navigating your free trial of Biglytics--there's a ton to look at! Feel free to book some time on my calendar, and I'd be happy to walk you through. You can use the link below:
https://app.hubspot.com/meetings/mpici
All the best,
Elise
Helvetica Neue
Send email
Discard
Filter timeline (29/29)
JULY 2016