



HATCHBUCK

EXTENDED PROFILE



HATCHBUCK™

OVERVIEW

Hatchbuck is a CRM with a fully-integrated marketing solution designed for SMBs. The fact that it is not 'patched together' avoids the common problem of incompatibility when IT infrastructures are modular and built incrementally. Hatchbuck aims to prevent all the compatibility problems between CRM and marketing software by delivering it all in a single package.

As a small business CRM, Hatchbuck allows users to grow their customer base through small DIY systems that manage the sales funnel with you. It helps manage marketing campaigns via email, giving you a complete story of your contacts and providing useful templates for contacting them. One of the most attractive features of the software is the marketing automation it offers, with easy to set up intelligent actions and notifications that keep your marketing and sales on track.

Other major features include the ability to manage contacts, automate follow up through drip campaigns and autoresponders and track success through the analytics dashboard, which provides insights into sales and marketing data. As a cloud solution, Hatchbuck can be accessed through any device with internet compatibility.

There are several packages you can choose including small biz; team; professional and enterprise. The cost varies depending on the number of users, contacts, and emails. All packages come with a Quickstart Package, which includes: a marketing strategy overview, one hour of training from a dedicated consultant, a branded newsletter template, and one pre-built email campaign. This can be upgraded to Quickstart Pro for a small cost and you receive three hours of training and three pre-build email campaigns, as well as a customized sales and marketing process mapping.

FEATURE OVERVIEW



HATCHBUCK™

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Hatchbuck
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	X
TASK ASSIGNMENT	X
TERRITORY/QUOTA MANAGEMENT	X
SUPPLEMENTARY FEATURES	
CPQ	X
CUSTOMER SERVICE AUTOMATION	X
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	X
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	X
ENTERPRISE (201+ USERS)	X
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	X
CUSTOMIZABLE	✓
HOSTING METHOD	
CLOUD	✓
ON-PREMISE	X
FURTHER INFORMATION	

PRICING	Starting at \$99/month. 2 Users, 1500 Contacts
IMPLEMENTATION TIMEFRAME	1-48 hours



HATCHBUCK™

SOFTWARE SCREENSHOTS

The screenshot displays the Hatchback software interface. At the top, there is a navigation bar with the Hatchback logo and menu items: Dashboard, Contacts, Deals, Tasks, Tools, and Reports. On the right side of the navigation bar, there are icons for search, notifications, and a user profile.

The main dashboard area is divided into several sections:

- Contact Snapshot:** Shows 3,814 Total Contacts and 55 New Contacts. An "IMPORT" button is visible at the bottom.
- Follow-Up Performance:** Shows 2,756 Contacts in a Follow-up Status. Below this are three circular progress indicators for Engaged (2,020), Neglected (801), and Unresponsive (612).
- Contact Statuses:** A table showing the distribution of contact statuses:

Status	Count
Lead	750
Opportunity	53
Customer	965
Former Customer	252
- Email Performance:** Shows an Open Rate of 36.7% and a Click Rate of 4.6%.
- Sales:** Shows Revenue Won of \$83,333.
- Tasks and Campaigns:** A teal box highlights 11 Tasks due today, 77 Emails scheduled today, and 81 Campaigns scheduled today.
- Announcements:** A section titled "How to Create a Killer Mission Statement – And Use It to Grow Your Company" with a "CONTINUE READING" link.
- User Activity Feed:** A list of recent user actions, including:
 - Dave Boehme (12m): Opened the email The More the Merrier (users that is) | Hatchback.
 - Carol Murphy (33m): Visited www.hatchback.com/request-live-demo.
 - Aurelien Salomon (49m): Opened the email re: Thank You from the Hatchback Team.
 - Judy Shen-Fileman (2h): Submitted the form Guide: Personalized E-Mails.
 - Joseph Terach (4h): Clicked on the link http://www.hatchback.com/wp-content/uploads/2014/05/personalized...
 - Jeremy Nathan (7h): Opened the email Hatchback Live Demo.
 - Dave Boehme (12h): (Action partially visible)

53
New Deals

26
Deals Won

The email re: Stumped by how to get found online? bounced for thomas@avionicsgroup.com (soft bounce).

HATCHBACK Dashboard | Campaigns | Contacts | Deals | Tools | Reports

Opportunity Nurture

10 STARTED | 10 IN PROGRESS | 0 COMPLETED

Task Timeline:

- DAY 1: Update the Contact Record
- DAY 5: Send Follow Up Email Times to Task
- DAY 12: Create a New Task for Contact's Sales Rep
- DAY 19: Send Follow Up Email Street

HATCHBACK Dashboard | Contacts | Deals | Tools | Reports

Aaron Cox
Manager of Software Product Development at SEI Technologies
aaroncox@gmail.com | Work

0 SCORE | Lead status

Activity Feed:

- Added the tag job.
- Scheduled the email to 3 Benefits of a Personal Trainer to be sent in the future.
- Scheduled the email to Aaron to be sent in the future.
- Scheduled the email to 3 Benefits of a Personal Trainer to be sent in the future.

HATCHBACK Dashboard | Campaigns | Contacts | Deals | Tools | Reports

My Email Templates | Create Email Template

Select a Pre-designed Email Template

- A Special Customer Offer
- A Webinar You Can't Miss
- Activate Your New Account
- Book Your Next Now
- Change Your Life
- Company News
- Cool Weather, Not Deals
- Delicious Savings
- Discover Our Services
- Don't Miss This Conference

HATCHBACK Dashboard | Campaigns | Contacts | Deals | Tools | Reports

Tasks | 12 | 12 | 0 | 0

DATE	TYPE	TASK	STATUS	ASSIGNED TO
Mar 28, 2017 02:42 AM	Call	Call Nathan	Not Done	Nathan
Mar 28, 2017 07:39 AM	Call	Call Debra Wang et. and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call Saja Mankab et. and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call Nathan Parnis et. and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call Andrew Stan et. and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call James Pate et. and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call Sam Sasser et. and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call Sam Payer et. 554-288-0265 and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call Nick Truett et. 554-524-5555 and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call Ron Beasley et. 238835722 and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 07:39 AM	Call	Call Ruthe Vucic et. and welcome them to the gym!	Linky Status	Linky Status
Mar 28, 2017 03:44 AM	Call	Call Patrick Dorsey to follow up on Life Wellness Gym Membership	Linky Status	Patrick Dorsey