



HUBSPOT CRM

EXTENDED PROFILE



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.



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



SOFTWARE SCREENSHOTS

Sales ▾ Dashboard Contacts Companies Deals Tasks Sales Tools ▾ Settings























New Contacts With Lead Score ... ▾

45 contacts • My view

All contacts

+ Add filter

Search all contacts in this view...

<input type="checkbox"/>	Name	Company Name	Phone Number	Create Date ▾	Lead Score
<input type="checkbox"/>	 Jeff Russo	HubSpots	(508) 942-5258	 09/17/2014	80
<input type="checkbox"/>	 Gareth Flynn	Dell	(207) 248-3425	 09/07/2014	40
<input type="checkbox"/>	 Ariel Lifschitz	Hewlett Packard	(154) 316-9750	 09/07/2014	41
<input type="checkbox"/>	 Suzy Goodwin	Alere	(635) 959-3817	 09/07/2014	44
<input type="checkbox"/>	 James Ferris	Oracle	(570) 220-0681	 09/07/2014	46
<input type="checkbox"/>	 Chad Zamler	Altair	(508) 857-7536	 09/07/2014	46
<input type="checkbox"/>	 Bobbi Bustos	Worldpay	(678) 671-8718	 09/07/2014	48
<input type="checkbox"/>	 Scott Rief	Haas School of Business	(866) 872-5590	 09/07/2014	50
<input type="checkbox"/>	 David Campbell	Colliers	(157) 505-5951	 09/07/2014	48
<input type="checkbox"/>	 gary whisenhunt	Office Depot	(129) 467-3843	 09/07/2014	49
<input type="checkbox"/>	 Brian Coleman	Vocus	(616) 117-3817	 09/07/2014	51

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	APPOINTMENT COMPLETED	BUYER JOURNEY CONFIRMED	WORKING UPGRADE
<p>\$100 Biglytics - New Deal Close date: 10/25/16</p> <p>\$200 Hub IO - New Deal Close date: 10/31/16</p> <p>\$100 Change.ly - New Deal Close date: 10/24/16</p>	<p>\$150 HubSpot - New Deal Close date: 10/20/16</p> <p>\$250 BigDataX - New Deal Close date: 10/31/16</p> <p>\$100 Mauventures - New Deal Close date: 10/31/16</p> <p>\$300 TraditionsR - New Deal Close date: 10/31/16</p>	<p>\$100 Kasco - New Deal Close date: 10/30/16</p> <p>\$100 Portnet - New Deal Close date: 10/31/16</p>	<p>\$100 Fryco - New Deal Close date: 10/28/16</p> <p>\$100 Trintree - New Deal Close date: 10/31/16</p> <p>\$100 Netstar - New Deal Close date: 10/29/16</p>
Total: \$400	Total: \$800	Total: \$1,230	Total:

Mail + Move to Inbox More

Compose

Following up

Inbox (7) Starred Sent Mail Drafts (8)

Elise Beck <eback@hubspot.com> **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

Save Draft Send

July 2015 Filter timeline

- Bob was added to the 1st Lead to Nurture July 10 at 4:33 pm
- Gwen Jacobs called Bob July 10 at 4:33 pm
 - 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
 - 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 Picic (mpic@hubspot.com)

First Name: Jeffrey
Last Name: Russo
Email: jrusso@hubspot.com

Eligible for Blast
Phone Number
Account Phone
Last Contacted: 06/06/2016 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 -eback@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 need 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/mpic>

All the best,
Elise

Send Email Discard

Filter timeline (29/29)

JULY 2015