



# HATCHBUCK

# EXTENDED PROFILE



**HATCHBUCK™**

## OVERVIEW

Hatchback 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. Hatchback 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, Hatchback 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, Hatchback 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             | ✗ |
| TASK ASSIGNMENT                | ✗ |
| TERRITORY/QUOTA MANAGEMENT     | ✗ |
| <b>SUPPLEMENTARY FEATURES</b>  |   |
| CPQ                            | ✗ |
| CUSTOMER SERVICE AUTOMATION    | ✗ |
| MARKETING AUTOMATION           | ✓ |
| SOCIAL RELATIONSHIP MANAGEMENT | ✗ |
| <b>CUSTOMER SIZE</b>           |   |
| SMALL (1-50 USERS)             | ✓ |
| MEDIUM (51-200 USERS)          | ✗ |
| ENTERPRISE (201+ USERS)        | ✗ |
| <b>OTHER FEATURES</b>          |   |
| MULTIPLE LOCATIONS             | ✓ |
| MULTIPLE CURRENCY              | ✗ |
| CUSTOMIZABLE                   | ✓ |
| <b>HOSTING METHOD</b>          |   |
| CLOUD                          | ✓ |
| ON-PREMISE                     | ✗ |
| <b>FURTHER INFORMATION</b>     |   |

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



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## SOFTWARE SCREENSHOTS

The screenshot displays the Hatchback CRM dashboard with a dark navigation bar at the top containing the logo and menu items: Dashboard, Contacts, Deals, Tasks, Tools, and Reports. The main content area is divided into several sections:

- Dashboard Overview:** Includes filters for "LAST 7 DAYS" and "ALL USERS".
- Contact Snapshot:** Shows 3,814 Total Contacts and 55 New Contacts, with an "IMPORT" button.
- Follow-Up Performance:** Shows 2,756 Contacts in a Follow-up Status, broken down into three donut charts: Engaged (2,020), Neglected (801), and Unresponsive (612).
- Contact Statuses:** A table showing counts for Lead (750), Opportunity (53), Customer (965), and 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.
- Activity Feed:** A list of user activities on the right side, including tasks due, emails scheduled, and campaigns scheduled, along with a feed of user actions like opening emails and visiting the website.

| Status          | Count |
|-----------------|-------|
| Lead            | 750   |
| Opportunity     | 53    |
| Customer        | 965   |
| Former Customer | 252   |

| Status       | Count |
|--------------|-------|
| Engaged      | 2,020 |
| Neglected    | 801   |
| Unresponsive | 612   |

| User              | Action  | Time |
|-------------------|---|------|
| Dave Boehme       | 11 Tasks due today  | 12m  |
| Dave Boehme       | 77 Emails scheduled today   | 12m  |
| Dave Boehme       | 81 Campaigns scheduled today  | 12m  |
| Dave Boehme       | Opened the email The More the Merrier (users that is)   Hatchback.                      | 12m  |
| Carol Murphy      | Visited www.hatchback.com/request-live-demo   | 33m  |
| Aurelien Salomon  | Opened the email re: Thank You from the Hatchback Team.                                 | 49m  |
| Judy Shen-Fileman | Submitted the form Guide: Personalized E-Mails.   | 2h   |
| Joseph Terach     | Clicked on the link http://www.hatchback.com/wp-content/uploads/2014/05/personalized... | 4h   |
| Jeremy Nathan     | Opened the email Hatchback Live Demo.   | 7h   |
| Dave Boehme       | 11 Tasks due today  | 12h  |

53  
New Deals

26  
Deals Won

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

The screenshot shows the 'Campaigns' section for 'Opportunity Nurture'. It features a timeline of tasks with dates and descriptions. On the right, there are statistics for 'STARTED', 'IN PROGRESS', and 'COMPLETED' tasks, along with a 'Campaign Info' sidebar.

| DATE   | TASK                                      |
|--------|---|
| DAY 1  | Update the Contact Record                 |
| DAY 5  | Send Follow Up Email Time to Talk         |
| DAY 12 | Create a New Task for Contact's Sales Rep |
| DAY 12 | Create a New Task for Contact's Sales Rep |
| DAY 20 | Send Follow Up Email Thank                |

The screenshot shows the contact profile for Aaron Cox, Manager of Software Product Development at XLI Technologies. It includes an activity feed with scheduled emails and other contact information.

**Activity Feed**

- Added the tag 'pro' - 2:41 PM
- Scheduled the email to 3 Benefits of a Personal Trainer to be sent in the future - 9:00 AM
- Scheduled the email to Aaron to be sent in the future - 7:49 AM
- Scheduled the email to 3 Benefits of a Personal Trainer to be sent in the future - 12:21 PM

The screenshot shows the 'Email Templates' page with a grid of pre-designed email templates for various marketing purposes.

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

The screenshot shows the 'Tasks' page with a list of tasks including dates, types, and assignees.

| DATE                  | TASK  | STATUS      | ASSIGNED TO           |
|-----------------------|---|-------------|-----------------------|
| Mar 28, 2017 10:42 AM | Call  | Not Started | Neil Rosen, Hatchback |
| Mar 28, 2017 07:39 AM | Call: Debra Wang et. and welcome them to the gym!                 | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Saja Mendez et. and welcome them to the gym!                | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Nathan Phipps et. and welcome them to the gym!              | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Ashley Star et. and welcome them to the gym!                | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Jenna Pate et. and welcome them to the gym!                 | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Lori Jones et. and welcome them to the gym!                 | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Lori Papp et. and welcome them to the gym!                  | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Ness Truen et. 554-524-5555 and welcome them to the gym!    | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Ron Beasley et. 238835722 and welcome them to the gym!      | Not Started | Limby Stroud          |
| Mar 28, 2017 07:39 AM | Call: Ruthe Vucic et. and welcome them to the gym!                | Not Started | Limby Stroud          |
| Mar 28, 2017 11:44 AM | Call: Patrick Dorsey to follow up on Life Wellness Gym Membership | Not Started | Patrick Dorsey        |