HubSpot
Sales Hub

Sales Hub Tools with Demo Use Cases

Templates
- Creating repeatable templates reps can use when creating a new lead to book a meeting
- Reporting on what templated content works the best

Sequences
- Rep can make sure leads don't fall through the cracks without manually creating tasks for themselves to follow up after an email goes unanswered
- Rep can personalize each email for their prospects, which leads to a higher reply rate than bulk email

Documents
- Rep sending a case study to their prospect can see what they viewed and for how long
- Marketer can see if the collateral they are creating for their reps is actually being sent and how they are performing

Messages
- Company can target a specific list of people based on criteria inside the CRM
- Company can rotate a known contact to the right sales rep automatically, ensuring that the prospect is always talking to the right person
- Prospects on a company's pricing page can get the quick answers they need about the pricing structure

Meetings
- Rep booking a meeting without the back and forth from their inbox
- Marketer booking meetings for a rep through BOFU email marketing
- Marketer booking meetings for a rep through website pricing page

Calling
- Rep using the call queue to make more calls in less time with a list they are prospecting into
- Rep reviewing the recording from a previous call with a prospect they have an upcoming meeting with
- Manager reviewing how many calls were placed and what the disposition of those calls were by rep

Notifications
- Rep being able to stay top of mind with a prospect that went dark by following up with them right after he sees they opened the rep's email

Workflows
- Creating a task automatically for a rep to follow up with their prospect in 2 days when lead status of a contact gets changed to "left voicemail".
- Automatically creating a deal when a meeting is booked.
- Automatically rotating new leads to reps when they are created in HubSpot.

Reporting
- Manager can see how long deals stay in each deal stage
- Manager can stack rank their reps by activity, broken out by activity type
- Managers can see what Sequences they have created are performing the best

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Predictive Lead Scoring

- Reps can prioritize their leads based off of predictive lead score and has not been contacted yet
- Managers can use reporting to see the quality of leads marketing is creating for them

Required Fields

- Reps must fill out an amount field when they create a deal so a manager has accurate forecasting
- Reps must set the lead status of a new lead they create so no leads go uncontacted
- Managers get better data fidelity on any custom field they care about because they can enforce that the field is filled out.

Multiple Deal Pipelines

- Scale-up company creates multiple pipelines, one to track channel sales and one to track direct sales
- Start-up company creates multiple pipelines, one to track sales and one to track investors they are trying to close for their next round
- Managers can see an accurate forecast for different pipelines using reporting.

Products

- Reps can remind themselves what products, in what quantities and discounts, they offered their prospect
- Managers can report on how much they are selling, and when they are being sold to manage inventory

SFDC Connector

- Importing the company's data from HubSpot to Salesforce
- Syncing contact and deal data to Salesforce for reporting

Teams

- Splitting up channel and direct teams so they can only see leads assigned to their team
- Reporting on the activity of the direct team vs. the channel team

Advanced Views

- Manager can create views and set them as the reps favorited views so the manager knows the reps have the right views to work

For a complete list of features, visit [HubSpot's product catalog](#).

For additional information:

Visit the Product Page