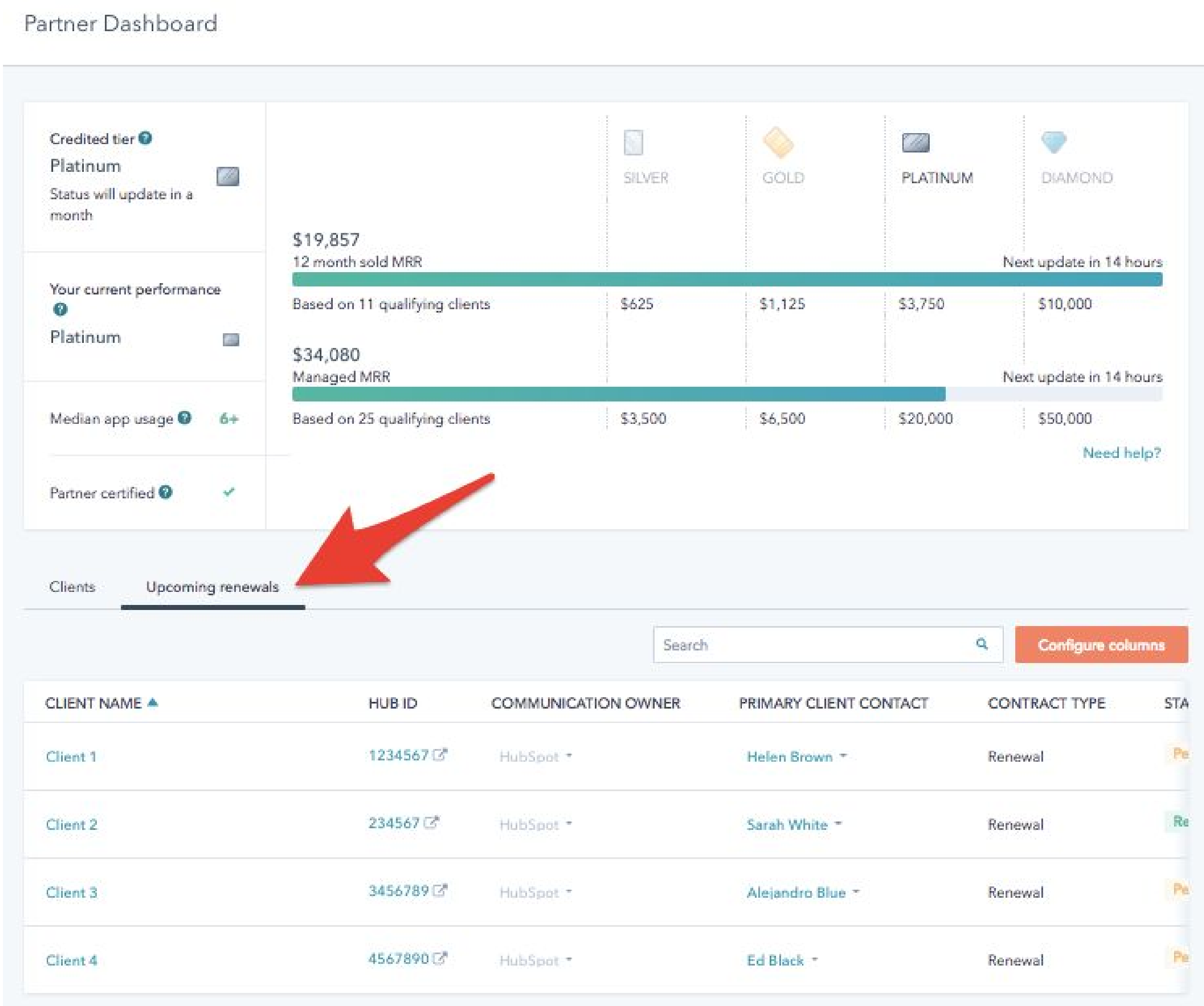
HubSpot AGENCY PARTNER PROGRAM

Renewal Management Dashboard
How-to Guide & FAQs

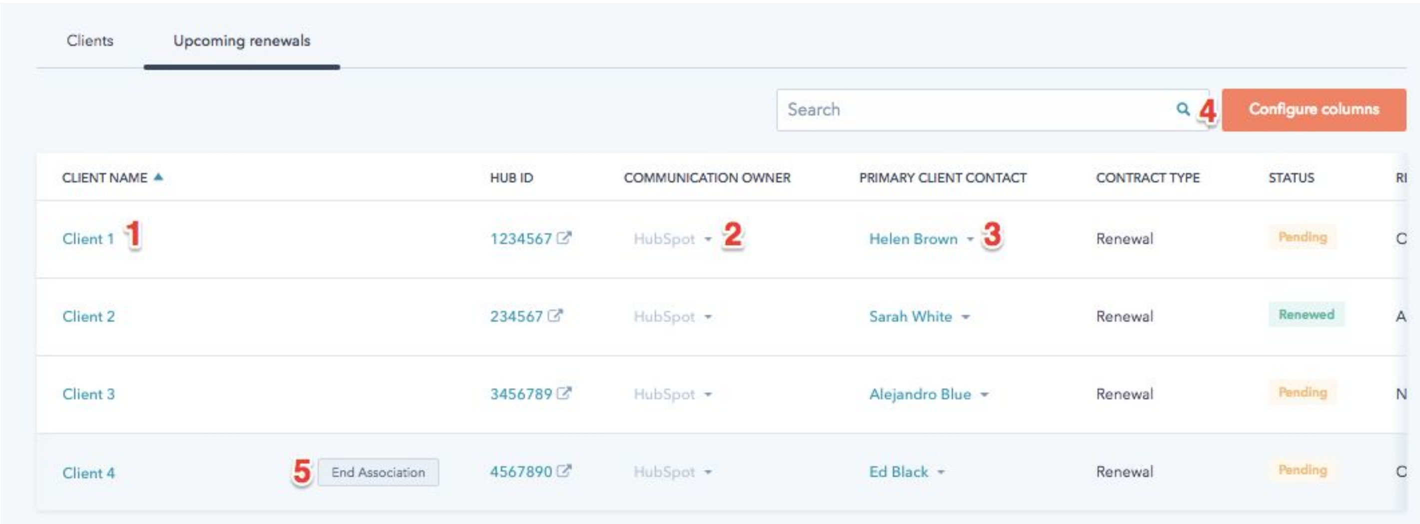
What is the Renewal Management Dashboard?

The Renewal Management Dashboard gives you insight into your clients' upcoming HubSpot contract changes, including renewals, contact tier upgrades and email overages. It can be found in your partner portal. Here's what it looks like:



In your partner portal, you'll see a new tab called "Upcoming Renewals" under your tiers dashboard. By clicking on "Upcoming Renewals," you'll be see all of your clients' upcoming contract changes.

What can you see in the Upcoming Renewals tab?



1. Clicking on "Client Name" will expand a panel of details about this client's main points of contact, their products, app usage and upcoming contract changes (more on this below).

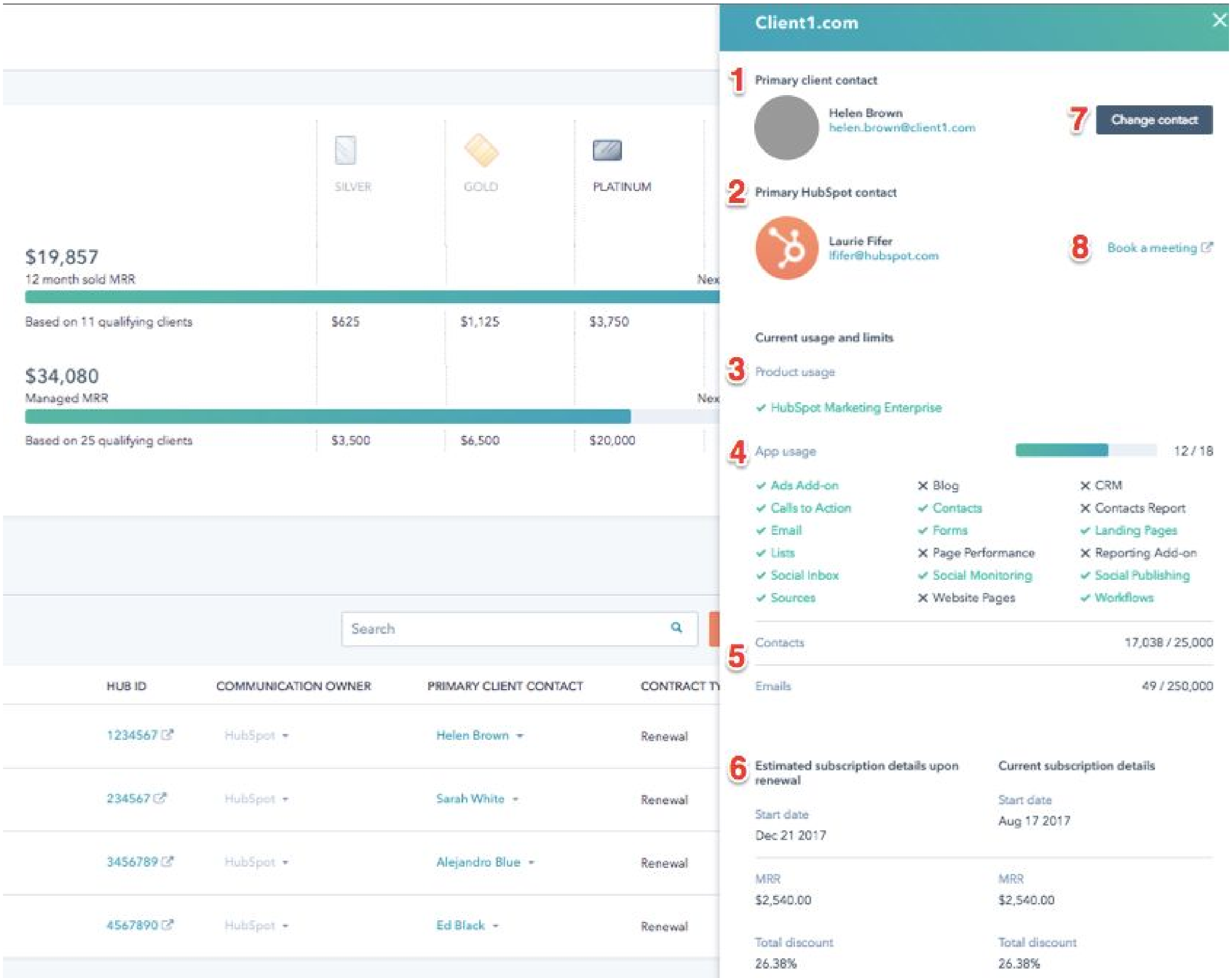
2. "Communication Owner" indicates who is responsible for relaying the details of an upcoming contract change to the client. By default, this will show as "HubSpot," unless you manually change it *or* if you have previously indicated to your Channel Consultant that you would like to own all transactional conversations with your clients

3. "Primary Client Contact" is the contact HubSpot will be reaching out to about their contract change if HubSpot is selected as the Communication Owner. You can click this field, and select the primary contact from a list of their portal users.

4. "Configure Columns" allows you to add or remove columns from this table. By default, the table will show "Client Name," "HUB ID," "Communication Owner," "Primary Client Contact," "Contract Type," "Status," "Renewal Deadline," "Current MRR," and "Estimated New MRR."

5. "End Association" appears when you hover over the client. If you click "End Association"you will remove the client from your renewals dashboard, and you will no longer receive email communication when that client is coming up on contract changes or renewals. When you end association with a client, HubSpot will be notified and will take the lead on the account moving forward.

What happens when you click on Client Name?



The slide out panel mentioned above will share details about a client's current contract.

1. "Primary Client Contact," which also appears in the table view, indicates who HubSpot will attend to communicate with about the upcoming contract change if HubSpot is selected as the Communication Owner.

2. "Primary Renewal Contact," refers to the renewal manager

3. "Product Usage" will list out known marketing and sales products that the client has purchased.

4. "App Usage" will reflect the client's known app usage. This also appears in the main client view of the dashboard.

5. "Contacts" and "Emails" will report their current usage against their contact and email limits.

6. "Upgraded Contact Limits" and "Current Contact Limits" will show a side-by-side comparison of the clients' current contract against any upcoming changes.

7. "Change Contact" is where you can change the primary client contact at the client.

8. Book a meeting to discuss this or other upcoming client contract changes with your renewal manager.