

HubSpot CRM & Salesforce: **What is the best solution for your company?**

As a marketing agency, we are always speaking with business owners, marketing managers and sales teams about their current situation, as well as how they can identify opportunities to improve efficiency, grow their company and ultimately crush their competitors. Using a Customer Relationship Management (CRM) system is one of the most effective ways to do this.

In this ebook, we wanted to share with you a few of the most common questions that we hear when we start working with a prospect or client. Choosing the right CRM for your business is an important decision to make; we hope this guide eases the process.

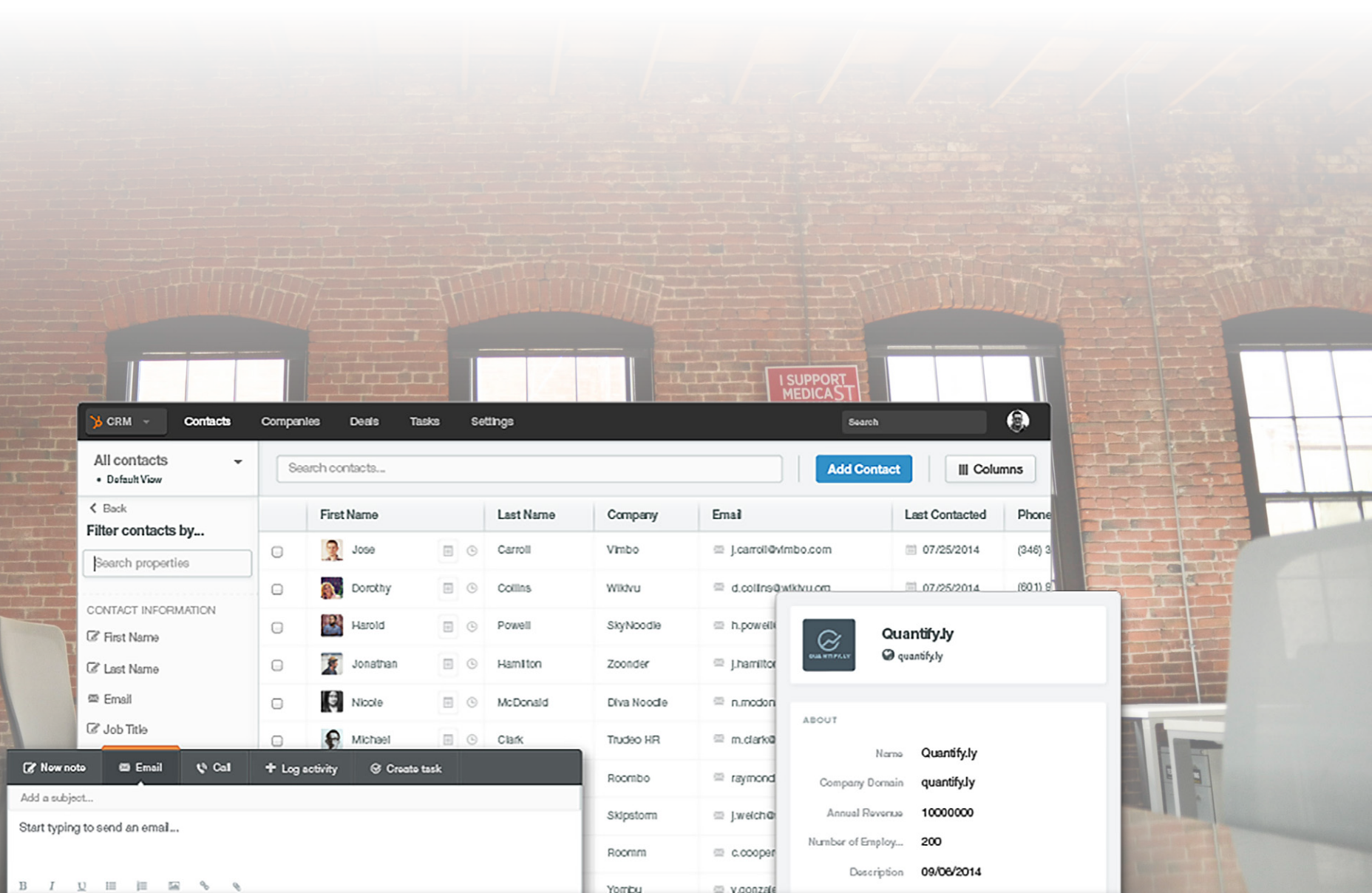


What are the benefits of the new HubSpot CRM?

We have used both HubSpot's and Salesforce's customer relationship management software systems, and found that the HubSpot CRM outweighs the Salesforce CRM, by far. Salesforce was the top dog in the CRM world until HubSpot shook things up with the release of their own CRM in 2014. The HubSpot CRM is a strong contender in the sales industry for its simplified closed-loop reporting and integration with HubSpot's marketing automation software; these capabilities aid in the data flow between your sales and marketing teams.

Marketing and sales are becoming so intertwined that they've coined the term **SMARKETING** to describe it. The HubSpot CRM captures both sides of the sales process in this way, connecting seamlessly with HubSpot to further integrate all marketing and sales functions into one platform. Both Salesforce's and HubSpot's CRMs are fully capable marketing automation platforms, the distinction just depends what your business's needs are. We all know a CRM helps drive and increase sales, but which one suits your business needs best?

The following are 9 of most important CRM features to consider when choosing a platform:



1. Cost:

How much does each edition of HubSpot and Salesforce cost?

HubSpot CRM:

Free - for everyone, regardless of tier level. The monthly cost for tiers, however, is dependent on the amount of contacts you have in the HubSpot database.

Comes with the browser extension, Sidekick, which gives you instant notifications when one of your prospects is interacting with your business in any way.

Salesforce:

The cost can range from \$5 to \$300 per user a month; it all depends on the features you want to utilize. Average cost is \$125 monthly per user on the widely sold enterprise edition. Salesforce can be costly for a large office to use.

HubSpot

Salesforce

HubSpot CRM	Group	Professional	Enterprise	Unlimited
Free	\$25/User/Month	\$65/User/Month	\$125/User/Month	\$250/User/Month
Lead scoring, Event tracking, Customizable reports & history, Campaigns, Workflows	Lead scoring, Event tracking, Customizable reports	All Group features plus Campaigns, Collaborative forecasts, Mass email	Get all Professional features plus Workflow automation, Report history	Get all Enterprise features plus, Unlimited customizations, 24/7 toll-free support
Unlimited users	Basic, up to 5 users	Any size team	Any size team, very customizable	Unlimited

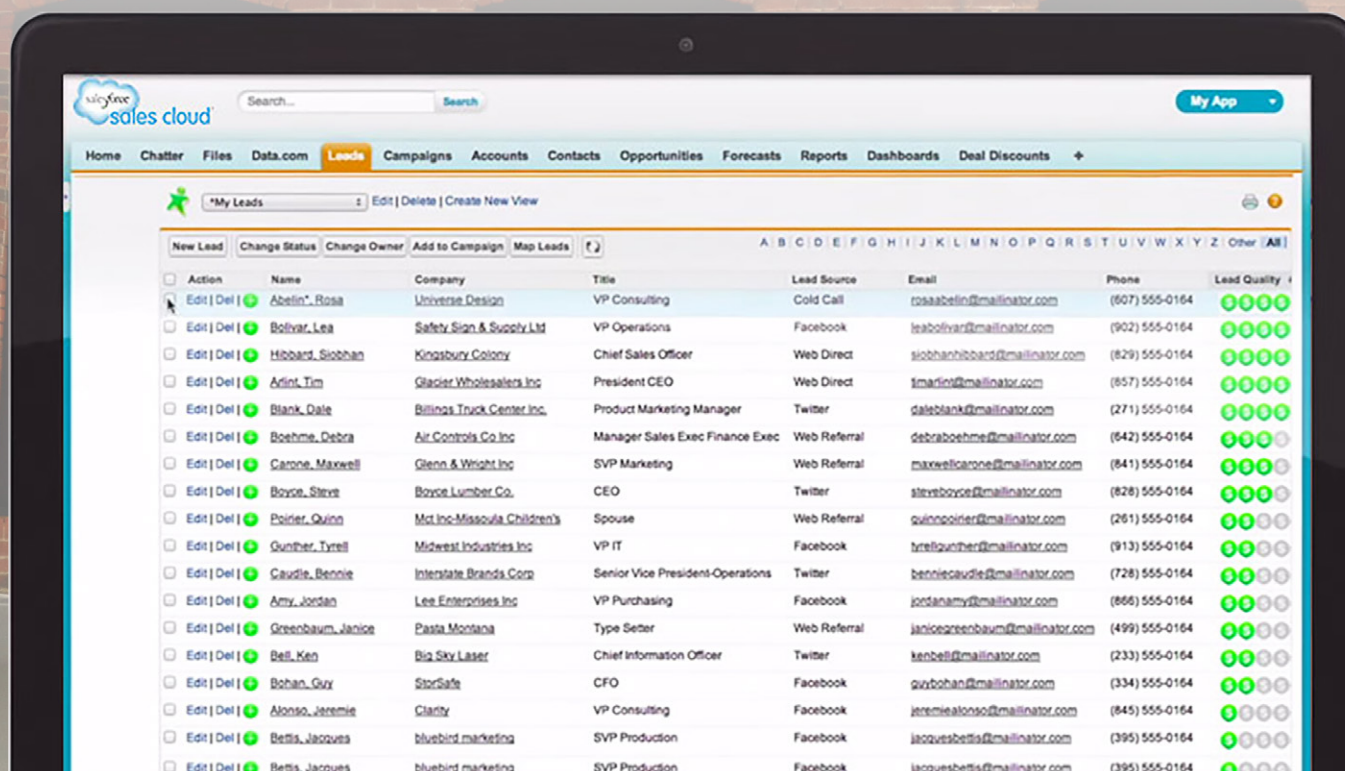
2. User experience: What's the Usability of this CRM System?

HubSpot:

- HubSpot is a very user-friendly platform. It's design simplicity and polished look make it easy to navigate.
- Runs on any browser, tablet, desktop or mobile phone.
- Has Android and mobile apps for use on the go.

Salesforce:

- Sales rep must manually input data regarding their prospects.
- Runs on any browser, tablet, desktop or mobile phone but has a historically does a poor job on mobile phones.
- Also has Android and mobile apps for use on the go.



Action	Name	Company	Title	Lead Source	Email	Phone	Lead Quality
☐ Edit Del	Abelin, Rosa	Universe Design	VP Consulting	Cold Call	rosaabelin@mailinator.com	(607) 555-0164	★★★★★
☐ Edit Del	Bolivar, Lea	Safety Sign & Supply Ltd	VP Operations	Facebook	leabolivar@mailinator.com	(902) 555-0164	★★★★★
☐ Edit Del	Hibbard, Siobhan	Kingsbury Colony	Chief Sales Officer	Web Direct	siobhanhibbard@mailinator.com	(829) 555-0164	★★★★★
☐ Edit Del	Adint, Tim	Glacier Wholesalers Inc	President CEO	Web Direct	timadint@mailinator.com	(857) 555-0164	★★★★★
☐ Edit Del	Blank, Dale	Billings Truck Center Inc.	Product Marketing Manager	Twitter	daleblank@mailinator.com	(271) 555-0164	★★★★★
☐ Edit Del	Boehme, Debra	Air Controls Co Inc	Manager Sales Exec Finance Exec	Web Referral	debra-boehme@mailinator.com	(642) 555-0164	★★★★★
☐ Edit Del	Carone, Maxwell	Glenn & Wright Inc	SVP Marketing	Web Referral	maxwellcarone@mailinator.com	(841) 555-0164	★★★★★
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☐ Edit Del	Gunther, Tyrell	Midwest Industries Inc	VP IT	Facebook	tyrellgunther@mailinator.com	(913) 555-0164	★★★★★
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☐ Edit Del	Greenbaum, Janice	Pasta Montana	Type Setter	Web Referral	janicegreenbaum@mailinator.com	(499) 555-0164	★★★★★
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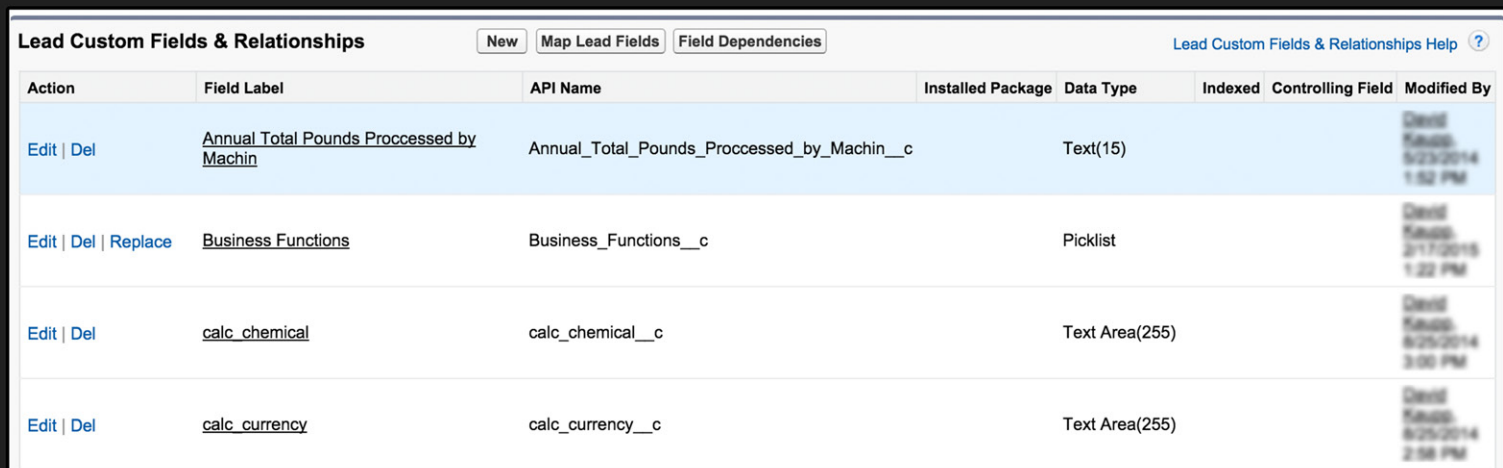
3. Customization: Can I create custom fields unique to my company's needs?

HubSpot:

- Any sales rep can customize their settings to their specific needs.
- Can create custom contact, company and deal records.
- Can also customize display, lead scoring and form field mapping.

Salesforce:

- Salesforce administrator is in charge of customization.
- Can create custom database tables that allow you to keep data unique to your business.
- Dashboards are notorious for their limitations.



Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit Del	Annual Total Pounds Processed by Machin	Annual_Total_Pounds_Processed_by_Machin__c		Text(15)			David Russell 5/23/2014 1:52 PM
Edit Del Replace	Business Functions	Business_Functions__c		Picklist			David Russell 5/23/2014 1:22 PM
Edit Del	calc_chemical	calc_chemical__c		Text Area(255)			David Russell 5/25/2014 3:00 PM
Edit Del	calc_currency	calc_currency__c		Text Area(255)			David Russell 5/25/2014 2:58 PM

4. Sales & marketing alignment:

What does this system do to help me align my sales and marketing teams?

HubSpot:

- “Find Companies” tool helps you learn more about your prospect by identifying company information, such as their annual revenue and how many employees work there.
- Prospects’ social media accounts are automatically pulled so you can get more valuable information about them. You can connect with prospects via Facebook, LinkedIn, Twitter and Google+.
- Contacts can be grouped together to form lists, where you can access them in the marketing portal of HubSpot and target for marketing campaigns.
- Custom contact, company and deal records automatically sync with the marketing platform so your sales and marketing teams stayed aligned and have access to the same information.

Salesforce:

- Integrates with Chatter, which is its enterprise social network tool. You can easily talk between your sales and marketing teams.
- Can easily segment contacts into lists so they can become grouped together and then used to target specific marketing efforts.
- Don’t have to pay extra for sales and marketing features; they’re automatically included.
- You connect with prospects via Facebook, LinkedIn and Twitter.

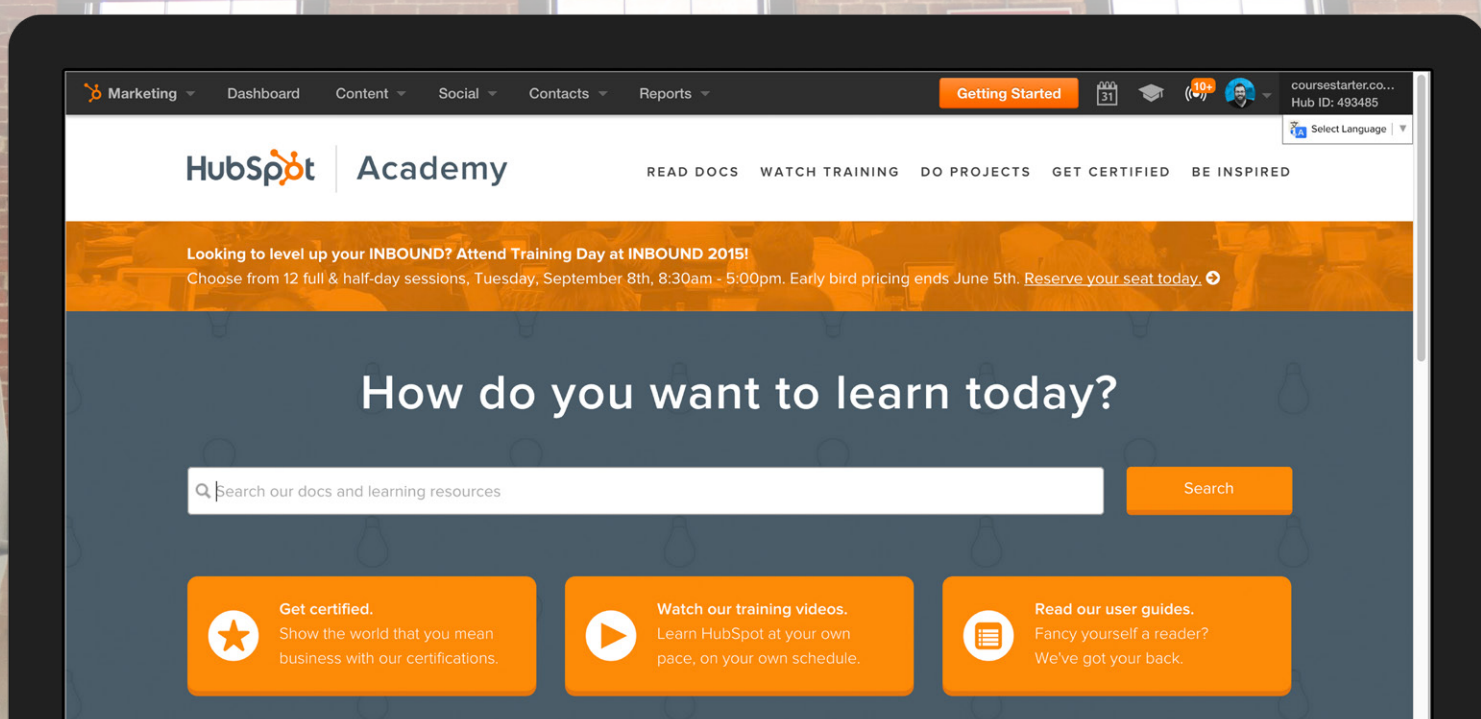
5. Setup & training: How difficult is it to learn this system?

HubSpot:

- HubSpot has its own set of training you can complete on your own time. Their “Academy Training” has a CRM section where you can learn the ins and outs of the software.
- Allows you to also learn the fundamentals of inbound marketing.
- Includes many additional resources like blogs, the knowledge center, ebooks, etc.
- Some criticism states that there is too much focus on the inbound marketing strategy.
- Having employees certified increases your credibility.

Salesforce:

- Just like HubSpot, Salesforce has a training and certification program called “Salesforce University.”
- Also gives third-parties the assurance and credibility for your employees.
- Can become an advanced level ‘administrator’ for those well versed on the system.



6. Usability: Who is best suited for this CRM system?

HubSpot:

- Good for offices both large and small.
- Every interaction between a contact and your company is automatically organized on your timeline.
- Very intuitive for users. Looks very appealing and user-friendly to the eye.

Salesforce:

- Best for larger offices.
- The high level of functions Salesforce is capable of adds to the complexity of using it.
- Even though it's look is very clear and simple, it's not necessarily easy to navigate.



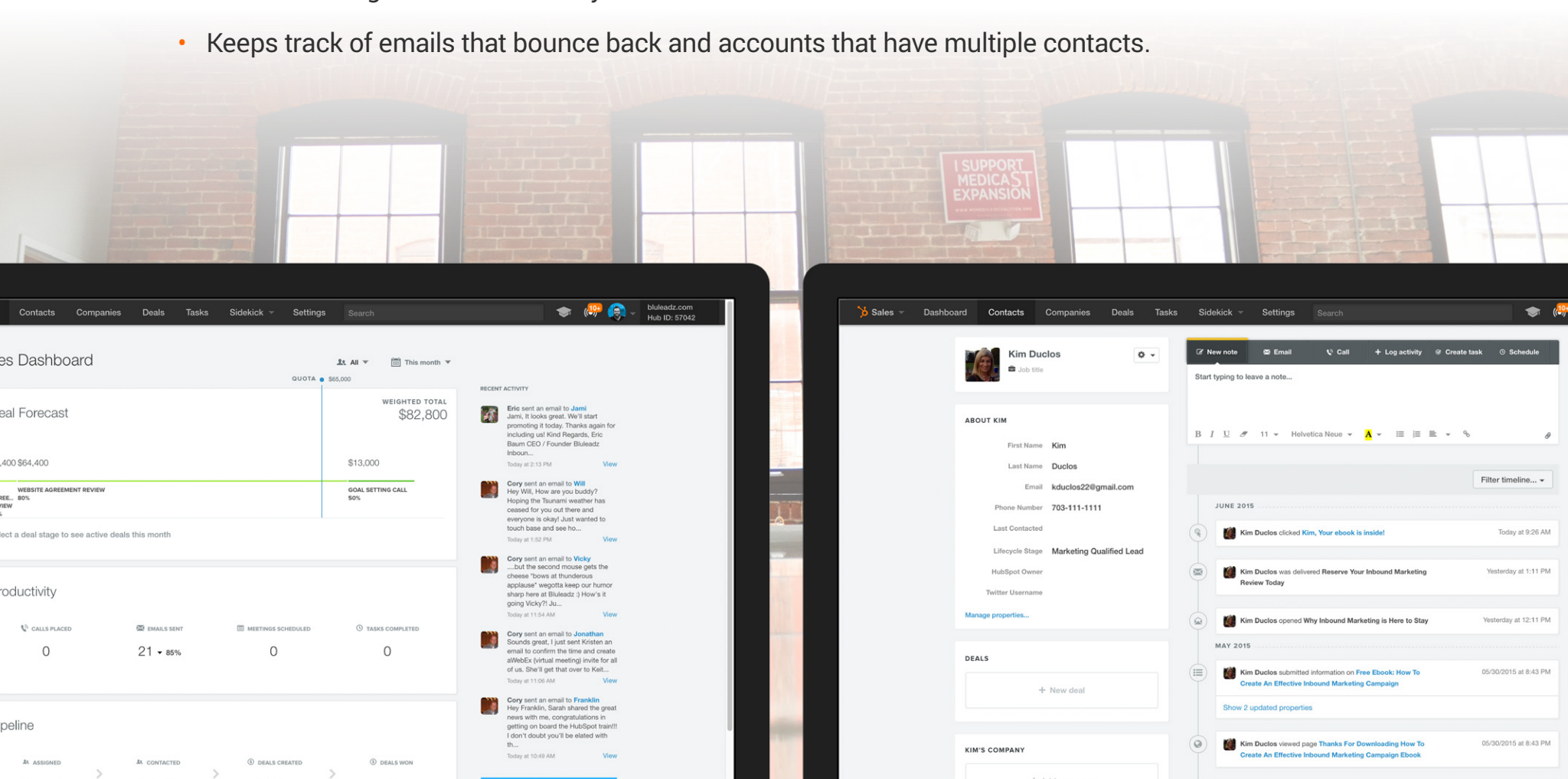
7. Email marketing: What does this product have to offer in terms of email marketing?

HubSpot:

- HubSpot CRM integrates with Gmail, Apple Mail and Outlook, and logs emails automatically.
- Doesn't let sender CC on emails; one-recipient emails only.
- Instant Notification when your emails are opened or clicked on.
- Keeps track of emails that bounce back and accounts that have multiple contacts.

Salesforce:

- Salesforce integrates with Outlook.
- Users must log in emails manually.
- Keeps track of emails that bounce back and accounts that have multiple contacts.



8. Analytics and reporting:

Can I customize reports based on my specific set of data?

HubSpot:

- Analytics automatically generated with a few clicks.
- Limited in the breadth of reports that can be created.

Salesforce:

- Wide range of reports and statistics; any type of report you can think of can be generated with Salesforce.
- Automatically generated with a few clicks.
- Reporting formulas are limited. Importing an excel document for its formulas is necessary for a deeper dive in reporting.



9. Customer support

HubSpot:

- Quick response time for any problem.
- Easy to get a hold of live support.
- Email, telephone and live chat customer support available.
- Same support no matter what tier you're in.

Salesforce:

- Different options for support exist, depending on Standard, Premier and Premier + Success Plan.
- Email, telephone and live chat customer support available.
- Difficult to get a hold of live support.



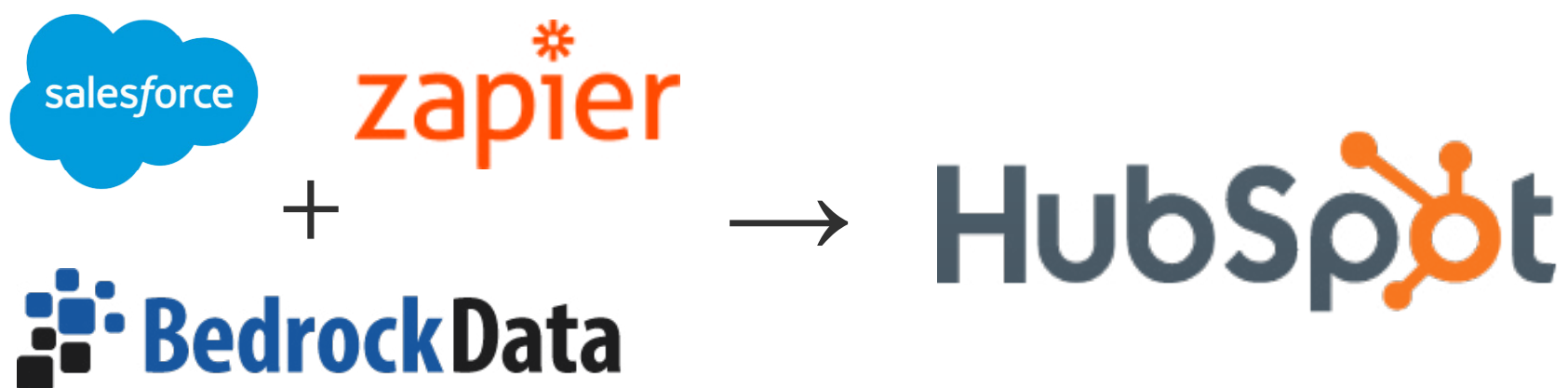
How would our current CRM integrate with HubSpot?

If you're on Salesforce:

- HubSpot's CRM actually integrates with Salesforce quite easily. The migration is supported and built by HubSpot's computer engineers. The integration gives you a complete sync between your HubSpot and Salesforce databases. This integration is available to all Pro and Enterprise HubSpot customers; using Salesforce comes at no additional cost for these users.

API's (featured: Zapier and Bedrock Data)

- Bedrock Data gives you access to many integrations for a variety of CRM platforms, like HubSpot. In HubSpot, you are able to integrate your Professional and Enterprise HubSpot portals with any other system in use.
- Bedrock Data can sync your records and lists, and automate the creation/updating of contacts in the HubSpot platform.
- HubSpot is partnered with Zapier to offer every HubSpot customer a free integration. It's built and maintained by HubSpot, so everything is all in one place.
- Zapier uses triggers/actions to automate work between HubSpot and other apps. A trigger is an event that happens in one app and an action is the event that Zapier automatically performs in another app.



How can I migrate my current CRM to the HubSpot CRM?

You can easily enable the HubSpot CRM to sync seamlessly with your Salesforce data. By doing this, you'll have both systems enabled with all of your most recent contact/lead information, accounts, opportunities, tasks and activities. Start by making sure all the information you want in HubSpot is there, and set up to migrate on an ongoing basis with Salesforce.

When you sync HubSpot with Salesforce, be expected to use additional API calls. Once data is set up properly, put it into HubSpot and turn on syncing with new objects. This HubSpot article goes into more detail about how to migrate the two CRM platforms. Here are the basic steps:

- Import all contacts
- Import all accounts associated with contacts
- Turn on and import all Opportunities associated with contacts
- Turn on and import all Tasks/Activities with Contacts

The best way a business can gain momentum and truly grow is through good customer relationship management. CRM software is an essential tool for this. For this reason, it's imperative to choose the right software that will best fit what your company needs.

After seeing the capabilities of the HubSpot CRM system, are you interested in learning more about it? You can view a free demo to see it in action [here](#)!





Bluleadz Inbound Marketing helps small businesses increase their online visibility, get more leads, and increase their number of clients using inbound marketing processes. We partner with HubSpot, a provider of inbound marketing software, to help our clients create, implement, manage, and measure successful inbound marketing plans that enable them to meet their business objectives.

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