



HubSpot Sales Hub





Sales Hub helps you build an efficient process to engage your prospects and turn them into customers.

Feature Highlights Include...

STARTER

Simple Automation

Simple Quotes

Live Chat

Templates

Documents

Calling

Notifications

Meetings

PROFESSIONAL

Forecasting Tools and Sales Analytics

Proposal Templates and eSignature

Deal stage, task, and lead rotation

automation

Email sequences

Salesforce integration

Native ABM features

ENTERPRISE

Custom Objects

Deep Permissions

Hierarchical Teams and Team Goals

Playbooks

Predictive Lead Scoring

Call Transcription

Advanced Reporting



SALES HUB STARTER

Templates + Snippets

Craft personalized templates for every stage of the sales process, and share them across your team.

Save time by saving short “snippets” of text you can easily drop into your emails using keyboard shortcuts.

The screenshot shows the HubSpot interface for creating an email sequence. On the left is a sidebar with a 'Mail' section containing folders like 'Inbox (2)', 'Starred', 'Sent Mail', 'Drafts (5)', and '_Outbox'. The main area is titled 'Sequences Meeting Follow Up'. It shows a sequence with two emails: 'EMAIL 1' (Thu 9/14) and 'EMAIL 2' (Tue 9/19). The 'EMAIL 1' editor is active, showing a 'Send email on' field set to '09/14/2017' at '7:10 PM'. The email content includes a 'Biglytics Recap' and a personalized message: 'Hey Jeffrey, Great connecting with you. We covered a lot on the call so I want links.' Below the message is a list of product features: 'Biglytics - \$50/month per user', 'Custom Objects - Unlimited', 'Advanced Reporting - Unlimited', 'Advanced Permissions', and 'Unlimited Events - Unlimited usage events'. At the bottom, there are 'Start sequence' and 'Cancel' buttons, and the recipient email 'To: jrusso@hubspot.com'.



SALES HUB STARTER

Documents

Build a library of helpful sales content for your entire team, share documents right from your Gmail or Outlook inbox, and see which content closes deals.

When a lead clicks an email link to open your document, or shares it with a colleague, we'll notify you instantly on your desktop. Get aggregate data about how your sales content is helping to move your sales process forward.

[< Back to documents](#)



About HubSpot

SHARES	VISITORS	VIEWS
145	11	17

Visitors

NAME



Joseph Cavallaro



Kristen Kelley



Julia McCarthy



SALES HUB STARTER

Quotes

Quotes allows your sales reps to quickly configure a quote right inside HubSpot using your contact, company, and product data. Send a shareable link to your quote, and even allow your prospect to pay using a credit card or EFT via Stripe.

Richards Company - New Deal

Richards Company
2801 North Central Expressway
Dallas, TX 75204
United States

Mark Richards
Student
mrichards@hubspot.com
6178627319

Reference: 20210120-111116051
Quote created: January 20, 2021
Quote expires: April 20, 2021
Quote created by: Daniel Jacobs
djacobs@hubspot.com
+1 (857) 829-5287

Products & Services

Item & Description	SKU	Quantity	Unit Price	Total
big data software	5678	1	\$2,000.00	\$2,000.00
Helios - Pro Services Hourly Rate	12345	1	\$165.00	\$165.00

Subtotals

One-time subtotal \$2,165.00

Total \$2,165.00

 Sign



SALES HUB STARTER

Tasks

Reps work from their inboxes, CRMs, calendar, spreadsheets, notebooks, any number of applications all in an effort to figure out what to do next, execute their sales activities, and ultimately to hit their sales goals.

With the Tasks, HubSpot gives reps a personalized command center. It's their command center for everything they need to do to reach success, all in one single tab.

The screenshot displays the HubSpot Tasks interface. At the top, there are navigation tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main header includes a search bar, a user profile for Brittany Lambert, and a 'Start 6 tasks' button. Below the header, there are filters for 'All', 'Due today', 'Overdue', 'Upcoming', 'Prospecting 2', 'Inbound Leads', and 'More'. A search bar for tasks and a 'Find a task' input field are also present. The main content area is a table of tasks with columns for Status, Title, Associations, Last Contacted, Last Engagement, and Due Date. A 'Tasks beta options' tooltip is visible at the bottom left of the table.

STATUS	TITLE	ASSOCIATIONS	LAST CONTACTED	LAST ENGAGEMENT	DUE DATE
<input type="checkbox"/>	Task for Brenda Davis	Brenda Davis, +2	14 days ago	3 days ago	July 28, 2020
<input type="checkbox"/>	Ivan Cornejo	Ivan Cornejo, +1	6 days ago	--	July 28, 2020
<input type="checkbox"/>	Chiemeka Yobachukwu	Chiemeka Yobachukwu	3 days ago	--	July 28, 2020
<input type="checkbox"/>	FUP w Yvonne Knight	Yvonne Knight	--	--	July 28, 2020
<input type="checkbox"/>	Email Roman Kutepov	Email Roman Kutepov	11 days ago	3 days ago	July 28, 2020
<input type="checkbox"/>	Call Pedro Amorim	Pedro Amorim	--	6 days ago	July 28, 2020
<input type="checkbox"/>	FUP w Teng Jiang	Teng Jiang, +2	6 days ago	--	July 28, 2020
<input type="checkbox"/>	Call Oluchi Mazi	Oluchi Mazi	28 days ago	9 days ago	July 28, 2020
<input type="checkbox"/>	Email Ainaara Vergara	Ainaara Vergara	--	--	July 28, 2020
<input type="checkbox"/>	FUP w Margje Jutten	Margje Jutten, +1	7 days ago	--	July 28, 2020
<input type="checkbox"/>	Call Rim Chong-Suk	Rim Chong-Suk	--	3 days ago	July 28, 2020
<input type="checkbox"/>	Call Gopichand Sana	Gopichand Sana, +2	14 days ago	--	July 28, 2020
<input type="checkbox"/>	Call Gatharan Sangrota	Gatharan Sangrota	14 days ago	--	July 28, 2020

Summary Dashboard:

- Insights: Feed, Schedule
- Activities: 34 calls connected (▲ 4 from previous week)
- 8 meetings delivered (▲ 1 from previous week)
- Your weekly outreach: EMAILS (17, ▲ 4), CALLS (25, ▲ 7), MEETINGS (4, ▼ 4)
- Sequence tasks: First touch (2), Warm leads (4), Gone cold (3)



SALES HUB STARTER

Calling

Use data from HubSpot to prioritize your best calls, and set up a daily calling queue. Just one click connects you to a prospect through Voice Over IP or your desk phone.

The screenshot displays the HubSpot interface during a call. At the top, a navigation bar includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', and 'Automation'. A green header bar shows 'Connected to: +18578295297' and a timer at '0:28'. Below this, the contact profile for 'Lena Letterman', Financial Manager at Oktra, is visible. A notification states: 'Some of this contact's activity has been excluded based on their IP address. Learn more'. Action buttons for Note, Email, Call, Log, Task, and Meet are present. The 'About this contact' section lists her first and last name, email (lenaletterman@demospot.org), and phone number. The right-hand 'Activity' panel shows a 'Page view' for 'Biglytics | Home and 8 other pages' and a 'Session Details' table with five entries from 11/29/2018. A 'Form submission' entry at the bottom indicates 'Lena Letterman submitted [*] Default Fo'. A 'Call' button is overlaid on the right side of the interface.

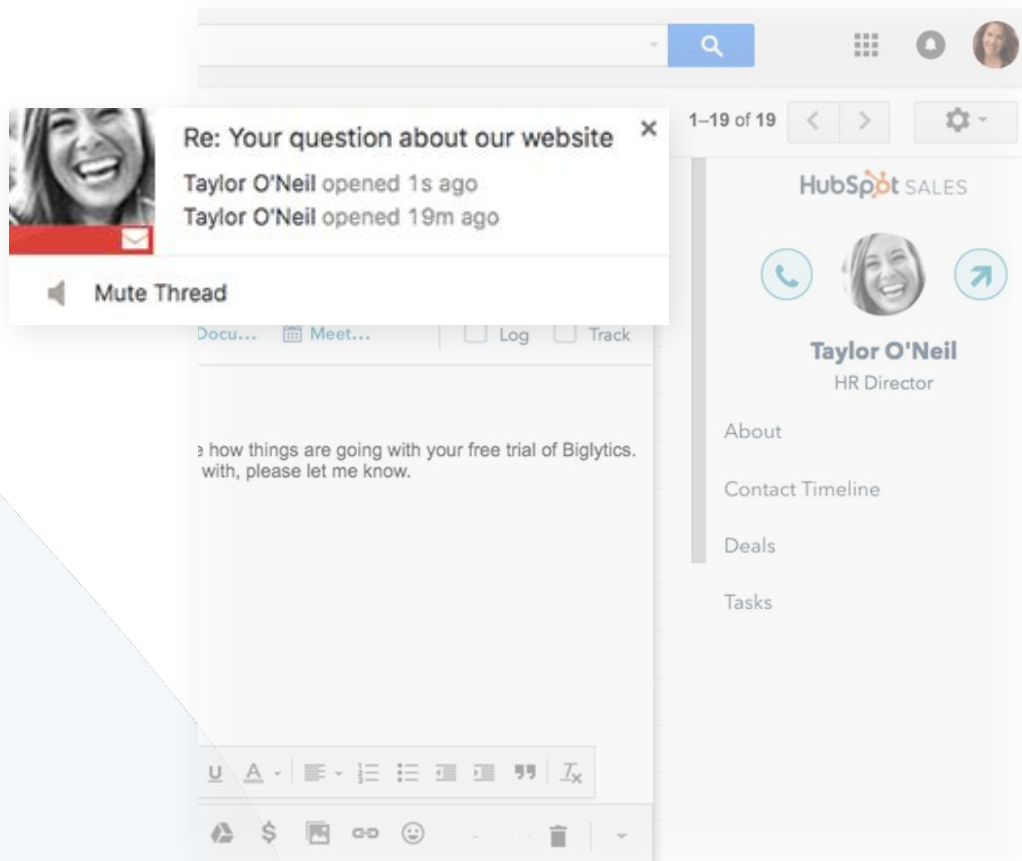


SALES HUB STARTER

Notifications

Use notifications to follow up seconds after a lead opens an email, clicks a link, or downloads an important document. Our built-in activity stream automatically logs each lead's email actions inside your browser or in Sales Hub.

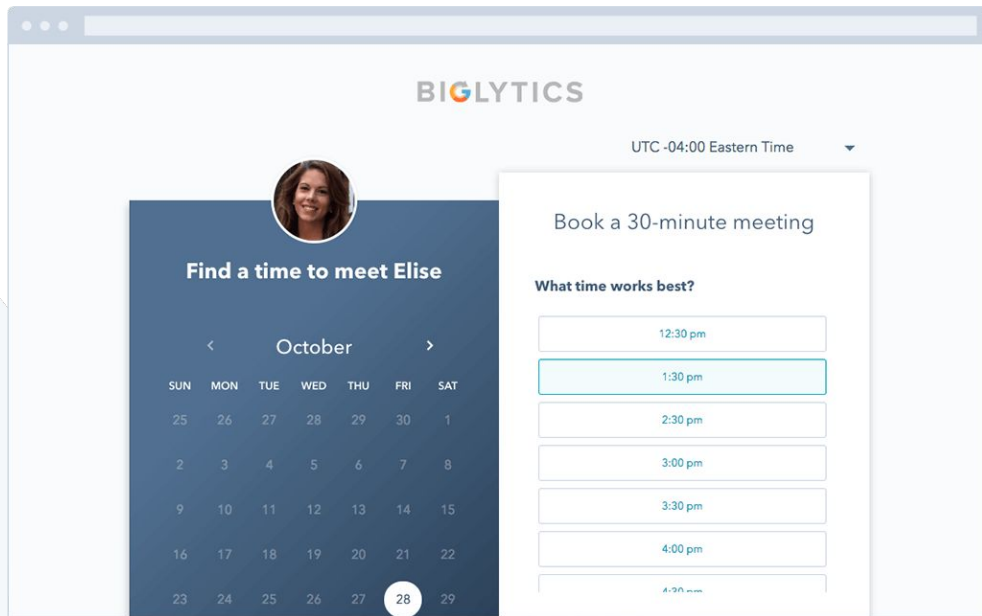
Open, click, and reply data helps you hone in on which email templates and sequences are most effective.



SALES HUB STARTER

Meetings

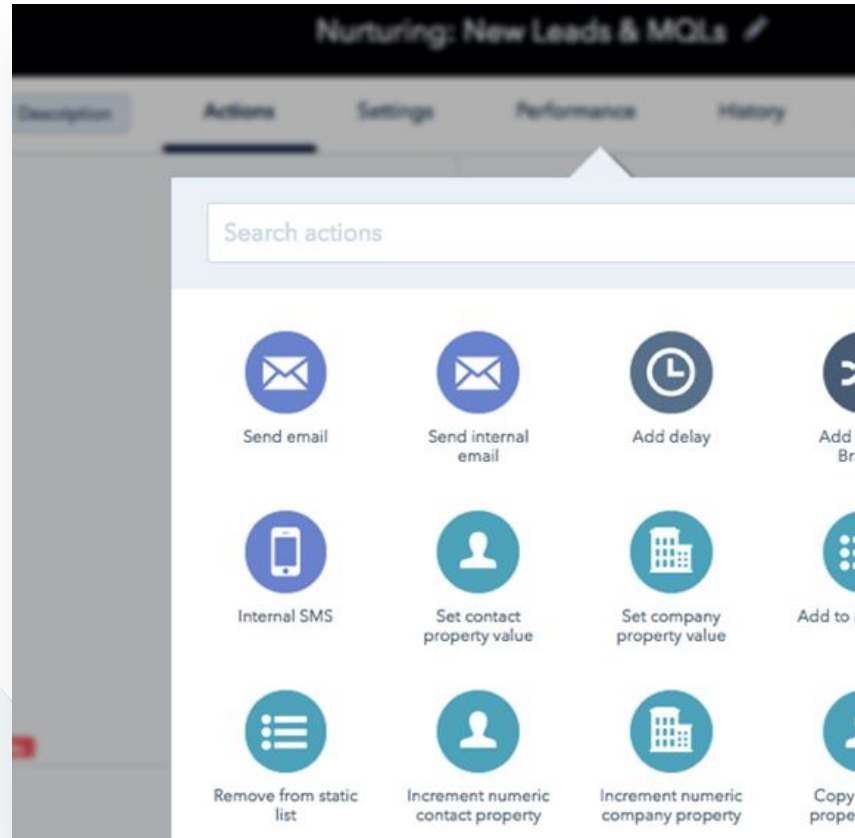
Put the power to book meetings in the hands of your prospects. Meetings sync to your Google or Office 365 calendar, so your schedule is always up-to-date. As prospects book meetings, automatically create new records and log the activity in HubSpot.



SALES HUB PROFESSIONAL

Automation

Automate common management tasks like assigning leads, alerting reps when contacts take specific actions, creating tasks, and more.



SALES HUB PROFESSIONAL

Sequences

Tee up a timed series of email messages and tasks based off your templates with Sequences.

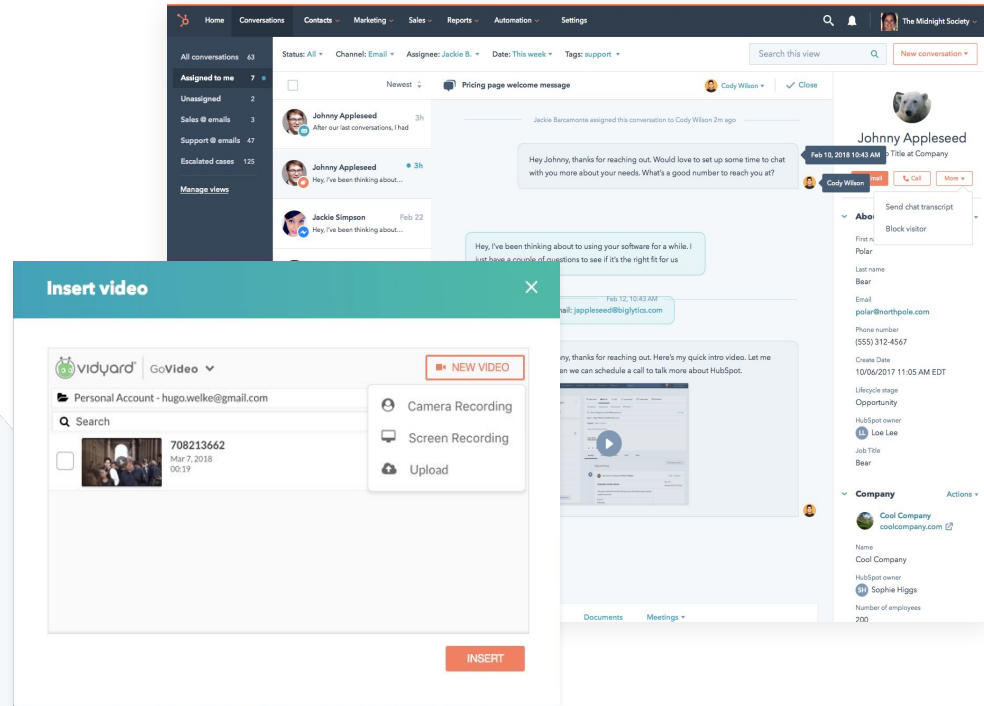
The screenshot displays the HubSpot Sequences interface for a 'Meeting Follow Up' sequence. On the left, a sidebar shows a 'Mail' section with a 'COMP' status and a list of folders including 'Inbox (2)', 'Starred', 'Sent Mail', 'Drafts (5)', and '_Outbox'. Below these are various tags like 'copywriting', 'emerging k', 'Fidelity', and 'GrowthStar', along with a contact profile for 'Elise'. The main area shows a sequence timeline with two emails: 'EMAIL 1' (Thu 9/14) and 'EMAIL 2' (Tue 9/19). The 'EMAIL 1' is selected, and its details are shown on the right. The 'Start sequence at:' dropdown is set to 'Email 1'. The 'Send email on' date is '09/14/2017' at '7:10 PM'. The email content includes a 'Biglytics Recap' and a message to 'Hey Jeffrey' about connecting with him. A list of features is provided: 'Biglytics - \$50/month per user', 'Custom Objects - Unlimited', 'Advanced Reporting - Unlimited', 'Advanced Permissions', and 'Unlimited Events - Unlimited usage events'. At the bottom, there are 'Start sequence' and 'Cancel' buttons, and the recipient email is 'To: jrusso@hubspot.com'.



SALES HUB PROFESSIONAL

Selling with Video

Salespeople can build stronger relationships with prospects by creating, sharing, and tracking personalized videos right from HubSpot.

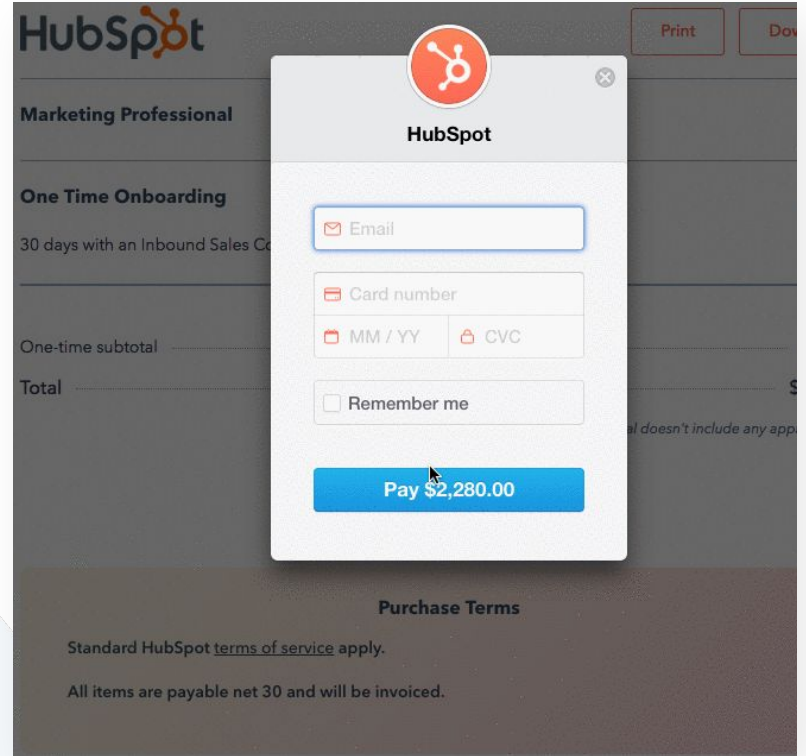


SALES HUB PROFESSIONAL

Products + Quotes

Products makes it easy to build a library of products that your sales team can easily add to deals inside HubSpot.

Quotes allows your sales reps to quickly configure a quote right inside HubSpot using your contact, company, and product data. Send a shareable link to your quote, collect eSignatures, and even allow your prospect to pay using a credit card or EFT via Stripe.



SALES HUB PROFESSIONAL

Account-based Marketing

Seamlessly coordinate across sales and marketing to run a powerful ABM program in HubSpot. With ABM properties and templates, company scoring, and out-of-the-box ABM reporting all available in both Sales Hub and Marketing Hub Professional, you can unite your teams around the same data to close more high-value deals. Better yet, enable reps to manage engagement with an account overview snapshot, available exclusively to Sales Hub Professional paid seat users.

The screenshot displays the HubSpot interface for account-based marketing. At the top, a navigation bar includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. The main section is titled 'Target Accounts' and features a 'Choose target accounts' button. Below this, a summary table provides key metrics:

TARGET ACCOUNTS	ACCOUNTS WITH OPEN DEALS	OPEN DEAL VALUE	MISSING ANY BUYING ROLE	MISSING DECISION MAKERS
53 Total chosen companies	46 87% of target accounts	\$124M Avg \$1.8M per deal	4 8% of target accounts	18 26% of target accounts

Below the summary table, a 'COMPANY' filter is set to 'Xuatico'. A sidebar on the left lists 'All target accounts' with various filters like 'No open tasks', 'No logged calls', etc. A 'Recommendations' section shows 'Potential target accounts' and 'Prospects'. An 'Account overview' modal is open, showing activity for 'This month':

PAGE VIEWS	SESSIONS	NEW CONTACTS	1:1 EMAILS SENT	LOGGED CALLS	MEETINGS
89 ▲ 3.01%	47 ▲ 2.98%	5 ▲ 7.12%	13 ▲ 13.45%	2 ▲ 1.07%	1 ▲ 2.98%

The 'Contacts' section below the activity shows a list of contacts with columns for 'CONTACT', 'BUYING ROLE', 'LAST TOUCH', 'LAST ENGAGEMENT', and 'SCHEDULED':

CONTACT	BUYING ROLE	LAST TOUCH	LAST ENGAGEMENT	SCHEDULED
Amy Andrews CEO at S2 Bogota	Decision Maker	3 days ago Ethan Kopt called	1 hour ago Opened email from Ethan Kopt	
Brian Boxer VP Marketing at S2 Bogota	Champion	5 days ago Nate Lacy sent email	2 days ago Opened email from Nate Lacy	Meeting Task
Callie Craven VP Finance at S2 Bogota	Economic Buyer Blocker	2 weeks ago Nate Lacy sent email	3 days ago Viewed Why HubSpot?	Sequence
Lacey Thomas		No outreach	5 days ago Viewed ABM 101	Aud audience Marketing
Lissa Terry		No outreach	No engagement	

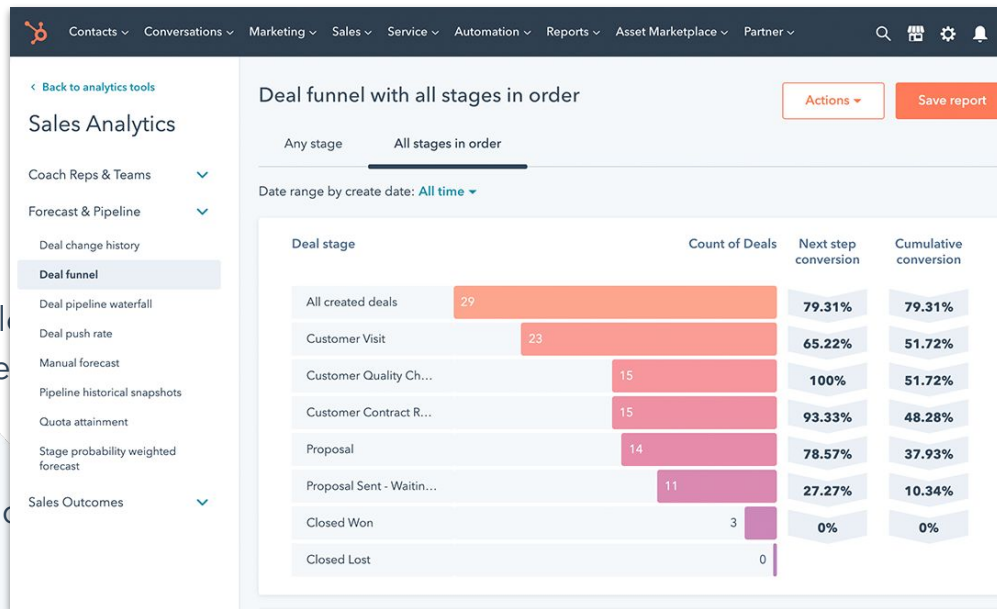
At the bottom of the contacts list, there is a pagination control showing 'Prev 1 2 3 4 5 Next' and '25 per page'.



SALES HUB PROFESSIONAL

Sales Analytics

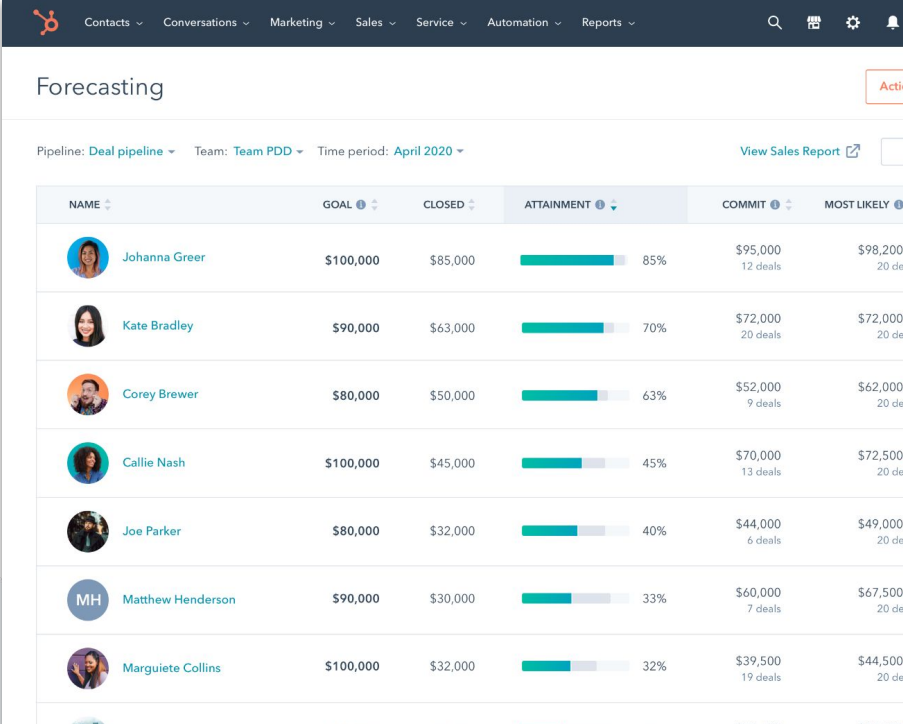
Get rich insights into the overall health of your sales pipeline so you can coach your team and improve outcomes over time. Sales Hub Professional and Enterprise customers can now access over 20 powerful reports like this deal funnel report -- which gives you a classic view to understand the efficiency of your sales funnel.



SALES HUB PROFESSIONAL

Forecasting & Goals

Collects input from sales reps to generate more accurate, up-to-date sales forecasts, while eliminating the need for double data entry. You'll be able to see the goal attainment of reps within your sales teams. You can drill down into the deals that your reps are working through to suggest tactics and to coach your reps.



The screenshot displays the Salesforce Forecasting interface. At the top, there is a navigation bar with menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main heading is "Forecasting". Below the heading, there are filters for Pipeline (Deal pipeline), Team (Team PDD), and Time period (April 2020). A "View Sales Report" link is also present. The main content is a table with the following columns: NAME, GOAL, CLOSED, ATTAINMENT, COMMIT, and MOST LIKELY. The table lists seven sales reps with their respective goal amounts, closed amounts, attainment percentages, committed deal counts, and most likely deal counts.

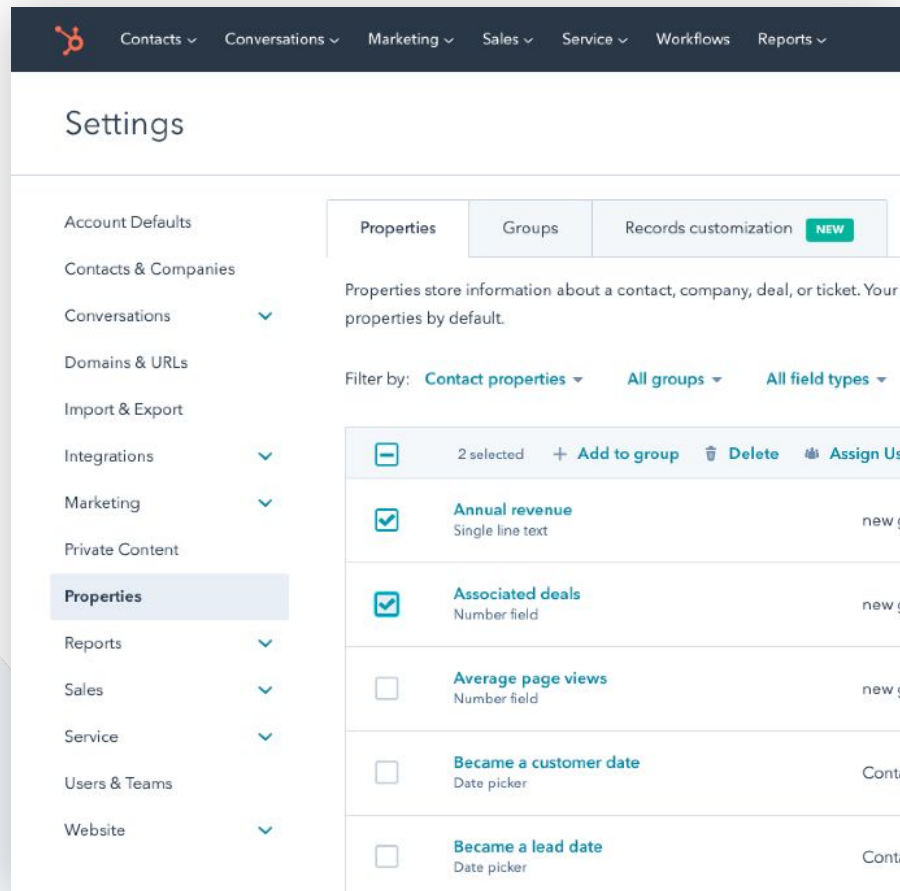
NAME	GOAL	CLOSED	ATTAINMENT	COMMIT	MOST LIKELY
Johanna Greer	\$100,000	\$85,000	85%	\$95,000 12 deals	\$98,200 20 deals
Kate Bradley	\$90,000	\$63,000	70%	\$72,000 20 deals	\$72,000 20 deals
Corey Brewer	\$80,000	\$50,000	63%	\$52,000 9 deals	\$62,000 20 deals
Callie Nash	\$100,000	\$45,000	45%	\$70,000 13 deals	\$72,500 20 deals
Joe Parker	\$80,000	\$32,000	40%	\$44,000 6 deals	\$49,000 20 deals
Matthew Henderson	\$90,000	\$30,000	33%	\$60,000 7 deals	\$67,500 20 deals
Marguiete Collins	\$100,000	\$32,000	32%	\$39,500 19 deals	\$44,500 20 deals



SALES HUB PROFESSIONAL

Teams & Permissions

Robust tools to manage and administer large teams. To protect the integrity of all that data you store in your CRM, create granular permissions on all your CRM data, including field-level permissions on your properties. Field-level edit permissions means managers and administrators can finally control who can edit specific CRM data. And with more granular permissions across HubSpot, you'll have more control than ever over the tools and content your team can access.



The screenshot shows the HubSpot Settings interface. At the top, there is a navigation bar with the HubSpot logo and menu items: Contacts, Conversations, Marketing, Sales, Service, Workflows, and Reports. Below this is the 'Settings' page header. On the left, a sidebar lists various settings categories: Account Defaults, Contacts & Companies, Conversations, Domains & URLs, Import & Export, Integrations, Marketing, Private Content, Reports, Sales, Service, Users & Teams, and Website. The 'Properties' category is currently selected and highlighted. The main content area is titled 'Settings' and has three tabs: 'Properties', 'Groups', and 'Records customization' (which has a 'NEW' badge). Below the tabs, there is a description: 'Properties store information about a contact, company, deal, or ticket. Your properties by default.' Below this, there are filter options: 'Filter by: Contact properties', 'All groups', and 'All field types'. A table lists several properties with checkboxes for selection. The table has columns for a selection checkbox, the property name, its field type, and a status indicator. The properties listed are: 'Annual revenue' (Single line text, new), 'Associated deals' (Number field, new), 'Average page views' (Number field, new), 'Became a customer date' (Date picker, Cont), and 'Became a lead date' (Date picker, Cont). At the bottom right of the screenshot, the HubSpot logo is visible.

SALES HUB ENTERPRISE

eSignature

Collect signatures on quotes and other documents right inside of HubSpot.

BIGLYTICS [Sign](#)

PKGD Marketing - New Deal

Prepared on May 13, 2019 - #20190513-115429401
For PKGD Marketing - Taylor O'Neil, Can Kutay [Show details](#)

Products & Services


Hours	5 x \$100.00 / month
Description	For 1 year
Product A	1 x \$10,000.00
Description	
Recurring subtotal	\$500.00 / month
One-time subtotal	\$10,000.00
Total	\$10,500.00

This total doesn't include any applicable taxes.

[Sign](#)


This quote expires on August 11, 2019.

Questions? Contact me


Elise Beck
ebeck@hubspot.com

[Download quote](#)

[Print quote](#)


Biglytics
25 First Street
Cambridge, MA 02139
United States



SALES HUB ENTERPRISE

Playbooks

Build a library of sales best practices and resources. Use rules-based automation to surface recommended content to your sales team, right inside of HubSpot.

The screenshot shows the HubSpot Playbook editor interface. At the top, there are navigation tabs for 'Sales', 'Service', 'Automation', and 'Reports'. The main title is 'Playbook'. Below this, there is a section for 'Discovery Call Script' with a description: 'Use this script when conducting a discovery call with new leads. Record answers for easy access later.' There are three radio buttons for 'How far out are you on making a purchase decision?' with '1-3 months' selected. Below that is a 'Lifecycle stage' dropdown menu set to 'Lead'. There is a text area for 'Add notes here'. At the bottom, there are 'Save' and 'Cancel' buttons. On the left side of the interface, there is a 'New note' section with a text input field and a 'Leave a note...' placeholder. Below that is an 'Activity' section showing a calendar for 'June 2017' with two activity items from 'Charlotte A.': one from June 4 at 2:18 with 'SENT' and 'DEL' status, and another from June 3 at 11:1.



SALES HUB ENTERPRISE

Advanced Goals

Give individual sales reps and teams the ability to report on metrics related to specific goals, like calls logged, meetings booked, revenue generated, or deals created.

Settings

Account Defaults

Contacts & Companies

Conversations ▼

Domains & URLs

Import & Export

Integrations ▼

Marketing ▼

Properties

Reports ▼

Goals

Tracking code

Goals

Monthly Weekly

Tickets closed ▼ All teams ▼

<input type="checkbox"/>	USER	TEAM	7/15 - 7/21
<input type="checkbox"/>	Charlotte Arrowood	Midwest	Add amount
<input type="checkbox"/>	Nate Lacy	Eastern	Add amount
+ Add user			Total: 0



SALES HUB ENTERPRISE

Predictive Lead Scoring

Predictive Lead Scoring takes hundreds of demographic and behavioral factors into account to automatically score contacts based on their likelihood to buy.

< Back

Manage properties

Some excluded

About

These contacts record your properties

Set default properties

First name

Last name

Email

✓ **Contact Property Name** 4 of 341 properties

Contact priority
Very High

Likelihood to close
2.08

ame 4 of 341 pro



SALES HUB ENTERPRISE

Call Transcription

Let HubSpot conveniently transcribe any recorded call right inside HubSpot.

The screenshot displays the HubSpot interface for managing calls. At the top, a navigation bar includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. The main section is titled 'Calls' and shows '6 records'. Below this, there are filters for 'Recorded calls', '+ Add view', and 'All views'. A search bar and 'Transcript Available' filter are also present. The call list table has columns for 'CALL TITLE' and 'CALL NOTES PREVIEW'. The transcript panel on the right shows a call review for 'Call with Carlos Garza' with a timeline and a list of transcript segments.

<input type="checkbox"/>	CALL TITLE	CALL NOTES PREVIEW
<input type="checkbox"/>	Call with Carlos Garza	Create and send quote with discount discou
<input type="checkbox"/>	Call with Anthony Brewer	Interested in premium package. Follow up
<input type="checkbox"/>	Call with Maddie Gilbert	Intro call regarding business process.
<input type="checkbox"/>	Call with Vicki Rodriguez	Talked to Vicki about what she was thinking
<input type="checkbox"/>	Call with Gary Bridges	Demoed product for business use case. Th
<input type="checkbox"/>	Fai Liang's Zoom Meeting	Fai Liang's Zoom Meeting

Call Review

6:12 10 seconds 10 seconds Speed 1x 25:16

IR VR

Transcript Participants (2) Share

Search transcript

We've been growing fine in the current conditions.

Ian Riedel 6:12
Got it. So what platform are you using now?

Vicki Rodriguez 6:18
Currently we use ACME in our business. We like it so far. It's not perfect. But it does what we need.

Ian Riedel 6:22
Ok. I find a lot of businesses like yours using ACME. You mentioned that it's not perfect. Why is that?

Vicki Rodriguez 6:26
I could go on for a while. How much time do you have?

Ian Riedel 6:29
Haha. We have plenty of time. I'd like to learn more.

Vicki Rodriguez 6:33
For one, for our growing business in a niche industry we find that

View Full Screen

