

# Set-up Your HubSpot Platform for Full Funnel Visibility

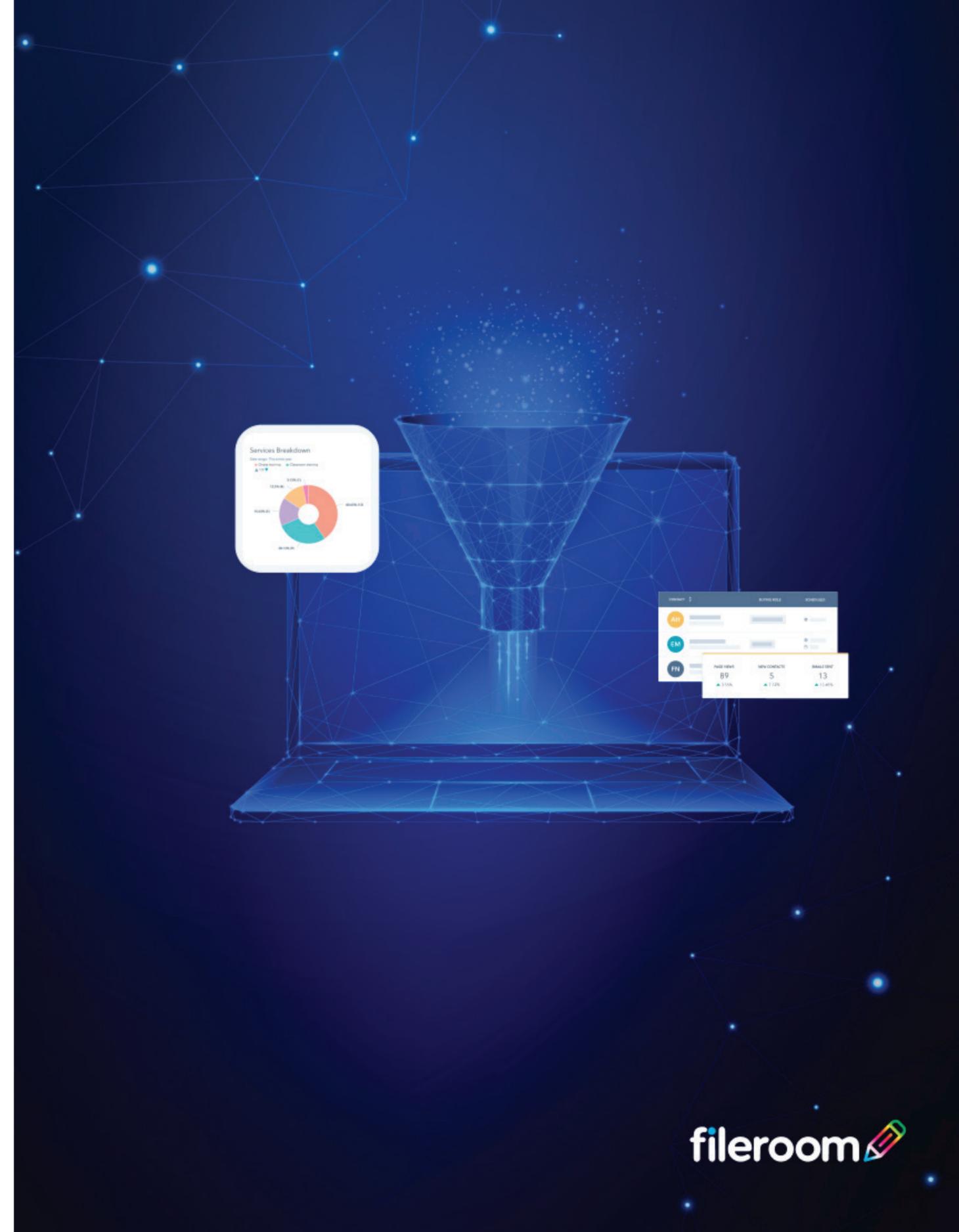
Get Confidence in your:

- Data Model & Visualisation
- App Integrations
- ROI Tracking & Measurement



# Playbook Contents

Topic	Page
A Message From filerom's Managing Director	2
Introduction: Solving Attribution Challenges	3
Before We Start	5
Chapter 1 - How Data Lives & Flows Through HubSpot	6
Chapter 2 - Case Study: Customising HubSpot for ChemCo	13
Chapter 3 - How to Craft Your HubSpot Environment	17
Chapter 4 - HubSpot Integration Mastery: Navigating Ready-Made & Custom Pathways	22
Chapter 5 - Which HubSpot Subscription is Best for You?	25
Discover Growth with filerom, Your Platinum HubSpot B2B Partner	28



# To the Data-Verse and Beyond

As you start your journey with how to best leverage your HubSpot environment, it's essential to reflect on what we need to unpack together. From the foundational bricks of HubSpot's environment to the intricacies of tailored integrations, this playbook has been written to help your team leverage the most value from your HubSpot environment.

Success in HubSpot isn't just about automating manual processes, leveraging tools or integrating systems; it's about designing a data ecosystem that aligns with your business vision, adapts to ever-evolving needs, and consistently delivers value and strategic insights to bolster further growth. Every strategy, tip, and best practice shared in this playbook is a stepping-stone towards that vision of HubSpot excellence.

Thank you for embarking on this journey with us. With the knowledge you will gain and the best practice steps at your disposal, you're well-equipped to start sculpting your HubSpot environment into a powerhouse of efficiency, insight, and growth.

Of course, it is what we do best, so if you are looking for a HubSpot partner agency with experience in the B2B and industrial sector, we are your people. Connect with us at any time for a chat and some guidance. We are HubSpot lovers and committed to our client's success on the platform.

To HubSpot mastery and beyond - here's to your success! 🚀

*Emma Ruefli*

Emma Ruefli  
Managing Director  
fileroom



# Introduction: Solving Attribution Challenges

## HubSpot's Customer Data Platform

In today's rapidly evolving business landscape, data has emerged as a game changer, providing organisations and teams with unprecedented opportunities to drive growth and make informed decisions. Yet there is often a gap between CRM and other system data sources which make insights difficult to form as attribution doesn't flow all the way through the sales funnel into ongoing sales and revenue figures. This limits attribution insights and makes customer lifecycle values hard to determine against real acquisition costs.

If you spend some time to set your HubSpot data model correctly, you can leverage HubSpot as a single source of truth to gain deep insights into customer behaviour, optimise sales strategies, refine product development, enhance customer loyalty, and ensure compliance with data, privacy and other regulations. Getting your CRM setup with a solid foundation for your business and specific processes means not only solving attribution issues but also allows you to leverage your data to contribute to a range of insights across your organisation.

### Enhanced Decision Making

Data-driven decision making has become a cornerstone of successful businesses. By analysing various datasets, you can make informed choices based on real-time insights rather than relying on gut feelings.

Whether it's optimising marketing campaigns, refining pricing strategies, or improving operational efficiencies, data empowers you with the knowledge you need to drive growth and stay ahead of competitors.

### Customer Experience Insights

Customer experience is a key differentiator in today's competitive business landscape. Data plays a pivotal role in understanding customer preferences, behaviours, and satisfaction levels. By leveraging customer data in your HubSpot platform, you can personalise interactions, anticipate needs, and deliver exceptional experiences that foster loyalty and advocacy.

### Sales Forecasting

Accurate sales forecasting is indispensable for effective resource allocation, inventory management, and revenue projections. Data-driven sales forecasting empowers you to identify patterns, trends, and seasonality, enabling them to make accurate predictions and set realistic targets.

By understanding customer buying patterns, you can optimise sales team efforts and drive revenue growth.

### Product Development

Successful product development requires a deep understanding of market demands and customer preferences. Your data can allow you to gather valuable insights on market trends, customer feedback, and usage patterns. By leveraging these you can better develop products that resonate with your target audiences, enhancing competitive advantage and driving innovation.

### Customer Loyalty

Building and maintaining customer loyalty is critical for long-term success. Data enables you to personalise customer experiences, tailor offerings, and proactively address concerns.

By analysing your customer data, you can identify opportunities to strengthen relationships, increase customer retention, and foster brand advocacy.

### Risk and Compliance

Compliance with regulations and risk management are top priorities for most businesses across industries. Data-driven risk and compliance strategies provide you with real-time insights to identify potential risks, detect anomalies, and ensure regulatory compliance. You can leverage data to minimise risk exposure, protect your reputation, and maintain trust among stakeholders.

# Leverage Your HubSpot CRM for Attribution Intelligence

## Gain Revenue, Channel, Campaign and Team Attribution Insights

### Holistic Customer View

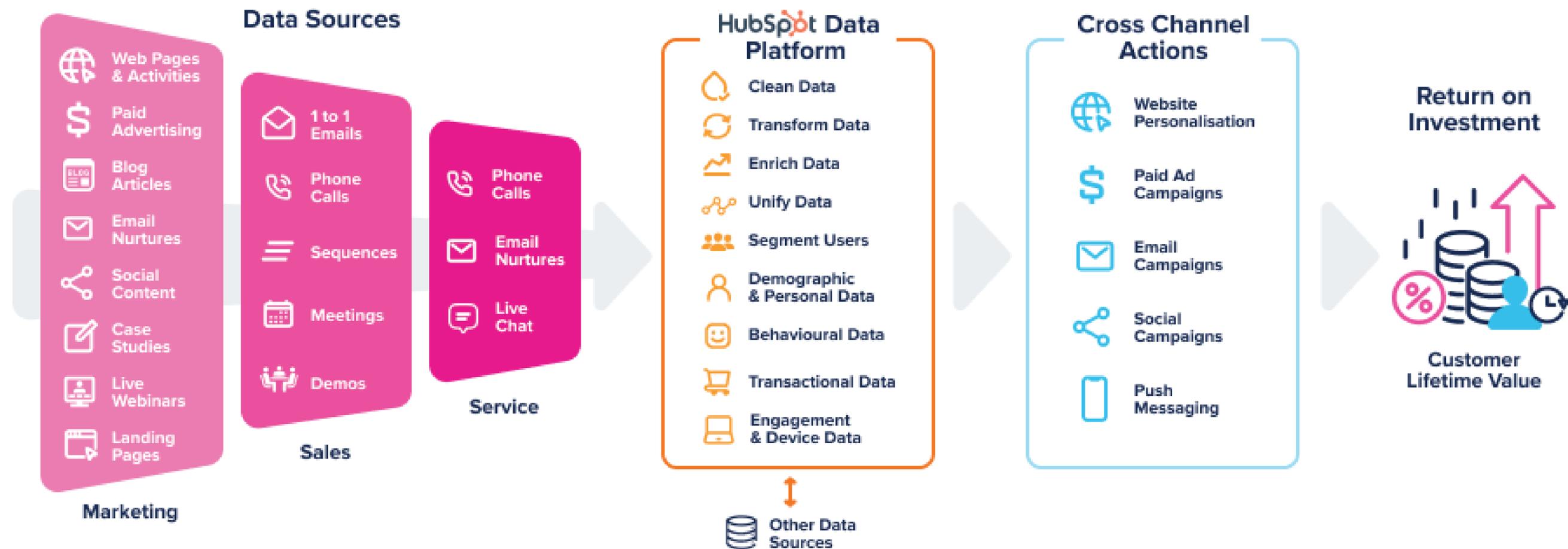
HubSpot CRM enables you to consolidate customer data from various touchpoints, including marketing, sales, and service. This unified view allows for a holistic understanding of customer behavior, preferences, and lifetime value.

### Advanced Attribution Analytics

With HubSpot CRM, you can leverage advanced analytics tools to attribute customer interactions accurately. This attribute-level visibility enhances marketing ROI analysis and helps optimise campaigns, channels, and touchpoints for maximum impact.

### Flexible Connections

With HubSpot's robust ecosystem, you can effortlessly connect data from various sources, including marketing automation tools, customer support platforms, ERP and e-commerce systems. This flexibility allows a comprehensive view of your customers to gain valuable insights from lead through to ongoing sales.



# Before We Start

This playbook will guide you through all the details about best practice HubSpot implementation.

We recommend adopting a team-oriented approach when it comes to HubSpot. HubSpot is a powerful tool built on a unified CRM platform that seamlessly combines Sales, Marketing, Customer Service, eCommerce and other Operations.

Use this guide to configure the platform yourself, building a solid foundation for HubSpot's use beyond your expectations. Our goal is to give you insights to the things you only learn over time to develop a higher-level understanding of HubSpot's components. This will enable you to get your platform configured correctly from the onset and help you leverage the framework and tools that best suit your business needs for a quicker win.

At filerom, business growth and digital enablement is our priority.

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# Chapter 1

## How Data Lives & Flows Through HubSpot

### Understanding the Basics of Data Fundamentals in HubSpot

Navigating the digital landscape for your organisation can feel like trying to solve a complex puzzle. But when you have the right pieces, like HubSpot, the picture becomes clearer. Here's a closer look at the data fundamentals to consider when planning your HubSpot configuration and use by your team.



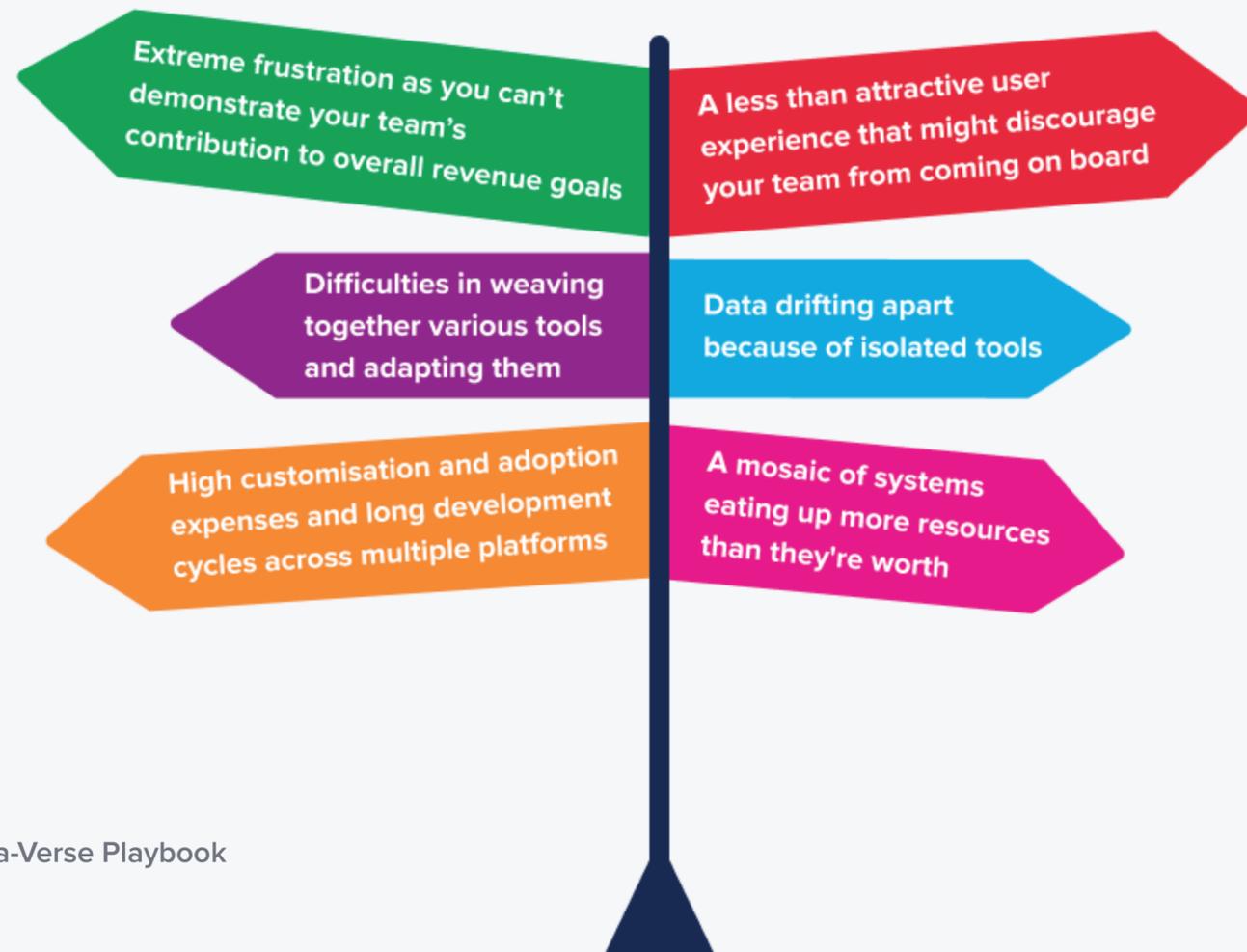
# Solving the Crisis of Disconnection

## How to Leverage HubSpot

You're standing at the intersection of technology and connectivity. Imagine a world where you have fulfilled your goal to find that one magical tool to perfect your customers' journey insights, ensuring every step is visible and transparent.

As you've probably noticed, there's no "magic wand" CRM that fits everyone's needs. Instead, you find yourself drowning in a sea of specialised tools, leading to towering tech stacks and redundant products.

Navigating this fractured tech landscape, you're likely facing:

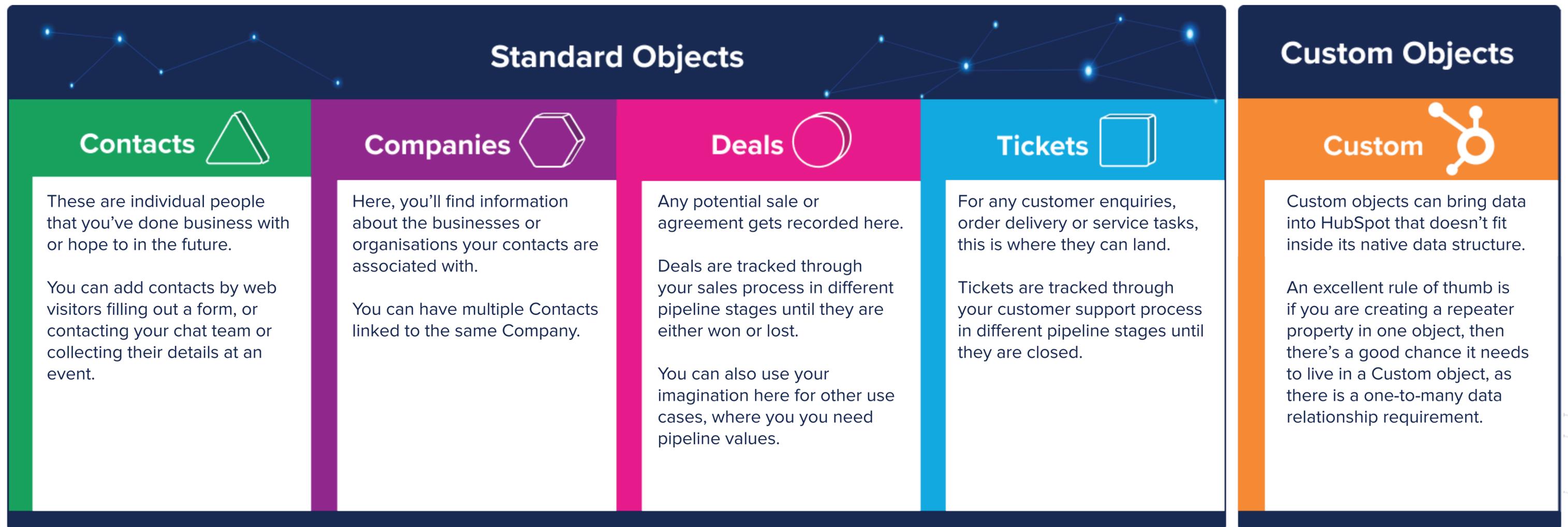


**Here's a startling revelation from HubSpot:** while the average company has 254 SaaS apps at its fingertips, they actively use only about 45% of them. Before diving in to configure your HubSpot portal, familiarise yourself with the groundwork needed for a thriving HubSpot data ecosystem, and join us as we delve into how to evaluate, visualise, and blueprint your HubSpot Environment to pave the way for your success.



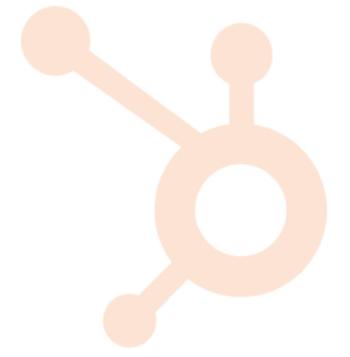
# 1. HubSpot Objects

Think of objects as building blocks in your HubSpot universe. You're probably already familiar with HubSpot's main standard objects like Contacts, Companies, Deals and Tickets. Let's explore what they are used for and how they function. **Not every piece of data clearly maps to a standard HubSpot object and that's where custom objects come into the picture.** It's important to understand how to create Custom objects unique to your needs.



# Deep Dive on Custom Objects

## More Use-Case Examples



### Mining Sector



Consider a manufacturer of industrial valve and hosing products to the mining sector. Their customers, for example BHP, may own many mine sites and each mine site has its own characteristics like type of mining operation, number of people on the site, equipment on site, location, whether the site is in operation etc.

In this example, the data structure could benefit from several one-to-many relationships to house unique data and creating custom object associations to other objects gives them a 360-degree view about each mine site. For example:

- Mine Site Custom Object associated with Companies, Contacts, Deals and Tickets, Site Maintenance and Mining Equipment Custom Objects.
- Mining Equipment Custom Object associated with Mine Site and Site Maintenance Objects.
- Site Maintenance Custom Object associated with Mine Site and Mining Equipment Objects.

### Construction Sector



Another example is a manufacturer and distributor of doors in the building and construction sector. Creating a custom object for 'Building Projects' integrated with external data sources like EstimateOne and BCI would allow a live feed of project data to a pre-qualification pipeline, keeping project data connected as it moves all the way through the sales pipeline.

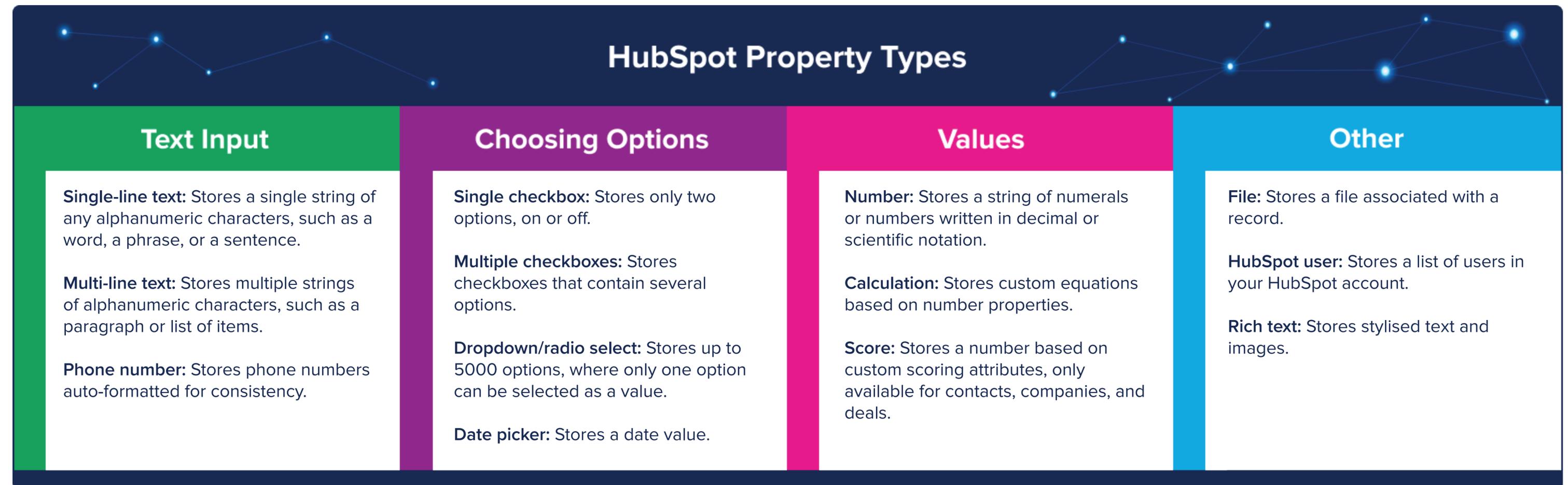
This is an ideal scenario as a project moves from feasibility into construction and multiple companies and contractors are involved in the specification and procurements process.

- Building Projects Custom Object associated with Companies, Deals, Contacts and Tickets.

## 2. Properties

### Your Data's DNA

Each object in HubSpot comes with properties – specific pieces of information about that object. For instance, for Contacts, properties could be their persona, lifecycle, email, phone number, or last purchase date. By tailoring these properties to match your unique business needs, you're essentially customising HubSpot to think and act like you do.



 How you set these properties is also critical. If you want to be able to run reports based on data variables, be sure to use Multi-select, Dropdown or Radio fields, as Free Text fields will allow your team to add a plethora of different terms which won't be easily manipulated or captured for dashboards and reporting.

## 3. Lists & Segmentation

### Grouping Like a Pro

You should personalise your communication so you can communicate differently with loyal customers, suppliers, and new leads.

HubSpot's got your back! Create Static or Dynamic lists to group contacts based on shared properties or behaviours.

Now you can tailor your marketing, sales, and customer service efforts to resonate with each group personally.

## 4. Data Integrations

### Bringing It All Together

You've probably got other tools you adore. And guess what? HubSpot plays well with others. Connect your favourite apps and tools, letting data flow seamlessly. With everything integrated, you're not juggling between platforms but mastering them all from one central place. Use your HubSpot platform to centralise your team and all your systems and do away with overlap and siloed systems.

## HubSpot Can Connect Data and Activities Easily

Great flexibility with over 1500 apps in the HubSpot marketplace.



## 5. Data Hygiene

### Keep it Clean and Streamlined

Your HubSpot environment is like a garden. Occasionally, you'll need to weed out outdated or inaccurate data. Regularly auditing and cleaning your database ensures that your decision-making is based on the freshest, most relevant insights.

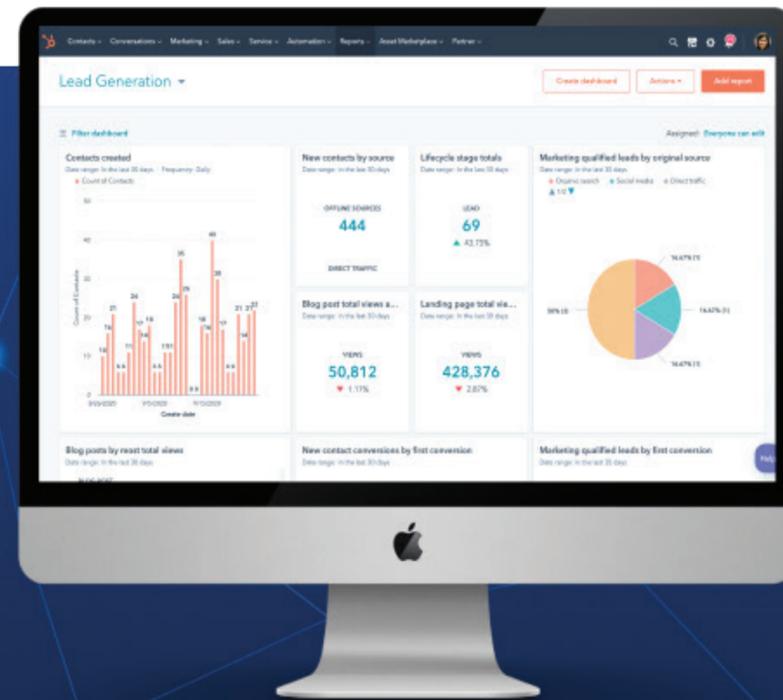
HubSpot has easy tools for doing this in the Data Quality area, but good housekeeping practices will also ensure it will run like a well-oiled machine and you can rely on your data confidently.

## 6. Reports & Dashboards

### Your Data Storyteller

Once you've got your data in place, you'll want to make sense of it all. HubSpot's reporting tools let you visualise data trends, giving you clear insights into what's working and where there's room for improvement.

Remember, you're not just collecting data; you're weaving stories, spotting trends, making informed decisions and understanding your market universe, or as the team at fileroom call it 'Data-Verse'. With these HubSpot data fundamentals at your fingertips, you're not just playing the digital game - you're mastering it.



## Ready to Dive Deeper?

The world of HubSpot awaits, tailored just for you. Let's look at how to customise your HubSpot environment.

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# Chapter 2

## Case Study: Customising HubSpot for ChemCo

### Refining Processes with HubSpot

Let's start with a case study to set the scene and give you a visual as you work through each section. This is helpful when planning your own data model.

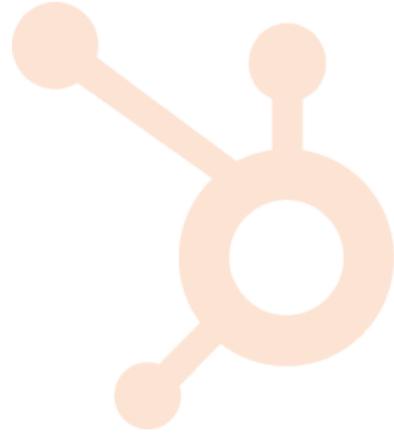
ChemCo\* is a premier supplier of high-grade chemicals designed for minerals processing in the mining and resources industry. Recognising the need to refine their CRM, lead generation, sales architecture and after service support, they opted for HubSpot. The challenges revolved around tailoring HubSpot for ChemCo's project bidding system, detailed mine site tracking, and ensuring its integration with their ERP.

\*ChemCo is a fictitious company to protect privacy and for the purpose of this case study example.



# Case Study

## ChemCo



### Challenges

- 1. Complex Sales Cycle:** The intricacies of selling chemicals to the mining sector entails engaging multiple stakeholders over a long sales cycle.
- 2. Industry-Specific Needs:** Varied requirements surface across different mining applications, assets and climates.
- 3. Segmented Marketing:** An aspiration to unveil brand awareness marketing campaigns tailored to specific mining applications.
- 4. Multifaceted Project Bidding System:** ChemCo's bidding activities encompass multiple projects, with each demanding varied quotes dispatched to diverse contractors.
- 5. Detailed Mine Site Tracking:** A necessity to meticulously document specific data about each mine, its operational assets, its parent company, chemical usage and associated contractors.
- 6. ERP Integration:** The need for seamless data flow between HubSpot and ChemCo's ERP system to gain full visibility across the sales funnel and marketing attribution to closed sales.

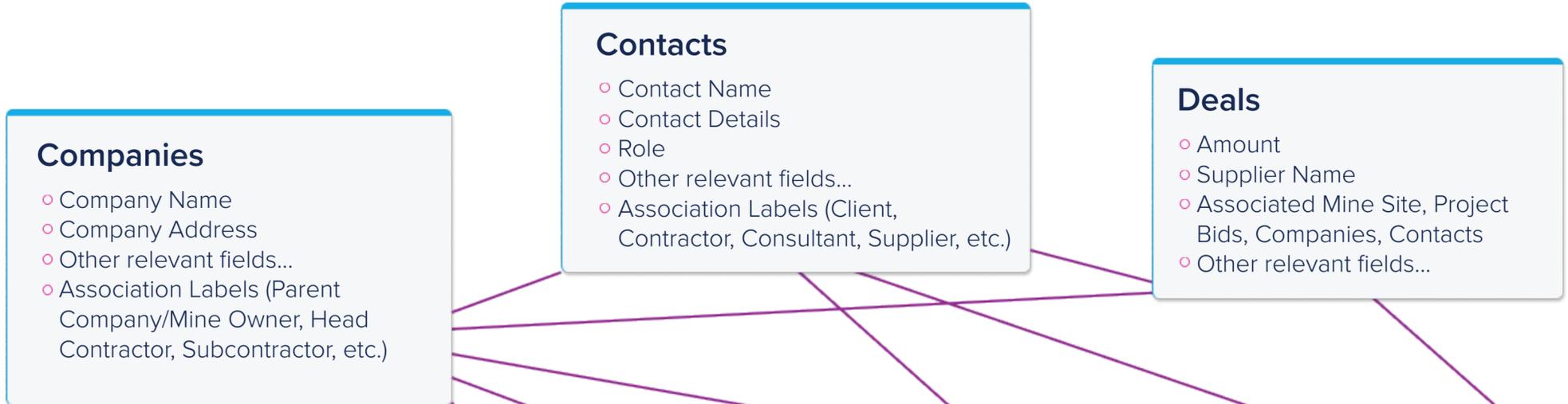
### Solutions

- 1. Custom CRM Pipeline:** An in-depth reflection of ChemCo's sales process was meticulously crafted within HubSpot's CRM.
- 2. Custom Properties:** Attributes like the type of mining operations and preferred chemicals were seamlessly integrated into the relevant objects.
- 3. Email Marketing Segmentation:** HubSpot's adept segmentation mechanisms powered customised campaigns targeting individual mining categories.
- 4. Advanced Bidding Management via Custom Object:** To manage ChemCo's complex bidding environment, HubSpot was enhanced to monitor prospective projects and integrated with BCI to enable automatic access for the sales team to access and nurture mine site project opportunities. Each project accommodated multiple deal entries, capturing the spectrum of deals (quotes) sent to varying contractors.
- 5. Mine Site Custom Object:** A second custom object was created to capture specific information about each mine. This included data such as mine depth, estimated mineral reserves, operational status, and safety records. Additionally, the system was devised to link each mine to its parent company, contractors engaged, and BCI project, offering a 360-degree view of operations and stakeholders.
- 6. Mine Site Assets Object:** A third custom object was created to capture specific information about each asset. This included data such as asset type, maintenance status, and safety records.
- 7. ERP Integration:** Ensured real-time synchronisation between ChemCo's ERP and HubSpot, driving coherence in inventory, order management, and sales projections.
- 8. Automated Workflows:** ChemCo benefited from consistent engagement pathways, driven by automated customer interactions.
- 9. Granular Reporting:** Custom dashboards provided actionable insights, guiding ChemCo's strategic insights and priorities.

# The HubSpot Data Model for ChemCo

Here's a basic representation of the HubSpot data model with the entities and relationships mentioned:

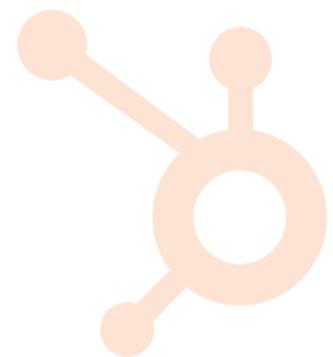
## Standard Objects



## Data Relationships

- Each Company can have multiple Mine Sites.
- Each Mine Site can have multiple Contractors and multiple Project Bids.
- Each Project Bid can have multiple Deals (Quotes).

## Custom Objects

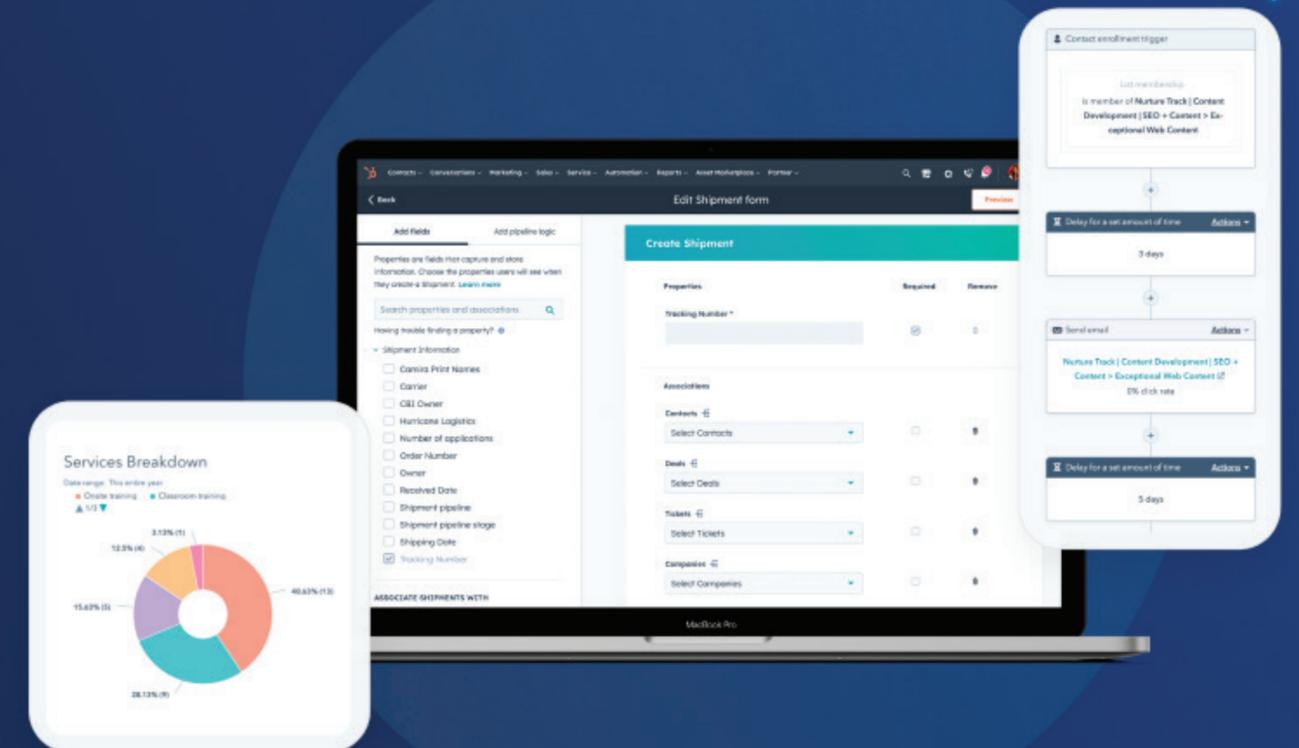


## Results

- 1. Enhanced Sales Cycle Analytics:** The sales pipeline was configured to show the full length of the sales cycle, enabling ChemCo to identify areas to reduce timeframes.
- 2. Bidding Mastery:** The advanced bid management framework and process improved ChemCo's bid success rate. Lead scoring metrics with predictive analytics to determine which prospects have a higher likelihood to close.
- 3. Engagement Amplification:** Tailored campaigns boosted customer engagement and interactions, and increased awareness among new contacts feeding in from BCI projects, further increasing opportunities for ChemCo.
- 4. Unified Data Ecosystem:** The ERP-HubSpot integration achieved a harmonised data environment, strengthening operational agility and enabling ChemCo to leverage HubSpot for aftersales and service activities with their customers.
- 5. Holistic Mine Site Insights:** The mine site custom object empowered ChemCo with a panoramic view, fostering informed decisions and strengthened partnerships.
- 6. Lead Conversion Elevation:** Targeted workflows improved lead conversions significantly as HubSpot was setup to help the sales team keep on top of closing opportunities.

## Conclusion

ChemCo's journey with HubSpot demonstrates the benefits of platform customisation. Addressing multi-layered challenges, from project bids to mine site data intricacies, the case demonstrates the impact of tailored CRM solutions in industrial sectors.



# Chapter 3

## How to Craft Your HubSpot Environment

### Strategic Approaches to Help You Plan

Planning and designing a HubSpot environment requires a thoughtful, strategic approach. You need to tackle it from two angles. One – what is your ultimate dream state with all the bells and whistles? And Two – what are your first priorities?

With this information in hand, you can start using HubSpot for quick wins, while you build the bigger picture.

Before you dive headfirst into HubSpot, it's crucial to evaluate where you stand.



# Set the Stage

## Designing Your Ecosystem to Harness Data

- 1 Assess Current Systems**  
What tools and platforms are you currently using? How do they need to interplay with your HubSpot environment?
- 2 Define Key Objectives and Team Commitment**  
Whatever your goals, define them clearly with your team. Include stakeholders from different areas of the business and create a project team. Early involvement will lead to faster adoption and smoother change management. Whether you are focused on lead generation, customer management, sales optimisation or automating business processes, having clarity across teams is paramount to success, as a system is only as good as the people using it. Whether software is free, or costs \$100,000 a year, if your team aren't onboard then the human factor can impede your success.
- 3 Quiz Yourself**
  - When it comes to your environment and operations what are the non-negotiables?
  - How do these fit into your plan?
  - What solutions are workable?
  - How realistic is your budget?
  - What parameters need to be worked within to deliver results?

## 4 Take Time to Consider Your Requirements

When diving into the vast landscape of HubSpot, it's vital to discern between business challenges and mere technical necessities. At its core, the goal isn't to simply shuffle data around but to genuinely address and solve pressing business concerns using HubSpot's robust features.

Often, there's a temptation to view things through a narrow, tech-centric lens. But that approach can inadvertently box you in, limiting the expansive potential HubSpot can offer. Remember, data isn't just about sharing or moving figures from one point to another. It's about harnessing that data, analysing it, and transforming it into actionable insights that can propel your business forward.

**Think of HubSpot as more than a tool; envision it as a collaborative partner, ready to offer solutions tailor-made for your business.** So, shed the conventional hat for a moment. Dive deep, brainstorm, and sculpt innovative solutions. You're not just configuring a platform; you're crafting a dynamic, data-driven ecosystem designed to elevate every facet of your business.

**Embrace the challenge, get imaginative, and let HubSpot amplify your business aspirations.**

# Craft Your Blueprint

## Seamless and Intuitive Interactions Every Step of the Way

Charting the vast waters of HubSpot requires more than just data. It demands vision, strategy, and precision. Break down the process of sculpting a successful HubSpot environment, so you can be sure it will deliver your unique business needs.

**Map Out Processes:** Visualise your current workflows. Which ones will transfer to HubSpot, and which ones will evolve? Use tools like Miro to make it easy.

**Customise To Fit:** Remember the properties we spoke about previously? Design them to align with your needs. Also, adapt default settings to make the environment feel like home.

**Think User Experience:** Consider the journey of every team member who will interface with HubSpot. Listen to your team and consider all possibilities, consolidating them into a cohesive solution. Communicating and agreeing on the solution with the project team and stakeholders will allow them to own the solution too.

## When Crafting Your Blueprint, Ensure You Cover the Following Points:

- Which materials and techniques will achieve your vision?
- What limitations exist that need to be considered?
- How will changing one element impact others?
- What are the pros and cons of each option?

## Draft and Ideate Your HubSpot Blueprint

With the accumulated insights and goals in hand, start building your Data-Verse story. Remember, every piece of data and every process has a role to play in this grand design.

- **Clarifying Vision:** Reframe your understanding of the bigger picture - your overarching objectives, essential processes, and desired data insights.
- **HubSpot Objects Deciphered:** Dive into the available HubSpot objects. Will they suffice, or will your narrative require some tailored characters (custom objects)?

# The Standard vs. Custom Object Debate

In the Vast Theatre of HubSpot, it's Essential to Select Your Players Wisely.



## Standard Objects - First Line of Defense

Whenever possible, try to align your needs with HubSpot's standard objects. They're tried, tested, and optimised for most business scenarios.



## Custom Objects - The Special Forces

If the standard setup doesn't quite capture the nuances of your business model, it might be time to bring in the special troops: custom objects. But tread with caution. These should be the answer to specific needs, not arbitrary additions.

If you decide to bring in the special forces and Custom Objects are the way, here's a roadmap:

### Design with Purpose

Each custom object should have a clear reason for its existence. Does it offer a unique view, a singular insight, or bridge a gap?

### Associations - The Golden Threads

Associations in HubSpot are akin to the veins connecting the heart and mind. They represent the myriad relationships between objects. Be it a connection, transaction, or interaction, they're your keys to accessing vital data intersections like contacts and companies.

### Labels & Descriptions

Ensuring your team is on the same page is crucial. Label and describe your associations clearly. This not only boosts team comprehension but also optimises communication, automation, filtering, and reporting.

With this in hand, you're equipped to draft and ideate a HubSpot blueprint that's not just functional but exemplary. Dive in and let HubSpot become the centre stage where your business revolves.

### Pro Tip

A clutter-free HubSpot is a happy HubSpot. Overloading with custom objects can complicate your data landscape. Always prioritise the innate prowess of standard objects before calling in the custom cavalry.

# Best Practice for Crafting Your Data-Verse

## Be Sure to Document Clearly and Concisely

A documenting mindset begins with clarity and in the realm of your HubSpot environment, the vision is your documentation. Well documented architecture will assist with seamless execution and ongoing knowledge as team members grow or change over time.

Strike a balance between depth and brevity and include:

- **All Relevant Details:** From system architecture to user flows, ensure all critical aspects are covered.
- **Avoid Jargon Overload:** Technical terms will be inevitable, but they can also alienate non-tech-savvy readers. Where necessary provide explanations or glossaries.
- **Flowcharts and Diagrams:** Complex tech concepts can often be better explained visually. Using visual aids to demonstrate processes, hierarchies and systems can make it simpler.
- **Screenshots and Annotations:** Visuals of the UI with clear annotations also help users to adopt quickly.
- **Regular Updates:** Ensure your documentation always mirrors the current state of play and updates are made with each significant change.
- **Archive System:** Keep and maintain older visions of your documentation as they serve as a history and valuable reference points during the project's evolution.

As you inch closer to the build stage of your HubSpot project, your documentation will be your guiding star as it will outline your complete data-verse, ensuring every stakeholder sails smoothly, with clarity and purpose.

You can then embark with confidence as your well-documented journey awaits.

## Timeline: Be Realistic and Plan Carefully

Remember, pacing is key and prioritising your execution into phases into goals-based delivery will get you up and running on HubSpot more quickly.

- **Phased Implementation:** Consider rolling out in stages. Start with core functionalities, and then expand.
- **Review Milestones:** Regularly check in on progress. Are you meeting your milestones? If not, adjust accordingly.
- **Launch & Beyond:** Celebrate the official launch! But remember, the journey doesn't end here. Plan for regular reviews and refinements to ensure your HubSpot environment continues to sing in harmony with your business needs. HubSpot introduces new features regularly so keep on top of them and leverage them in continuous improvement.

## Don't Want To Go It Alone?

Book a call with our Solutions Architect to discuss how we can work with you or support you in achieving your HubSpot vision.

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# Chapter 4

## HubSpot Integration Mastery: Navigating Ready-Made & Custom Pathways

### Plug & Play or Custom?

Integrations stand as the powerful connectors linking your HubSpot domain to the broader digital world. The decision between harnessing a ready-to-go bridge (Plug & Play) or sculpting a personalised one (Custom Integration) is crucial.

Add to this mix HubSpot's API Endpoints, which bring their own set of capabilities, advantages and sometimes constraints, the decision is one to weigh up carefully. Journey with us to discover the path that suits your environment best.



# Plug & Play

## Embracing Off-the-Shelf Solutions

The charm of ready-to-use integrations is their simplicity and immediacy.

### Pros

- **Swift Onboarding:** These integrations offer quick deployment and adaptability.
- **Proven Efficiency:** Their reliability comes from being tried and tested across diverse setups.

### Cons

- **Fixed Functionality:** They might not always cater to niche requirements.
- **Version Compatibility:** Always ensure your choice aligns with your current HubSpot setup.

The HubSpot app store offers some well-developed plug & play integrations, that are quick to install, and others are limited in functionality. This is where the custom conversation comes in.

# Custom Integrations

## The Art of Personalisation

When out-of-the-box solutions don't suffice, carving out a custom path can be the answer.

### Pros

- **Designed for You:** These integrations align with your unique needs.
- **Future Ready:** They are adaptable and can grow with your evolving business requirements.

### Cons

- **Time Commitment:** Customisation is an investment in time.
- **Ongoing Maintenance:** The onus of regular updates and troubleshooting often falls on you.

# HubSpot's API Endpoints

## Capabilities & Constraints

The API Endpoints of HubSpot play a pivotal role in determining the nature of your integration.

### Pros

- **Versatility:** HubSpot's API offers a plethora of options for diverse integrations.
- **Secure Data Transfers:** It ensures data is safely moved between systems.

### Cons

- **Rate Limits:** There's a ceiling to the number of requests one can make within a specific timeframe, which might slow down data-intensive operations.
- **Depth of Customisation:** While the API is robust, certain niche requirements might go beyond its scope.

# ROI Analysis

## Weighing Immediate Needs vs. Long-Term Value

Every choice carries an investment and potential return.

- **Immediate Solutions vs. Future Flexibility:** While Plug & Play offers instant results, Custom Integrations might serve better for the long haul.
- **Financial Considerations:** Evaluate the upfront and ongoing costs associated with each choice.

# Seamless Merging

## A Journey Without Hitches

No matter the route, the goal is a smooth and effective integration.

- **Pilot Testing:** Before rolling out, ensure thorough testing in real-world scenarios.
- **Iterative Feedback:** Constant feedback can highlight areas for refinement and optimisation.

# HubSpot Integrations

## Endless Possibilities

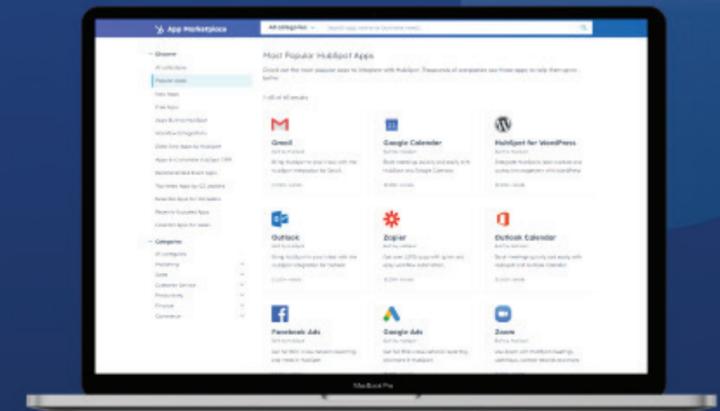
The vast possibilities within HubSpot amplify when integrations are thoughtfully executed. Whether it's the simplicity of Plug & Play, the tailored approach of Custom Integrations, or leveraging HubSpot's API Endpoints, the aim remains: to optimise and elevate your HubSpot experience. Embark on this journey, letting this guide be your compass.

Each step, each decision, aims to harmonise your business vision with HubSpot's potential. Here's to successful integrations!

## Need Help With Integrations?

If you need some guidance or to chat through some ideas for your environment, connect with one of our HubSpot Solutions Specialists.

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# Chapter 5

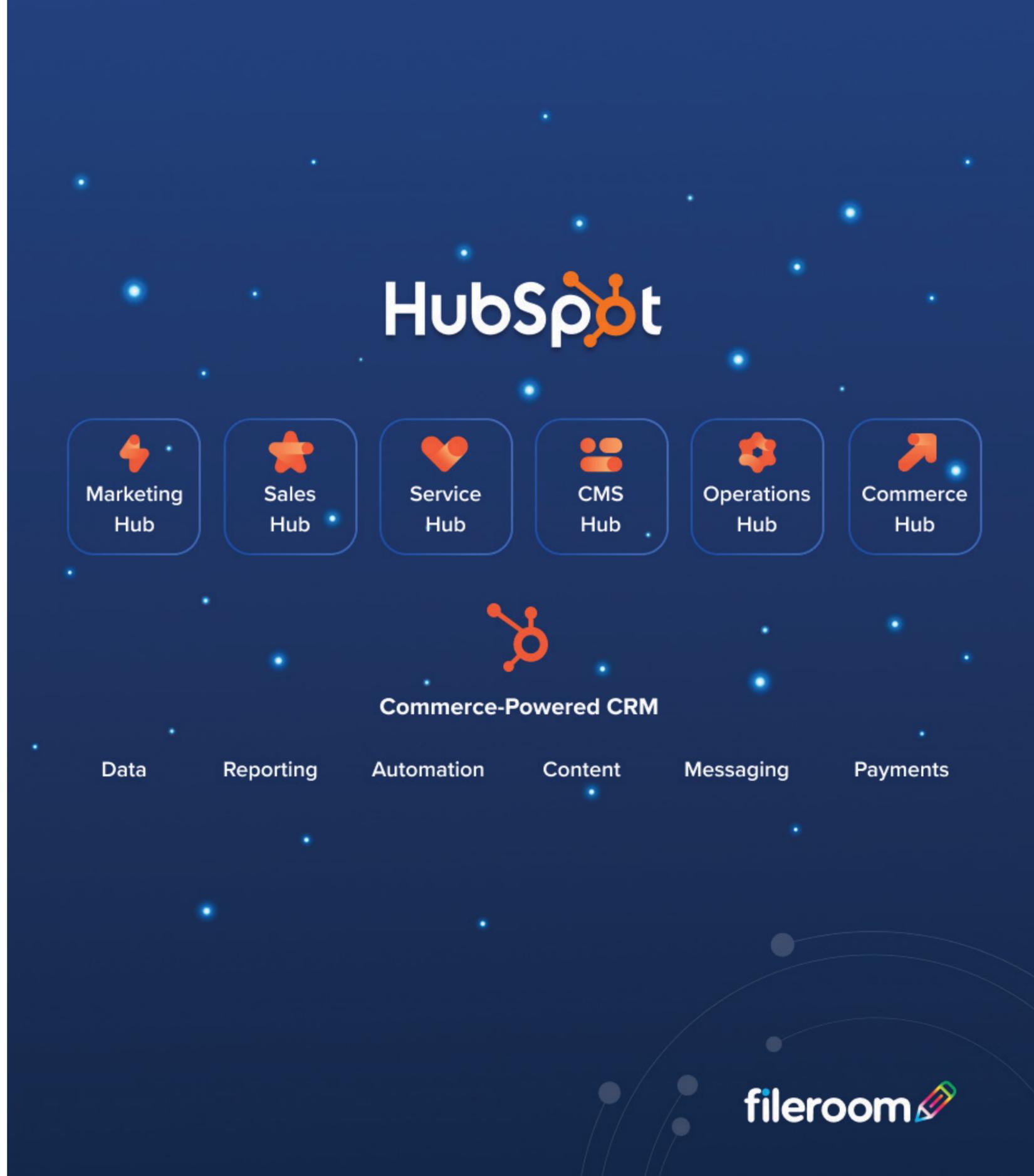
## Which HubSpot Subscription is Best for You?

### Find What Works for Your Business

Delivering a customer experience strategy focused on continuous value, context and choice means you have to think differently about your technology solutions. You need a single source of truth to enter the age of connected customers with a fully connected CRM platform.

This is where HubSpot tools excel, providing a unified view of your customer across all channels and touchpoints, bringing marketing, sales, and customer service teams together to better connect with customers and each other.

So, what does each Hub subscription give you, and how do you access additional features to get the most of our your HubSpot environment?



# Deciphering Your Business Needs

## Focused Start or Ready to Scale?

The first step is introspection. Understanding where your business stands and where you aim to reach is pivotal.

**Size of Your Business:** Are you a budding startup, a thriving SME, or a vast enterprise?

**Functionality Demands:** Are you primarily looking to bolster your marketing efforts, streamline sales, enhance customer service, or an amalgamation of all?

## HubSpot's Subscription Tiers: An Overview

HubSpot's subscription options come in various shapes and sizes.

- **HubSpot Free:** Ideal for those dipping their toes into CRM or exploring the HubSpot UI.
- **Starter:** Perfect for businesses looking for basic form driven automation and enhanced functionalities over the free version.
- **Professional:** A comprehensive suite for growing businesses requiring advanced automation, reporting, and more.
- **Enterprise:** The ultimate package for large businesses and enterprises with sophisticated demands, from advanced analytics to customised bots.

## Niche Functionalities: Marketing, Sales, Service & CMS

Each HubSpot tier offers specialised versions for Marketing, Sales, Service, and CMS.

- **Marketing Hub:** If lead generation, email marketing, and automation are your prime focus, steer your attention here.
- **Sales Hub:** Perfect for those aiming to optimise sales processes, from deal pipelines to predictive lead scoring.
- **Service Hub:** If enriching the customer experience and boosting loyalty is your mantra, this is your go-to.
- **CMS Hub:** For those looking to create a powerful, optimised website without the hassles of daily website management and updates.
- **Operations Hub:** For those looking to optimise, sync, and streamline data, advanced reporting, and programmable automation.
- **Commerce Hub:** All-in-one suite of B2B commerce tools that work directly with HubSpot CRM. For those looking to streamline the revenue to opportunity process to get paid faster, increase revenue, and save time.



Payments



Data



Automation



Messaging



Reporting



Content

# Subscription Costs

## Endless Possibilities

While value for money is given with HubSpot when compared to other CRMs, it's essential to align your choice with your financial capabilities. It can be hard when deciding, to understand the true benefits of HubSpot features over other CRM and CMS systems and features. While they sound like the same thing, they behave differently and the difference in results and time to execute can be monumental.

Ensure that your selected subscription provides the functionalities you need without overstressing your budget. With HubSpot the more you bundle different Hubs, the more you will save, so it is worth being really clear on your requirements to get the best outcome.

## Scalability: Future-Proof Your Choice

Think long-term. As your business grows, you'll want a subscription that can keep pace. Some questions to consider:

- How easy is it to switch or upgrade within HubSpot subscriptions?
- Does the chosen tier offer functionalities that you might need a year down the line?



## Some Key Tips

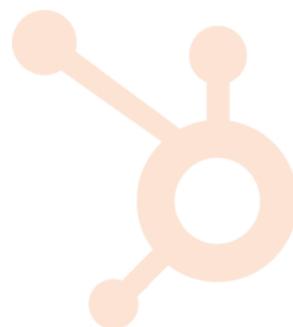
Important considerations for your planning:

- If you are planning on using Custom objects, one of your hubs will need to be on an Enterprise subscription.
- If you are looking to use calculated properties for reporting, you will need a Professional subscription and where you can access five calculated properties, for more you will need an Enterprise subscription.
- If you are looking to use Webhooks or Programmable Automation, you will need to add the Operations Hub Professional subscription to your suite.
- If you have a larger number of customer contacts in your HubSpot and want to email them, opt for transactional email. If you have more contacts you want to email than your marketing contact limit, and these contacts are already customers, then Transaction email will ensure non-marketing contacts receive communications. This is also more cost effective after a certain point for large numbers of contacts.
- If you want to design custom quote and proposal templates to utilise within HubSpot's quoting tools, you will need CMS Hub Professional.

**We Are Available to Guide You With Any Questions and Cost Estimates.**

If you're looking for some advice, connect with our team.

[GET IN TOUCH](#)



# Discover Growth with **fileroom**: Your Platinum HubSpot B2B Partner

## Australia's Customer First HubSpot Agency

At fileroom, our clients are at the heart of what we do. As a Customer-First Platinum HubSpot partner; our strength lies in delivering strategies and services for companies operating in B2B and industrial sectors.

Our rich industry know-how comes from genuine experience and positions us perfectly to team up with you, to design and implement custom growth strategies for your business. We've navigated through diverse sectors, from mining, engineering, architecture and construction to tech, agriculture, professional services, healthcare, and more.

Together, we aim to elevate your business, crafting approaches to deliver your objectives that are both logical and impactful. We believe in genuine connections, authentic growth, and the power of partnership. Our customer-first philosophy means embarking on this journey together to navigate your CRM journey with confidence.



## We Pride Ourselves On:

### Understanding Your Business Landscape

With HubSpot and AI at our side, we aim for a comprehensive grasp on your customer insights. It's not just about the data; it's about understanding the narratives behind each interaction and relationship, so we can build your data-verse.

### Creating Value Together

Our primary goal? To help you offer clear, intuitive buying experiences for your clients while ensuring your internal teams function efficiently. It's a balanced approach aiming for long-term, sustainable growth and mutual trust.

### A Partnership Built on Trust

To us, it's not just another project. We see every collaboration as a relationship. We're here to walk beside you, integrating our expertise with your team's passion, aiming for shared success.

### Considering HubSpot? Let's Discuss

CRM technology is a significant step. If you're contemplating HubSpot, we're here for candid advice. It's about making informed decisions that resonate with your business needs.

### A Genuine Conversation Awaits

Curious about what's possible with HubSpot or just need some insights? Connect with us for a no-strings-attached consultation. The first step is about understanding your goals and requirements.

[BOOK A DISCOVERY CALL](#)



Need some guidance setting up  
your HubSpot environment?

BOOK A DISCOVERY CALL

hello@fileroom.com.au

+61 1300 345 376

fileroom.com

