



HubSpot Operations Hub

The Challenge

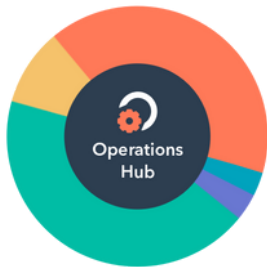
As companies scale, systems snowball. Every employee buys their favorite SaaS apps. Every manager maintains their own spreadsheet. Every team builds their own process. Disconnection ensues. Mistrust and miscommunication flare. Efficiency tanks.

To survive and thrive, your business needs to run better. To run better, you need to reimagine operations. You need RevOps. Centralized and not siloed, RevOps aren't afterthoughts; they're the architects of your growth engine.



To do RevOps, you need a unified ops toolset that connects tools, cleans customer data, and automates business processes.

The Solution



Introducing Operations Hub. Unlike siloed data tools, Operations Hub combines an ops team's full toolkit into a CRM platform, uniting all your customer data on one connected platform.

The result: a more efficient, aligned, and agile business, an unhindered and strategic ops team, and a friction-free customer experience.

Data Sync

Keep your apps and data in sync in an easy, no-code package. Get bidirectional sync, custom field mappings, filtering, and historical syncing so all your teams stay aligned.

Programmable Automation

Keep your team efficient and customers happy. Code custom automation actions for every business process—lead rotation, territory management, renewals, and more.

Data Quality Automation

Eliminate time-consuming data cleanup. Automatically fix date properties, format names, and more with new out-of-the-box automations.

Data Sets

Curate your HubSpot data into approachable collections to save your ops team time, and enable fast, easy, consistent reporting.

Snowflake Data Share

Connect all your HubSpot data into your Snowflake instance quickly and securely, so you can curate and report on your data in your business intelligence tool of choice.

Custom Report Builder

Create compelling visualizations of all your CRM data – contacts, companies, deals, behavioral events, marketing campaigns, and more – in one place.

Expanded Operational Capacity

To keep up with your business's growth, you need more room to run. Operations Hub includes higher limits on lists, workflows, and reports ensuring your CRM will grow as fast as you do.



"Operations Hub allows you to extend your HubSpot functionality to achieve anything, regardless of whether or not that feature is built.... Like what do you wanna do? Tell us how it's gonna work? You can go build it."

Connor Jeffers, CEO - Aptitude 8

Use Cases



Integrate Everything. Establish HubSpot as Your Source of Truth

- Sync your CRM with your ERP, to ensure that customer data stays up to date between front-office teams (marketing sales, and service) and back-office (finance and billing).
- Integrate your CRM and marketing apps – whether HubSpot's your CRM or not. Sync CRM fields to marketing to personalize campaigns and analyze revenue impact. Sync marketing data to CRM to score and rotate leads and inform sales conversations.
- Phone contacts: Sync your reps' phones with your CRM, ensuring they always have access to up-to-date information when they're on the road.
- Real estate: Keep your CRM and your real estate apps aligned. For example, assign leads to your agents as soon as they come in.



Migrate to HubSpot with Ease

- Use HubSpot Sync to migrate all your data, including custom objects and historical data.



Clean Up Dirty Data

- With the new data quality actions in workflows, you can clean your data with less time-consuming Excel work.



Create Custom Automation for More Complex Business Processes

- Rotate leads with custom logic and third-party queries. Example: when a new lead comes in, query another system to determine sales rep capacity, route the lead in HubSpot based on that information.
- Enrich leads and accounts with third-party data. Example: when a lead fills out a form, query another database of government data or real estate history, and append that data to the HubSpot record, then create a task if the data is worth following up on.
- Service or sales-based SLA. Example: Create deadlines for response time based on ticket open date. "Has ticket been open for x amount of time? Has it met X threshold? If so, rotate in XYZ way"
- Renewal management. When a deal closes, create a deal in the future (e.g. one year from now) and manipulate it in some way (e.g. remove discount from price, etc.)
- Create complex calculated properties. Manipulate and transform your property value in any way you choose. Example: create a lead score using data from HubSpot and inputs from a dozen other systems, and use a custom action to populate the value in HubSpot.

Free

- HubSpot Sync
 - Two-way data sync
 - Default Field Mappings
- Ecosystem Integrations
 - All 3rd Party Integrations

Starter - \$50/mo

- Everything in free +
- HubSpot Sync
 - Custom Field Mappings for data

Professional - \$800/mo

- Programmable Automation
 - Custom Code Actions in Workflows
 - Custom Coded Actions in Bots
 - Webhooks
- Additional Portal Capacity
 - 3,000 additional reports
 - 300 additional dashboards
 - 100 additional lists
 - 100 additional Workflows

Enterprise - \$2,000/mo

- Data Sets
- Snowflake Data Share
- Reporting Calculations
- Additional Portal Capacity
 - 3,000 additional reports
 - 300 additional dashboards
 - 100 additional lists
 - 100 additional Workflows