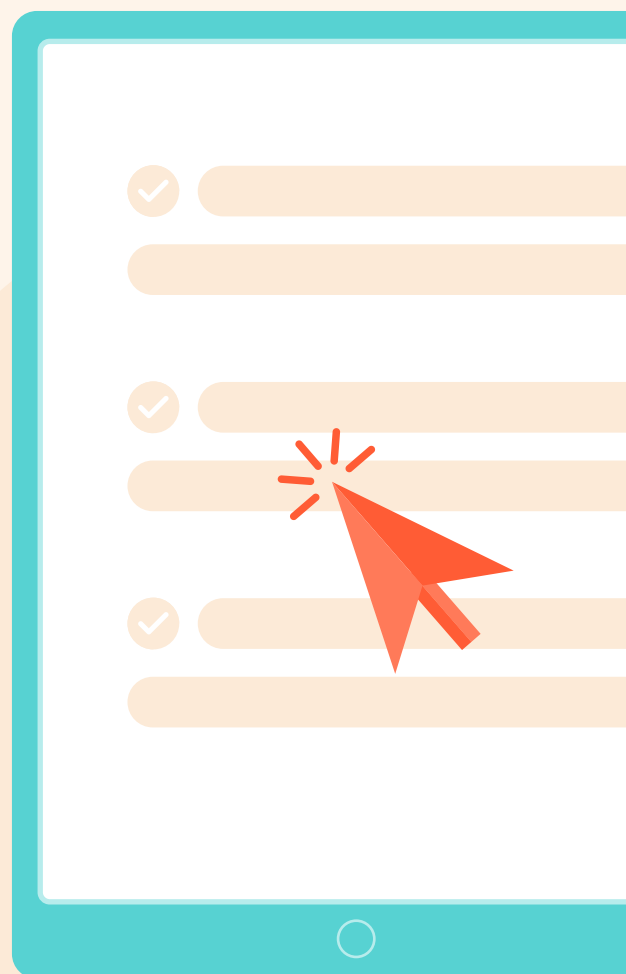


# Qualifying Questionnaire

Find your best fit

What you've been hearing about Sales Hub is true: you don't have to choose between power and ease of use. But eventually, when the timing is right, you may need to make a choice between **Sales Hub Professional** and **Sales Hub Enterprise**.

To help you think through your requirements list, drive group consensus, and accelerate buy-in across your buying committee, here are some questions to consider.



## Q&A

1. How would you break down your sales organization? Who would need access to a CRM?

2. How much growth do you envision for your sales team in the next 6-12 months?  
How about in the next 3-5 years?

3. How are your teams structured and related to one another?

4. How many teams do you have?

5. Are your teams separated due to location, product lines, units of business, or other factors?

Yes      No

If yes, how?

6. Do you have reps on multiple teams?

Yes      No      Future State

7. How do you report and forecast across teams?

8. What types of roles do you have on your Sales, Marketing, and Service teams? Select all that apply:

Business Development Representative

Account Executive

Solutions Engineer

Sales Development Representative

Partner

Consultant

Onboarding Specialist Representative

Other:

9. Do certain roles need access to specific information, or can everyone view/edit everything?

Yes, certain roles need access to specific information

Everyone can view/edit everything

10. Should certain roles see different information about contacts or companies they're working with?

Yes

No

11. Do you require SSO to manage your HubSpot users?

Yes

No

12. Do you or your IT team need to conduct experiments or tests with data without impacting your portal?

Yes

No

If yes, what assets?

13. What goals are you measuring your team on? Select all that apply:

Revenue goals

Deals created

Meetings booked

Calls logged

Other:

14. Is your team able to see how they are tracking towards their individual goals compared to team goals?

Yes

No

15. You are able to consistently report on your goals and KPIs.

True      False

16. How are sales reps assigned leads?

17. What types of training tools do your teams use currently? Select all that apply:

Call recordings

Deal reviews

Written materials  
in a Wiki or content  
management system

Call reviews

Workshops/webinars

Other:

18. How do you provide best practice training for your sales teams?

19. How do you provide feedback on call recordings? Select all that apply:

Live support

Call recording software

1:1 with manager/peer

Other:

20. To share insights from top performers with the rest of the reps, what resources can you leverage? Select all that apply:

Playbooks

Sales enablement

Excel sheets

None

Other:

21. On a scale of 1 to 5, how valuable would it be to have actionable insights based on call metrics?

THE LEAST

1

2

3

4

5

THE MOST

22. On a scale of 1 to 5, how valuable would it be to have actionable insights based on the customer's words?



23. You have the ability to track common terms brought up on calls.

True      False

24. On a scale of 1 to 5, how valuable would it be to understand how words mentioned on calls drive certain actions?



25. On a scale of 1 to 5, how effectively are you able to ensure sales reps are following best practices?



26. How do you ensure data quality when reps are taking notes or logging engagements?

27. You have standardized notes that ramping reps can follow to ensure a successful and speedy onboarding.

True      False

28. How many processes are your sales reps following?

0-5      6-10      11+

29. You have custom objects/categories outside of the standard companies/accounts, deals/opportunities, contacts/leads, and tickets/cases.

True      False

30. Does your sales team generate quotes within your CRM?

Yes      No

31. Do they need to be reviewed?

Yes      No

If so, what factors cause them to need approval?

32. How do you currently oversee and approve your team's deal quotes?

33. Does your team collect e-signatures on quotes?

Yes      No

If yes, how many quotes are being collected per month?

34. How many reps do you have?

35. How many dials do you expect your reps to make per day?

0-20                      21-50                      51-75                      >76

36. How long do your reps typically spend on a prospecting call?

1-2 minutes                      3-5 minutes                      >5 minutes

37. Everyone on my team needs access to all information.

True      False

38. There are certain data points that should not be seen or edited by certain users.

True      False

39. Do you have recurring revenue and/or subscriptions?

Yes, both      Yes, recurring revenue      Yes, subscriptions      No, neither

40. How do you track projected revenue over time? Select all that apply:

Not able to, today      With Excel      With our existing CRM

Other:

41. On a scale of 1 to 5, how valuable would it be to know which months you will lose or gain revenue based on renewals, upgrades, downgrades, or churn?

THE LEAST      1      2      3      4      5      THE MOST

42. Do you do lead scoring?

Yes      No

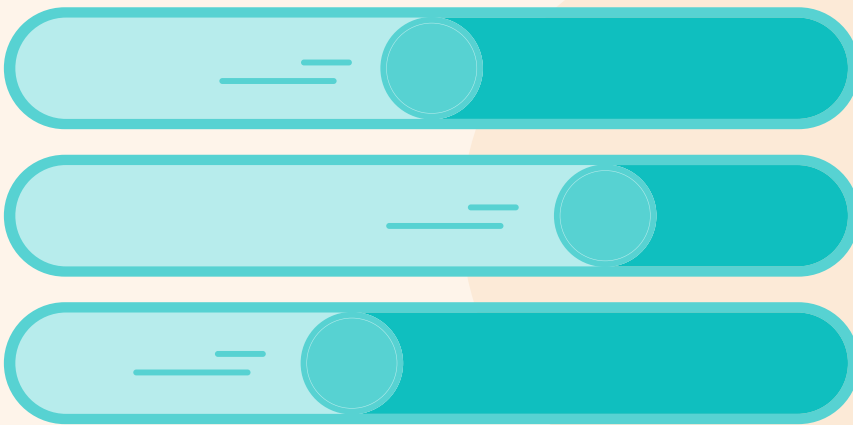
43. On a scale of 1 to 5, how helpful would it be to automatically score and rank leads based on different data points?

THE LEAST      1      2      3      4      5      THE MOST

44. On a scale of 1 to 5, how easy is it for your sales team to identify the highest intent leads?

THE LEAST      1      2      3      4      5      THE MOST

Once you've completed your questionnaire, circle back up with your primary point of contact at HubSpot for help determining which Sales Hub solution best fits your needs.



**Spoiler alert:**

No matter which tier you choose, you'll be able to:

- ✓ Streamline your systems and decrease your total cost of ownership
- ✓ Align teams around a single source of customer truth
- ✓ Increase productivity per rep
- ✓ Access new data and insights
- ✓ Deliver more connected customer experiences
- ✓ Unlock your next stage of growth for a [better value](#)