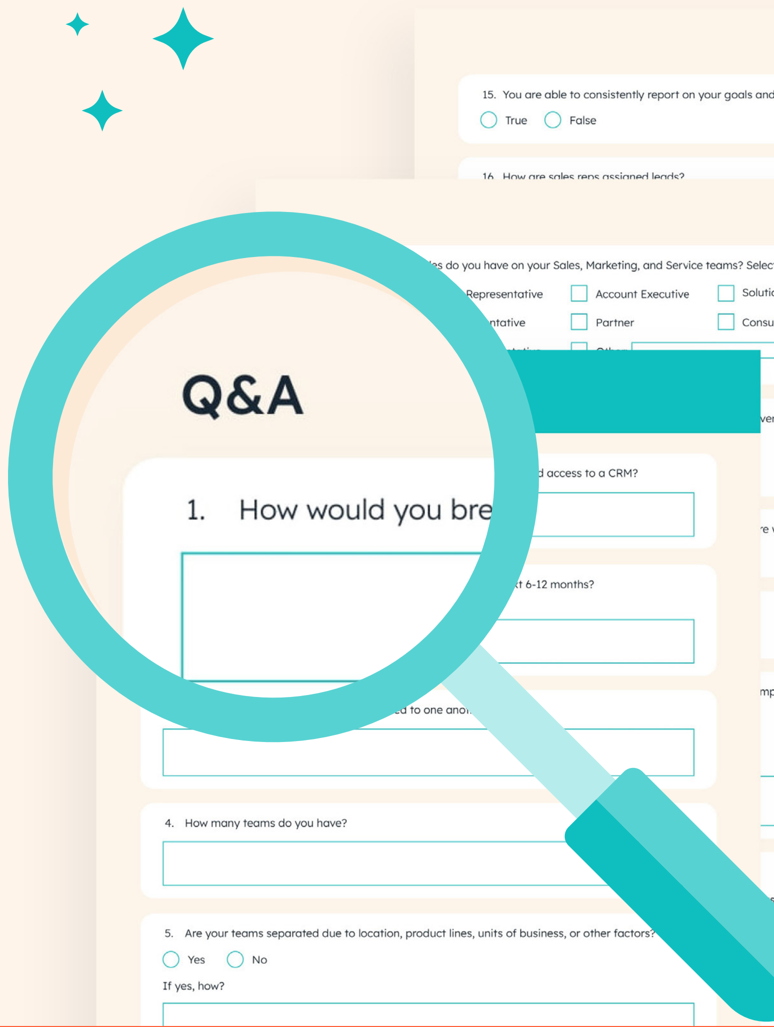
Sales Hub™

For Sales Reps

# Qualifying Questionnaire Cheat Sheet

Sales Hub Enterprise




To help you qualify prospects for Sales Hub Enterprise, we’ve created the following cheat sheet to accompany our customer-facing questionnaire (titled “Sales Hub Prospective Customer Questionnaire” in Seismic).

**Please do not share this version externally.** The customer-facing version contains the questions in the left-hand column. The “What We’re Getting At” and “What to Know” columns are included only in this internal cheat sheet, for your benefit.

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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?

## Seat Count

- There are 10 users included in Sales Hub Enterprise, vs. five in Sales Hub Professional.
- Larger sales organizations typically require more advantage permissioning around team structure, and seat count can be a good starting indicator of which tier would be a better fit.
- This also opens up the ability for us to mention that non-sales users who wouldn't need a seat but still need access to HubSpot can have a paid seat. Note: This is a huge competitive differentiator for HubSpot.
- Understanding sales team growth can help us start to understand whether Enterprise or Professional will be better suited when it comes to feature limits.

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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?

# Hierarchical Teams

→ If a prospect has more than 10 teams (the limit with Sales Hub Professional), they would need Enterprise (includes as many as 300 teams).

→ Enterprise unlocks the ability to implement hierarchical teams. Typically, teams with multiple levels within their sales org (SDR, BDR, AE) need different levels of permissioning and/or structure.

→ Hierarchical teams can also be helpful if a prospect has different locations, brands, or products. For example, if a team has a USA sales team, it might be broken up by territory. With this tool, sales leaders can see performance for both individual territories and an entire region.

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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

## User Roles

→ Enterprise unlocks the ability to partition dashboards, reports, properties, and record side bars, as well as create conditional layouts.

→ Playbooks permissioning is specific to Sales Hub Enterprise (publish or write)

## Customizing the CRM

→ Personalizing the record sidebar for different teams is an Enterprise-only feature and allows customization to which properties are visible for specific teams.

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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?

## Single Sign-On (SSO)

→ If the answer is yes, your prospect needs Enterprise.

## Sandboxes

→ If the answer is yes, your prospect needs Enterprise.

→ Note: There are limitations on what can and can't be tested, so it's a good practice to ask upfront.

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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

## Sales Goals

→ Enterprise unlocks the ability to set goals for a wide range of sales activities like calls logged, meetings booked, deals created, and/or revenue.

→ Goals help managers create user-specific quotas for their teams and assign the goals at a user, team, or pipeline level.

→ The ability to have a monthly revenue goal is available on Sales Hub Professional and Enterprise.

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16. How are sales reps assigned leads?

## Sales Automation

- Note that a rep will need a paid seat (not necessarily Enterprise) to be rotated leads.
- What to listen for: If sales reps are rotated leads via inbound sources like web forms from Marketing, then they will need Sales Hub Enterprise to be a part of that rotator.
- More detail.

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Part 1 | Part 2

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: ____________________

# Conversational Intelligence

- Note that Conversational Intelligence has moved down to Sales Hub Professional and the only feature that is Enterprise-specific now is the ability to report off of tracked terms used during the call.
- Answers to "How are you able to keep track of common terms brought up on calls?" and "Would you be looking to track common competitors or phrases mentioned on sales calls" will be key here.
- What's the business value? If your prospect is realizing they are losing deals due to XYZ Competitor, conversational intelligence could help Marketing make content to proactively handle objections.
- Another key to listen for is volume: Customers get 1,500 hours of transcription per month per user with Enterprise, vs. 500 with Professional.

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Part 1 Part 2

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

    THE LEAST ○ ○ ○ ○ ○ 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?

    THE LEAST ○ ○ ○ ○ ○ THE MOST

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?

    THE LEAST ○ ○ ○ ○ ○ THE MOST

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

THE LEAST ◯ ◯ ◯ ◯ ◯ THE MOST

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+

# Playbooks

- Note: Playbooks also got bumped down to Sales Hub Professional, except for the ability to input properties.
- The large difference in volume is also key: prospects get 5,000 playbooks with Enterprise and five playbooks with Professional.
- Understanding how many processes a prospect has can help you understand how many playbooks they may need. This can also play into the potential need for multiple deal pipelines — think a renewal pipeline vs. a sales pipeline vs. an onboarding pipeline. Sales Hub Enterprise comes with 100 deal pipelines, whereas Sales Hub Professional comes with 15.

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

   ◯ True ◯ False

## Custom Objects

- → HubSpot has four standard objects: contacts, companies, deals, and tickets. These are commonly termed as leads, accounts, opportunities, or cases across the industry.
- → Custom Objects allow for further flexibility beyond what our standard objects offer.

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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?

# Quote Approvals

- The ability to require a quote to be approved prior to it being sent to a prospect is specific to Sales Hub Enterprise.
- Understanding how a prospect goes about getting quote approvals can help determine if our quote approval functionality will meet their needs.
- If the sales team collects e-signature on quotes and they have a high quote volume, pay attention to the e-signature limits between Professional and Enterprise. Sales Hub Enterprise includes 30 signatures per user per month, whereas Sales Hub Professional includes 10.

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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

## Call Transcription

→ These three questions will help you do the math and qualify for call transcription rate limits. Enterprise customers get 1,500 per user per month, vs. 500 with Professional.

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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

# Field-Level Permissions

→ Field-level permissions make it possible to hide specific properties from selected users or teams or make certain properties "View Only" to certain users or teams.

→ Limitation note: Once field-level permissions are set, users will still be able to see restricted property values in reports, workflows, and forms. The best way to prevent users from seeing this data is by removing their access to these tools.

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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 ◯ · · · · ◯ · · · · ◯ · · · · ◯ · · · · ◯ THE MOST

# Recurring Revenue Tracking

- → HubSpot's recurring revenue feature lets customers manage and track projected revenue over time.
- → Please note, recurring revenue has to be a monthly value.

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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 ◯ ◯ ◯ ◯ ◯ 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 ◯ ◯ ◯ ◯ ◯ THE MOST

# Predictive Lead Scoring

- → Getting a hot lead in front of Sales at the right time can make or break a deal. With Predictive Lead Scoring, reps can effectively prioritize their daily tasks.
- → HubSpot's predictive lead scoring feature analyzes customers and industry customer sets to determine the probability that open contacts will close as customers within 90 days.
- → We analyze things like: analytics information (including page visits, time of last visit, email interactions, and form submissions), firmographic information (from HubSpot insights and about our customers' businesses), and interactions logged in the CRM.

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