

~~5~~ 3 Ways to Use HubSpot to Drive Best-in-Class Growth

Sarika Garg & AJ Bruno
Sept. 4

Agenda

- Introduction
- Why operationalize the CRM
- 3 ways to do it
- Next steps
- Q&A



About us



Sarika Garg

GM and VP of Commerce Hub
Former Co-Founder and CEO of Cacheflow



AJ Bruno

Co-Founder & CEO at QuotaPath



Operationalizing the CRM

Why are RevOps leaders doing this?

- ✔ Pressure to Improve Efficiency and Reduce Manual Work
- ✔ Aligning GTM Teams Around Shared Goals
- ✔ Eliminating "Spreadsheet Ops"

What it looks like



CRM as a system of action
(not just record)



Integrating Cross-Functional
Tools & Data



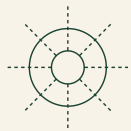
Aligning Cross-Functional Teams

3 Ways to Unify your CRM

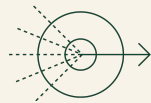
AND Drive Best In Class Growth

1 CPQ

Make CPQs



Easy



Fast



Unified

CPQ in HubSpot

HubSpot

Search HubSpot

Upgrade

Copilot

HubSpot App Objects Testing Ground

Quotes

BETA

Set up quote approvals

Actions

Create quote

Summary

All quotes

Search all quotes

Status: All

Buyer activity: All

Owners: All users

Archive status: Active

QUOTE	BUYER ACTIVITY	QUOTE VIEWS	QUOTE AMOUNT	STATUS	QUOTE OWNER
FXAIR, Flexjet, and Sentient J...	No activity	No views	\$540.00	Draft	Chloe Andersc
FXAIR, Flexjet, and Sentient J...	No activity	No views	\$540.00	Draft	Chloe Andersc
ThoroughCare - \$13700	No activity	No views	\$0.00	Draft	Alexa Settlemi
FXAIR, Flexjet, and Sentient J...	No activity	No views	\$540.00	Draft	Chloe Andersc
FXAIR, Flexjet, and Sentient J...	No activity	No views	\$540.00	Published	Chloe Andersc
FXAIR, Flexjet, and Sentient J...	No activity	No views	\$2,520.00	Published	Chloe Andersc
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FXAIR, Flexjet, and Sentient J...	No activity	No views	\$5,400.00	Published	Chloe Andersc
Jigsaw - \$8700	No activity	No views	\$0.00	Draft	Alexis Park (sc

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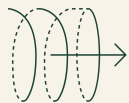
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Next >

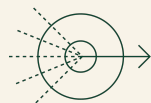
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2 Incentives

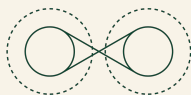
Make Incentives



Aligned



Automated



Integrated



Actionable



Visible

Incentives in practice and outcomes

Actions ▾

OverviewActivities

Earnings Overview

Total Forecasted Earnings

\$1,833

▲ +\$1,675

Current Earnings

\$158

Approved Earnings

\$158

QuotaPath Earnings

NAME	DATE	FLAG	STAGE	PLAN	PATH COMPONENT
Karmatales	Jul 12, 2024		Pipeline	AE Plan 2024	Quarterly Commission
Karmatales	Aug 23, 2024		Pipeline	AE Plan 2024	2 Paths ▾
Karmatales	Aug 23, 2024		Closed/Won	AE Plan 2024	2 Paths ▾
Karmatales - Demo Complete	Oct 18, 2024	Flagged	Closed/Won	AE Plan 2024	Quarterly Commission

Powered by QuotaPath UI Extensions

Recent Activity

Karmatales

Amount: \$2,500

Stage: Closed Won ▾

[View in QuotaPath](#)

About this deal

Rep Approval

Manager Approval

Finance Approval

Deal owner

 Maria Kenter ▾

Plan Name

Account Executive 2024

Close Date:

 1/20/2024

Approved Date:

 1/24/2024

Earnings Overview

Total Forecasted Earnings

\$1,833

▲ +\$1,675

Approved Earnings

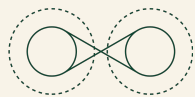
\$158

1 + 2 The Power of Both... Together

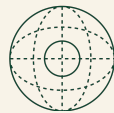
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AI

Make AI



Integrated



Contextual



Actionable

AI Experiences: Wins and Learnings

Wins

- ✔ Predictive Lead Scoring and Prioritization
- ✔ Automated Data Capture and CRM Hygiene
- ✔ Revenue Forecasting and Deal Risk Identification

Learnings

- ⊕ Speed of Iteration > Perfection at Launch
- ⊕ Data Integrity Is Non-Negotiable
- ⊕ AI Is Only as Good as the Problem It Solves

Key Takeaways

Key Takeaways

- 1 The CRM should move from a system of record to a **system of action**
- 2 Leverage **CPQ** as an accelerator
- 3 **Incentives** are your performance driver



“If I had to do one
thing over...”

Q&A

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