

HubSpot Demo



COMMUNITY COLLEGES

SAN DIEGO & IMPERIAL COUNTIES

CAREER EDUCATION

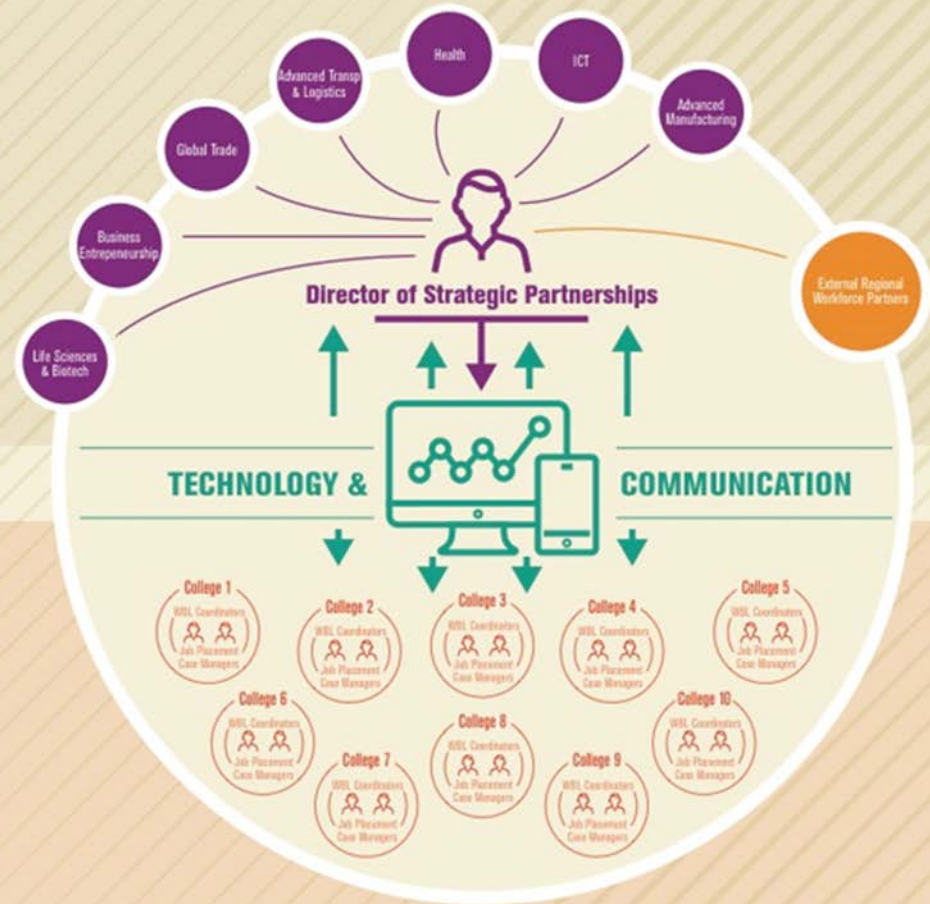
Agenda

- Regional Approach to Employer Engagement
- Need for a CRM (Customer Relationship Management)
- DEMO

Employer Engagement Model

- Regional Directors
- External Partners
- Job Placement Case Managers & Work Based Learning Coordinators
- Technology & Communication

EMPLOYERS



STUDENTS

“Our work
begins and ends
with employers”



Improve contact with employers
Increase tracking of metrics
Improve communication
Improve collaboration
Improve process

Avoid overwhelming employers!

Components for CRM

EMPLOYER CONTACT INFO MANAGEMENT

- Standard employer contact data
- Ability to tag for sector
- Place to note which colleges have connection to employer
- Log types of engagement
- Owner and rules of engagement
- Unique ID to avoid duplication
- Lead management- track who is associated with company
- Open space for notes

DIFFERENTIATED ACCESS

- Dashboards
- Ability to limit access to records

PROCESS MANAGEMENT

- Tasks/Follow-up
- Email tracking
- Meeting/Appt. tracking
- Call tracking
- Activity tracking
- Ability to move employers through a sales process

NOTIFICATIONS/MESSAGING

- Campaign management (like Constant Contact)
- Send Alerts
- Outlook Integration

OTHER

- Reports
- Mobile App
- Data share in both Directions

General Feel for HubSpot



Types of Contacts

The screenshot shows the HubSpot CRM interface for a specific account. The browser address bar displays `app.hubspot.com/contacts/5632584/companies/list/view/all/`. The top navigation bar includes tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. A dropdown menu is open under 'Contacts', showing options for Contacts, Companies, Activity Feed, and Lists. The main content area displays a table of companies with columns for NAME, CREATE DATE, FIRST CONTACT CREATE DATE, and COMPAN. The table lists five companies: Laird Plastics, Port Plastics, WestEd, IMA Industria Macchine Autom..., and PDA. The table also includes checkboxes for selection and a 'Table actions' dropdown.

<input type="checkbox"/>	NAME	CREATE DATE	FIRST CONTACT CREATE DATE	COMPAN
<input type="checkbox"/>	Laird Plastics	Jun 23, 2020	Jun 23, 2020	Ru
<input type="checkbox"/>	Port Plastics	Jun 23, 2020	Jun 23, 2020	Ru
<input type="checkbox"/>	WestEd	Mar 26, 2020	Mar 26, 2020	Ke
<input type="checkbox"/>	IMA Industria Macchine Autom...	Mar 2, 2020	Mar 2, 2020	Ru
<input type="checkbox"/>	PDA	Mar 2, 2020	Mar 2, 2020	Ru

Companies View

Companies
317 Companies

Actions Import Create company

All companies My companies Add view All views

Search Company owner Create date More filters Table actions Save view

<input type="checkbox"/>	NAME	CREATE DATE	FIRST CONTACT CREATE DATE	COMPANY OWNER
<input type="checkbox"/>	Laird Plastics	Jun 23, 2020	Jun 23, 2020	Ruishan Chow (rchow@p
<input type="checkbox"/>	Port Plastics	Jun 23, 2020	Jun 23, 2020	Ruishan Chow (rchow@p
<input type="checkbox"/>	WestEd	Mar 26, 2020	Mar 26, 2020	Kevin McMackin (kevin.n
<input type="checkbox"/>	IMA Industria Machine Autom...	Mar 2, 2020	Mar 2, 2020	Ruishan Chow (rchow@p
<input type="checkbox"/>	PDA	Mar 2, 2020	Mar 2, 2020	Ruishan Chow (rchow@p

Prev 1 2 3 4 Next 100 per page

Chat Help

<https://app.hubspot.com/contacts/5632584/companies/list/view/all/?isDesti...>

Contact View (People)

The screenshot displays a CRM interface for viewing contacts. At the top, a navigation bar includes tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. Below this, the 'Contacts' section shows 525 contacts and includes buttons for 'Actions', 'Import', and 'Create contact'. A filter bar allows switching between 'All contacts', 'My contacts', and 'Unassigned contacts'. A search bar and additional filters for 'Contact owner' and 'Create date' are present. The main area is a table with the following data:

	NAME	EMAIL	PHONE NUMBER	CONTACT OWNER
<input type="checkbox"/>	Stacey Bells	stacey_bells@sters.com	747-430-1313	Ruishan Chow (rchow@p)
<input type="checkbox"/>	Pari Kazeminy	pkazeminy@biotech.com	--	Ruishan Chow (rchow@p)
<input type="checkbox"/>	Masami Amakawa	amakawa@socalpdachapter.org	--	Ruishan Chow (rchow@p)
<input type="checkbox"/>	Marianna Tcherpakov	info@bioservamerica.com	858-450-3123	Ruishan Chow (rchow@p)
<input type="checkbox"/>	Christopher Fee	chris.fee@imalife.com	716-695-6354	Ruishan Chow (rchow@p)
<input type="checkbox"/>	Kava Murrav	info@dirtdonthurtme.com	--	Ruishan Chow (rchow@p)

At the bottom, there is a pagination control showing 'Prev 1 2 3 4 5 6 Next' and '100 per page'. A 'Chat Help' button is located in the bottom right corner.

Employer Contact Information



Company Features

The screenshot displays a CRM interface for managing companies. At the top, a navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main heading is 'Companies' with a sub-count of '317 Companies'. Action buttons for 'Actions', 'Import', and 'Create company' are visible. Below the heading, there are view filters for 'All companies' and 'My companies', along with an 'Add view' button. A search bar contains the text 'sharp'. Filter options include 'Company owner', 'Create date', and 'More filters'. A 'Table actions' dropdown and a 'Save view' button are also present. The main table lists companies with columns for Name, Create Date, First Contact Create Date, and Company Owner. The table is currently on page 1 of 1, with 100 items per page. A 'Chat' and 'Help' button is located in the bottom right corner.

<input type="checkbox"/>	NAME	CREATE DATE	FIRST CONTACT CREATE DATE	COMPANY OWNER
<input type="checkbox"/>	Laird Plastics	Jun 23, 2020	Jun 23, 2020	Ruishan Chow (rchow@p
<input type="checkbox"/>	Port Plastics	Jun 23, 2020	Jun 23, 2020	Ruishan Chow (rchow@p
<input type="checkbox"/>	WestEd	Mar 26, 2020	Mar 26, 2020	Kevin McMackin (kevin.r
<input type="checkbox"/>	IMA Industria Macchine Autom...	Mar 2, 2020	Mar 2, 2020	Ruishan Chow (rchow@p
<input type="checkbox"/>	PDA	Mar 2, 2020	Mar 2, 2020	Ruishan Chow (rchow@p

Sharp Company View

The screenshot displays a CRM interface for the 'Sharp' company. The top navigation bar includes tabs for 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. The main content area is divided into three sections:

- Left Sidebar:** Displays the company logo 'SHARP', the name 'Sharp', and the website 'sharp.com'. Below this are icons for 'Note', 'Email', 'Call', 'Log', 'Task', and 'Meet'. A section titled 'About this company' lists details: Company owner (Heather Cavazos), Industry (Hospital & Health Care), Lifecycle stage, and Opportunity.
- Central Activity Feed:** Shows a single activity: 'Company created' on Mar 27, 2019 at 4:13 PM PDT. The description reads: 'This company was created'.
- Right Sidebar:** Lists 17 contacts. The visible contacts are:
 - Janet Hanley:** Sharp, email: janet.hanley@sharp.com
 - Cathy Prante:** Director of Nursing Education, Finance and Professional Development at Sharp, email: m.prante@sharp.com
 - Jeffrey Cabrera:** Manager 4W Acure Care at Sharp, email: jeffrey.cabrera@sharp.com
 - Claudia Bock:** System Clinical Co... Affiliation at Sharp, email: claudia.bock@sharp.com

Employer Contact Data

The screenshot displays a CRM interface with a dark navigation bar at the top containing menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the right side of the navigation bar are icons for search, a dashboard, settings, notifications, and a user profile. The main content area is divided into three sections:

- Left Panel (Company Details):** Shows details for 'Sharp' (sharp.com). Fields include: Company owner (Heather Cavazos), Industry (Hospital & Health Care), Lifecycle stage (Opportunity), Name (Sharp), Number of employees (10,000), Phone number (800-827-4277), Street address (8695 Spectrum Center Boulevard), and State/Region (CA). A blue arrow points from the 'Activity' tab to the 'Opportunity' field.
- Center Panel (Activity):** Shows a 'Company created' event on Mar 27, 2019 at 4:13 PM PDT with the message 'This company was created'. The filter is set to 'Filter activity (8/10)' and 'All users'.
- Right Panel (Contacts):** Lists 17 contacts. Visible contacts include:
 - Janet Hanley** (Sharp, janet.hanley@sharp.com)
 - Cathy Prante** (Director of Nursing Education, Finance and Professional Development at Sharp, m.prante@sharp.com)
 - Jeffrey Cabrera** (Manager 4W Acure Care at Sharp, jeffrey.cabrera@sharp.com)
 - Claudia Bock** (System Clinical Cod Affiliation at Sharp, claudia.bock@sharp.com)Buttons for 'Chat' and 'Help' are visible at the bottom of the contact list.

Ability to Tag for Sector

The screenshot displays a CRM interface with a dark navigation bar at the top containing menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the right side of the navigation bar are icons for search, home, settings, notifications, and a user profile. The main content area is divided into three sections:

- Left Panel (Company Profile):** Shows details for 'Sharp' (sharp.com). Fields include: Company owner (Heather Cavazos), Industry (Hospital & Health Care), Lifecycle stage (Opportunity), Name (Sharp), Number of employees (10,000), Phone number (800-827-4277), Street address (8695 Spectrum Center Boulevard), and State/Region (CA).
- Center Panel (Activity Feed):** Titled 'Activity', it shows a filter for 'Filter activity (8/10)' and 'All users'. A recent activity entry reads: 'Company created' on 'Mar 27, 2019 at 4:13 PM PDT'. A large blue arrow points from the 'Hospital & Health Care' industry tag in the left panel to this activity entry.
- Right Panel (Contacts List):** Titled 'Contacts (17)', it lists several individuals with their roles and email addresses:
 - Janet Hanley, Sharp, janet.hanley@sharp.com
 - Cathy Prante, Director of Nursing Education, Finance and Professional Development at Sharp, m.prante@sharp.com
 - Jeffrey Cabrera, Manager 4W Acure Care at Sharp, jeffrey.cabrera@sharp.com
 - Claudia Bock, System Clinical Co... Affiliation at Sharp, claudia.bock@sharp.com

Place to Note College Connections

The screenshot displays a CRM interface with a search dropdown on the left and an activity log in the center. The search dropdown lists several colleges: "All Colleges in San Diego an...", "Cuyamaca College", "Grossmont College", "Imperial Valley College", "MiraCosta College", and "Colleges of California". The activity log shows a notification titled "Company created" dated "Mar 27, 2019 at 4:13 PM PDT" with the message "This company was created". A large blue arrow points from the search dropdown to the activity log entry. The right sidebar shows a list of contacts, including Janet Hanley, Cathy Prante, Jeffrey Cabrera, and Claudia Bock, each with their name, title, and email address.

Log Types of Engagement

The screenshot displays a CRM interface with a dark navigation bar at the top containing menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the left, a sidebar shows a list of engagement log types with checkboxes, including "Offering a workplace experi...", "Offering a workplace studen...", "Hosting a teacher for an indu...", "Providing a job shadow opp...", "Providing a student internship", and "WBL Opportunities at company workplace". The main area is titled "Activity" and shows a filter for "Filter activity (8/10)" and "All users". A blue arrow points to a log entry with the timestamp "Mar 27, 2019 at 4:13 PM PDT". On the right, a "Contacts (17)" list includes Janet Hanley, Cathy Prante, Jeffrey Cabrera, and Claudia Bock, each with their title and email address. A "Chat Help" button is visible at the bottom right of the contact list.

Owner/Rules of Engagement

The screenshot displays a CRM interface for a company named 'Sharp' (sharp.com). The left sidebar shows the 'Rules of Engagement' field, which is currently empty. A large blue arrow points from this field to the 'Activity' tab in the main content area. The 'Activity' tab shows a notification: 'Company created' on 'Mar 27, 2019 at 4:13 PM PDT' with the message 'This company was created'. The right sidebar lists contacts for 'Sharp', including Janet Hanley, Cathy Prante, Jeffrey Cabrera, and Claudia Bock, each with their title and email address. The top navigation bar includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'.

Unique Identifier

HubSpot uses emails and website for unique identifiers.

Lead Management- Associated Contacts

The screenshot displays a CRM interface with a dark navigation bar at the top containing menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the left, a sidebar shows the 'Companies' view for 'Sharp' (sharp.com), listing details such as Company owner (Heather Cavazos), Industry (Hospital & Health Care), and Number of employees (10,000). The main area is titled 'Activity' and shows a 'Company created' event with the text 'This company was created'. A large blue arrow points from this activity to a list of 17 contacts on the right. The contact list includes Janet Hanley (janet.hanley@sharp.com), Cathy Prante (m.prante@sharp.com), Jeffrey Cabrera (jeffrey.cabrera@sharp.com), and Claudia Bock (claudia.bock@sharp.com). A 'Chat Help' button is visible at the bottom right of the contact list.

Open Space for Notes

The screenshot displays a CRM interface with a dark navigation bar at the top containing menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the left, a sidebar shows a 'Companies' list with a card for 'Sharp' selected. The main content area is divided into tabs: Notes, Emails, Calls, Tasks, and Meetings. A large blue arrow points to the 'Notes' tab. Below the tabs, a 'Create Note' button is visible. The notes area contains the text: 'Take notes about this record to keep track of important info. You can even @mention a teammate if you need to. [Learn more](#)'. On the right, a 'Contacts (17)' list is shown with entries for Janet Hanley, Cathy Prante, Jeffrey Cabrera, and Claudia Bock, each with their title and email address. At the bottom right, there are 'Chat' and 'Help' buttons.

Differentiated Access



Dashboards

The screenshot displays a CRM dashboard interface. At the top, a dark navigation bar contains tabs for 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. A blue arrow points from the 'Reports' tab to the 'Sales Dashboard' dropdown menu. Below the navigation bar, the 'Sales Dashboard' is selected, showing a 'Create dashboard' button with a lock icon, an 'Actions' dropdown, and an 'Add report' button. The main content area is titled 'Filter dashboard' and includes a 'Team Activity' section with a magnifying glass icon and the text 'No activities to show for this time frame.' To the right is a 'Sales Performance' section with a date range of 'In the last 30 days'. It features five metrics: 'CONTACTS CREATED' (0, 100% decrease), 'CONTACTS ASSIGNED' (0, 100% decrease), 'CONTACTS WORKED' (0), 'NEW DEALS CREATED' (0), and 'DEALS CLOSED WON' (0). A 'Chat' and 'Help' button is located in the bottom right corner of the dashboard area.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾

Sales Dashboard ▾

Create dashboard 🔒 Actions ▾ Add report

Filter dashboard Assigned: Everyone can edit

Team Activity
Date range: In the last 30 days

No activities to show for this time frame.

Sales Performance
Date range: In the last 30 days

CONTACTS CREATED	CONTACTS ASSIGNED	CONTACTS WORKED
0	0	0
▼ 100%	▼ 100%	
NEW DEALS CREATED	DEALS CLOSED WON	
0	0	

Chat Help

Limiting Access to Companies/Contacts

The screenshot shows the HubSpot 'Users & Teams' settings page. The left sidebar contains navigation options: Account Defaults, Contacts & Companies, Conversations, Cookies, Import & Export, Integrations, Marketing, Properties, Sales, Tickets, Tracking Code, and Users & Teams (highlighted). A 'Try the settings beta' button is at the bottom of the sidebar. The main content area has a header: 'Create new users, customize user permissions, and remove users from your account.' Below this is a 'Status: All' dropdown, a search bar, and a 'Create user' button. A table lists users with columns for NAME, TEAM, and ACCESS. A blue arrow points to the 'ACCESS' column header. The table contains the following data:

<input type="checkbox"/>	NAME	TEAM	ACCESS
<input type="checkbox"/>	Christopher Yerkes christopher.yerkes@gcccd.edu		Super Admin
<input type="checkbox"/>	Connie Lafuente connie.lafuente@gcccd.edu		Service Contacts Reports Marketing
<input type="checkbox"/>	Duane Rinehart drinehart@palomar.edu		Service Contacts Reports Marketing
<input type="checkbox"/>	Erin Carter ecarter@wested.org		Service Contacts Reports Marketing
<input type="checkbox"/>	Heather Cavazos heather.cavazos@gcccd.edu		Service Contacts Reports Marketing
<input type="checkbox"/>	Jennifer Patel jpatel@miracosta.edu		Service Contacts Reports Marketing

At the bottom right of the main content area, there are 'Chat' and 'Help' buttons.

Process Management



Tasks and Follow Up

The screenshot displays a CRM interface for a company named "San Diego Regional Economic Development Center" (EDC). The main navigation bar includes "Contacts", "Conversations", "Marketing", "Sales", "Service", "Automation", and "Reports". The left sidebar shows the company profile with contact icons for Note, Email, Call, Log, Task, and Meet. The central pane is titled "Upcoming" and shows a task: "F/U with Kate" assigned to "Kevin McMackin (kevin.mcmackin@gcccd.edu)". The task details include a due date of "09/18/2020" at "8:00 AM" with a "To-do" type, a "None" priority, and a "Reminder" set for "09/18/2020" at "8:00 AM". The task was created by "Kevin McMackin". A blue arrow points to the "Tasks" tab in the top navigation, and a "Create Task" button is visible below it. The right sidebar lists four contacts: Kierstin Rielly, Mark Cafferty, and Matthew SanFord, each with their role, company, email, and phone number.

Email Tracking

The screenshot displays the HubSpot CRM interface for a contact named Christopher Yerkes. The top navigation bar includes tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. A blue arrow points to the 'Emails' tab. The contact's profile shows their name, title (Program Specialist at Grossmont-Cuyamaca Community College District), and various action buttons (Note, Email, Call, Log, Task, Meet). The 'About this contact' section lists the contact owner (Duane Rinehart) and other details. The main content area shows a list of email tracking events for April 2020, including 'Email tracking' events with timestamps and descriptions of opened emails. The right sidebar shows contact details for Grossmont-Cuyamaca Community College District, including company information, deals, tickets, and attachments.

Contacts Conversations Marketing Sales Service Automation Reports

< Contacts Actions

Christopher Yerkes
Program Specialist at Grossmont-Cuyamaca Community College District

Note Email Call Log Task Meet

About this contact

Contact owner
Duane Rinehart

First name
Christopher

Last name
Yerkes

Filter by: Filter activity (17/19) All users

April 2020

Email tracking Apr 6, 2020 at 9:45 AM PDT
Christopher Yerkes opened RE: 21st Century Skills Meeting

Email tracking Apr 6, 2020 at 9:45 AM PDT
Christopher Yerkes opened Hubspot Test

Email tracking Apr 6, 2020 at 9:45 AM PDT
Christopher Yerkes opened RE: WG6 Employer Engagement Work

Email tracking Apr 6, 2020 at 9:45 AM PDT
Christopher Yerkes opened RE: Regional Internship Model

Company (1) + Add

Grossmont-Cuyamaca Community College District
gcccd.edu
619-644-7010

Deals (0) + Add

Use deals to track all your revenue opportunities.

Tickets (0) + Add

Use tickets to track all of your customer's questions and requests for help.

Attachments + Add

Chat Help

Meeting/Appointment Tracking

The screenshot displays a CRM interface with a dark blue navigation bar at the top containing 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. Below this, a secondary navigation bar includes 'Companies', 'Meetings', 'Notes', 'Emails', 'Calls', and 'More'. A large blue arrow points to the 'Meetings' tab. The main content area shows a meeting log for 'San Diego Regional EDC' (sandiegobusiness.org) for March 2019. A 'Logged meeting' entry from March 18, 2019, at 10:30 AM PDT is detailed, including the text 'Met with Matt and Kate to discuss ongoing work being done at the Regional EDC and how we might work together moving forward.' Below the text is a table with columns for Outcome, Attendees, Duration, and Date. The entry shows 'None' for Outcome, '2 attendees' for Attendees, '0 Minutes' for Duration, and '03/18/2019' for Date. A 'Time' section shows '10:30 AM'. A user note indicates 'Kevin McMackin logged a meeting with Kate Gallagher, Matthew SanFord'. The right sidebar lists contacts: Kierstin Rielly, Mark Cafferty, and Matthew SanFord. A 'Log Meeting' button and a 'Create Meeting' button are visible at the top of the meeting log.

Call Tracking

The screenshot displays a CRM interface with a top navigation bar containing 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. A blue arrow points to the 'Calls' tab in the 'Activity' section. The main content area shows a call log entry for 'Kate Gallagher' on '09/15/2020' at '2:24 PM' with the outcome 'Left voicemail'. A modal window titled 'Log Call' is open, showing a table with columns for 'Contacted', 'Call outcome', 'Date', and 'Time'. The entry for 'Kate Gallagher' is highlighted. Below the table, there is a text field with the note 'LM to discuss Advancing San Diego.' and a 'Log activity' button. The sidebar on the left shows the company profile for 'San Diego Regional EDC' with contact information and a list of actions: Note, Email, Call, Log, Task, and Meet.

Activity Tracking

The screenshot displays a CRM interface with a dark navigation bar at the top containing menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the right side of the navigation bar are icons for search, home, settings, notifications, and a user profile. Below the navigation bar, a secondary menu shows 'Companies', 'Activity', 'Notes', 'Emails', 'Calls', 'Tasks', and 'More'. A large blue arrow points to the 'Activity' tab. The main content area shows a filter for 'Filter activity (8/10)' and 'All users'. The activity log is for 'September 2020' and features a 'Logged call' entry from 'Kevin McMackin' on 'Sep 15, 2020 at 2:24 PM PDT'. The call details include the subject 'LM to discuss Advancing San Diego.', a table of activity (Contacted: Kate Gallagher, Outcome: Left voicemail, Date: 09/15/2020), and a duration of 2:24 PM. A 'Kevin McMackin logged a call' notification is also present. The left sidebar shows the company profile for 'San Diego Regional EDC' with contact information and interaction options (Note, Email, Call, Log, Task, Meet). The right sidebar lists other contacts: Kierstin Rielly, Mark Cafferty, and Matthew SanFord, each with their role and contact details. A 'Chat Help' button is visible at the bottom right of the contact list.

Move Employers Through Sales Process

The screenshot displays the HubSpot CRM interface. On the left, a dropdown menu is open, showing lifecycle stages: marketing qualified lead, Sales qualified lead, Opportunity, Customer, Evangelist, and Other (highlighted). Below the dropdown, contact details for 'San Diego Regional Economic Development' are visible, including 50 employees and phone number 619-234-8484. The main area shows a task 'F/U with Kate' assigned to Kevin McMackin, with a due date of 09/18/2020 at 8:00 AM. A blue arrow points to the 'Sales qualified lead' option in the dropdown. The right sidebar shows a list of contacts: Kierstin Rielly, Mark Cafferty, and Matthew Sanford.

Notifications and Messaging



Campaign Management

Not in free version

API available to connect to Mailchimp or Constant Contact

Send Alerts

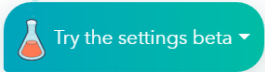
The screenshot displays a CRM interface for 'San Diego Regional Economic Development' (EDC). The main view shows an 'Upcoming' task: 'F/U with Kate', assigned to 'Kevin McMackin'. The task details include a due date of '09/18/2020' at '8:00 AM' with a 'To-do' type. A blue arrow points to the '8:00 AM' reminder time. The interface also shows a sidebar with contact information for three individuals: Kierstin Rielly, Mark Cafferty, and Matthew SanFord. The top navigation bar includes options like 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'.

Outlook Integration

Settings

Your Preferences

- Basic Info
- Notifications
- Security
- Account Defaults
- Contacts & Companies
- Conversations ✓
- Cookies
- Import & Export
- Integrations ✓
- API Key



Email Integrations

Connected Emails | HubSpot Extensions | Log and Track | Configurations


★ Pro tip: Install the extension for Google Chrome to use HubSpot in your Gmail. [Install extension](#) ✕

Send email with your HubSpot tools and update all your contact records effortlessly.

If it happens in your email, you should know.

When you connect HubSpot to your Gmail, Outlook 365, or other inbox with IMAP, any emails you send or receive will be automatically saved to the right contact record. No more manual copying and pasting conversations to your CRM.

[Connect an inbox](#)



[Chat](#) [Help](#)

Other



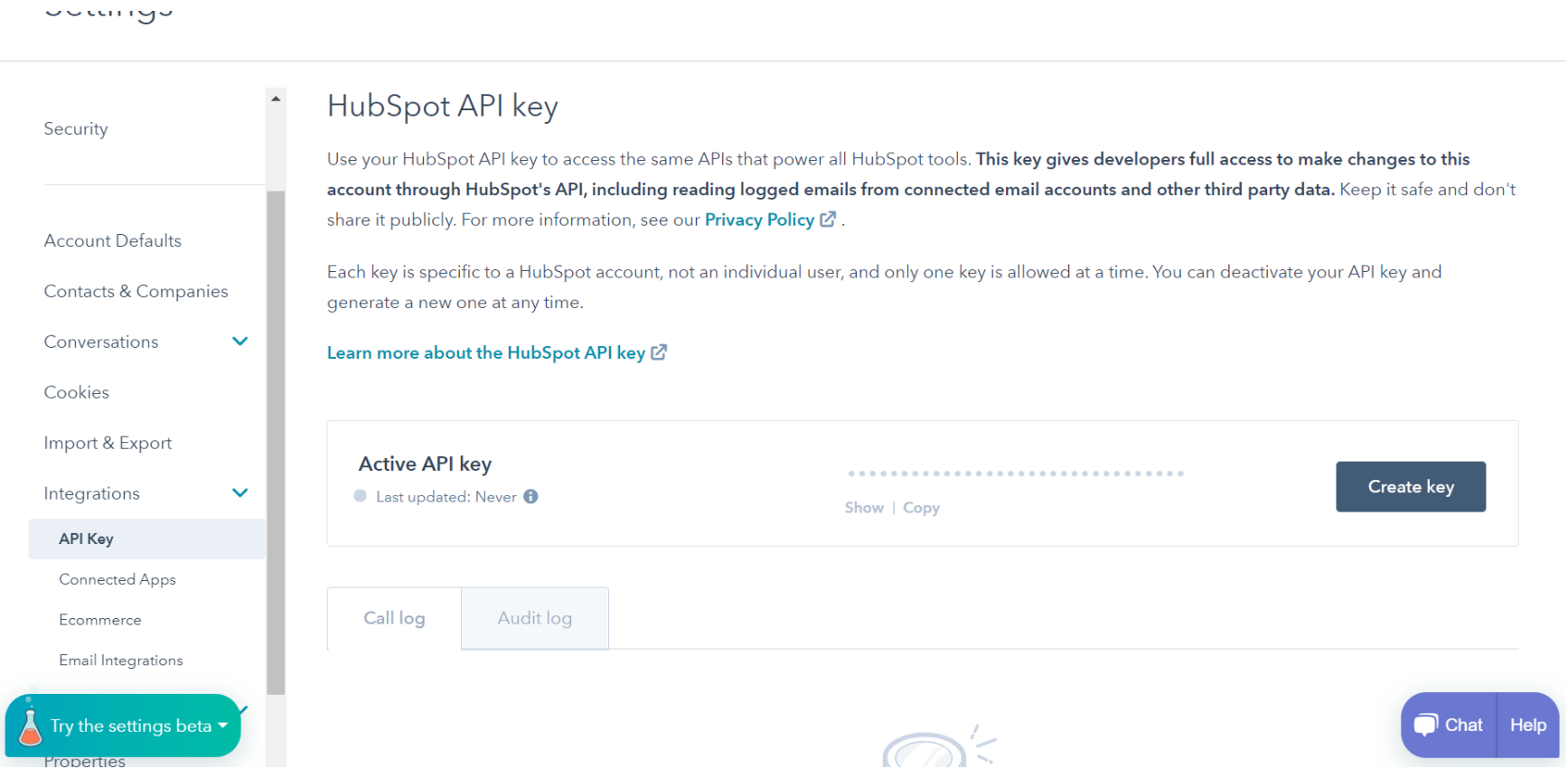
Reports

The screenshot shows the HubSpot interface. At the top, a dark navigation bar contains the HubSpot logo and several menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. A large blue arrow points to the Reports menu item. Below the navigation bar, the 'Analytics Tools' section is visible. It features a card for 'Traffic Analytics' with an icon of a laptop and a bar chart, and a description: 'Track sources, pages, topics and campaigns that are driving traffic to your website.' To the right, another card for 'Website Analytics' is partially visible, with the text 'Track the performance of your HubSpot website pages, landing pages, and blog.' At the bottom right of the interface, there are 'Chat' and 'Help' buttons.

Mobile App

The screenshot shows the top navigation bar of the HubSpot website. On the left, there is a language selector set to "English" and a "Contact Sales" link. On the right, there is a search icon, a "Go to my account" button, and a "Get HubSpot free" button. The main content area features a dark blue background with the text "Mobile CRM App" in large white font. Below this, a smaller white text reads: "Move work forward at any time by managing your sales process, outreach, and team collaboration on your phone." At the bottom of this section are two buttons: "Download on the App Store" and "GET IT ON Google Play". To the right of the text is a large image of a smartphone displaying a chat conversation. The chat is with a contact named "Isabel". The messages are: "Any discount if we sign for 18 months?" (sent by Isabel at 7:21pm) and "How many users?" (sent by Ronan at 7:23pm). A small chat icon is visible in the bottom right corner of the phone screen. A white chat bubble with a blue icon and a close button (X) is overlaid on the phone screen, containing the text: "If you need me, I'm here to answer your questions about what HubSpot's software can do for your business. Don't be shy!"

Two Way Data Share (API)



The screenshot shows the HubSpot settings page for API keys. On the left is a navigation sidebar with categories like Security, Account Defaults, and Integrations. The 'API Key' option is highlighted. The main content area is titled 'HubSpot API key' and contains a warning about full access to data, a 'Create key' button, and a section for the active API key with a 'Show | Copy' link. At the bottom, there are 'Call log' and 'Audit log' buttons, a 'Try the settings beta' notification, and 'Chat' and 'Help' buttons.

Settings

Security

Account Defaults

Contacts & Companies

Conversations

Cookies

Import & Export

Integrations

API Key

Connected Apps

Ecommerce

Email Integrations

Properties

HubSpot API key

Use your HubSpot API key to access the same APIs that power all HubSpot tools. **This key gives developers full access to make changes to this account through HubSpot's API, including reading logged emails from connected email accounts and other third party data.** Keep it safe and don't share it publicly. For more information, see our [Privacy Policy](#).

Each key is specific to a HubSpot account, not an individual user, and only one key is allowed at a time. You can deactivate your API key and generate a new one at any time.

[Learn more about the HubSpot API key](#)

Active API key [Redacted] [Create key](#)

Last updated: Never [Info]

Show | Copy

Call log Audit log

Try the settings beta

Chat Help

THANK YOU



COMMUNITY COLLEGES

SAN DIEGO & IMPERIAL COUNTIES

CAREER EDUCATION