HubSpot Demo

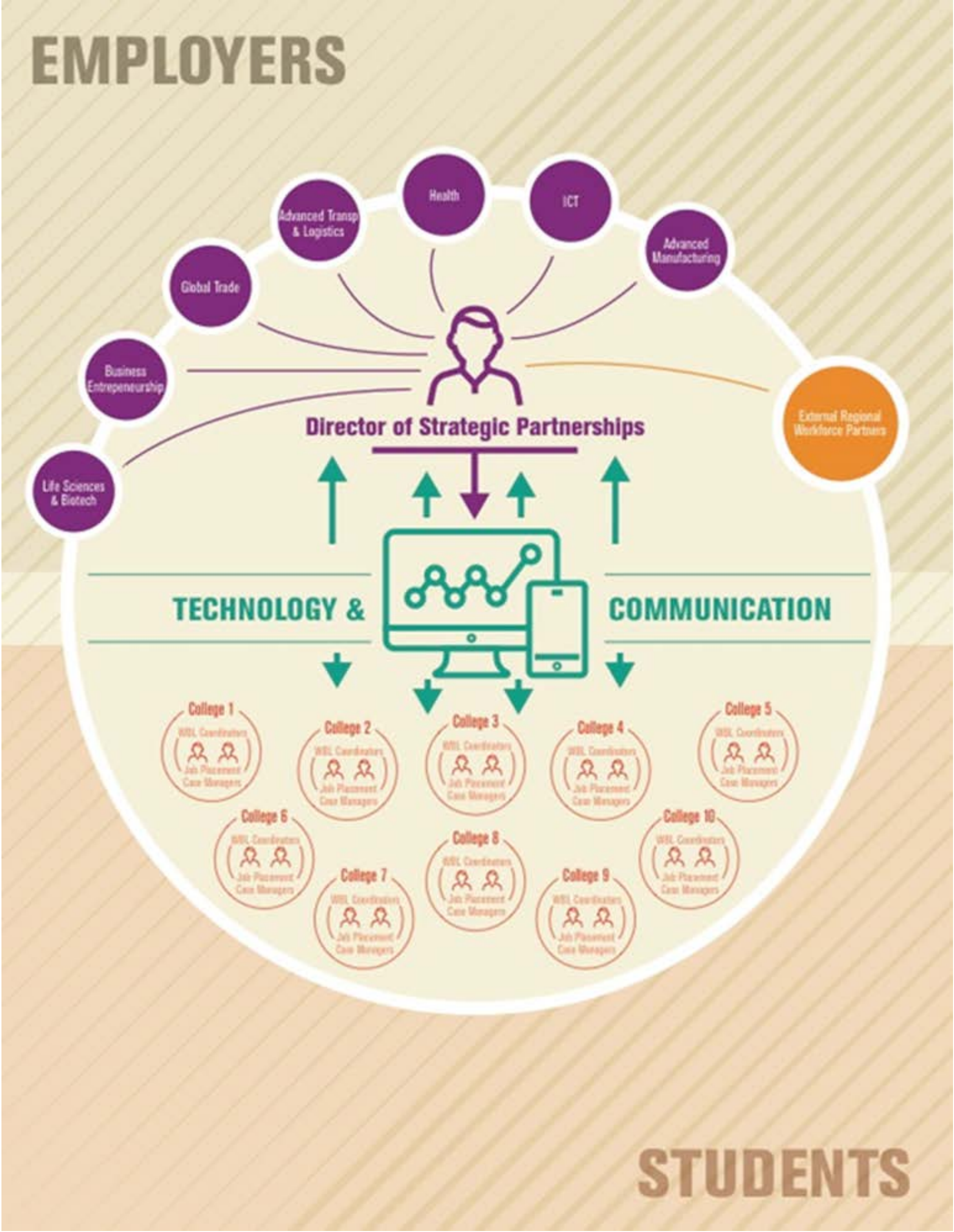
COMMUNITY COLLEGES
SAN DIEGO & IMPERIAL COUNTIES
CAREER EDUCATION

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
- **<u>Technology & Communication</u>**



“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

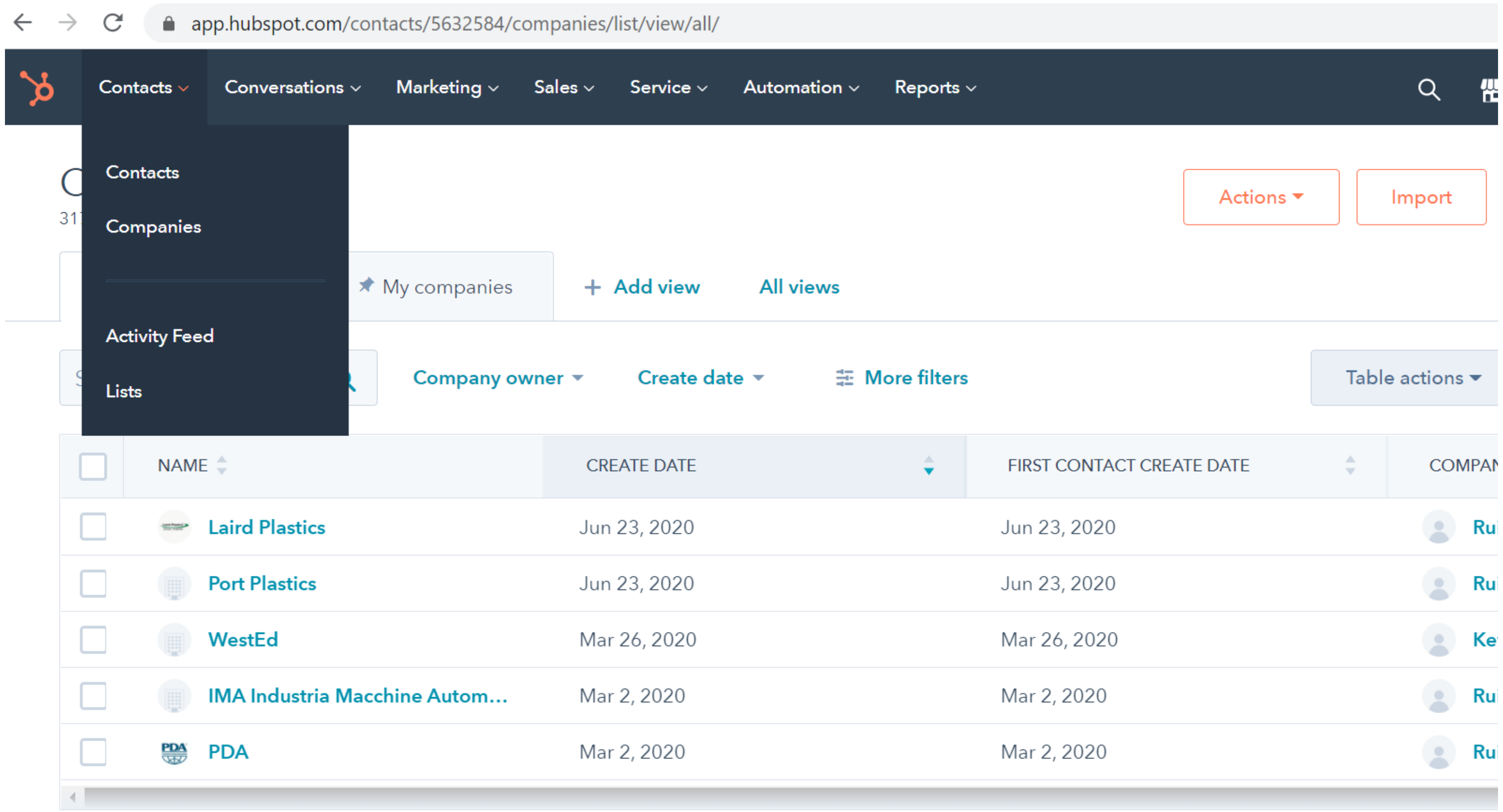
- Campaign management (like Constant Contact)
- Send Alerts
- Outlook Integration

OTHER

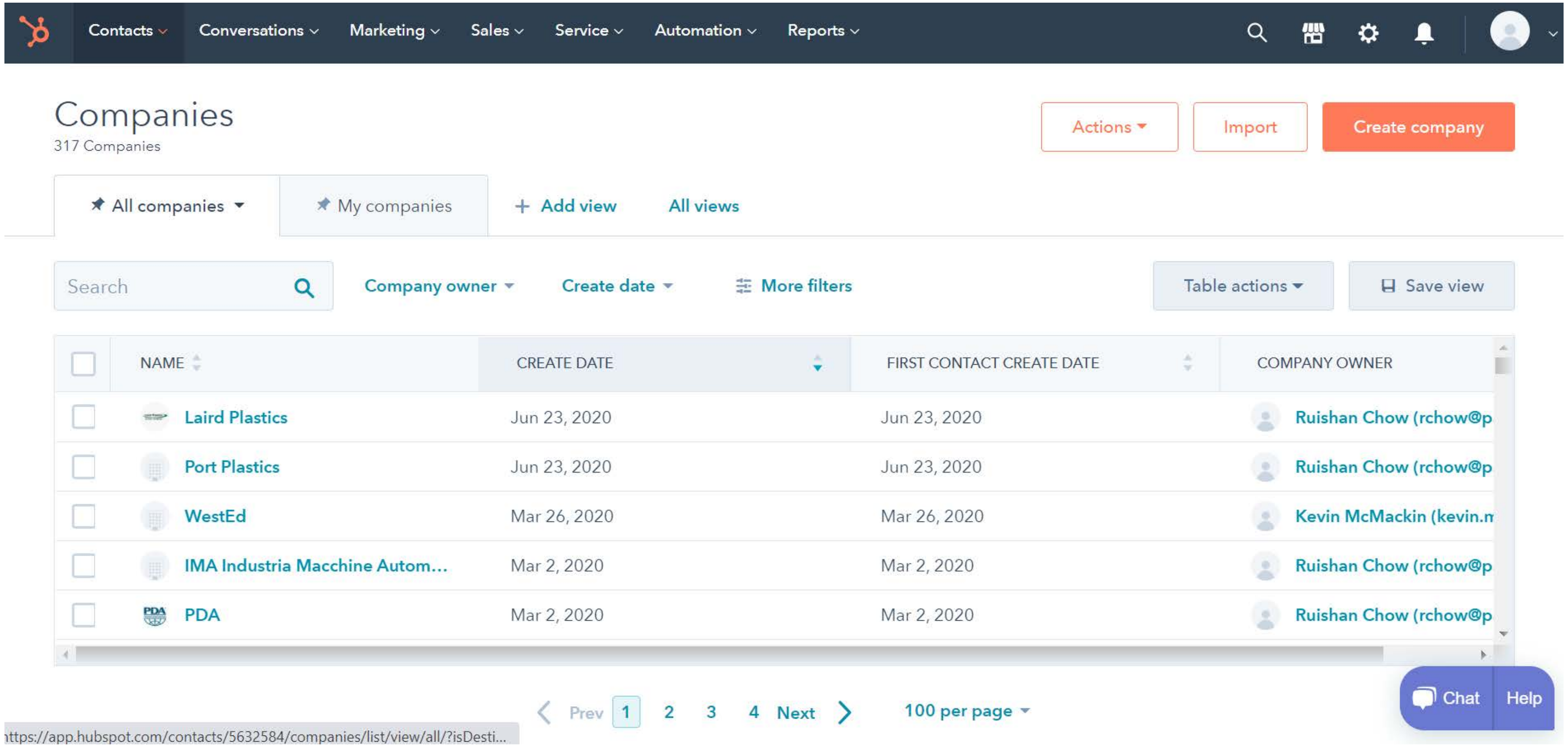
- Reports
- Mobile App
- Data share in both Directions

General Feel for HubSpot

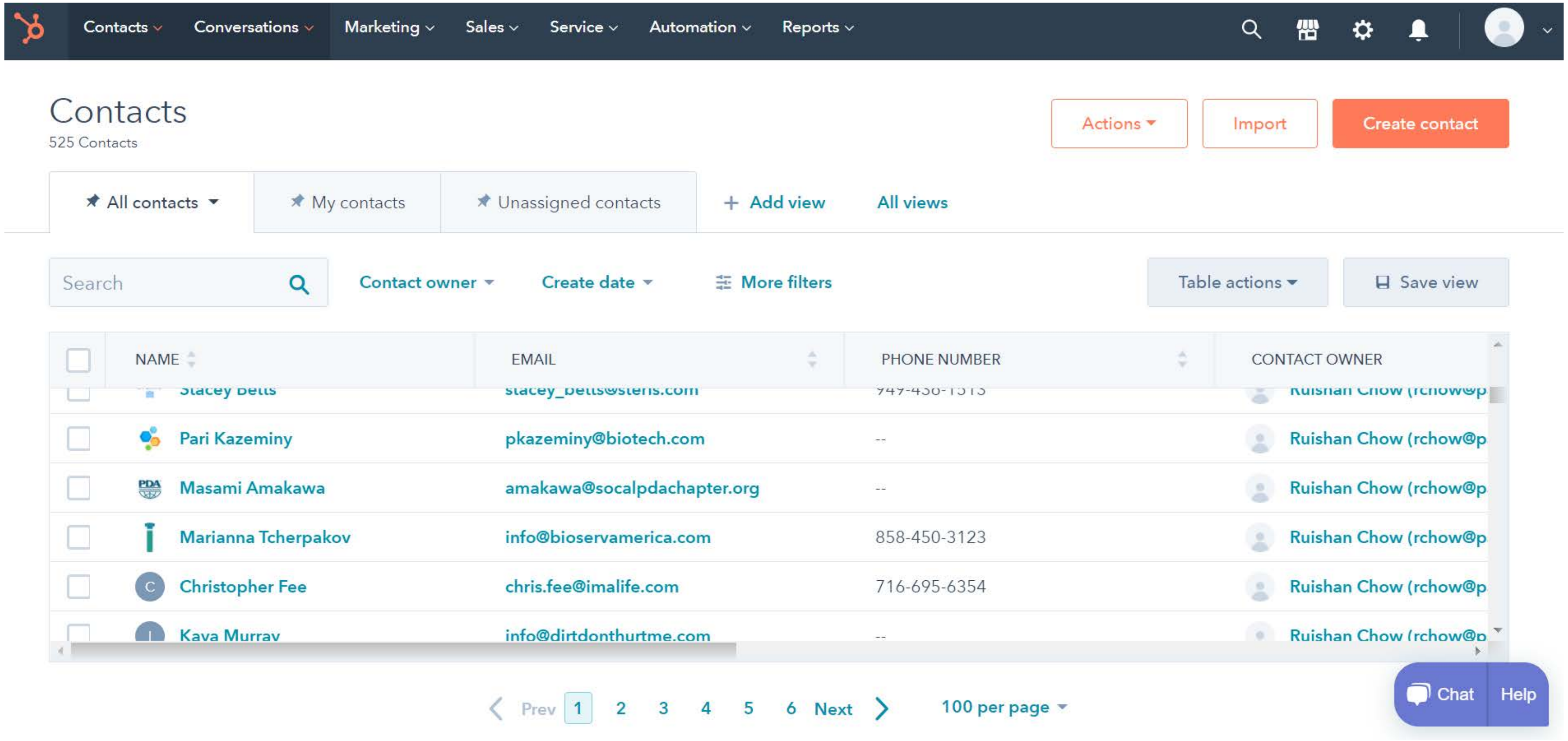
Types of Contacts



Companies View

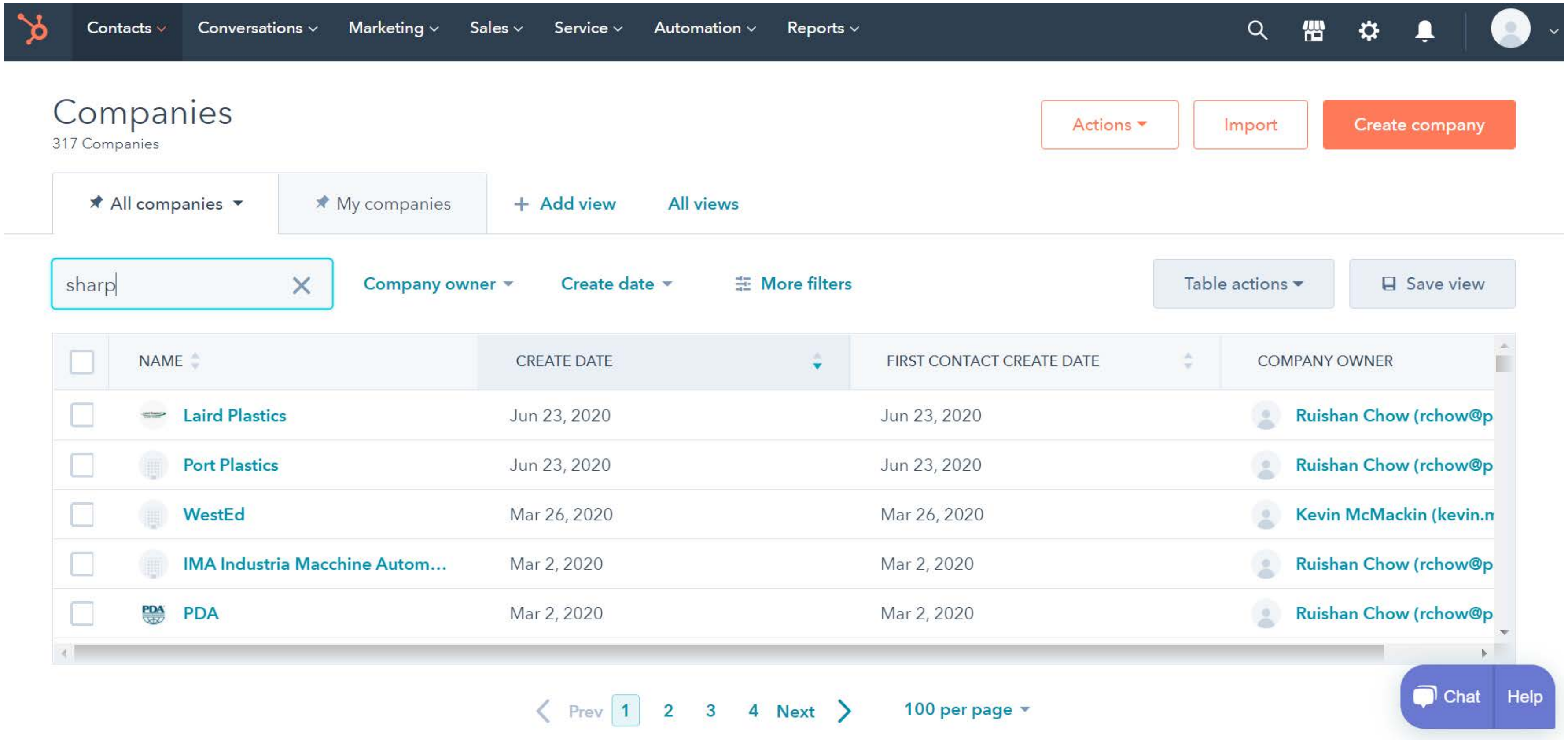


Contact View (People)

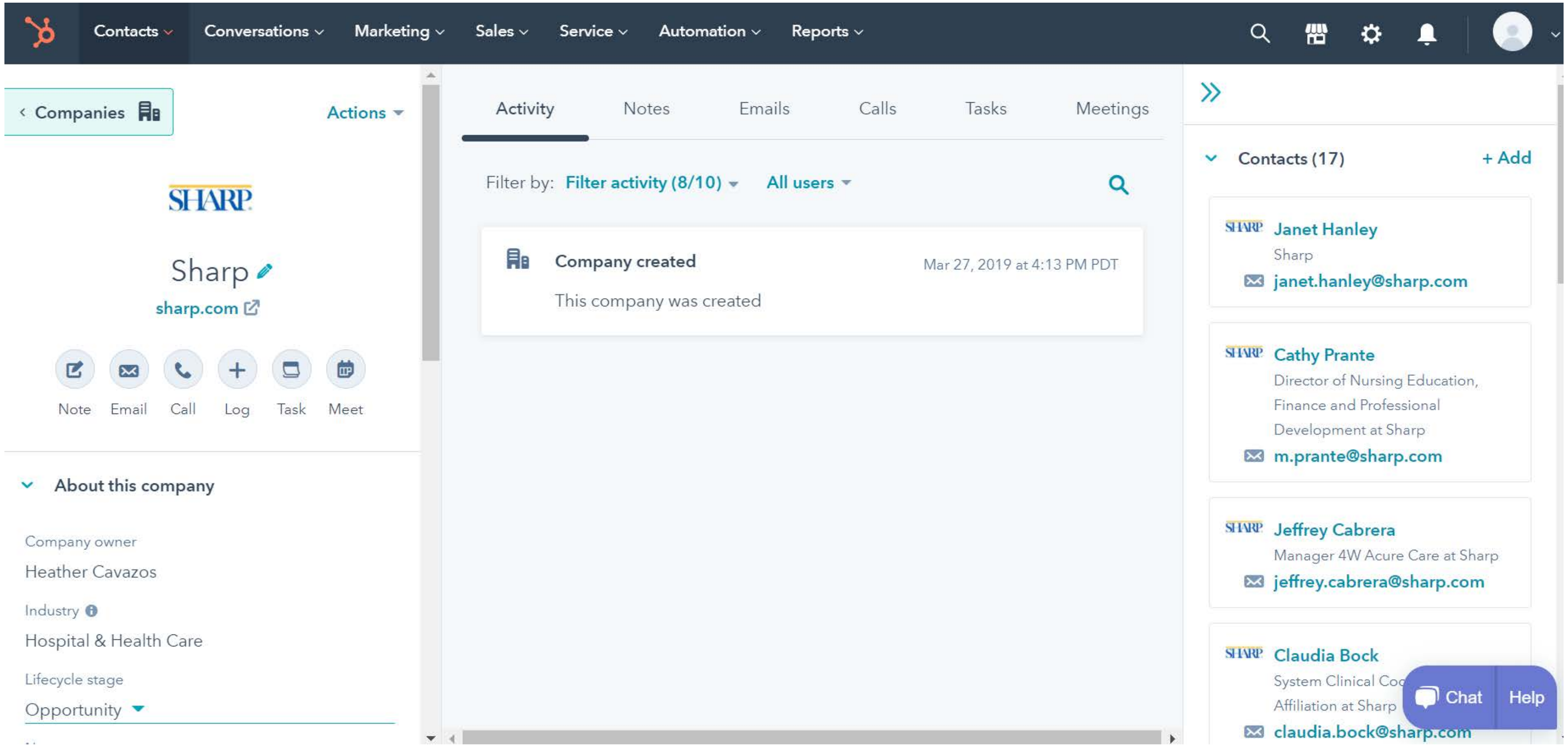


Employer Contact Information

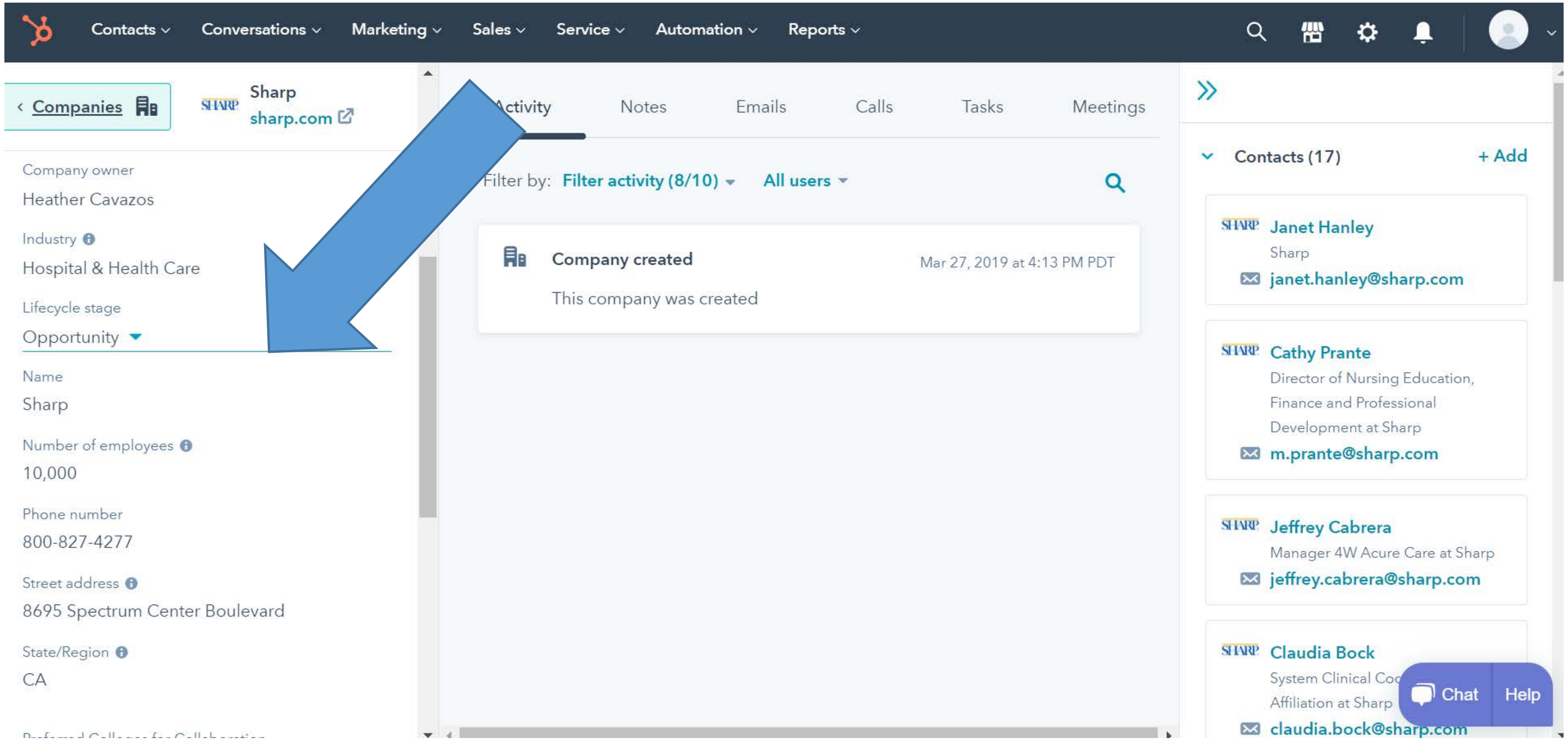
Company Features



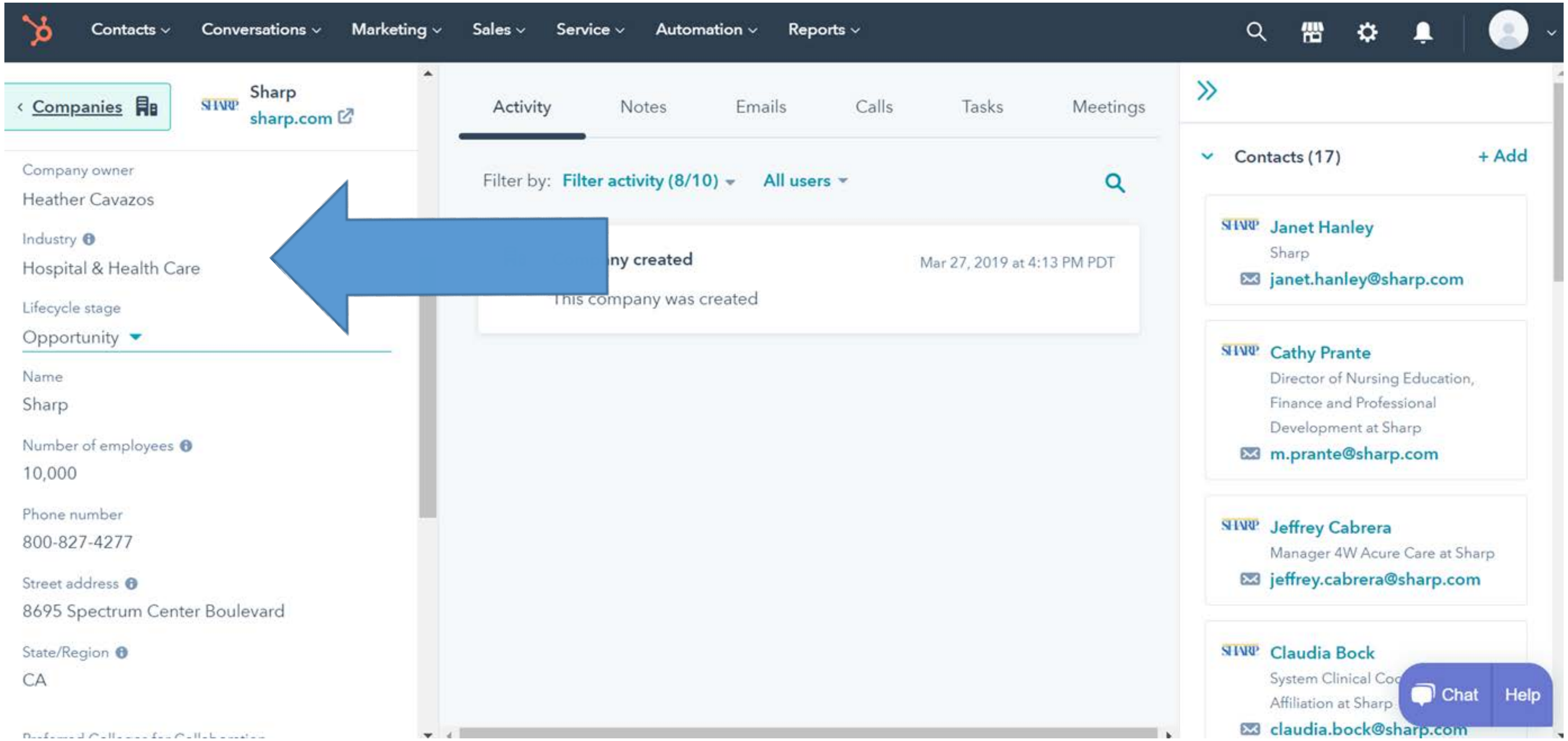
Sharp Company View



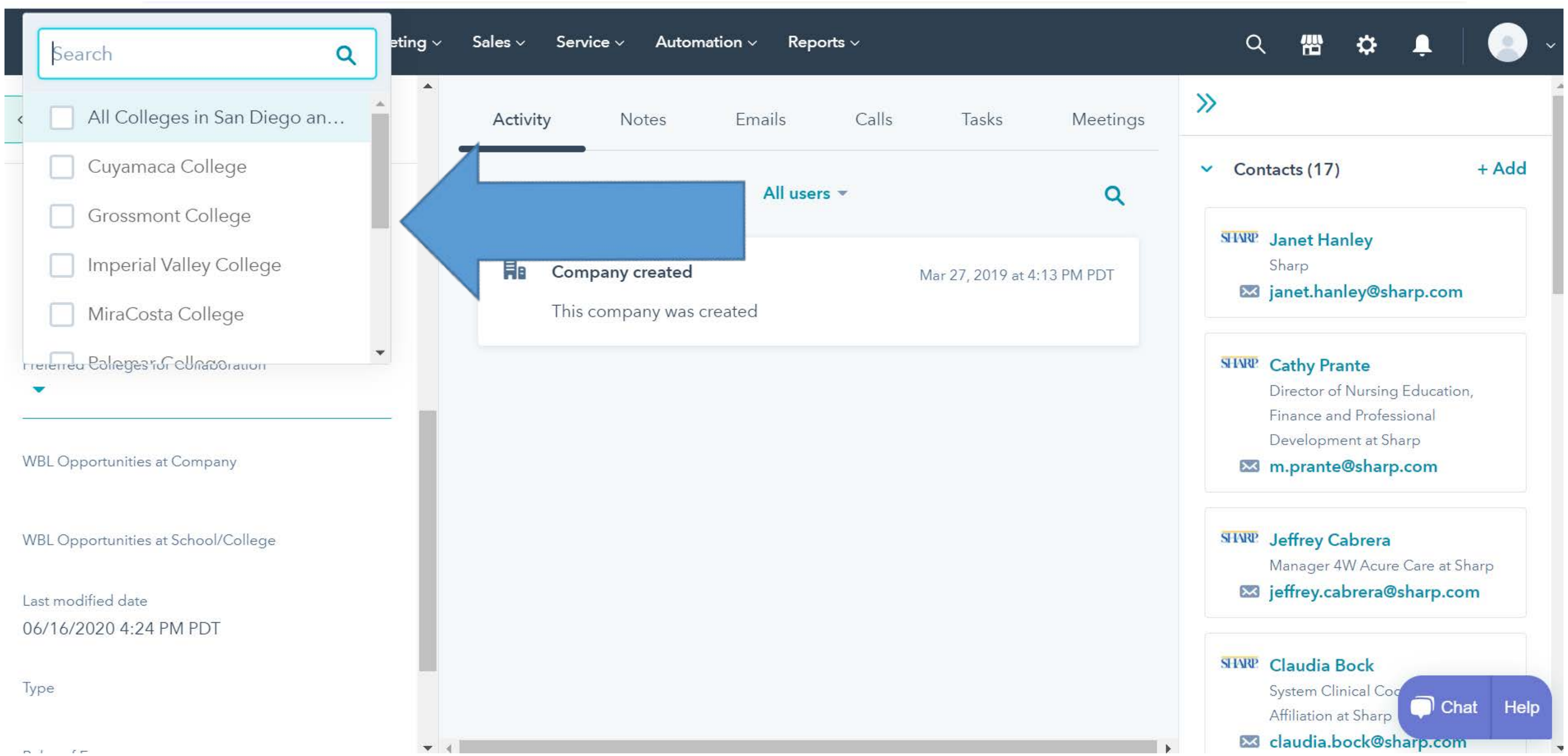
Employer Contact Data



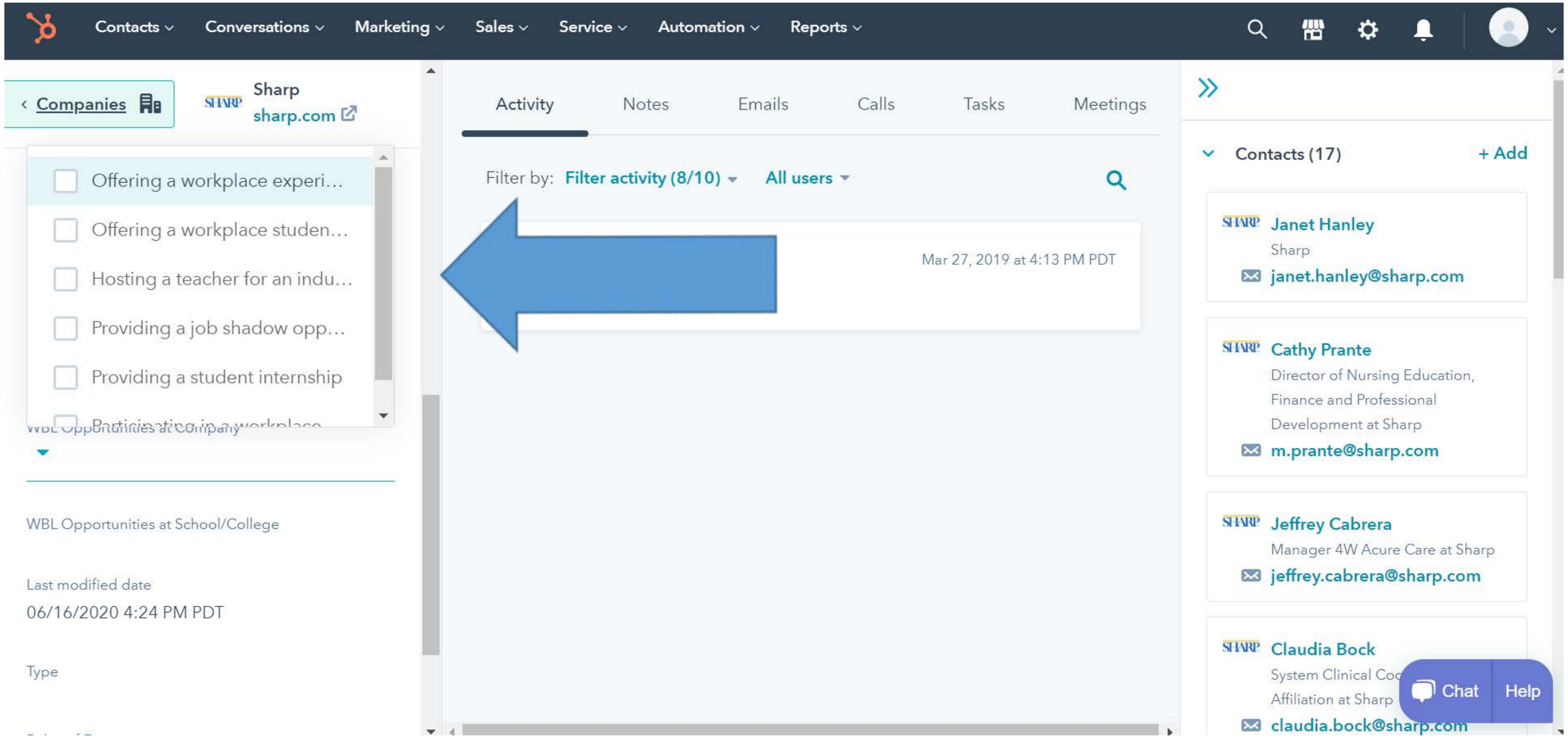
Ability to Tag for Sector



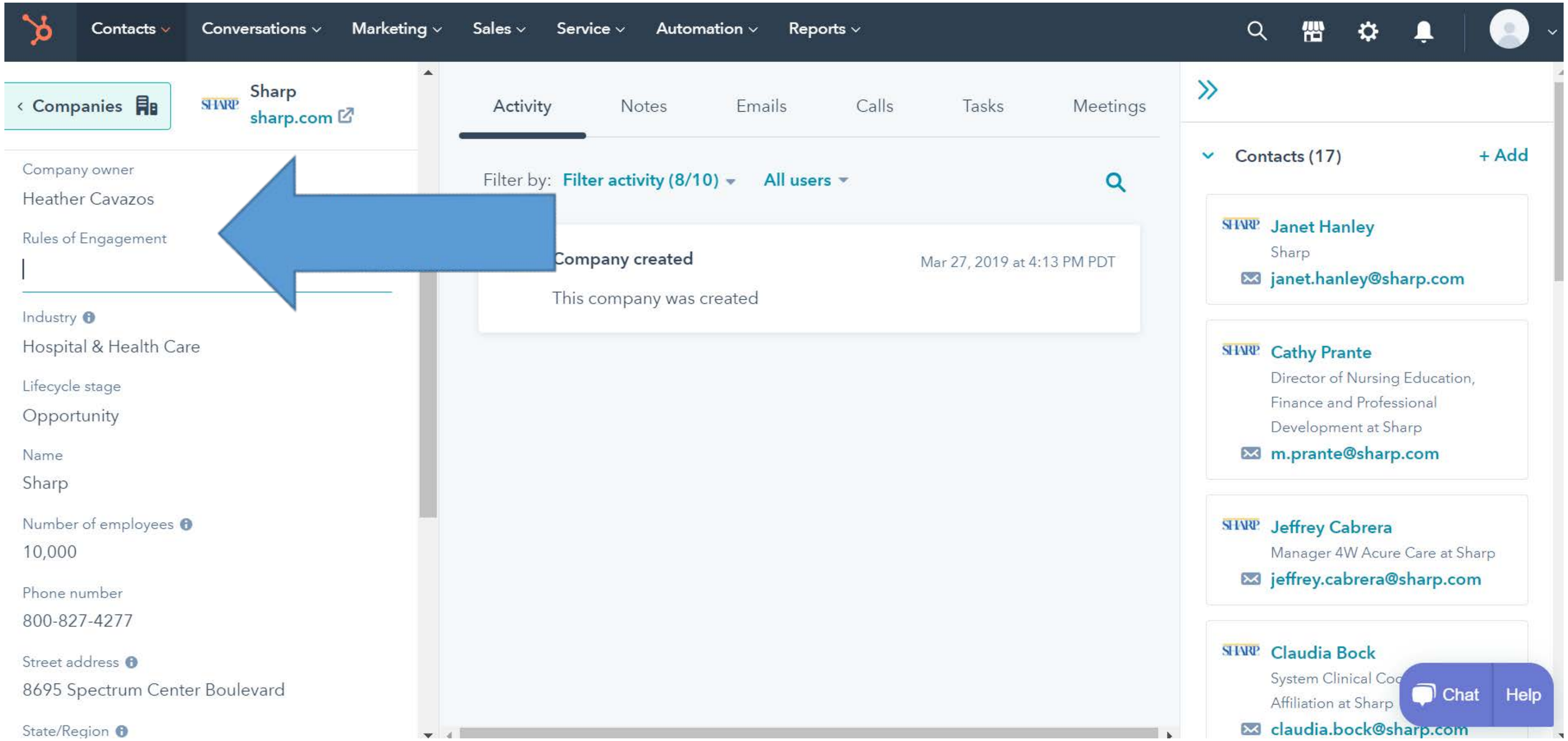
Place to Note College Connections



Log Types of Engagement



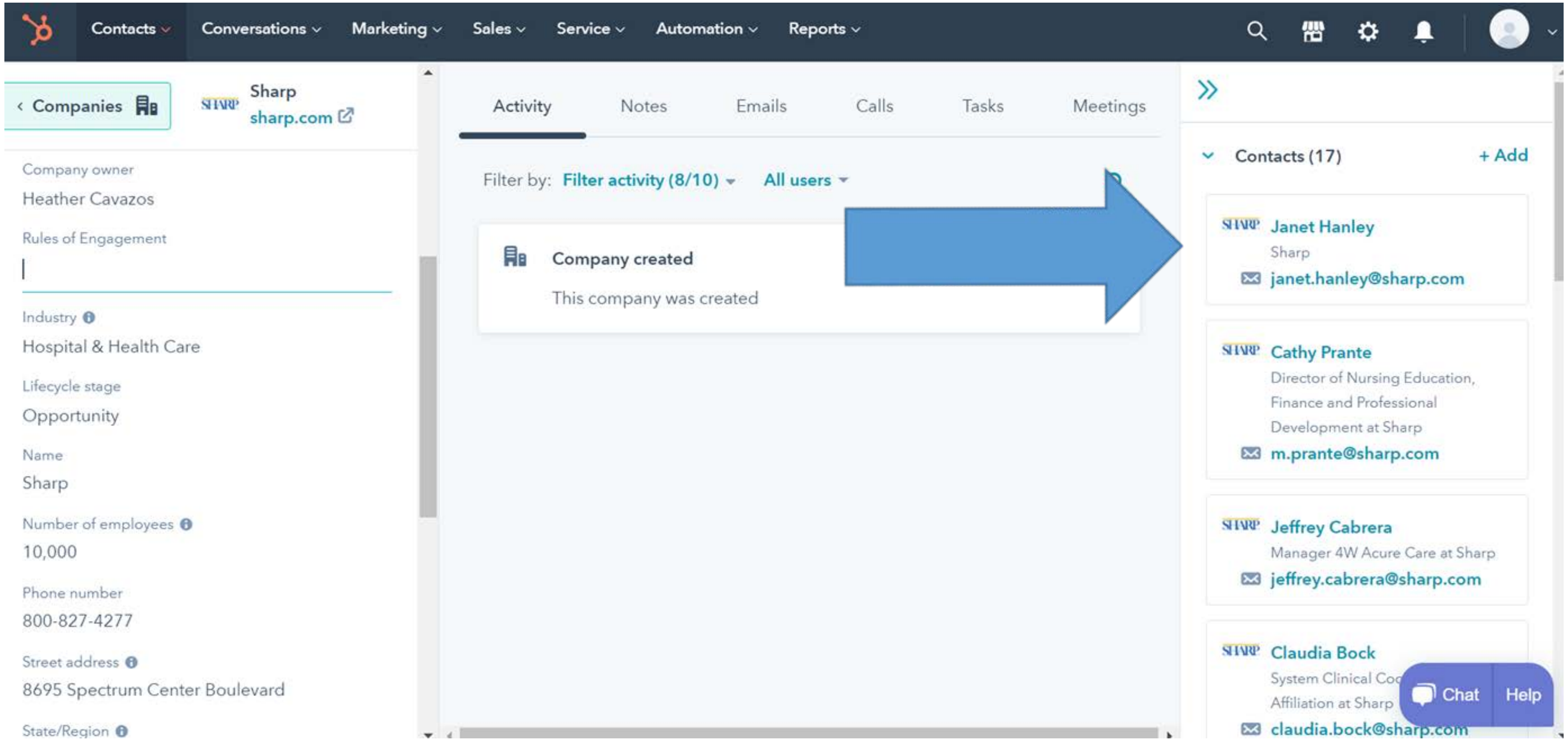
Owner/Rules of Engagement



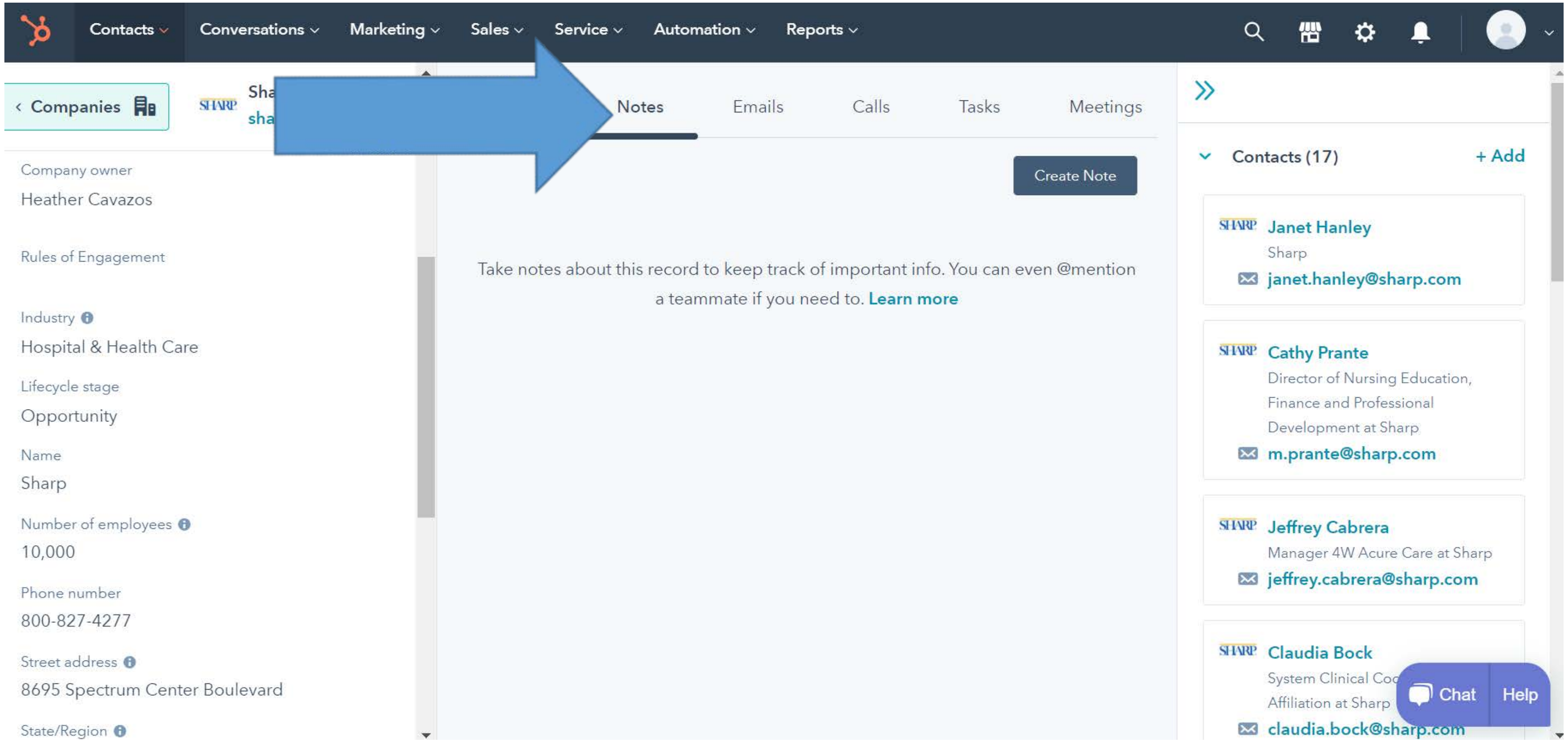
Unique Identifier

HubSpot uses emails and website for unique identifiers.

Lead Management- Associated Contacts

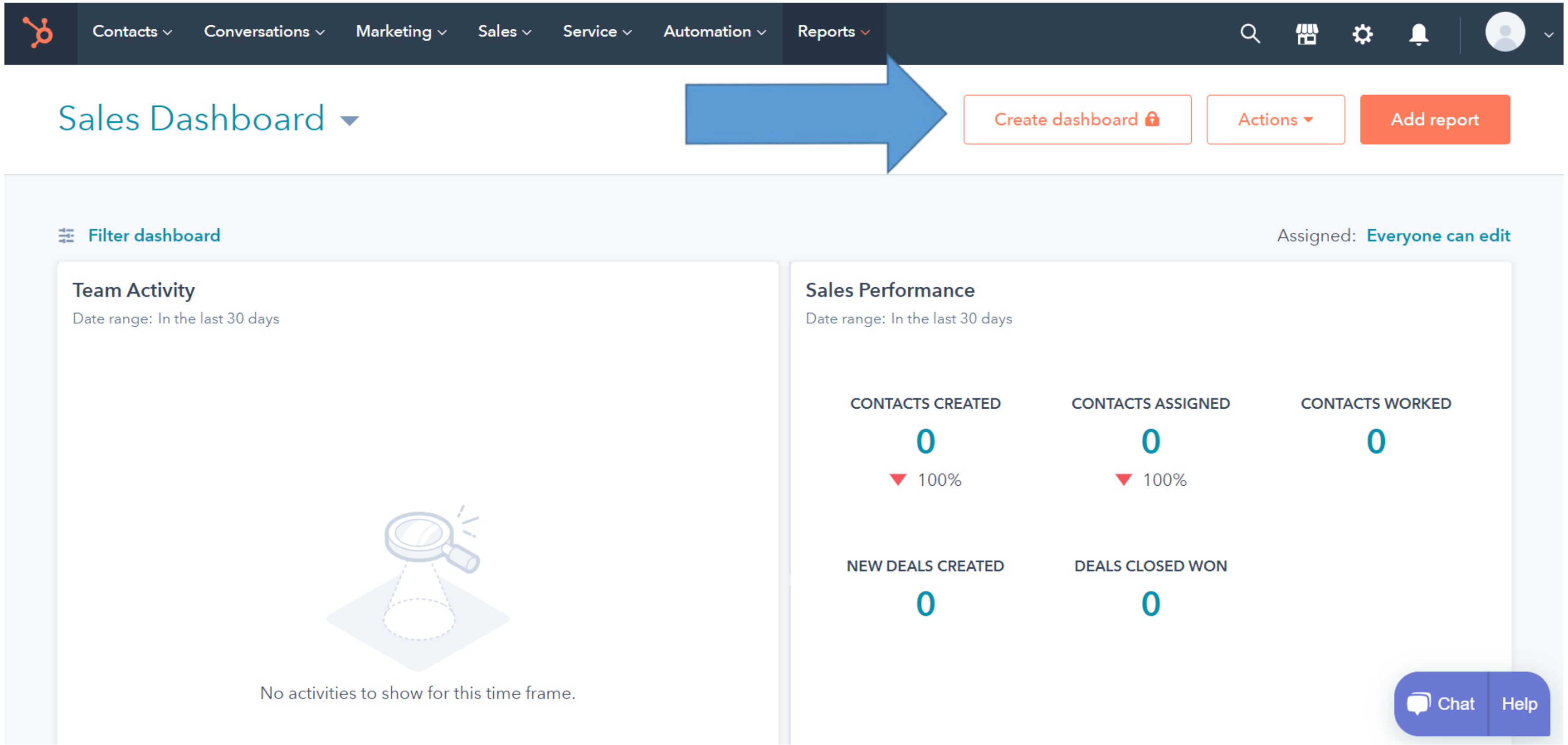


Open Space for Notes



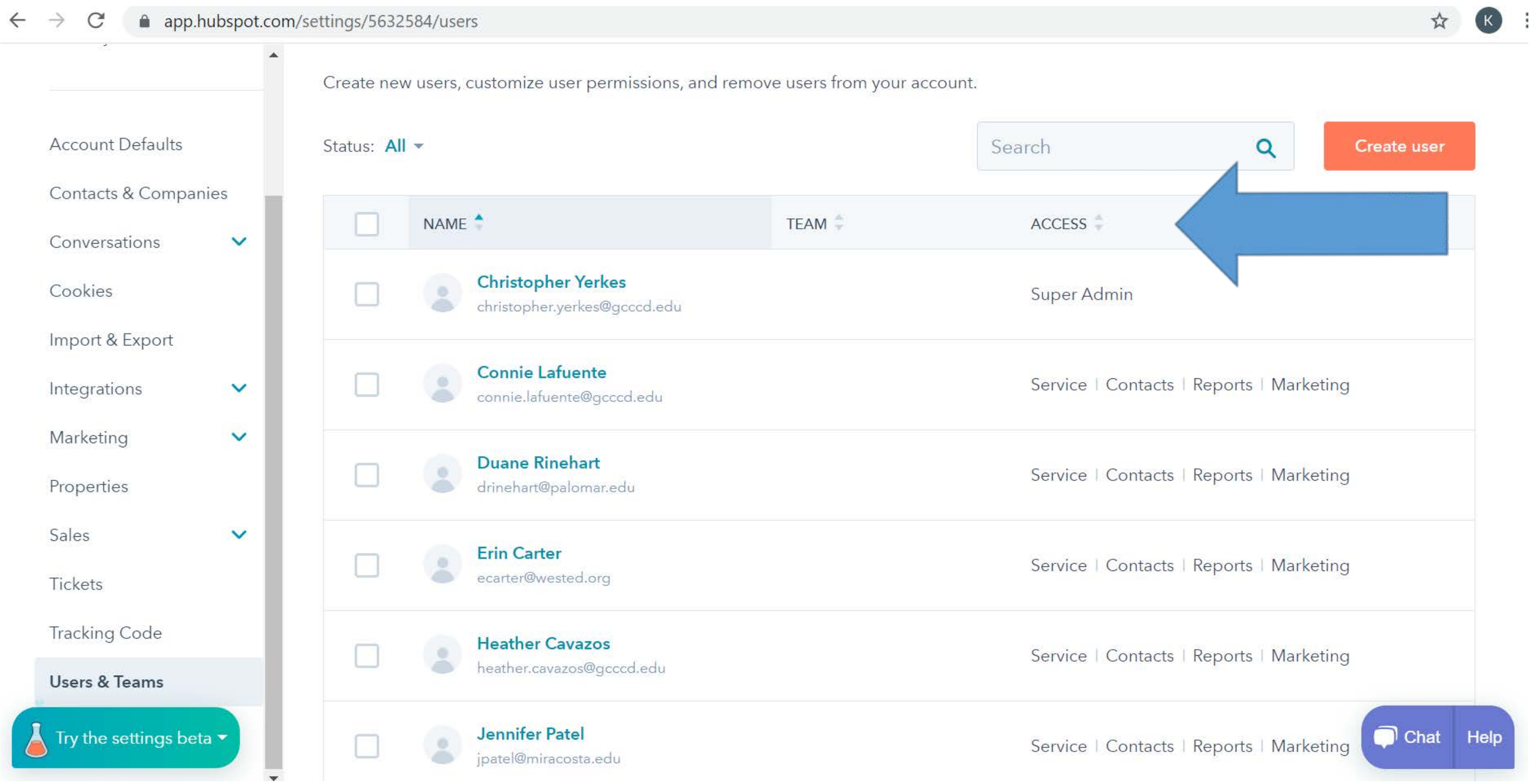
Differentiated Access

Dashboards



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
0
100%
CONTACTS ASSIGNED
0
100%
CONTACTS WORKED
0
NEW DEALS CREATED
0
DEALS CLOSED WON
0
Chat
Help

Limiting Access to Companies/Contacts



Process Management

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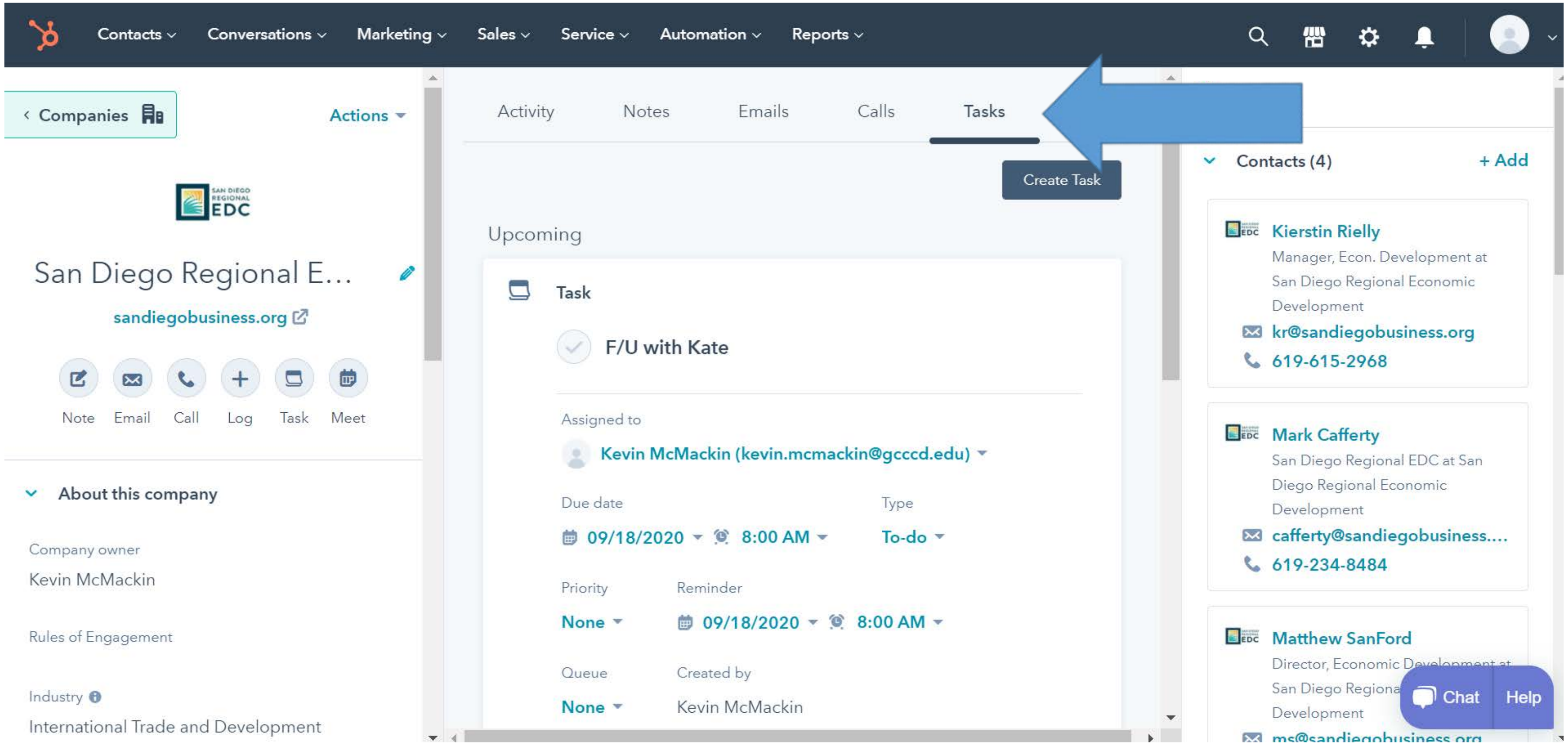
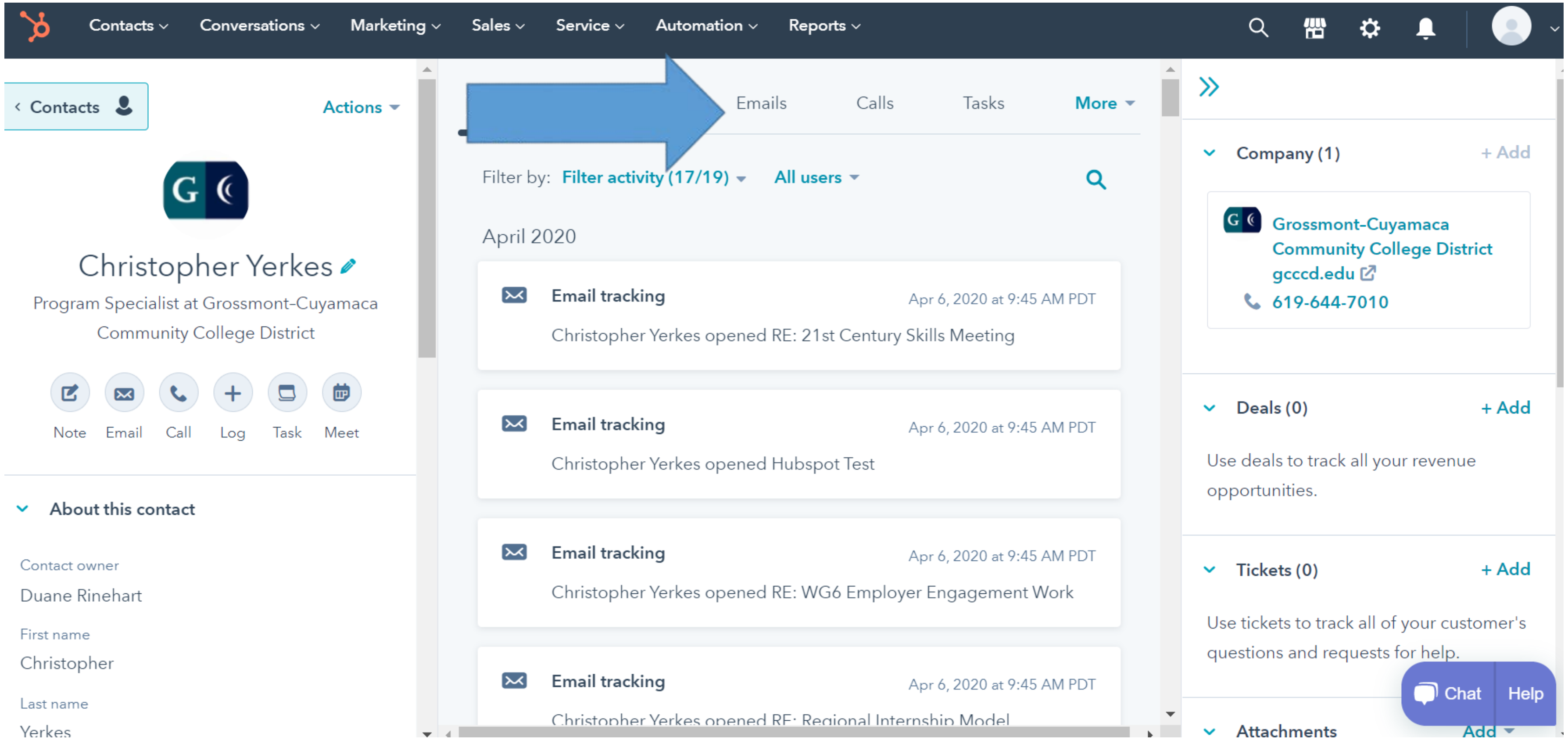
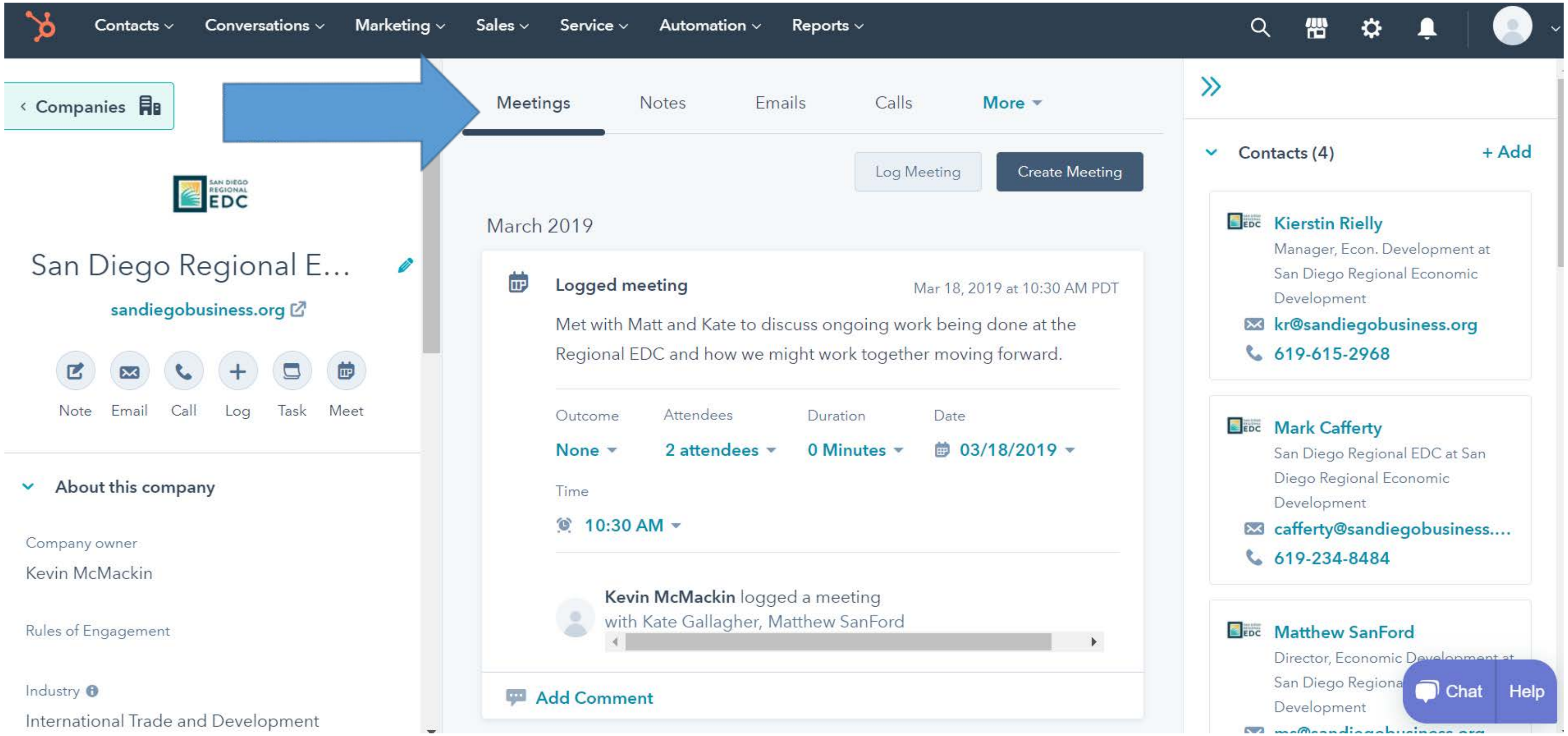
Tasks and Follow Up



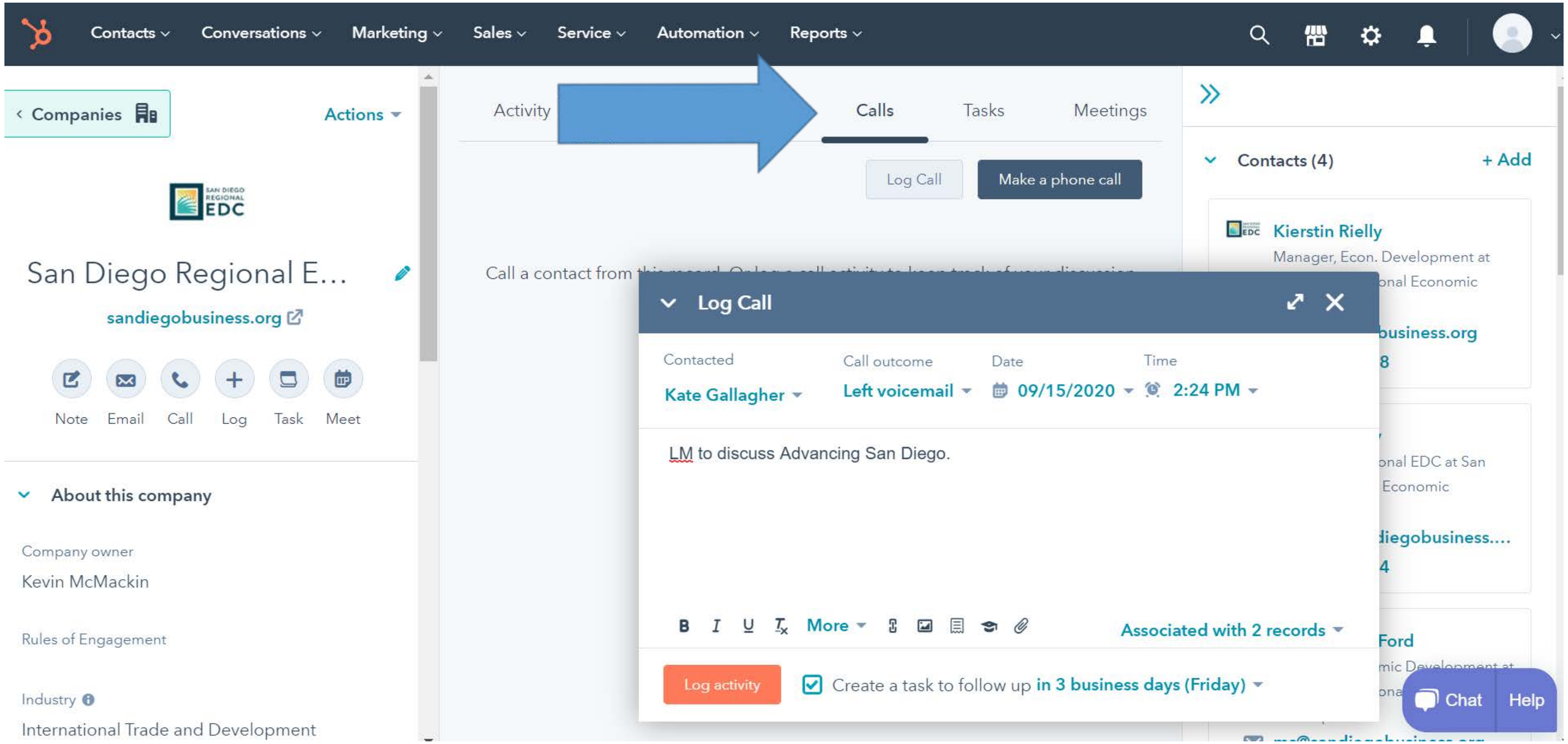
Email Tracking



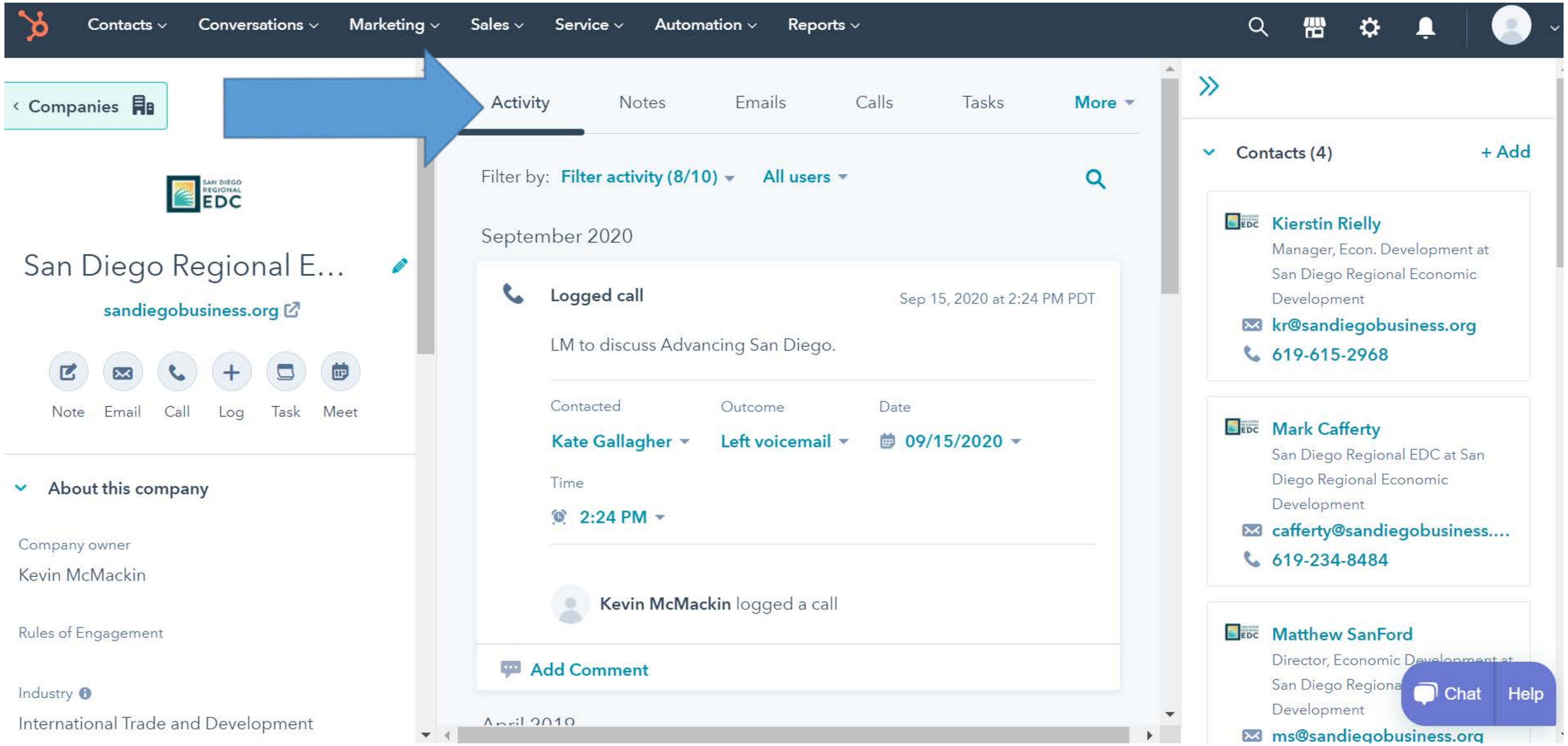
Meeting/Appointment Tracking



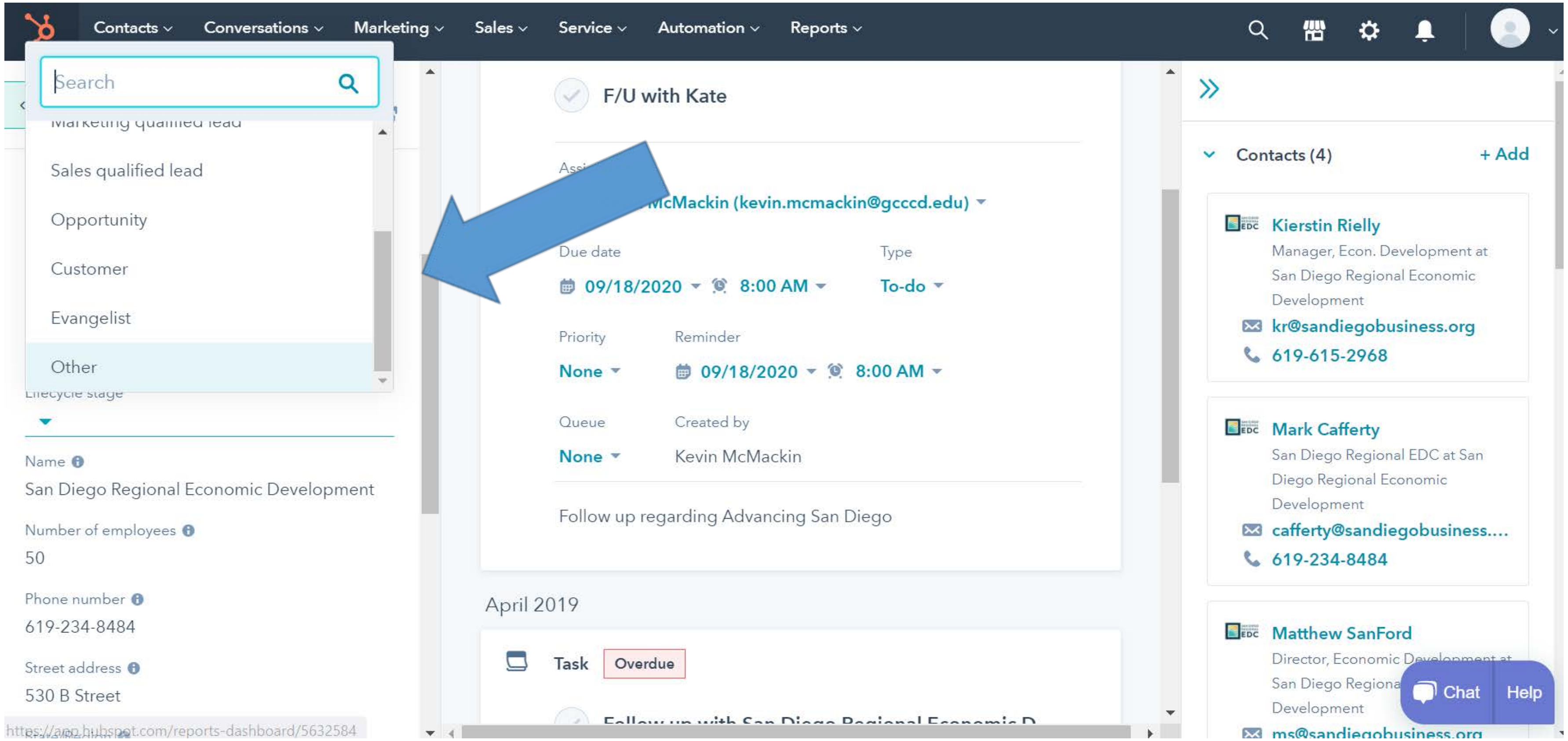
Call Tracking



Activity Tracking



Move Employers Through Sales Process



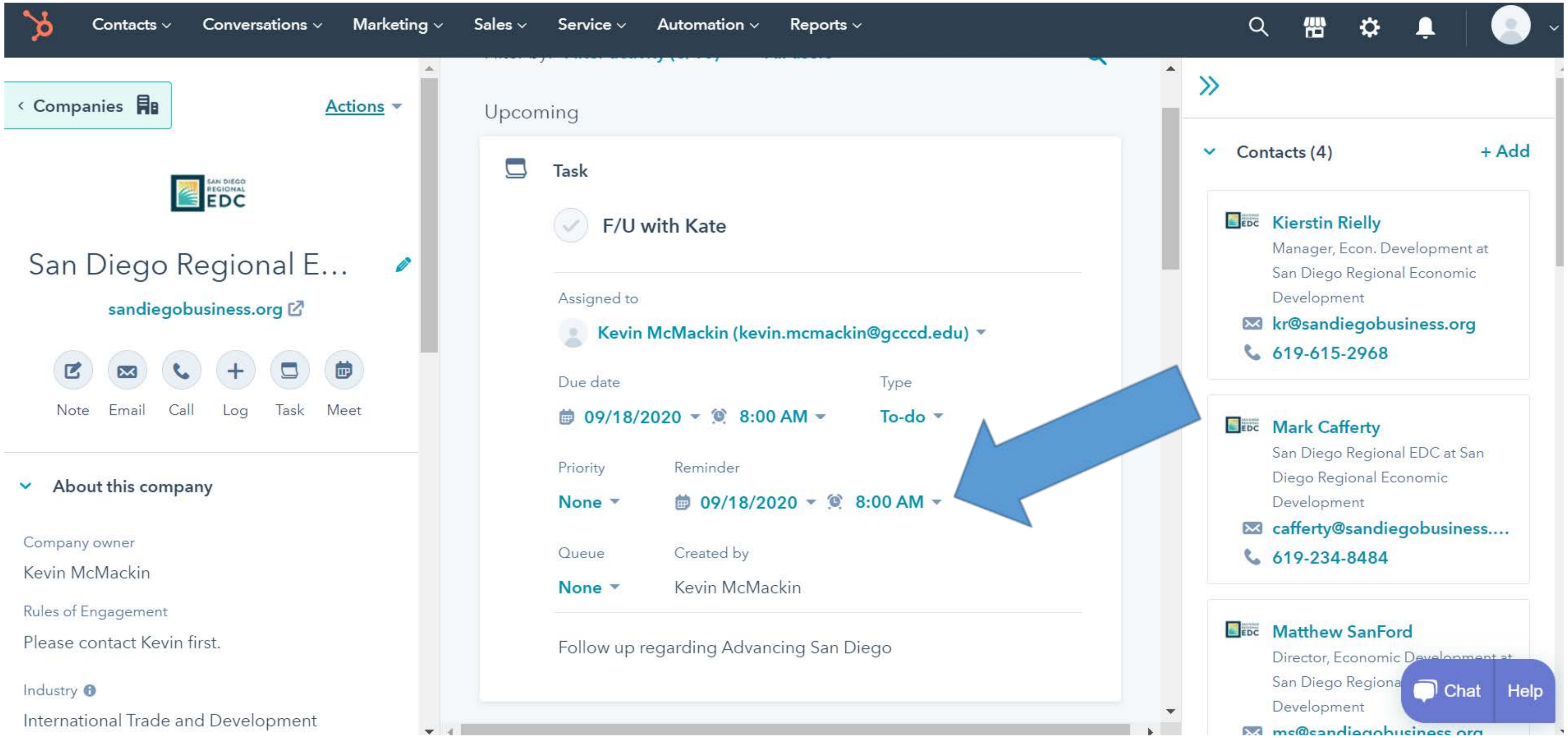
Notifications and Messaging

Campaign Management

Not in free version

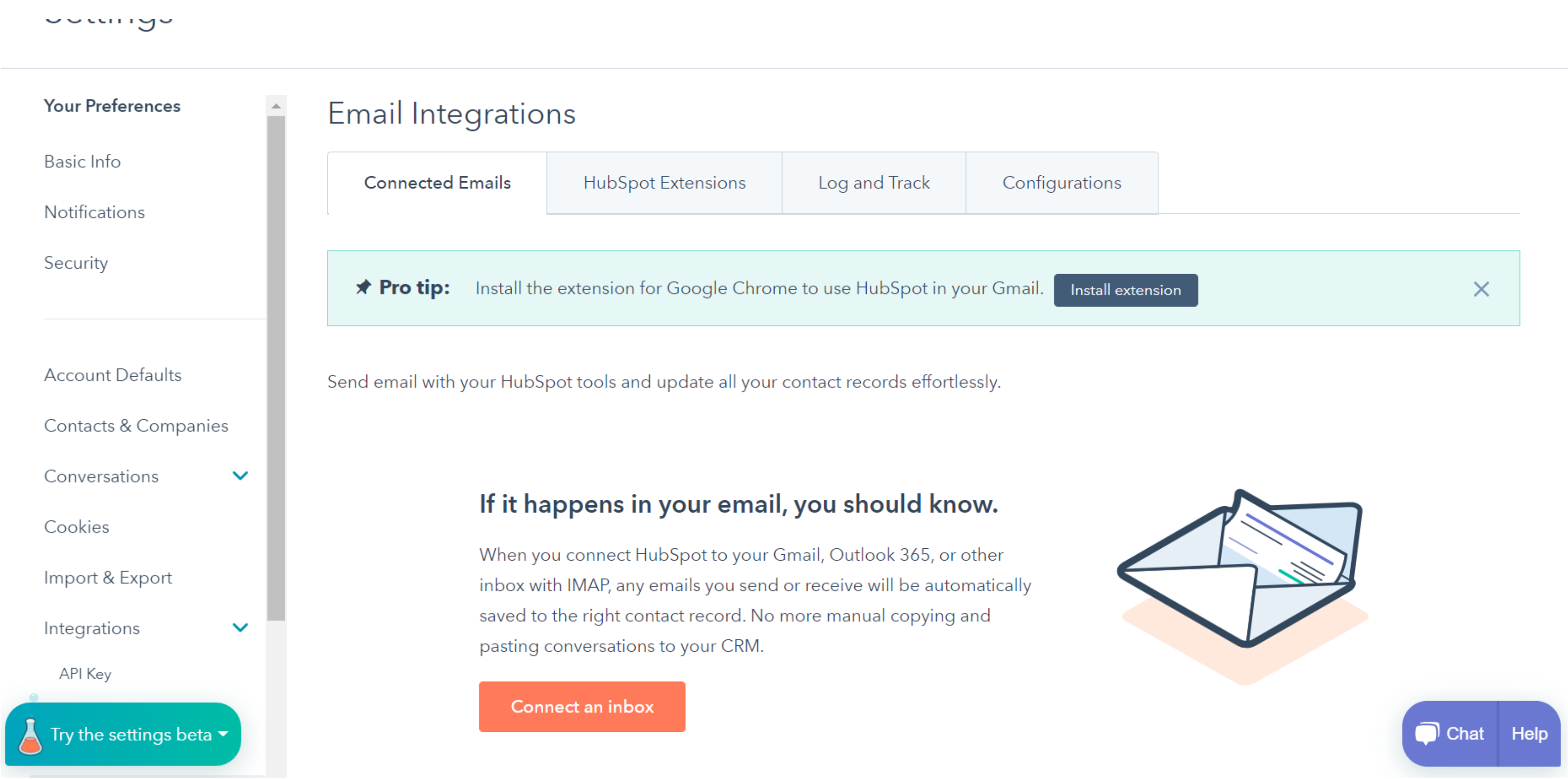
API available to connect to Mailchimp or Constant Contact

Send Alerts



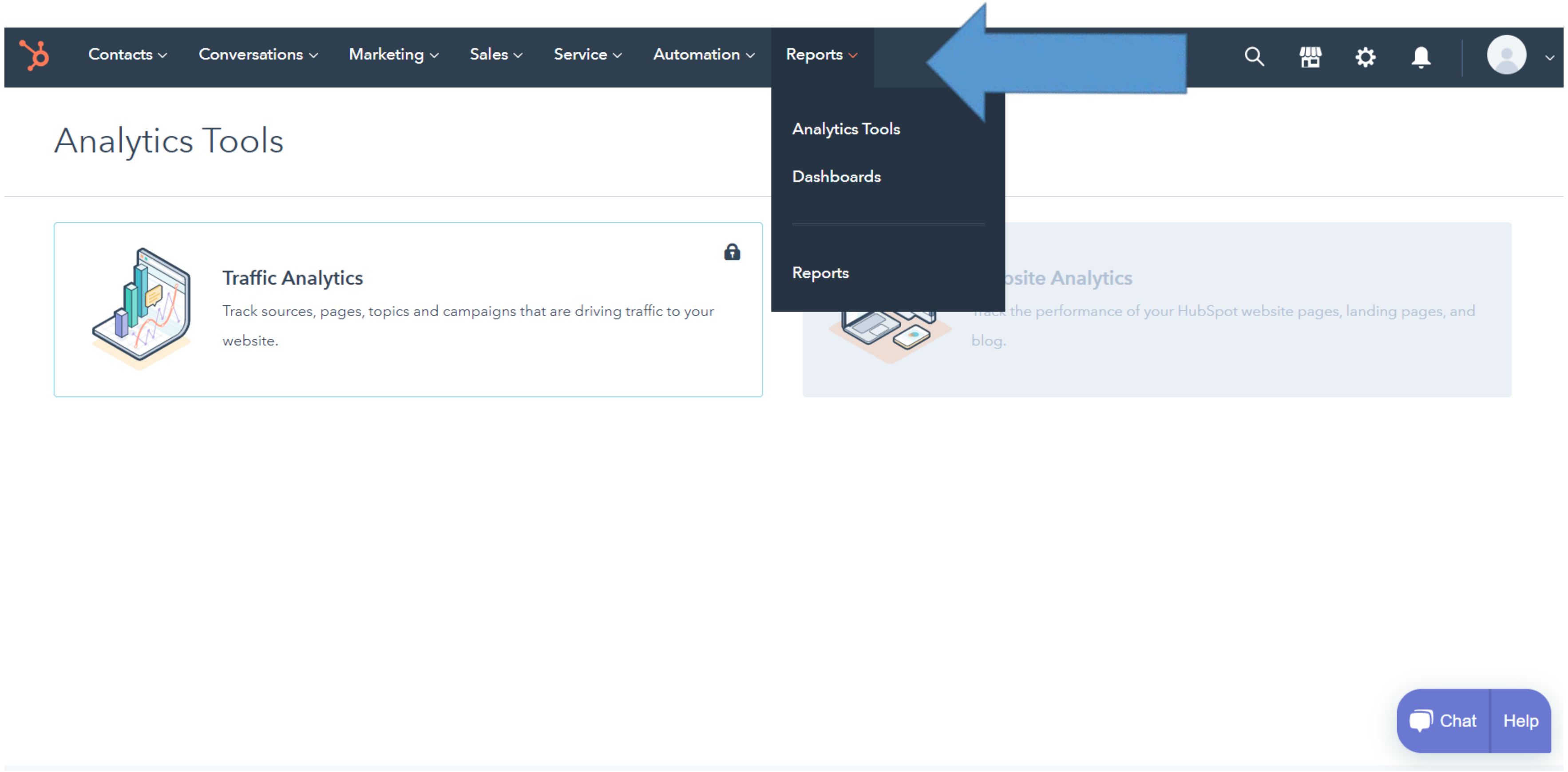
Contacts
Conversations
Marketing
Sales
Service
Automation
Reports
Companies
Actions
San Diego Regional E...
sandiegobusiness.org
Note
Email
Call
Log
Task
Meet
About this company
Company owner
Kevin McMackin
Rules of Engagement
Please contact Kevin first.
Industry
International Trade and Development
Upcoming
Task
F/U with Kate
Assigned to
Kevin McMackin (kevin.mcmackin@gcccd.edu)
Due date
09/18/2020
8:00 AM
Type
To-do
Priority
None
Reminder
09/18/2020
8:00 AM
Queue
None
Created by
Kevin McMackin
Follow up regarding Advancing San Diego
Contacts (4)
+ Add
Kierstin Rielly
Manager, Econ. Development at San Diego Regional Economic Development
kr@sandiegobusiness.org
619-615-2968
Mark Cafferty
San Diego Regional EDC at San Diego Regional Economic Development
cafferty@sandiegobusiness....
619-234-8484
Matthew SanFord
Chat
Help

Outlook Integration



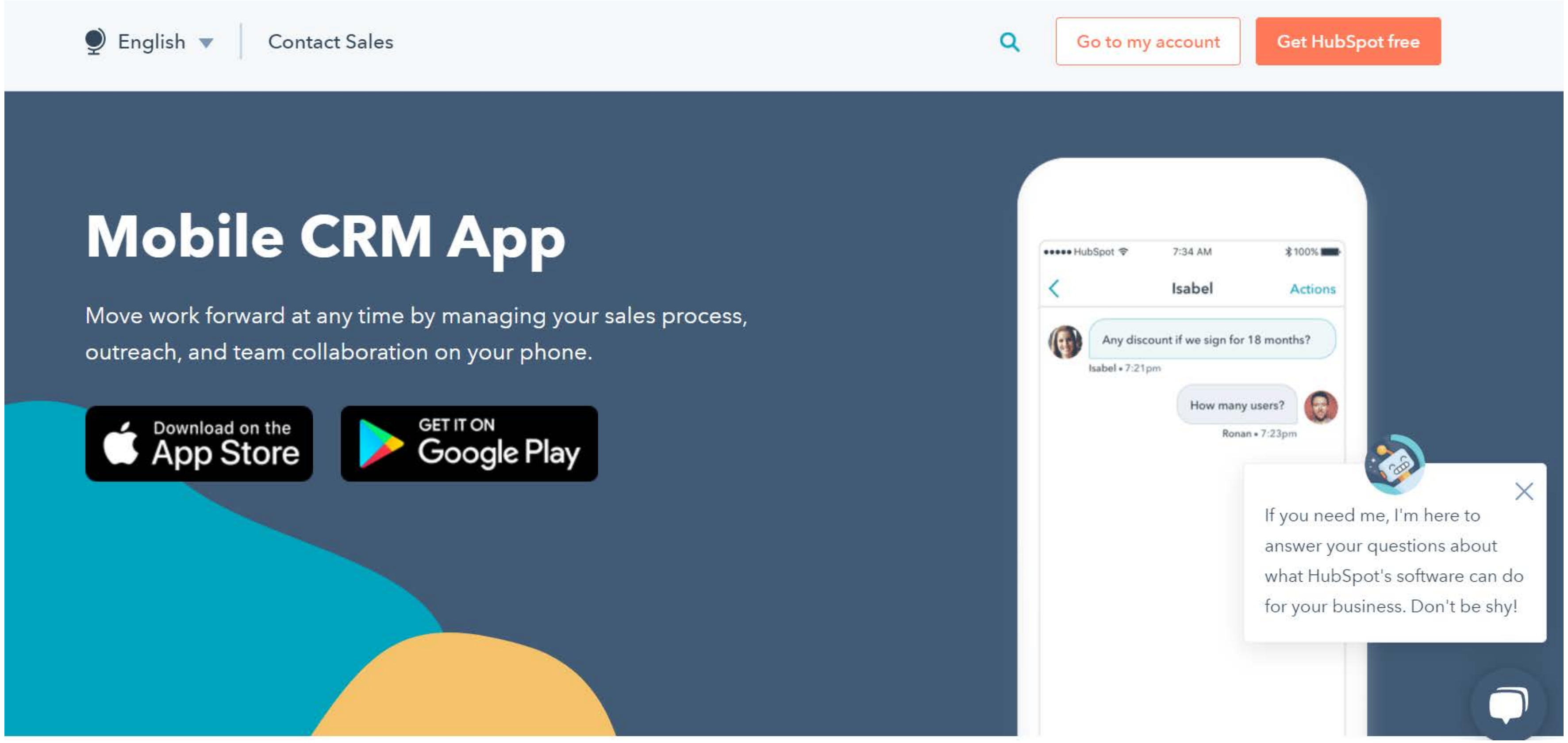
Other

Reports

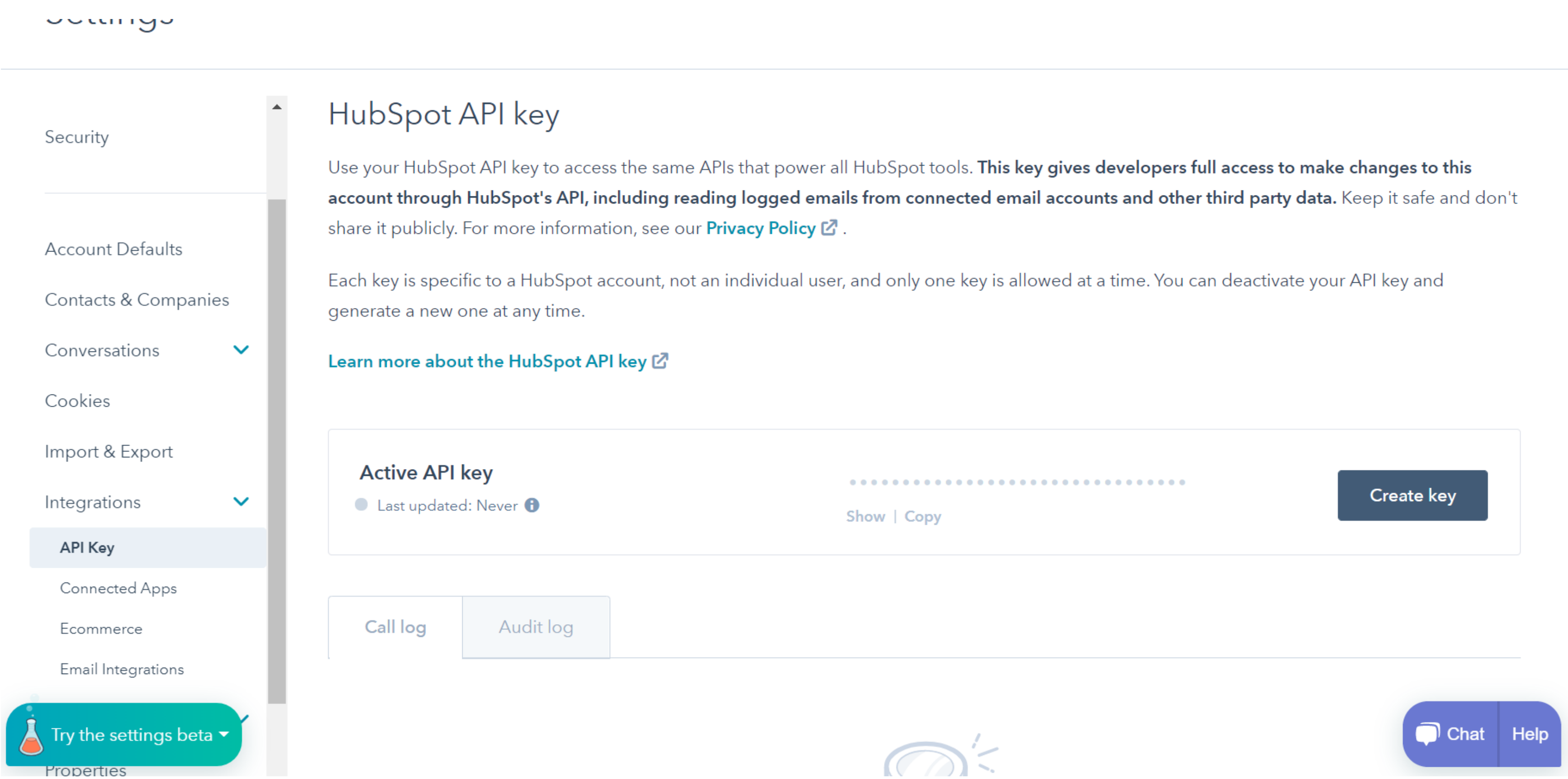


Contacts
Conversations
Marketing
Sales
Service
Automation
Reports
Analytics Tools
Analytics Tools
Dashboards
Reports
Traffic Analytics
Track sources, pages, topics and campaigns that are driving traffic to your website.
bsite Analytics
the performance of your HubSpot website pages, landing pages, and blog.
Chat
Help

Mobile App


English
Contact Sales
Go to my account
Get HubSpot free
Mobile CRM App
Move work forward at any time by managing your sales process, outreach, and team collaboration on your phone.
Download on the App Store
GET IT ON Google Play
HubSpot 7:34 AM 100%
Isabel
Actions
Any discount if we sign for 18 months?
Isabel • 7:21pm
How many users?
Ronan • 7:23pm
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)



THANK YOU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