



# HubSpot Operations Hub

## The Challenge

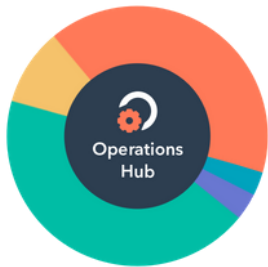
As companies scale, systems snowball. Every employee buys their favorite SaaS apps. Every manager maintains their own spreadsheet. Every team builds their own process. Disconnection ensues. Mistrust and miscommunication flare. Efficiency tanks.

To survive and thrive, your business needs to run better. To run better, you need to reimagine operations. You need RevOps. Centralized and not siloed, RevOps aren't afterthoughts; they're the architects of your growth engine.



To do RevOps, you need a unified ops toolset that connects tools, cleans customer data, and automates business processes.

## The Solution



Introducing Operations Hub. Unlike siloed data tools, Operations Hub combines an ops team's full toolkit into a CRM platform, uniting all your customer data on one connected platform.

The result: a more efficient, aligned, and agile business, an unhindered and strategic ops team, and a friction-free customer experience.

### Data Sync

HubSpot's data sync packs all the punch of a custom-built connector – bidirectional sync, custom field mappings, filtering, historical syncing – in an easy, code-free package. With your business apps in sync, your ops team will be free from integration fires, your go-to-market teams will be aligned and empowered, and your customer experience will be friction-free.

### Programmable Automation

With programmable automation in Operations Hub, your automation is as flexible as your imagination. Create custom automation actions for every business process – from territories to time management notifications to NPS – to keep your team efficient and your customers happy.

### Data Quality Automation

With new data quality actions in workflows, automate the work out of annoying and time-consuming data issues. Clean up date properties, capitalize first names, and more with new out-of-the-box automations. With HubSpot workflows, your data will be clean and under control, automatically, so your Operations team can focus on sparking growth instead of putting out data fires.

## Expanded Operational Capacity

To keep up with your business's growth, you need more room to run. Operations Hub includes higher limits on lists, workflows, and reports ensuring your CRM will grow as fast as you do.



Connor Jeffers  
CEO - Aptitude 8

*"Operations Hub allows you to extend your HubSpot functionality to achieve anything, regardless of whether or not that feature is built.... Like what do you wanna do? Tell us how it's gonna work? You can go build it."*

## Use Cases



### Integrate Everything. Establish HubSpot as Your Source of Truth

- Sync your CRM with your ERP, to ensure that customer data stays up to date between front-office teams (marketing sales, and service) and back-office (finance and billing).
- Integrate your CRM and marketing apps – whether HubSpot's your CRM or not. Sync CRM fields to marketing to personalize campaigns and analyze revenue impact. Sync marketing data to CRM to score and rotate leads and inform sales conversations.
- Phone contacts: Sync your reps' phones with your CRM, ensuring they always have access to up-to-date information when they're on the road.
- Real estate: Keep your CRM and your real estate apps aligned. For example, assign leads to your agents as soon as they come in.



### Migrate to HubSpot with Ease

- Use HubSpot Sync to migrate all your data, including custom objects and historical data.



### Clean Up Dirty Data

- With the new data quality actions in workflows, you can clean your data with less time-consuming Excel work.



### Create Custom Automation for More Complex Business Processes

- Rotate leads with custom logic and third-party queries. Example: when a new lead comes in, query another system to determine sales rep capacity, route the lead in HubSpot based on that information.
- Enrich leads and accounts with third-party data. Example: when a lead fills out a form, query another database of government data or real estate history, and append that data to the HubSpot record, then create a task if the data is worth following up on.
- Service or sales-based SLA. Example: Create deadlines for response time based on ticket open date. "Has ticket been open for x amount of time? Has it met X threshold? If so, rotate in XYZ way"
- Renewal management. When a deal closes, create a deal in the future (e.g. one year from now) and manipulate it in some way (e.g. remove discount from price, etc.)
- Create complex calculated properties. Manipulate and transform your property value in any way you choose. Example: create a lead score using data from HubSpot and inputs from a dozen other systems, and use a custom action to populate the value in HubSpot.

## Pricing:

### Free

HubSpot Sync

- Two-way data sync
- Default Field Mappings

Ecosystem Integrations

- All 3rd Party Integrations

### Starter - \$50/mo

Everything in free +

HubSpot Sync

- Custom Field Mappings for data

### Professional - \$800/mo

Programmable Automation

- Custom Code Actions in Workflows
- Custom Coded Actions in Bots
- Webhooks

Additional Portal Capacity

- 3,000 additional reports
- 300 additional dashboards
- 100 additional lists
- 100 additional Workflows