

HUBSPOT CRM

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For associations considering a dive into the customer relationship management (CRM) pool, HubSpot CRM provides a great jumping-off point. The robust, cloud-based platform is free to use and offers unlimited users, data, and up to one million contacts.

HubSpot CRM's clean user interface focuses on ease of use and efficiency, allowing your sales team to optimize workflows. Its dashboard offers a real-time view of the entire sales pipeline. In a couple of clicks, you can track when and how many times you've made contact with prospective members, sponsors, exhibitors and advertisers, as HubSpot CRM automatically stores email, social media or phone interactions in a timeline organized by lead. It also generates daily, weekly or monthly reports for scheduling

follow-up conversations and analyzing business metrics such as sales activity, productivity and individual performance.

If you're searching for a solution for creating and managing email templates and tracking how well your emails are performing, HubSpot CRM does that too. You can even set it to notify you or your sales team in real time when a contact opens an email, downloads an attachment or visits your website. Who knew a CRM could make all your Johnny-on-the-Spot dreams come true?

And being cloud-based, you'll always have the context you need to follow up when the time is right.

While HubSpot CRM has some limitations compared to other platforms such as Salesforce, the feature set is growing all the time. HubSpot also offers paid product add-ons, but the quality, functionality and strength of the free version are impressive. Take advantage of the training HubSpot offers with their training staff. There is also a large HubSpot community to tap into for tried and true methodologies.

Included Features:

- Reporting dashboard
- Company insights
- Deal tracking
- Pipeline management
- Email tracking and notifications
- Prospect tracking
- Meeting scheduling
- Live chat

Website: www.hubspot.com 

CSAE

WHO YOU GONNA CALL?

The times, they are unique, never seen before by most of us. Where can you turn for information, ideas, help, and support? How about your CSAE?



Information and Resources

We're continually seeking new resources on COVID-19 to share with you on the CSAE website (www.csae.org/covid-19-issue). You can access government publications and websites on the virus itself and preventive measures; reports on the impact on business, associations, and meetings; even an e-book on working from home.

Webinars and Online Discussions

Enjoy Tea Time With Your Peers, sharing ideas and getting suggestions. Attend one of our upcoming webinars (we've already had them on *Working from Home*, *Financial and Legal Implications of COVID-19*, *Non-dues Revenues—What Now?*). You'll also find information on other online resources and online learning from others.

Legislative Support

When there's coronavirus-related legislation that needs input and support, we'll share that information with you, request your support, and take additional action as we are continuing to do with the *Federal Relief Package* legislation.

CSAE Conference and Other Activities

Recognizing various health and safety issues and enhancing the ability of our members to attend, we've rescheduled the Conference to July 7–9 and are updating the programming to better address your needs during and after the current pandemic situation. We've rescheduled other CSAE activities and are considering learning offerings in other formats.

It's Just a Start!

There's more to do now and there'll be more to do in the months ahead. Let us know what you need. 