








# HubSpot

by Operations Executive

## Details

Review Date	11/13/2023
Purchase Date	Q3'21
Implementation Time	Fariha to fill out
Product Still in Use	Yes
Purchase Amount	Fariha to fill out
Intent to Renew	100%
Review Source	Elion

## Product Rating

Product Overall		4.0
Use Case Fit		3.5
Ease of Use		4.5
API		N/A
Integrations		5.0
Support		N/A
Value		4.0

## About the Reviewer

User Product Oversight

## Reviewer Organization

Specialty Practice Orthopedics

## Reviewer Tech Stack

Elation CertifyOS Telescope

Apollo.io

## Other Products Considered

N/A

## Summary

- **Product Usage:** The product is used for detailed note-taking on stakeholders, running marketing campaigns and sales outreach.
- **Strengths:** The product is intuitive, user-friendly, allows customization, supports large campaigns, and offers good contact import features.
- **Weaknesses:** Limitations exist in enrolling contacts into a sequence, data exporting is not supported in all functions, and it struggles with visually representing complex organizational structures.
- **Overall Judgment:** Given the company's needs and target market at time of purchase, the decision to choose HubSpot was correct; however, they may reassess as their organization grows.

## Review

**So today we're chatting about HubSpot and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?**

We are a musculoskeletal (MSK) care company. So we provide care navigation as well as telehealth services to patients facing MSK issues. I'm an operations executive there.

**What is the need that HubSpot is solving in your organization?**

When we first made the purchasing decision, we needed a CRM to perform the basic functions. We were more focused on the employer market at the time, and I think that lends itself better to typical marketing and sales campaigns that we could run through HubSpot. Since then, we've evolved a bit away from employers and more towards risk-bearing provider groups, which are less well-structured for typical CRM campaign outreach. So our use of HubSpot has definitely evolved, but for now, it's still meeting our needs.

**What were your requirements for a CRM for selling into provider groups?**

With an employer, it was easy to identify the head of benefits or the procurement lead. But risk-bearing provider groups don't have a procurement team for vendors, which is what we'd be selling into them as. So, since they don't have a dedicated team, we needed to be able to take really detailed notes in our CRM on who the key stakeholders were, because titles don't always reflect everything that they're covering for the organization. We needed a CRM that would allow us to customize and input a lot of our own data, on top of the information you could import from LinkedIn or other databases.

**Just to confirm, you were not looking for a HIPAA-compliant tool, right?**

Correct. We only use it for initiating conversations with customers and closing out the sales cycle. All our patient-facing communication is through a separate, HIPAA-compliant platform.

**Did you look at any other vendors for comparison?**

We considered Salesforce as well — I wasn't there during that decision. I know it came down to pricing. HubSpot was a more competitive price and also more user-friendly. One of our founders had used both and preferred HubSpot.

**What are the workflows and use cases you use HubSpot for?**

For our primary market, risk-bearing provider groups, we use HubSpot for building out information on their stakeholders to run sales campaigns. A lot of the time this is information that's not necessarily on the website or any directory, and when we do get the information, it helps to centralize that knowledge. Once we have stakeholder lists built out, we run marketing campaigns directly to those individuals for cold outreach for sales.

We have a paid subscription, which gives us a feature called "sequences," which are targeted, timed email templates you can use to run a sales outreach campaign. We've been running a relatively large campaign, about 3,200 individuals.

**What works and doesn't work for you in HubSpot?**

It's an infuriating mix between a mostly intuitive platform but some frustrating UX choices. You can only enroll 50 contacts into a sequence at a time, even if you have labeled and tagged thousands of contacts for that purpose. It's time-consuming and a little bit menial. You also can't export performance data from sequences. With a campaign, you can export data and get open rates, click-through rates, etc. for each recipient and each message they've received. But with a sequence, you can't do that. It's a little surprising that they have that capability for some outreach functions but not others.

Also, once an individual is enrolled in the sequence, you can't change any of the parameters around how they're receiving messages unless you unenroll them and re-enroll them, and if you do that, you lose the prior data you've collected on that individual.

### **How do you represent organizational structures with HubSpot now?**

Luckily for us, our customers' org structures are fairly lean and simple. It's less about finding a person in a specific role, and more about finding which person is covering five of the 25 various responsibilities. We're just writing notes within the HubSpot profile and it's not really more complex than that. If we did face a more complicated org chart, I don't think HubSpot would meet that need of representing it visually.

### **Do you integrate with other tools to run the campaigns?**

We can send the emails completely within HubSpot. We haven't done much design: we have a single image, so it's not that complex. We do integrate with a platform called Apollo.io, which is a database for contact information. When we add new contacts into our CRM, it pulls from the Apollo.io account.

The integration has worked really well for us. Whether you're manually adding a contact or bulk uploading, if you don't have all the necessary information, Apollo will recognize that person and automatically populate it for us into HubSpot. We have found that Apollo isn't necessarily as complete as we'd need it to be for the organizations we're looking at, though.

### **Do you mainly populate contacts through LinkedIn and Apollo.io searches?**

Apollo.io searches.

### **How is the UI and usability for HubSpot?**

For the most part it's very intuitive. We're in the process of hiring someone to fill a BD role for us, and overwhelmingly, everyone has said they prefer HubSpot to Salesforce. There are some bugs, but for the most part it's very intuitive.

### **What are the relative strengths and weaknesses for HubSpot**

Its strengths are again that it's really easy to use and requires minimal if any training. I appreciate that there are multiple ways to import contacts. As for weaknesses, they do a good job of sharing high-level data on the site itself, but there's not really an option for us to export it and play around with the data ourselves.

### **How would you characterize the tool's reliability or stability?**

The only bugs I've seen are that occasionally an email won't resize properly when rendered on certain screens. I've looked into other forum posts and customer questions, and other people have had the same issue.

**What criteria or circumstances would make it worthwhile for you to transition to a more heavyweight CRM platform than Hubspot?**

We'll soon need a CRM for providers. It's still not related to any patient data, but we'll need to store information on phone numbers for providers, how many offices their practice has, if they prefer emails or phone calls, etc., so that our provider engagement team can track these clients and engage with them appropriately. That's quite a bit different from the way we have been using the CRM so far, which is purely for sales. Our current plan is still to use HubSpot, and we'll check in with our team to get their feedback on if it's working or not. At that point, we'll reevaluate if it's the right CRM for us to keep using.

**How has the account management and support experience been?**

Neutral. We don't really interact with them that much. Typically, when we have a bug or question, it's already been addressed in HubSpot's help forums.

**Do you feel you made the correct assessment in choosing HubSpot?**

Given our needs at the time, and given our original target market, it was the right call. We haven't had the need to change it since then, even though our use cases have changed a bit. I think as our organization grows, we'll be better able to assess if it's still the correct product for us.

**Do you have any advice for other folks looking for a non-HIPAA-compliant CRM?**

It does matter how quickly you're expecting to scale and how robust you need those capabilities to be. For us, HubSpot was the right choice because we're an early-stage company and we're not driving too many sales through a sales team: it's more founder-led, relationship-based sales. For that lighter touch, it's the right choice. For more mature organizations with more established sales teams perhaps a different solution is more appropriate.