








# HubSpot

by Product Manager

## Details

Review Date	10/03/2023
Purchase Date	Q3'22
Implementation Time	N/A
Product Still in Use	Yes
Purchase Amount	\$500/month
Intent to Renew	100%
Review Source	Elion

## Product Rating

Product Overall		3.5
Use Case Fit		4.0
Ease of Use		4.0
API		N/A
Integrations		5.0
Support		2.5
Value		3.0

## About the Reviewer

- User
- Implementation Team

## Reviewer Organization

- Virtual-First Provider
- Fertility Care

## Reviewer Tech Stack

- Healthie
- Calendly
- Zapier
- OpenPhone
- Swipe Pages

## Other Products Considered

- N/A

## Summary

- **Product Usage:** HubSpot is used for customer communication, workflow creation, data consolidation, email and SMS marketing campaigns, and for managing the sales process, including financial forecasting and deal stages.
- **Strengths:** HubSpot integrates well with other tools and platforms, a major strength allowing for a wide range of use cases, and is known for its excellent documentation.
- **Weaknesses:** Usability for non-tech savvy personnel could be improved, setting up and debugging workflows can be challenging, and the platform experiences issues of tracking accuracy in terms of open rates and clicks.
- **Overall Judgment:** Despite some limitations, HubSpot is generally a positive tool for managing customer communication and workflows, and its versatility in integrating with other platforms is a significant advantage.

## 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?**

Our mission is to make it easier and more affordable for anyone who wants to start a family. As the head of product, my role involves overseeing everything from clinical operations to growth marketing to ensure a seamless end-to-end experience for our users.

Currently, our main product offering is a diagnostic workup. This includes virtual consultations with a fertility specialist. Once the diagnostic workup is complete, we provide the patient with a personalized report summarizing their situation and our recommendations. We then offer a care navigation service to connect them with any additional resources they may need.

### **What drove you to look for a product like HubSpot?**

One major problem HubSpot solves for us is the ability to communicate with a large number of people and customize those communications. For example, after booking appointments, it's important for us to have clear communication with our end users. Unfortunately, our current EHR, Healthie, only allows us to use standard templates, forcing us to stick with a generic template and make only limited changes. It's challenging to maintain our brand and personal touch when all our users receive are Healthie emails. The goal with HubSpot is to solve this problem by allowing us to send emails from our company, with messages personalized by the specific provider. We can also include custom images, text, and more to enhance the communication.

### **What key requirements did you use to evaluate HubSpot and its competitors?**

In terms of communication, we wanted to see if they could handle multiple channels. Could they handle texts and emails? We also needed them to provide high customizability and different conditional triggers.

### **Since HubSpot is not HIPAA compliant, how do you use it?**

With HubSpot, we're currently really focused on workflows. We create different flows for different scenarios. For example, if we're doing a lead-generation exercise, we separate leads based on where they came from or if they're part of a specific promotion.

If there's anything related to HIPAA, we direct the patient to go into Healthie, our EHR. We address any HIPAA-related communication there. So basically, HubSpot is used to grab attention, and we even go as far as sending highly personalized or manual messages through Healthie. For instance, we might say, "Hey, Cheryl, this is Jessica, your NP. We'd love to chat more about something. Please check your messages in Healthie." It's not ideal, but that's where we're at right now.

### **How was the onboarding and setup process?**

With the professional package, I feel like they try to overcharge you. I find it a bit much to pay \$700 for a one-time account manager meeting to discuss something that is clearly explained in their documentation. It feels like a major downside to me.

For someone like me who prefers self-service, it's pretty straightforward. I appreciate HubSpot's well-documented resources. They are known for their excellent documentation, so I didn't find it too difficult to navigate. It's well-guided, which is a positive aspect. However, if you have more specific questions and want to contact an account manager, it automatically becomes an opportunity for them to upsell you.

### **What are the key use cases that you use HubSpot for?**

Currently, in our lead generation exercises, we collect data from various platforms like our website, interactive top-of-funnel tools, and third-party vendors. The great thing about HubSpot is its ability to integrate with almost any platform. At this point integrating with Hubspot is a must-have for any new product we bring on. Setting up tasks and importing data from CSV files or third-party tools is straightforward with HubSpot. So overall I'd say that one significant use case for us is consolidating all this data.

We also heavily rely on HubSpot for email and SMS marketing campaigns. Additionally, we use the deal section of HubSpot for our sales process, as it helps us manage financial forecasting and manage deal stages. Deal stages are particularly useful for us in driving different workflows.

On the sales side, we're currently experimenting with high-touch interactions. When we reach out directly to patients through phone calls, we find HubSpot's playbook feature very helpful. It allows us to keep track of specific topics discussed with each patient and their reactions during the conversation. Using this feature enables us to maintain consistency and make the most of our interactions with patients.

### **What do you see as HubSpot's strengths?**

HubSpot seamlessly integrates with other tools and platforms. When I'm looking for a specific use case or a solution to a particular problem, I find that HubSpot does most things quite well. Even if I come across a unique problem that I need solved, I am confident that I can write code or find a workaround to make it work within the HubSpot. That's a win for me.

### **Can you talk about some of the weaknesses?**

I've been working in tech for a few years now, and one issue we consistently face is when our clinicians or operators who come from traditional brick-and-mortar companies are unfamiliar with platforms like HubSpot. They find it confusing to understand the concepts of deals, leads, and contacts and how everything is structured. This often causes usability issues as they struggle to input information and navigate the workflows correctly.

Another challenge we encounter is developing workflows. While it may seem intuitive at first, there are so many options and variables that it's easy to launch automations that don't work as intended. Debugging these issues can be frustrating because there isn't a clear trail to see if a specific group of people is following the desired path. This gets especially challenging when you stack workflows on top of each other, as the number of potential pathways is large.

Additionally, the reporting in HubSpot is relatively limited, considering the amount of information available.

### **How are the reliability and stability?**

We found it somewhat buggy when it comes to tracking accuracy, specifically with open rates and clicks. For some campaigns, we often see a high number of clicks from one person, but we question if that is a realistic click rate and how they are capturing those clicks. The same goes for open rates.

### **How are their integrations?**

We use Calendly as one of our go-to tools for scheduling appointments. OpenPhone is our phone plan provider, and we also rely on Swipe Pages for web page creation. We also use Viral Loops and Amplitude. We take advantage of the pre-built integrations available through HubSpot and basically just turn them on.

### **Have you generally found the marketplace for apps or integrations to meet your needs?**

Yeah, I think so. The first thing I use is the search bar. If I search for it, I can probably find what I'm looking for. If not, since it's a popular app, I'll likely check Google or Reddit to see if someone has encountered the same issue and what steps they took to solve it. Typically, within an hour, I can find the answer and figure out what to do. Unless it's a completely new product on the market, then I might have to reach out to the company for support, but even then, waiting for two days can be frustrating for me. I prefer getting a solution quickly.

### **How have you found their support and account management services?**

I don't think their account management is very good. They mainly rely on help articles, which can be frustrating. They want to lead you and your team through a course when you reach out for help. However, when it comes to support, they're decent at getting back to us. They acknowledge our support tickets and promise to respond. I've only had to reach out to them twice. The first time was because one of our patients had canceled their account and was having trouble reactivating it. The second time was when we encountered a problem with our workflows, but we managed to fix it internally before they got back to us.

### **Do you feel like you made the right decision going with HubSpot?**

Generally, I would say yes, but that's because we haven't invested in improving the communication of protected health information (PHI) on the other aspects of our stack. So it's good enough for what we need it for.

### **Do you see any potential areas of growth for HubSpot from your perspective?**

It would be great to have more transparency through an audit log, which would likely be more cost-effective. To be honest, considering the current stage we're in, spending \$500 every month on a glorified Rolodex seems a bit excessive.

### **Do you have any general advice for folks who are trying to make a product decision in this category?**

Make it make sense. I'm strongly opposed to taking on unnecessary new technology, especially in the current era of financial constraints. In an ideal scenario where we weren't so dependent on Salesforce, and my main focus is on solving marketing communication issues, I would likely invest in an EHR and a communication service. This could be something like an offshoot of OpenPhones or a HIPAA-compliant texting service. I would hope that the EHR seamlessly integrates with the chosen communication service, allowing us to create customized workflows. By putting effort into building this integration and paying for the subscription, I believe we could significantly reduce costs and find more affordable ways to deal with sales.

