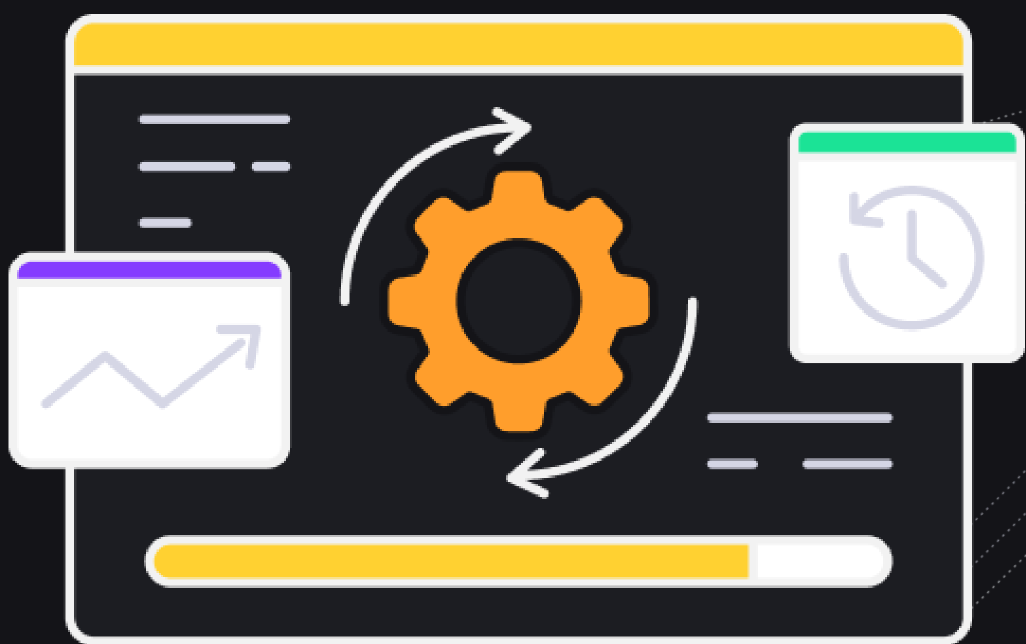
September 2023

APTITUDE 8

THE CRM CARD PLAYBOOK

Your most complex business cases, built on top of HubSpot's UI.



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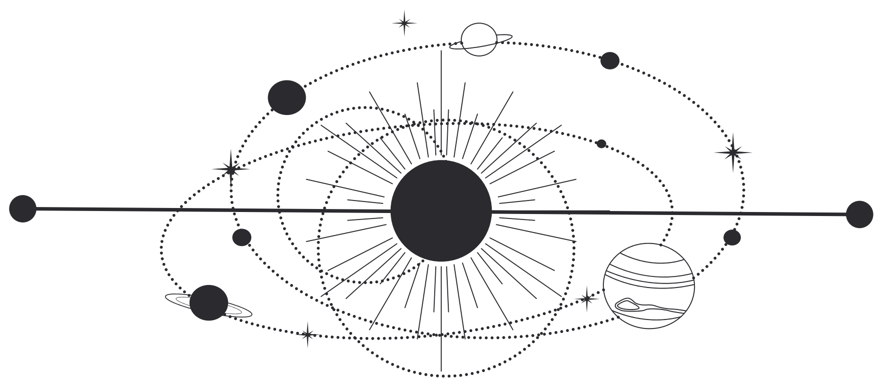
Intro to the Playbook

CRM cards are micro-applications that live on your CRM record pages. They extend HubSpot's functionality beyond what you can do with out-of-the-box functionality. With CRM Cards, your team can complete tasks that would usually require them to access multiple systems, entirely within HubSpot.



When to use a CRM Card

There are three types of problems that CRM cards are excellent solutions for:

Accessing & Actioning Data from External Sources

These types of CRM cards show you data from outside of HubSpot or allow you to action data by adding or editing data that exists elsewhere.

For example, a Sensitive Information Retrieval card allows you to retrieve credit card information that is stored in a PCI-compliant vault outside of HubSpot.

Creating a Customized Output Based on a Series of Inputs

These types of cards ask a set of questions and, based on your answers, provide you with a response.

For example, a CPQ card asks you questions about products, bundles, and pricing, and provides you with a custom-built quote.

Record-Specific Reports

These types of cards will show reports that are specific to that contact, company, deal, or other record.

For example, a web visits report could show you a timeline of a single contact's website activity.

Some cards will combine these multiple types of functionality.

For example, an Inventory Management card will access current inventory levels from an external system, let you select which ones you want, add them as line items to a deal, and then reduce the amount of inventory in your external system.

CRM Card Options

React vs. JSON

CRM cards can be coded with React or JSON.

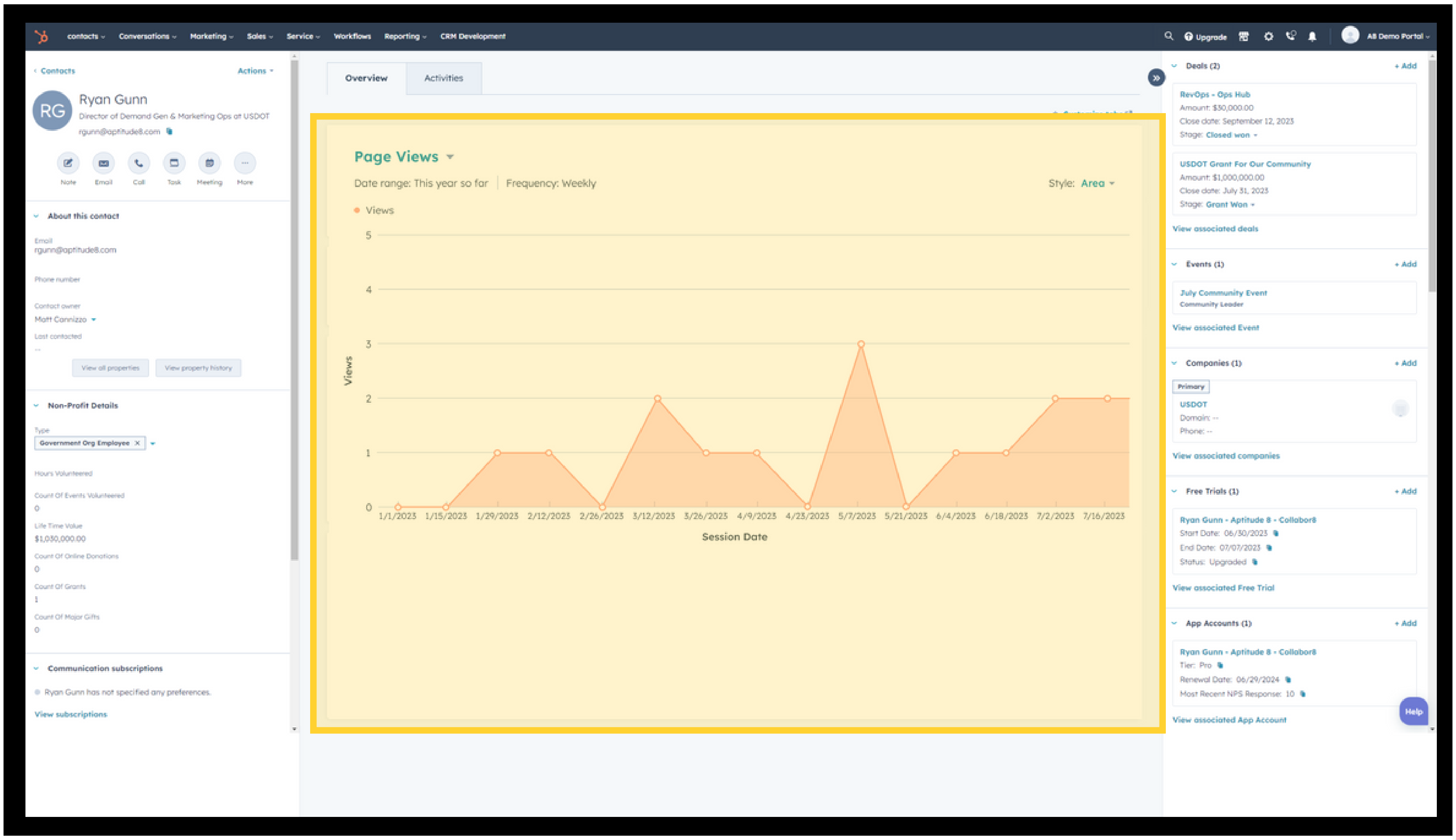
React offers more flexibility and design elements, but is early in beta development, while JSON is more stable.

Embedded vs. Iframe

CRM cards can be embedded into the HubSpot record and appear as a native UI element or can pop up as an iframe, which allows for more complex processes and customization.

Where do CRM Cards go?

CRM Cards live on Contact, Company, Deal, Ticket or Custom Object records. These cards are accessible in the middle of your record, where you would find your “Overview” section.



Permissions to view and interact with CRM cards can be restricted by role, team, or user to ensure that your team only has access to the tools they need in order to do their jobs.

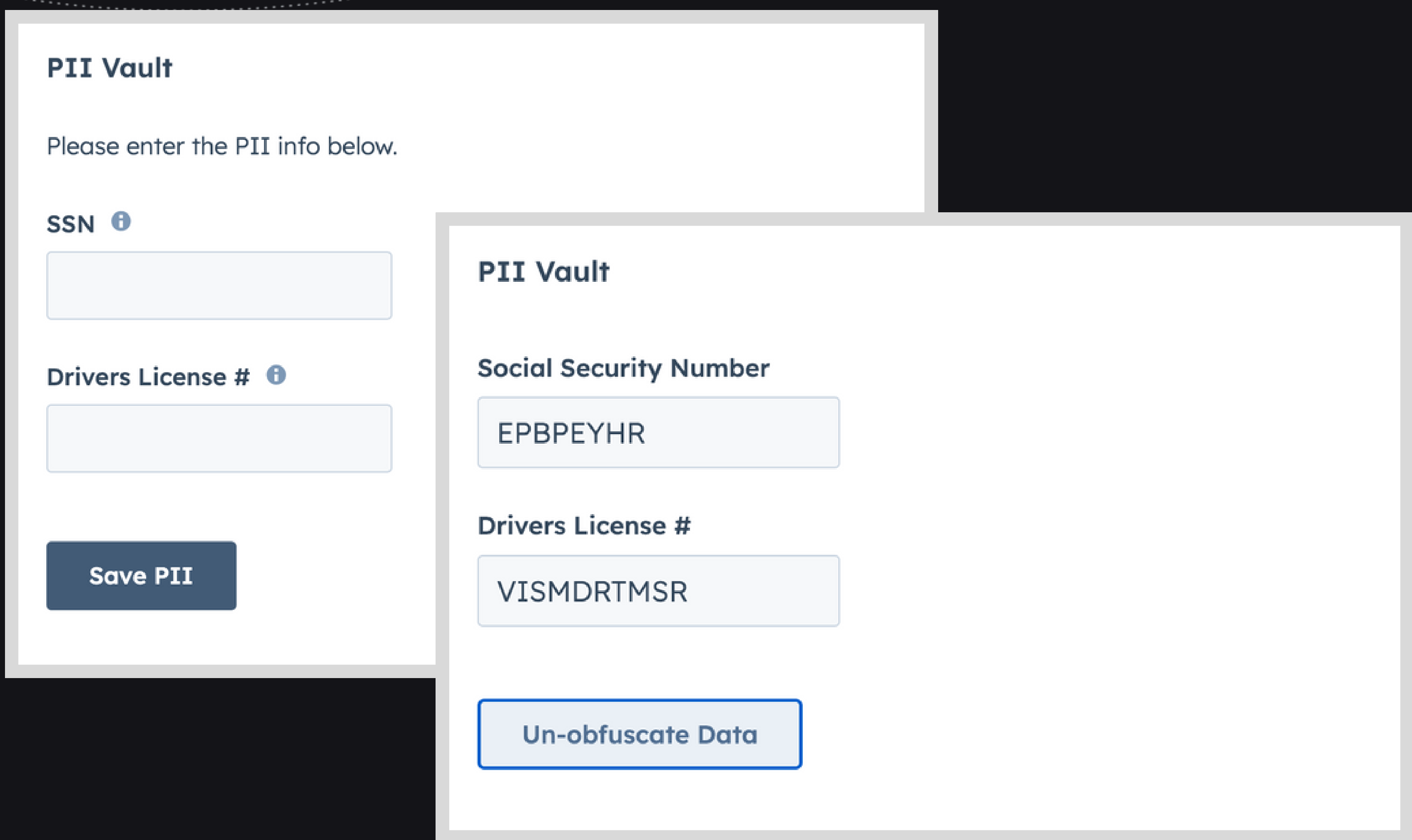
CRM Card Use Cases

Save your team time, avoid errors associated with switching systems to complete simple tasks, and add functionality they need to complete their jobs. These are just a few examples of what is possible with CRM Cards:

Contact Cards

Sensitive Information Retrieval

HubSpot doesn't allow you to store sensitive data like credit card numbers, SSNs, passport numbers, or medical information. That means your team has to access multiple systems to complete certain tasks. This CRM card allows you to save and retrieve a contact's credit card information that is stored in a PCI-compliant vault without leaving HubSpot. The card opens the door for financial services, healthcare, and travel companies who may have been wary of HubSpot's data restrictions to embrace the platform and build it into their day-to-day processes.

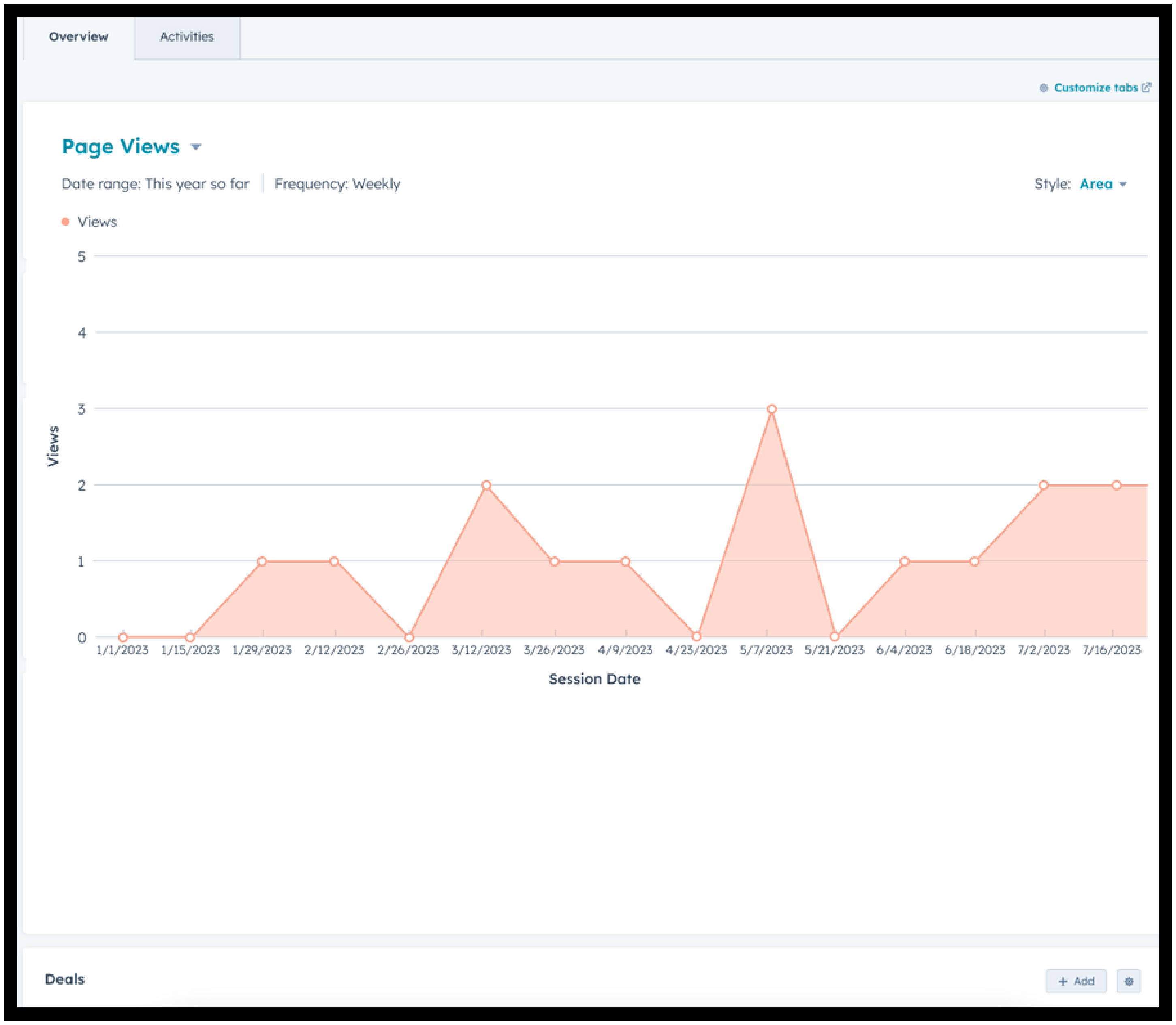


CRM Card Use Cases

Contact Cards

Invidual Contact Website Visits

A contact's website activity can be viewed in a feed, but there is no way to see a graph or visual timeline of a contact's website activity. This card shows the number of visits a contact has made to your website over time, with taller columns indicating more visits on a specific date.

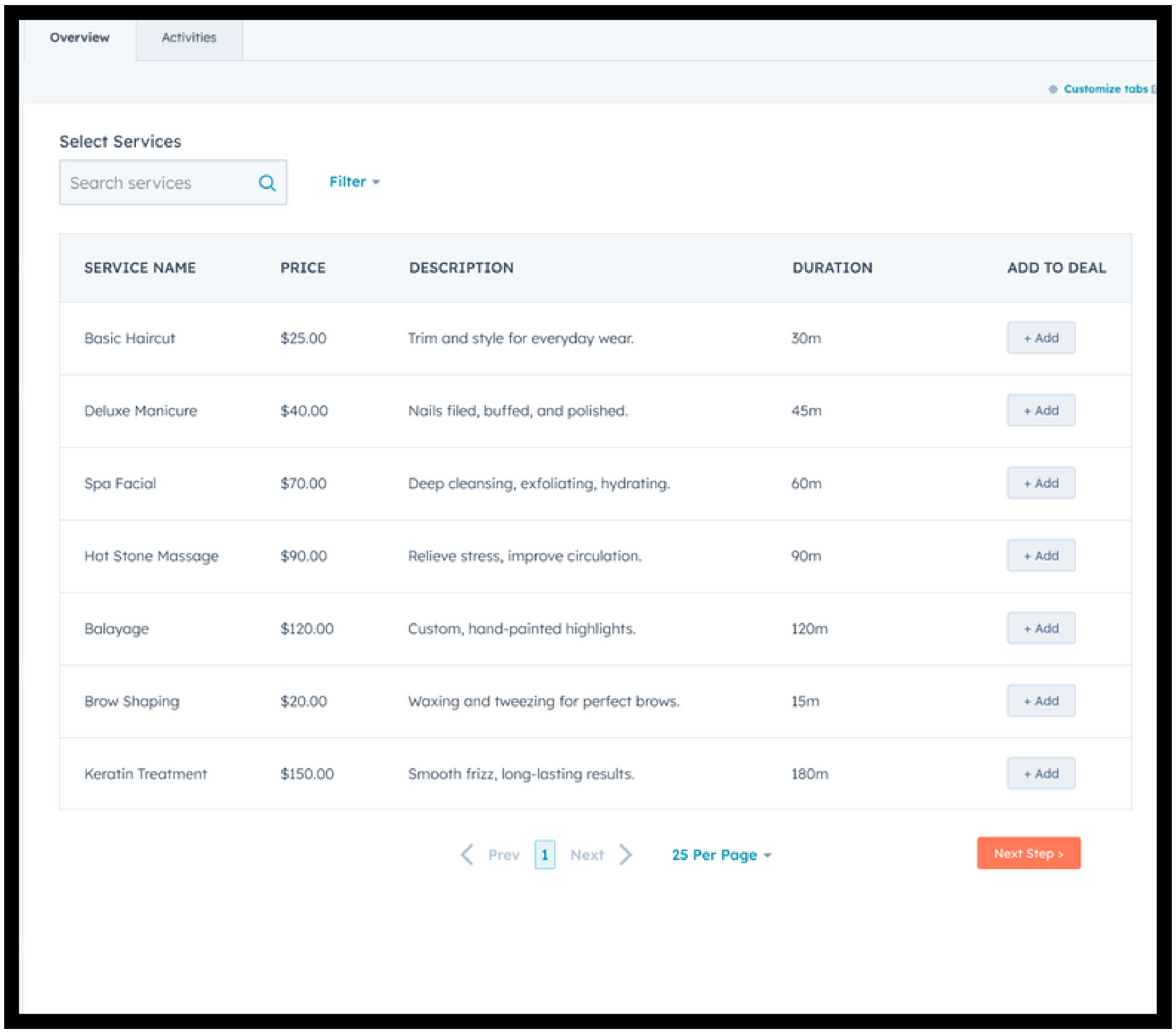


CRM Card Use Cases

Deal Cards

Appointment Scheduling

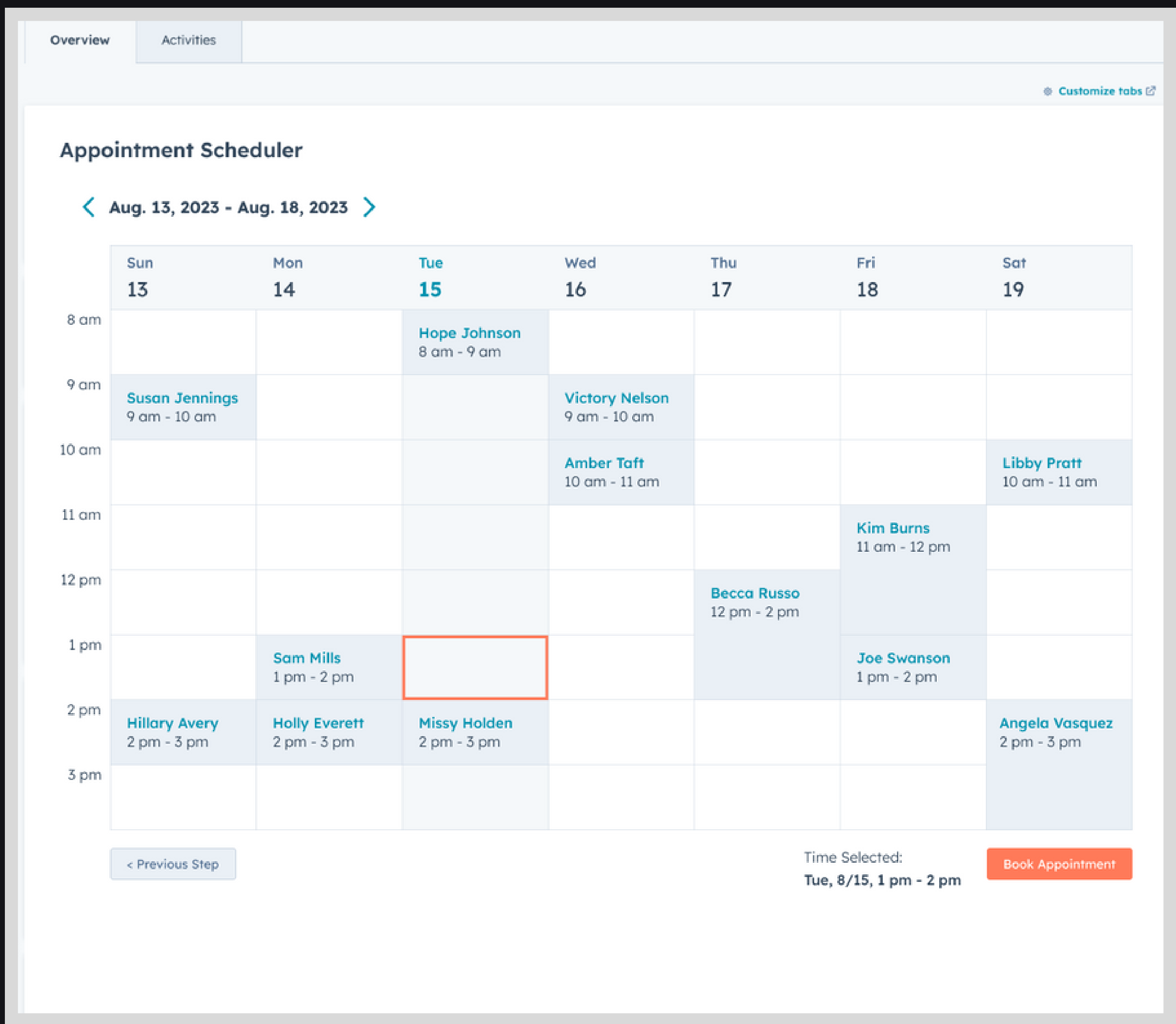
Companies that book time for services need to ensure they have an up-to-date view of the times and services that are available in order to avoid double booking.



CRM Card Use Cases

Appointment Scheduling (Cont.)

This CRM card integrates real-time scheduling data from your scheduling system or POS into HubSpot's Deal record. It lets you select services, reserve time slots, and automatically updates the deal value, all within the same interface.



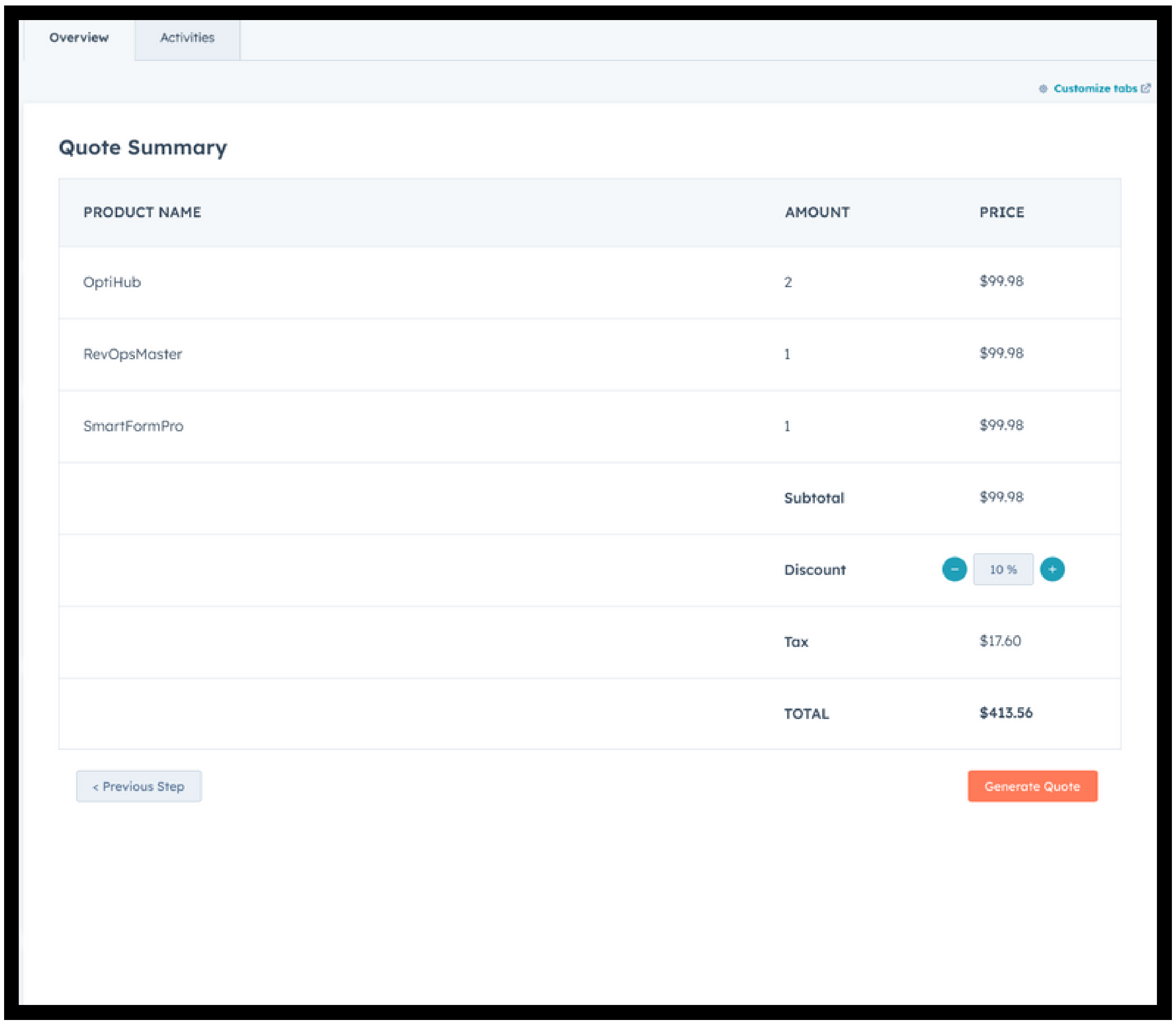
CRM Card Use Cases

Deal Cards

CPQ / Deal Builder

Without CPQ, companies face manual errors in quoting, inconsistent pricing, and delayed sales cycles. There's a risk of offering outdated or incompatible product configurations.

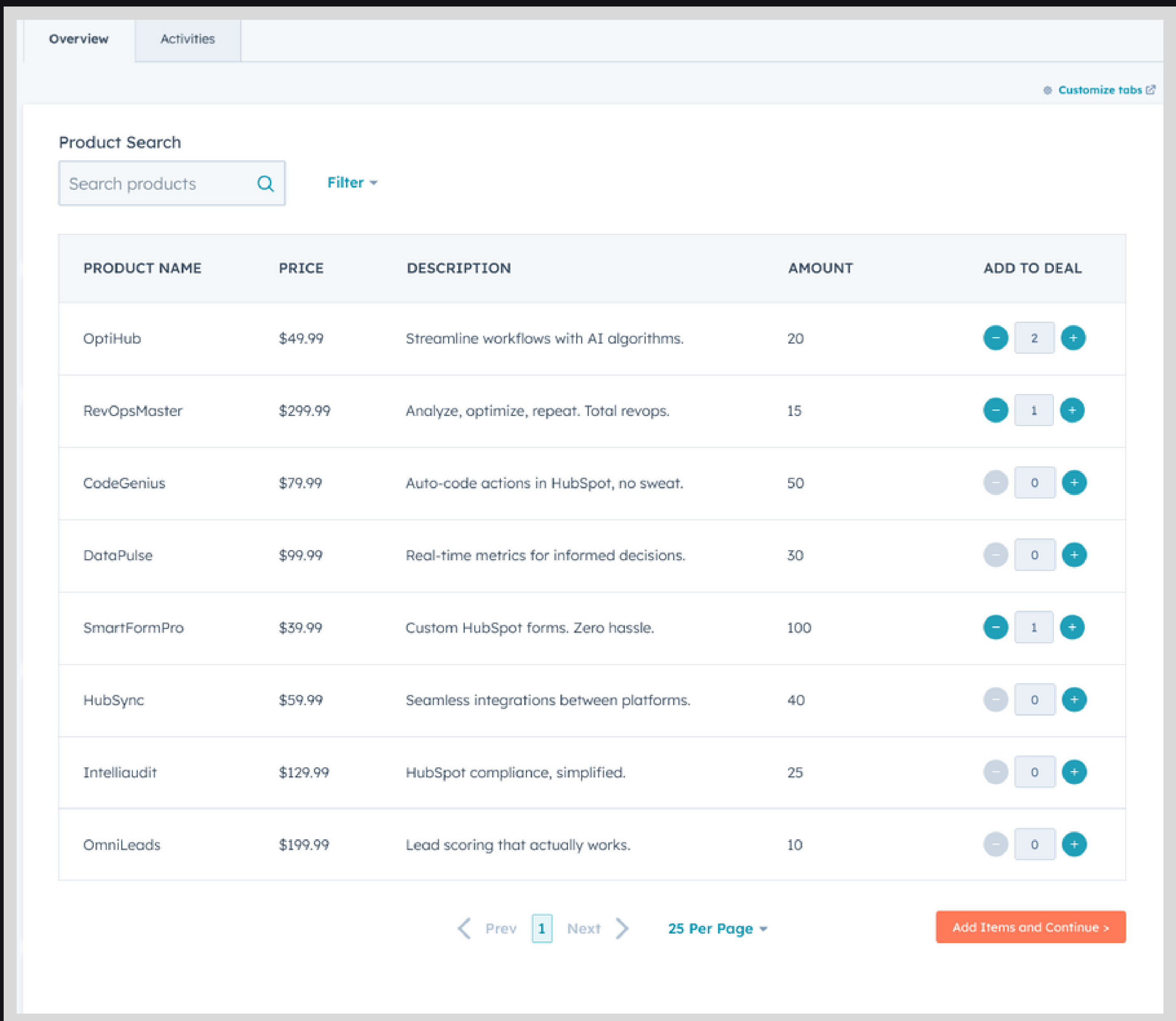
Sales reps waste time navigating complex pricing matrices and approval workflows, reducing time spent selling. Inconsistency in quotes erodes customer trust and affects deal quality. Poor data centralization impacts analytics, making revenue forecasting imprecise.



CRM Card Use Cases

CPQ / Deal Builder (Cont.)

This CRM card solves those problems by connecting directly with your ERP to get up-to-date pricing and automatically configures a quote directly in HubSpot. This significantly reduces errors and the amount of time your team has to spend building quotes, which means they can spend more time selling.



PRODUCT NAME	PRICE	DESCRIPTION	AMOUNT	ADD TO DEAL
OptiHub	$49.99	Streamline workflows with AI algorithms.	20	2
RevOpsMaster	$299.99	Analyze, optimize, repeat. Total revops.	15	1
CodeGenius	$79.99	Auto-code actions in HubSpot, no sweat.	50	0
DataPulse	$99.99	Real-time metrics for informed decisions.	30	0
SmartFormPro	$39.99	Custom HubSpot forms. Zero hassle.	100	1
HubSync	$59.99	Seamless integrations between platforms.	40	0
Intelliaudit	$129.99	HubSpot compliance, simplified.	25	0
OmniLeads	$199.99	Lead scoring that actually works.	10	0

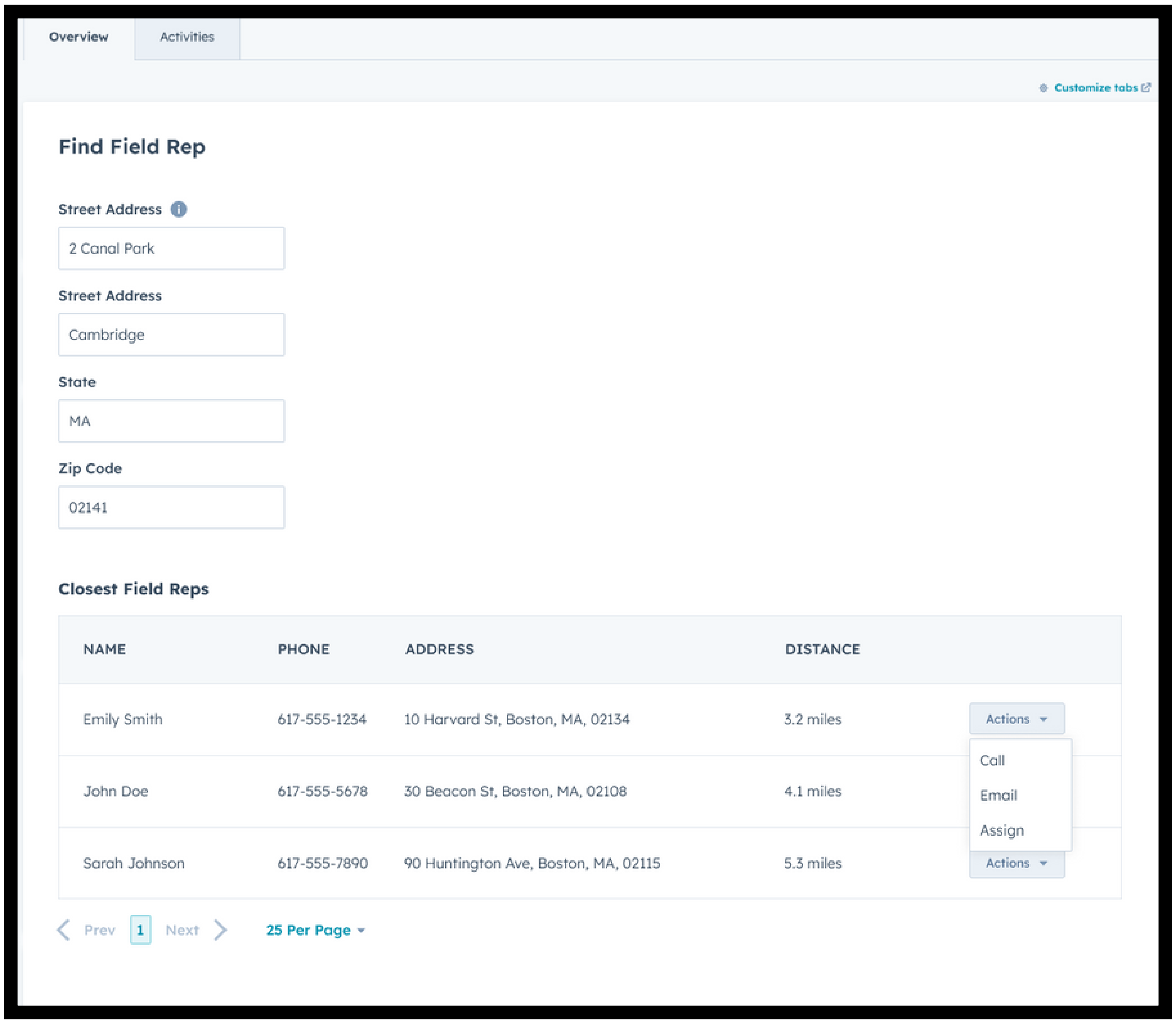
CRM Card Options

Company Cards

Location-based Field Rep Finder

Companies that operate in multiple geographic locations often need to connect prospects or clients to a field representative or office that is closest to them. This typically involves getting an address from the company and manually looking up which rep is closest by pulling up a map.

This card eliminates the manual lookup process by automatically identifying the closest rep when an address is entered by using Google Maps API.



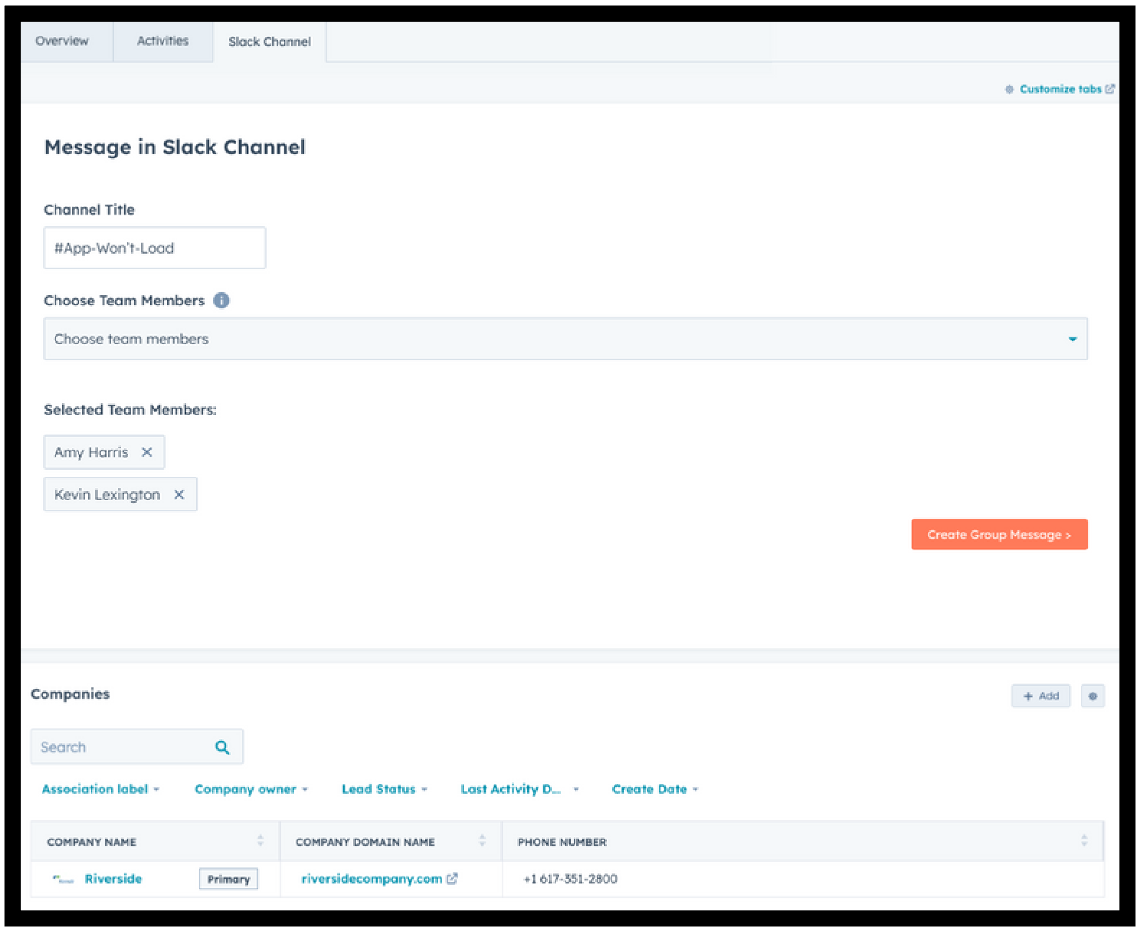
CRM Card Use Cases

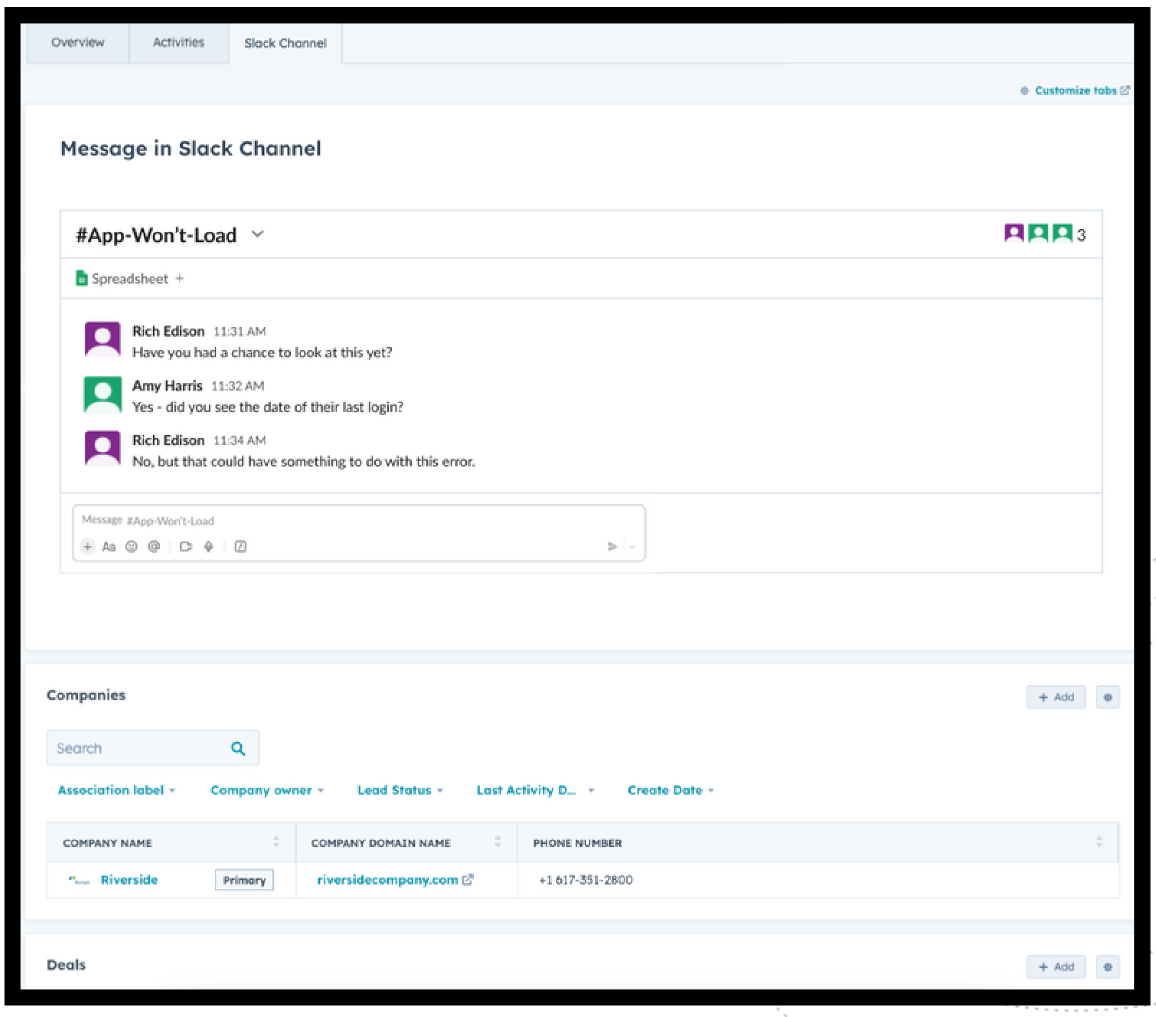
Ticket Cards

Create a new Slack Channel

When a customer submits a support ticket, the support manager may need to loop in multiple internal parties to get them the support they need.

Rather than switching to Slack and copying and pasting the contents of the support ticket, this CRM card allows your team to create a Slack channel/group message directly from the ticket record.





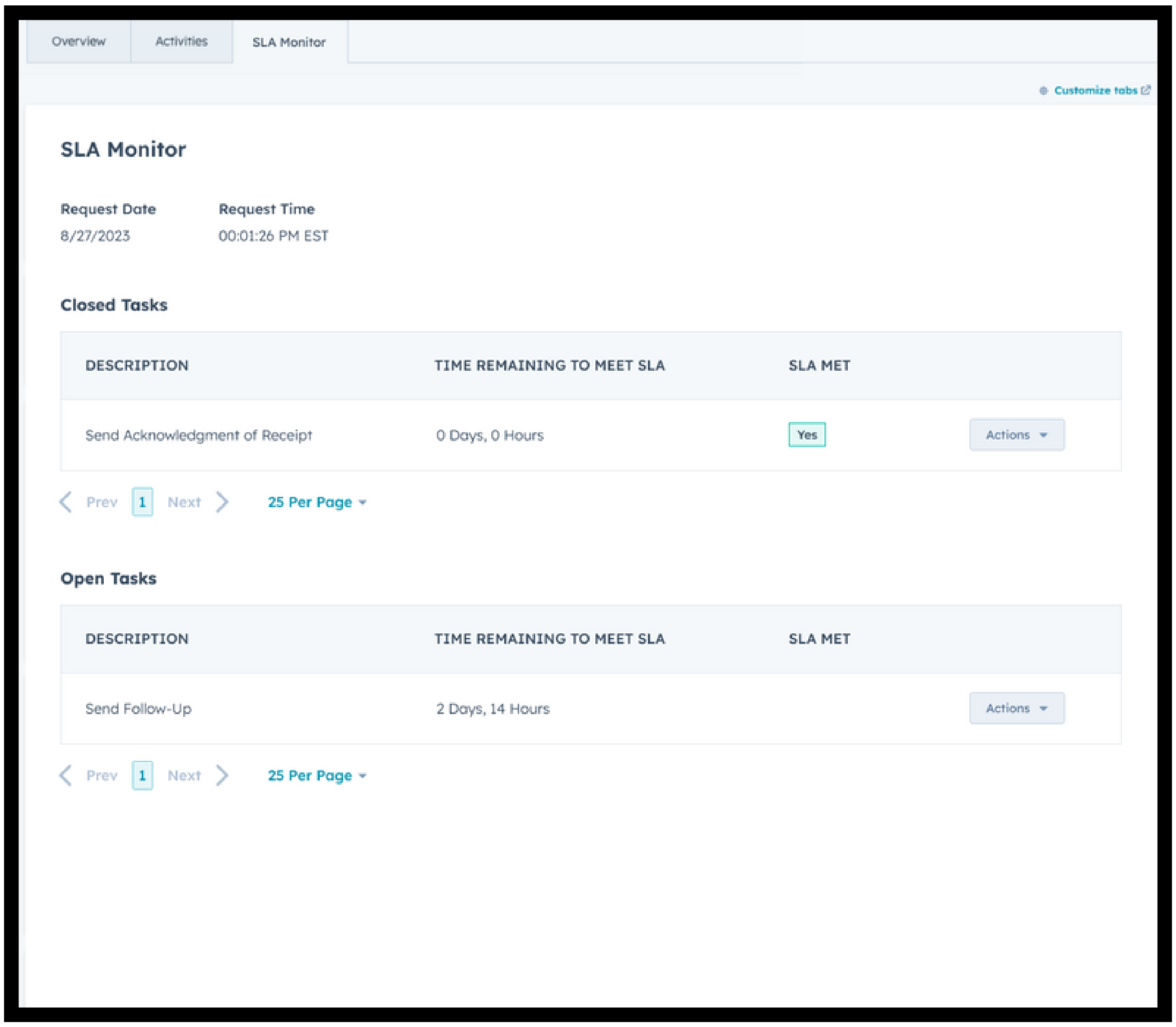
CRM Card Use Cases

Ticket Cards

SLA Monitoring

Your Customer Support team needs to respond to requests in a timely fashion. If you’ve formalized that into an SLA, then your team needs a way to monitor whether they are honoring that agreement with the customer.

This card shows when the request came in, and how long your team has to complete various follow-up tasks in order to comply with the SLA, as well as buttons they can click to initiate those tasks.



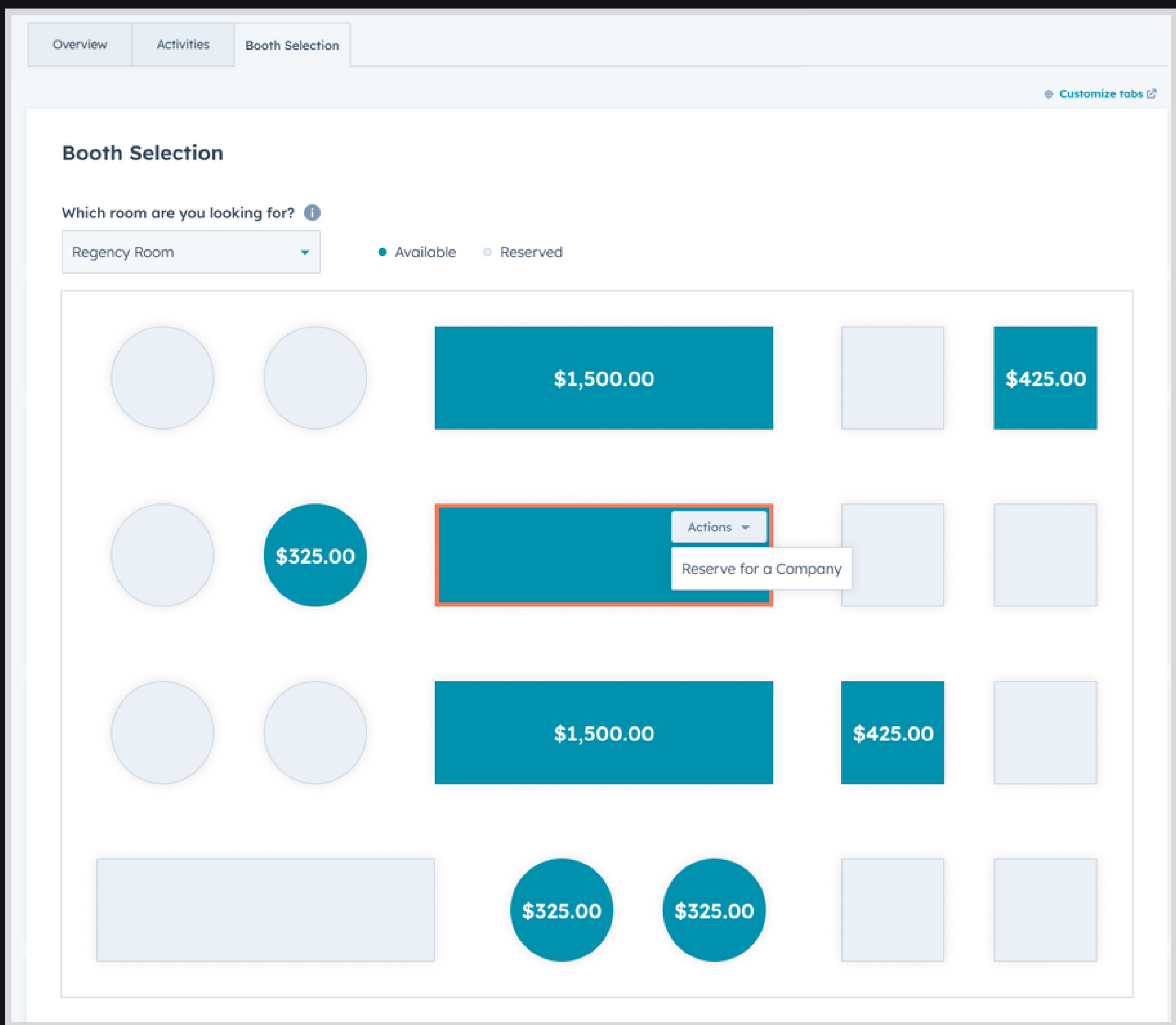
CRM Card Use Cases

BONUS: Custom Object Card

Trade Show Floor Plan

If you host conferences or trade shows and sell booth space for sponsorships, you need to know what booths are available and which are already taken so that you don't overbook or undersell the conference floor.

This card has a floor plan that shows what spaces are taken and which are available, as well as prices for each. When you select a booth space, you can search for a company to associate it with and it will automatically create a deal record for you to complete the sale.



Extensibility Unlocked

Build with HubSpot's Extensibility features

Whatever business process you need, we can build it. Aptitude 8 has the largest technical consulting team in the HubSpot ecosystem and we'll work with you to come up with a custom solution.

Interested in learning more?

CRM Cards are just one way that we are extending the capabilities of the HubSpot platform.

Check out more extensibility configuration and automation capabilities at aptitude8.com/custom-crm-development.

Do you have business needs that HubSpot can't handle out of the box? Let's chat about whether CRM cards may be a fit to solve your problem!

Reach out to us at aptitude8.com/contact-us.