



The Insight Studio

HubSpot Power-Tip 4.0

Five Considerations

CRM



Business Goals

- Generate leads
- Close sales
- Build brand loyalty
- Scalable growth

STEP
01



Budget

- How much can you allocate to your CRM Software?
- Does it offer budget-friendly incremental growth investment?

STEP
02



Integration

- Designed and crafted integration
- Not cobbled together
- How well does it integrate with your technology stack?

STEP
03



Features & Automations

- Marketing
- Sales
- Service
- Operations
- Task creation
- Email marketing
- Nurturing

STEP
04



Metrics and Reporting

- Forecasting
- Revenue growth
- Team performance

STEP
05



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