




# Customer Relationship Management (CRM)

## Group 6:

- Emily Fallon- HubSpot CRM
  - Caleb Lowery- Streak
  - Morgan Miller- Pipedrive
  - Brian Smith- Salesflare
- 

# Collaboration:

## **10/31/2022 Meeting**

Begin to think about/discuss what real life case we want to create for Customer Relationship Management.

Potential ideas: Who homeschools, private schools, or does public schools?

Who breastfeeds and/or formula feeds?

Who had a doula or didn't have a doula?

Focus on first 1-2 slide summary.

Sharing phone numbers so we can create a group chat.

Next meeting will be tentatively on 11/7/2022 at 7:15PM.

## **11/7/2022**

Talked about what case we are going to go with. Decided on doula work for our CRM case.

Chose four CRM tools

Emily – HubSpot CRM

Morgan - Pipedrive

Brian - Salesflare

Caleb - Streak

\*What information do we want vs not want?\*

Presentation Breakdown

- Title
- 1-2 Summary
- 1-2 Summary
- 4-5 slides
- 1 Source Page

# Collaboration:

**11/8-11/15**

Continue researching/getting info to add the slides to the presentation.

**11/21/2022**

Meeting on Teams to finalize the presentation and add the last few slides needed.

We used Teams for our weekly meetings and to collaborate on our presentation together. We also updates our sales report weekly on Teams.

We collaborated on Teams video to create our presentation and insert our own slides. We used texting as our main form of communication to let each other know what was updated/added.

Using texting as our main form of communication worked well as well as setting our meeting time for the consistent day/time each week.

As a team, we feel like choosing our case was a challenge. Otherwise, we felt like no other challenges surfaced.

Yes, we used texting as another tool aside from Teams.

# Tool Category Evaluation:

- For each tool that we chose, they offer very similar features from tracking emails and communication to organization. Each varied in cost and would depend on the budget that you would like to spend. Each tool seems similar in sustainability and functionality. Streak is convenient because they give you the option to try for free if you'd like prior to committing.
- When it comes to our case of tracking doula clients and our communication with them, each tool would be a great option. Again, mainly would depend mostly on desired budget.

# Streak – What Is It?

- Streak is a fully embedded workflow and productivity software in Gmail. It allows you to manage all your work within your inbox.

The screenshot shows the Gmail interface with the Streak CRM overlay. The Streak interface displays a pipeline with the following stages and counts:

- 6 Assigned
- 12 Contacted
- 14 Negotiations
- 14 Won
- 2 Lost
- 1 Resurrecting

The table below lists the deals in the pipeline:

Name	Stage	Priority	Source	Assigned To	Deal size	Probability	Last Call	Location	Interested In
<b>New</b>									
<b>Assigned</b>									
IBM - HQ	Assigned	High	Website	Yen T, Jasen K	\$282	30%	Feb 2, 2018	Boston	Email Power Tools
Amazon - HQ	Assigned	Medium	Email	Aubrey G	\$8,932	75%	Jun 3, 2018	New York	CRM
Google	Assigned	Medium	Email	Yen T	\$6,793	80%	Jun 3, 2018	Canada	CRM
Facebook Hardware	Assigned	Low	Website	Aubrey G	\$506	50%	Jan 1, 2018	San Francisco	Email Power Tools
WeWork	Assigned	Low	Website	Jasen K	\$553	20%	Aug 2, 2017	San Francisco	CRM
Streak	Assigned	Low	Ad Campaign #1	Yen T	\$334	50%	Aug 2, 2017	San Francisco	CRM
<b>Contacted</b>									
Medium.com	Contacted	Medium	Website	Yen T	\$10,000	40%	Oct 2, 2019	San Francisco	Something
Hacker Noon	Contacted	High	Website	Yen T	\$1,000,000	10%	May 1, 2019		
Zapier	Contacted	Medium	Email	Yen T	\$234,999	10%	May 18, 2019	New York	Email Power Tools
Spotify	Contacted	High	Website	Yen T, Ben E	\$5,000,000	30%	Jan 2, 2019	Beijing	Everything
Typeform	Contacted	Medium	Conference	Yen T, Jasen K	\$12,000	60%	Jan 8, 2019	San Francisco	General Learning
Slack	Contacted	High	Conference	Yen T	\$15,000	50%	Jan 8, 2019	San Francisco	General Learning
Oracle - QA Team	Contacted	High	Email	Yen T	\$100,000	50%	Oct 31, 2018	San Francisco	Everything
IBM - CS Team	Contacted	High	Ad Campaign #1	Streak S	\$324,400	20%	Sep 1, 2018	Seattle	CRM
Amazon - Product Team	Contacted	Medium	Website	Yen T	\$150,000	20%	Jan 13, 2018	London	General Learning

# Streak – How Could It Be Used?

- This tool allows the users to collaborate easily and effectively. It enables you to group leads and contacts together to further organize your work.

The screenshot displays the Streak CRM interface within a Gmail environment. The main view shows a pipeline for 'Ney's Sales' with a lead titled 'Call CFO with update'. The lead details include a file upload, a comment from 'Yen T' asking for a report status check, and meeting notes from '10/22/19'. The right sidebar displays lead information such as Stage (New), Assigned To (Yen T), Custom Columns (Priority: High, Probability: 90%, etc.), and Magic Columns (Incomplete Tasks Count: 1).

Priority	Source	Deal size
High	Conference	\$10,000

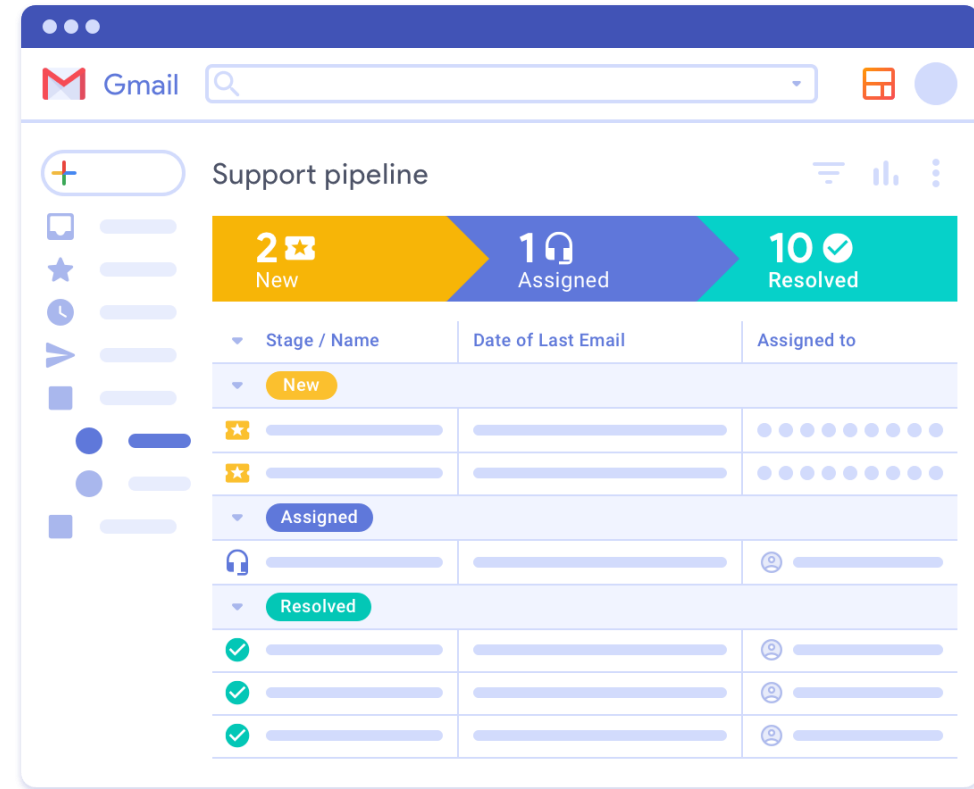
Probability	Last Call	Location
90%	Oct 1, 2019	Gotham

Interested In	Organizations	Contacts
CRM, General	Streak	Srikanth S Danielle A

Incomplete Tasks Count	Date of Last Interaction	Date of Last Sent Email
1	Oct 22	—

# Streak – Group Organizational Structure

- Streak allows you to organize leads to different group members you feel would be best suited for that person.



# Streak – How It Relates To Our Case

- In our example case of whether or not a mother should want a doula we could use Streak in many ways. We could organize our contact list of soon-to-be mothers, determine who would contact the potential client, gauge their interests, and hopefully sell them on the peace of mind we offer.

All your deals organized in Gmail

Name	Contacts and organization	Deal Size	Lead Source	Location Type	Products	Assigned To	Commis
<b>Lead</b> (Average: -)							
Amaryllis Tea	Elliot H		Referral	Corporate	Tea	Justine D	\$0.00
Clover Tea Bar	Lexi-May Lu		SDR	Mom n' Pop	Coffee, Tea	Justine D	\$0.00
Begonia Bar	Tatiana Cortez		SDR	Mom n' Pop	Coffee	Florrie G	\$0.00
<b>Contacted</b> (\$1,875.00 Average: -)							
Orchid Tea & Coffee	Hoang Nguyen	\$2,400.00	Website	Mom n' Pop	Coffee, Tea	Josh J	\$360.00
Camellia Coffee	Linzi Howarth	\$4,500.00	Referral	Ecommerce	Coffee	Justine D	\$675.00
Lilac Bar	Adi R	\$1,200.00	Referral	Mom n' Pop	Coffee	Josh J	\$180.00
Buttercup Coffee - 2020	Justine Delgadillo	\$2,400.00	Expansion	Franchise	Coffee	Justine D	\$360.00
Narcissus Tea Bar	Florrie Gomez	\$250.00	Outbound	Mom n' Pop		Justine D	\$37.50
Crocus Coffee Bar	Lani Kumar	\$500.00	Outbound	Franchise	Coffee	Josh J	\$75.00
<b>Proposal</b> (\$2,175.00 Average: -)							
Lavender Coffee	Andrew S	\$2,400.00	Inbound	Franchise	Coffee, Tea	Justine D	\$360.00
Rosemallows Tea	Franklin Feaney	\$4,500.00	SDR	Corporate	Tea	Justine D	\$675.00
Alyssum Tea	Lexi-May Lu	\$1,200.00	Website	Corporate	Coffee, Tea	Justine D	\$180.00
Zinnia Tea	Elliot H	\$2,400.00	Inbound	Mom n' Pop	Coffee, Tea	Florrie G	\$360.00
Dahlia Coffee & Tea	Tatiana Cortez	\$250.00	SDR	Corporate	Tea	Florrie G	\$37.50



# What is Pipedrive and how was it created?

- Pipedrive is the first CRM platform made for salespeople, by salespeople.
- After selling newspaper ads, insurance, and training sales professionals for companies like Coca-Cola and Nissan, Timo Rein and Urmas Purde saw a gap in the CRM market.
- They teamed up with fellow co-founders Martin Henk, Ragnar Sass and Martin Tajur to create software that puts the needs of salespeople first. Then came Pipedrive.

The Pipedrive logo is displayed in white lowercase letters on a dark green rectangular background. The logo is centered horizontally and vertically within the green box. The word "pipedrive" is written in a clean, sans-serif font. The background of the slide features decorative geometric shapes: a yellow triangle in the top right corner and a blue triangle in the bottom left corner, both with overlapping squares.

# Pipedrive: What plans are available?

## Essential - \$14.90/month

3,000 active deals  
30 custom fields  
15 reports

## Advanced - \$24.90/month

10,000 active deals  
100 custom fields  
30 reports

## Professional - \$49.90/month

(Recommended)  
100,000 active deals  
1,000 custom fields  
150 reports

## Enterprise - \$99.00/month

Unlimited active deals  
Unlimited custom fields  
Unlimited reports

The screenshot shows the Pipedrive pricing page with the following details:

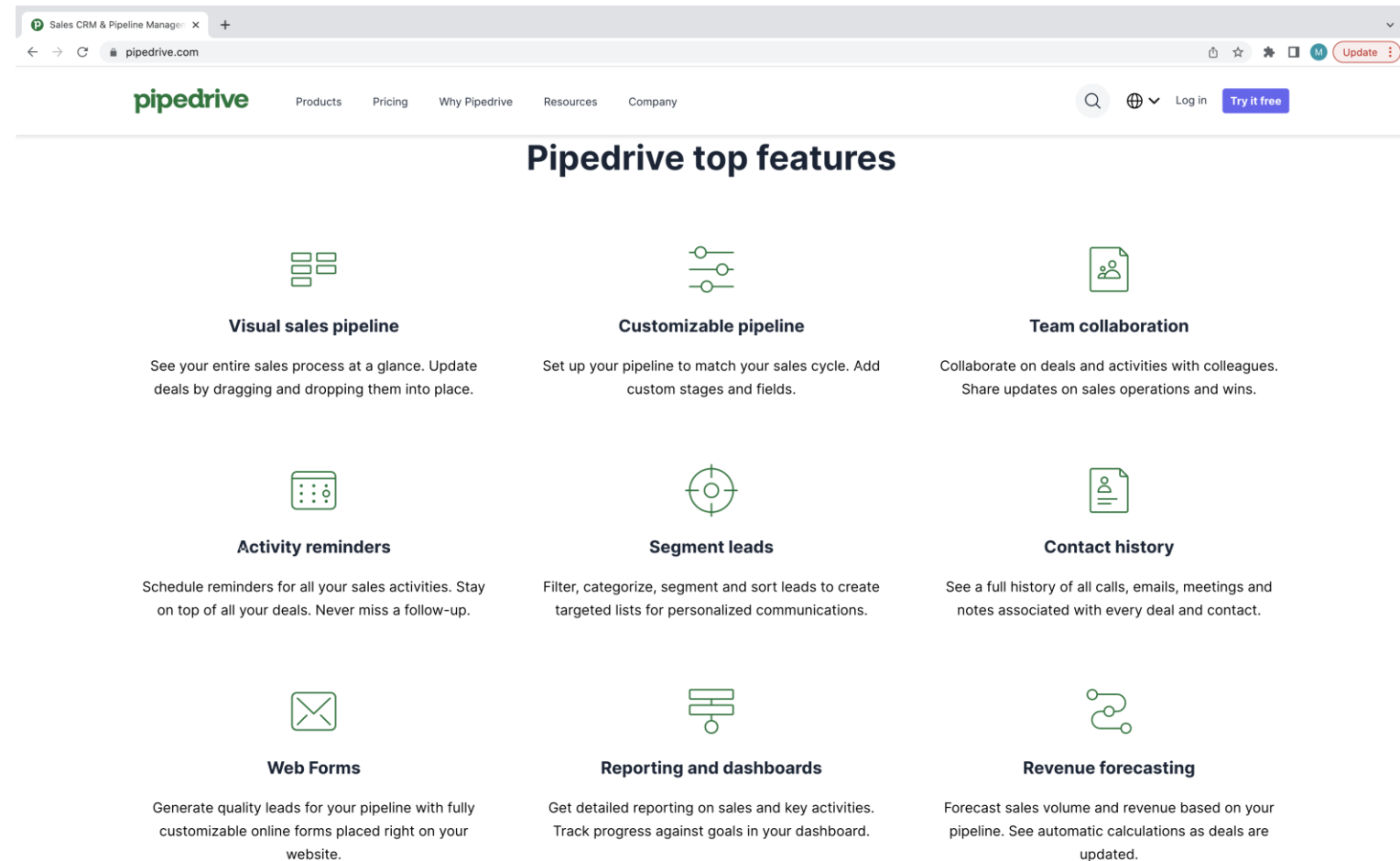
- Essential:** 3,000 active deals, 30 custom fields, 15 reports. Price: US\$ 14.90 per user per month, billed annually. Includes a 14-day trial.
- Advanced:** 10,000 active deals, 100 custom fields, 30 reports. Price: US\$ 24.90 per user per month, billed annually. Includes a 14-day trial.
- Professional (Recommended):** 100,000 active deals, 1,000 custom fields, 150 reports. Price: US\$ 49.90 per user per month, billed annually. Includes a 14-day trial.
- Enterprise:** Unlimited active deals, unlimited custom fields, unlimited reports. Price: US\$ 99.00 per user per month, billed annually. Includes a 14-day trial.

Additional features for each plan are listed below the pricing:

- Essential Plan +:** Lead, deal, calendar and pipeline management; Simple data import and easy customization; 24/7 support and 300+ integrations.
- Advanced Plan +:** Full email sync with templates and scheduling; Group emailing plus open and click tracking; Workflow builder with triggered automations.
- Professional Plan +:** Create, manage and eSign documents and contracts; Revenue projections, forecasts and enhanced custom reporting.
- Enterprise Plan +:** Unlimited user permission and visibility settings; Additional and heightened security preferences; Implementation program and phone support.

# Pipedrive: Products - Sales Software Features?

- Automation
- Insights and Reporting
- Email and communication tracking



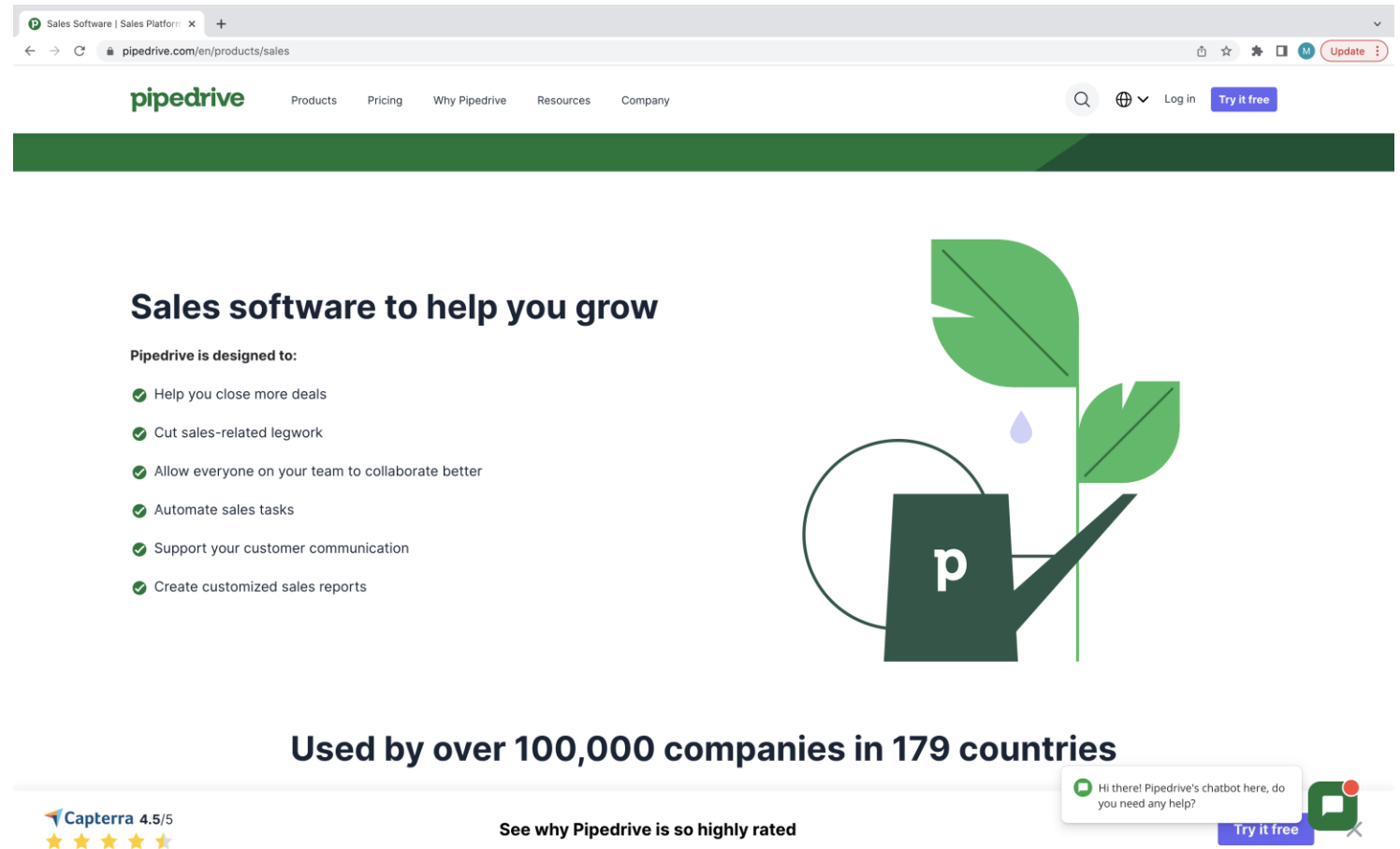
The screenshot shows the Pipedrive website's 'Pipedrive top features' section. The page has a navigation bar with links for Products, Pricing, Why Pipedrive, Resources, and Company. A search bar and a 'Try it free' button are also visible. The features are presented in a grid of nine cards, each with an icon, a title, and a brief description.

### Pipedrive top features

- Visual sales pipeline**  
See your entire sales process at a glance. Update deals by dragging and dropping them into place.
- Customizable pipeline**  
Set up your pipeline to match your sales cycle. Add custom stages and fields.
- Team collaboration**  
Collaborate on deals and activities with colleagues. Share updates on sales operations and wins.
- Activity reminders**  
Schedule reminders for all your sales activities. Stay on top of all your deals. Never miss a follow-up.
- Segment leads**  
Filter, categorize, segment and sort leads to create targeted lists for personalized communications.
- Contact history**  
See a full history of all calls, emails, meetings and notes associated with every deal and contact.
- Web Forms**  
Generate quality leads for your pipeline with fully customizable online forms placed right on your website.
- Reporting and dashboards**  
Get detailed reporting on sales and key activities. Track progress against goals in your dashboard.
- Revenue forecasting**  
Forecast sales volume and revenue based on your pipeline. See automatic calculations as deals are updated.

# Pipedrive: What are the advantages of using Pipedrive for our case?

- These software features will help us stay connected with our clients and available for any tasks that may come up or if we have to step away for a birth, we are covered.



The screenshot shows the Pipedrive website's 'Products/Sales' page. The browser address bar displays 'pipedrive.com/en/products/sales'. The navigation menu includes 'Products', 'Pricing', 'Why Pipedrive', 'Resources', and 'Company'. A search bar and a 'Try it free' button are visible in the top right. The main content area features the heading 'Sales software to help you grow' and a list of six benefits, each preceded by a green checkmark. To the right of the list is an illustration of a green watering can with a white 'p' on its side, watering a small green plant with three leaves and a single blue drop of water. Below the main content, a banner states 'Used by over 100,000 companies in 179 countries'. At the bottom left, there is a Capterra 4.5/5 star rating. At the bottom right, a chatbot window is open with the message 'Hi there! Pipedrive's chatbot here, do you need any help?' and a 'Try it free' button.

**Sales software to help you grow**

Pipedrive is designed to:

- ✓ Help you close more deals
- ✓ Cut sales-related legwork
- ✓ Allow everyone on your team to collaborate better
- ✓ Automate sales tasks
- ✓ Support your customer communication
- ✓ Create customized sales reports

**Used by over 100,000 companies in 179 countries**

Capterra 4.5/5  
★★★★★

See why Pipedrive is so highly rated

Hi there! Pipedrive's chatbot here, do you need any help?  
Try it free

# What is HubSpot CRM?

- HubSpot is a cloud-based CRM platform that helps your company work together by aligning sales and marketing teams. In other words, the platform helps your company market more effectively.
- The founders of HubSpot noticed that consumers were beginning to ignore advertisements made to get their attention. So, they created something that would empower businesses and satisfy shoppers at the same time.
- [https://www.hubspot.com/our-story?utm\\_content=&utm\\_source=bing&utm\\_medium=paid&utm\\_term=crm %25252Bhubspot%252520%25252Bcrm\\_EN&utm\\_campaign=CRM Portals EN NAM NAM Brand-NF\\_p\\_c\\_campaignid367689965\\_agid1213861280015126\\_bin&utm\\_id=&msclkid=d67924f6132410e45b1f478f491828d5](https://www.hubspot.com/our-story?utm_content=&utm_source=bing&utm_medium=paid&utm_term=crm%25252Bhubspot%252520%25252Bcrm_EN&utm_campaign=CRM%20Portals_EN_NAM_NAM_Brand-NF_p_c_campaignid367689965_agid1213861280015126_bin&utm_id=&msclkid=d67924f6132410e45b1f478f491828d5)



# What does HubSpot Have to Offer?

HubSpot offers many different services but for the sake of this presentation I have researched their CRM and Sales prices.

The screenshot displays the HubSpot Sales Hub pricing page. At the top, navigation tabs include Free Tools, Marketing, Sales (selected), Customer Service, CMS, and Operations. The main heading is "Sales Hub®" with the tagline "The sales CRM software you need to organize your data and close more deals, fast." and a "Calculate your price" link. A currency selector on the left lists USD \$, EUR €, GBP £, AUD \$, JPY ¥, SGD \$, COP \$, and CAD \$.

Plan	Starts at	Billed at	Paid users	Payment Options	Key Features
Starter	\$45/mo	\$600 / \$540/yr	2	Pay Monthly (Commit monthly), Pay Upfront (SAVE 10%, Commit annually)	Free tools with increased limits, plus: REMOVE HUBSPOT BRANDING FROM: ✓ Live chat ✓ Meeting scheduling ✓ Documents ✓ 1-to-1 email STREAMLINE B2B BUYING (NEW) ✓ Payments (U.S. only)
Professional	\$450/mo	\$6,000 / \$5,400/yr	5	Pay Monthly (Commit annually), Pay Upfront (SAVE 10%, Commit annually)	Starter plus: MANAGE YOUR GROWING TEAM: ✓ Sales analytics ✓ Teams ✓ Sales automation ✓ Standard CRM interface configuration ✓ Required fields ✓ Custom reporting ✓ Forecasting
Enterprise	\$1,200/mo	\$14,400/yr	10	Pay Monthly (Commit annually), Pay Upfront (SAVE 10%, Commit annually)	Professional plus: CUSTOMIZE TO MATCH YOUR BUSINESS: ✓ Custom objects ✓ Hierarchical teams ✓ Sandboxes EXTEND ADMINISTRATIVE CONTROLS: ✓ Advanced permissions COACH & ENABLE AT SCALE

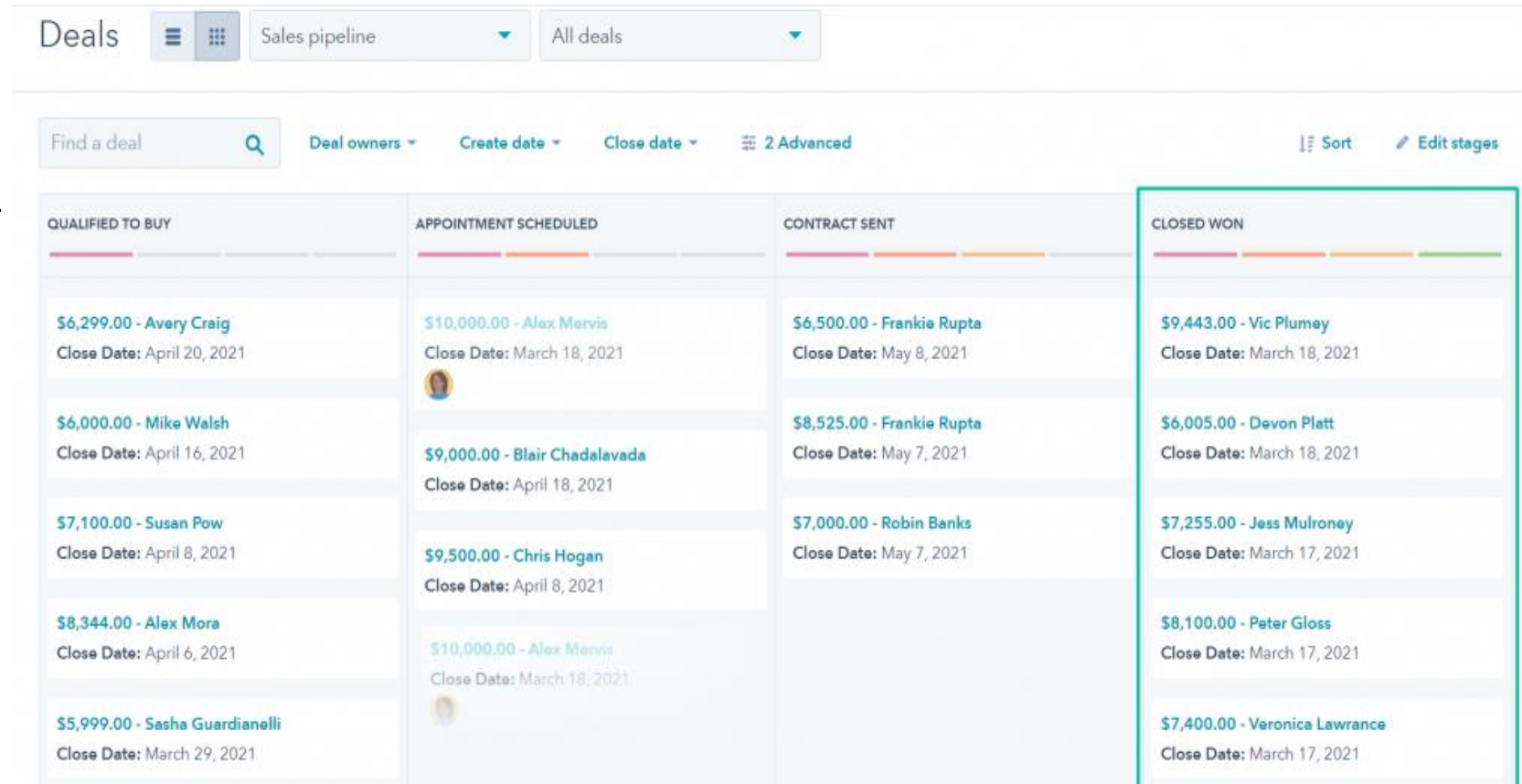
# HubSpot: Make customer interactions easier

- HubSpot offers:
- Call tracking- to prioritize, place, and record calls
- Live chat- to handle quick questions or concerns
- Email tracking- to automatically send follow up emails

<input type="checkbox"/>	TITLE ↕	TYPE ↕	ASSOCIATED WITH	DUE DATE ↕
<input type="checkbox"/>	Call Pam		Pam Williams	Mar 13, 2019 5:56 PM
<input type="checkbox"/>	Call Dave		David Debrule	Mar 13, 2019 5:56 PM
<input type="checkbox"/>	Call Tom		Tom Sullivan	Mar 13, 2019 5:56 PM
<input type="checkbox"/>	Follow up with Angela		Angie James	Mar 13, 2019 5:56 PM
<input type="checkbox"/>	Call Tom Sullivan		Tom Sullivan	Tomorrow
<input type="checkbox"/>	Call Taylor O'Neil		Taylor O'Neil	Tomorrow
<input type="checkbox"/>	Call Carlos Villalobos		Carlos Villalobos	Tomorrow
<input type="checkbox"/>	Call Angie James		Angie James	Tomorrow
<input type="checkbox"/>	Call Juan Miller		Juan Miller	Tomorrow

# HubSpot: How could a doula use it?

- HubSpot allows you to sync and share data easily. You can sync all data and interaction between you and a client. This makes it easier to access records of past visits at new appointments.
- HubSpot also automates your day-to-day tasks such as follow-up emails which saves time.



The screenshot displays the HubSpot CRM interface for a sales pipeline. At the top, there are navigation elements including 'Deals', a menu icon, a 'Sales pipeline' dropdown, and an 'All deals' dropdown. Below this is a search bar labeled 'Find a deal' and several filters: 'Deal owners', 'Create date', 'Close date', and '2 Advanced'. On the right side, there are options for 'Sort' and 'Edit stages'. The main area is divided into four columns representing different stages of the sales process, each with a progress bar at the top. The 'CLOSED WON' column is highlighted with a green border.

QUALIFIED TO BUY	APPOINTMENT SCHEDULED	CONTRACT SENT	CLOSED WON
\$6,299.00 - Avery Craig Close Date: April 20, 2021	\$10,000.00 - Alex Mervis Close Date: March 18, 2021	\$6,500.00 - Frankie Rupta Close Date: May 8, 2021	\$9,443.00 - Vic Plumey Close Date: March 18, 2021
\$6,000.00 - Mike Walsh Close Date: April 16, 2021	\$9,000.00 - Blair Chadalevada Close Date: April 18, 2021	\$8,525.00 - Frankie Rupta Close Date: May 7, 2021	\$6,005.00 - Devon Platt Close Date: March 18, 2021
\$7,100.00 - Susan Pow Close Date: April 8, 2021	\$9,500.00 - Chris Hogan Close Date: April 8, 2021	\$7,000.00 - Robin Banks Close Date: May 7, 2021	\$7,255.00 - Jess Mulronev Close Date: March 17, 2021
\$8,344.00 - Alex Mora Close Date: April 6, 2021	\$10,000.00 - Alex Mervis Close Date: March 18, 2021		\$8,100.00 - Peter Gloss Close Date: March 17, 2021
\$5,999.00 - Sasha Guardianelli Close Date: March 29, 2021			\$7,400.00 - Veronica Lawrance Close Date: March 17, 2021



# Salesflare:

- It is used for imputing data from sales that would take normally days and you can use it from your phone or computer to help make more sales.



The advertisement features the Salesflare logo at the top left, consisting of a stylized sun icon and the word "salesflare". Below the logo is the tagline "Simply powerful CRM" in a large, white, sans-serif font. At the bottom left, there is a prominent orange button with the text "TRY FOR FREE" in white, uppercase letters. To the right of the text, three devices are shown: a desktop monitor, a tablet, and a smartphone, all displaying the Salesflare CRM interface. The interface includes a navigation menu on the left, a central dashboard with various charts and data points, and a right-hand sidebar with additional options. The background is a dark blue gradient.

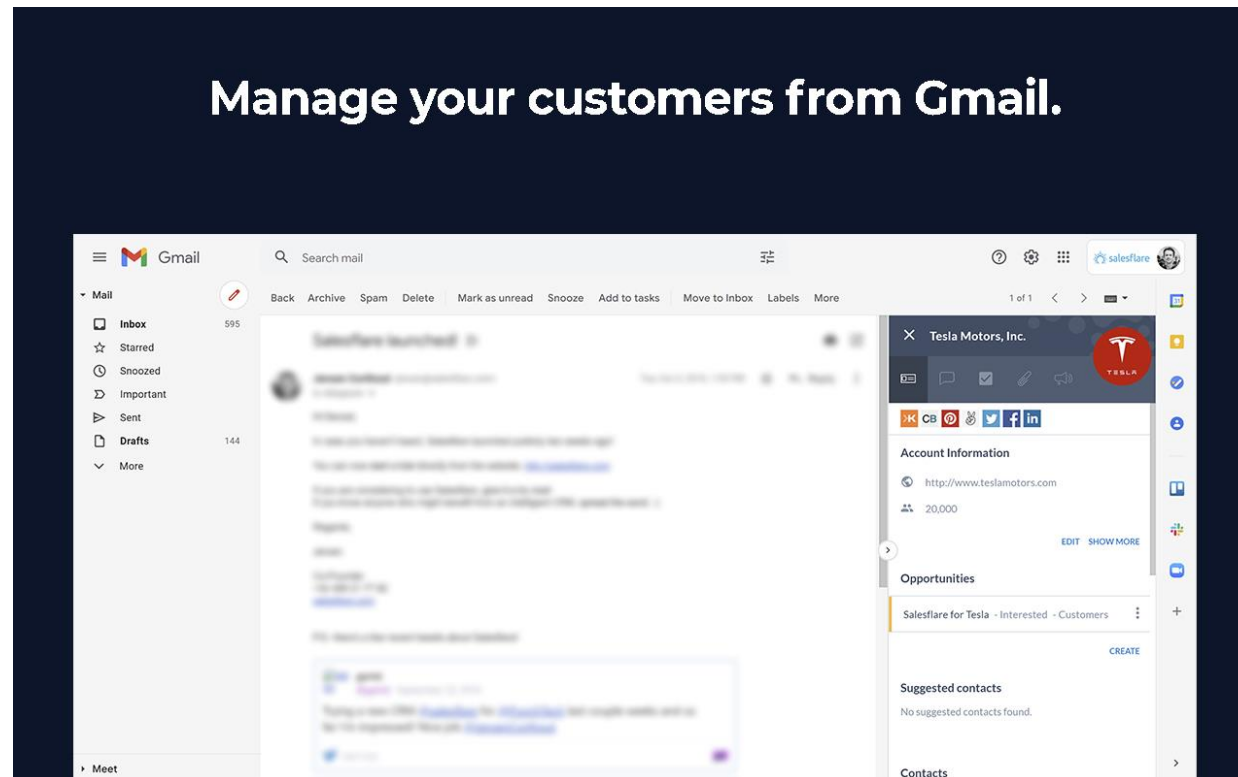
# Salesflare – How it can be used.

- This tool can be used to replace a telephone book, keep track of emails, LinkedIn Profiles, social profiles, postal addresses and more.



# Salesflare – relates to doula.

- We will not have to use time reporting and gathering the information because we will have automatic logging. We will be able to track customers easily.



# Salesflare – Customer interaction friendly

See when customers open emails or visit website. Real time notifications. They offer a free trial along with a subscription after that is not very expensive.

	most popular	
<b>Growth</b> <b>\$29</b> per user / month (billed annually) \$35 billed monthly	<b>Pro</b> <b>\$49</b> per user / month (billed annually) \$55 billed monthly	<b>Enterprise</b> <b>\$99</b> per user / month (billed annually) <a href="#">Contact us</a> (from 5 users)
All CRM features you'd expect, plus: <ul style="list-style-type: none"><li>✔ Automate your CRM data input ⓘ</li><li>✔ Track emails, links and website visits ⓘ</li><li>✔ Use a fully featured email sidebar &amp; mobile app ⓘ</li><li>✔ Send personalized email campaigns ⓘ</li><li>✔ 25 email finding credits (New!) ⓘ</li></ul>	All features on the Growth plan, plus: <ul style="list-style-type: none"><li>✔ Send workflows of multiple emails ⓘ</li><li>✔ Set user permissions ⓘ</li><li>✔ Create custom dashboards (New!) ⓘ</li><li>✔ 500 email finding credits (New!) ⓘ</li></ul>	All features on the Pro plan, plus: <ul style="list-style-type: none"><li>✔ Custom training ⓘ</li><li>✔ Data migration done for you ⓘ</li><li>✔ Dedicated account manager ⓘ</li><li>✔ Unlimited email finding credits (New!) ⓘ</li></ul>

# Conclusion:

Our Recommended Order of CRM Tools:

- 1- Streak
- 2- Pipedrive
- 3- Salesflare
- 4- HubSpot

This is the order our tools fall in when we compare their costs as well as functionality. The cheapest and easiest tool to use would be Streak, and the most expensive and difficult tool to use was HubSpot.

# Worked Cited:

Pipedrive Inc / Pipedrive. "About Us." *Pipedrive*,  
<https://www.pipedrive.com/en/about>.

Streak. "What Is Streak?" *Streak Support*,  
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HubSpot. "Hubspot CRM." *HubSpot CRM*,  
[https://www.hubspot.com/crm/e010a?utm\\_content=&utm\\_source=bing&utm\\_medium=paid&utm\\_term=crm\\_hu bspot+crm EN&utm\\_campaign=CRM Portals EN NAM NAM Brand-NF e c campaignid367689966 agid1216060302966728 bing&utm\\_id=&msclkid=e6e6df976be11c10690dbceb77c00874](https://www.hubspot.com/crm/e010a?utm_content=&utm_source=bing&utm_medium=paid&utm_term=crm_hu bspot+crm EN&utm_campaign=CRM Portals EN NAM NAM Brand-NF e c campaignid367689966 agid1216060302966728 bing&utm_id=&msclkid=e6e6df976be11c10690dbceb77c00874).

Salesflare. "Input Less Data, Make More Sales." *Less Admin*,  
<https://salesflare.com/feature1>.