HubSpot

Easy to use and easy to buy

Seat Types

View-only Seat	Core Seat	Sales & Service Hub Seat
View HubSpot features <u>without</u> edit access	Edit access to purchased Hubs and connection to Smart CRM	Everything included in a Core Seat plus Sales and Service features
Best for business leaders	Best for marketers, admins, developers, and operations.	Best for sales and service reps and enablement

Key Actions Taken

View-only Seat	Core Seat	Sales & Service Hub Seat
- View reports - View dashboards - View KPIs - View campaigns - View lists	- Edit data/records - Create and send marketing emails - Build website content or campaign assets - Maintain integrations or customizations - Oversee user/portal settings - Manage workflows - Generate reports	- Set up lead rotation - Make calls - Send prospecting emails - Create or use playbooks - Manage forecasting - Manage ticket and conversation routing

This is a representative list of actions each type of seat can take, and is not exhaustive.   Check out all HubSpot features here

What seat types do users need?

When deciding what seat type a user needs, reflect on the jobs they regularly perform within their role. Those jobs will require actions that map to a given seat type. Let's look at some examples:

I am a marketer who approves and sends marketing emails, views website analytics, and updates our web pages.

- This user needs a Core Seat. Though the ability to view website analytics can be accomplished with a View-Only Seat, the bulk of their tasks require a Core Seat.

I am Sales Operations Analyst. Though I don't use them myself, I need to create and manage the playbooks and email templates our reps use for prospecting.

- This user needs a Sales Seat. Though their role is primarily focused on management and reporting, their need to create sales assets that are only available with a Sales Seat.

I am a member of our Inside Sales team. My primary focus is sourcing leads. I log all of my activities in the CRM, but I don't perform any outreach to the leads.

- This user needs a Core Seat. Despite being a member of the sales team, their role is not involved in the core selling process.

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I am a support rep who manages incoming web, phone, and chat tickets. My job involves directly communicating with customers across those channels to help solve their problem.

- This user needs a Service Seat in order to make phone calls and send direct emails to their customers.

I am the Director of Revenue Operations. I oversee all operational functions including auditing process automation, defining employee access, and monitoring technological opportunities.

- This user needs a Core Seat. They need the ability to assign user permissions, edit workflows, action data quality recommendations, and more.

I am the Chief Financial Officer. I regularly review our core business KPIs including lead conversion rates, deal close rates, and NPS.

- This user needs a View-Only Seat. They have no need to edit any of the data or settings in HubSpot, they just need to be able to log-in and locate key reports and dashboards.