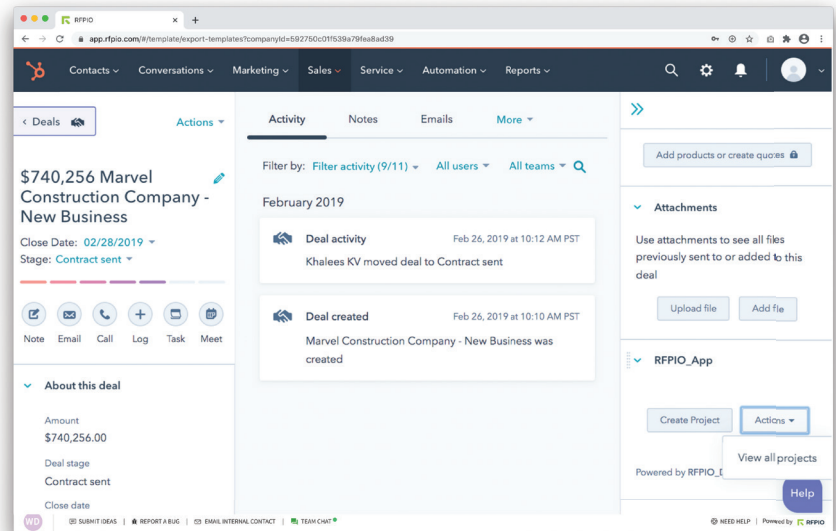


Hubspot integration

Connect your CRM to your response process



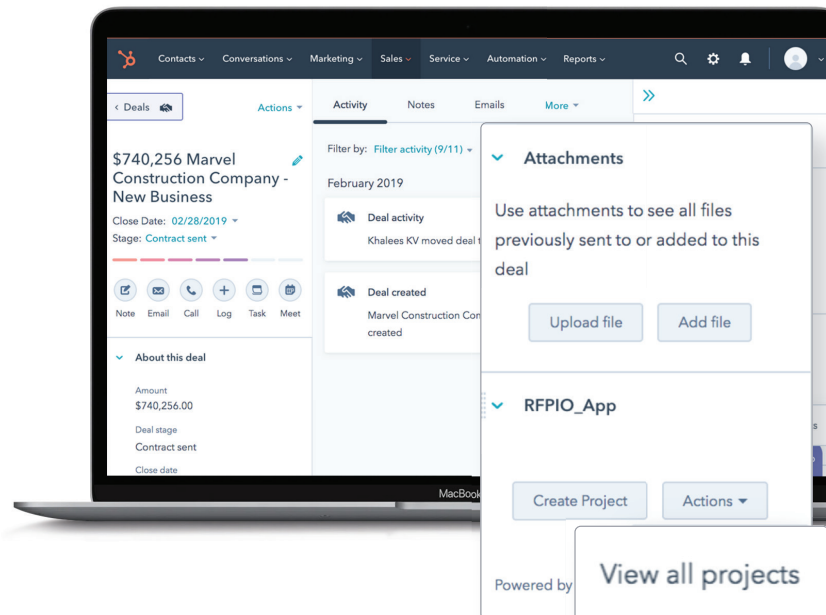
Your revenue teams are already rocking in their CRM. Keep the momentum going by extending proposal operation into the platform where sales teams already work: Hubspot! Submit project requests, track progress, and access proposal content without ever leaving Hubspot. Sales and proposal teams are better together, and connecting Hubspot with RFPIO is the best way to save time and win more!



Save time by simplifying the project creation process

Instead of going back-and-forth with sales teams to collect the information you need, kick-off projects directly from any Hubspot Deal page. All you have to do is click "Create Project", and it will immediately trigger a new project request within RFPIO.

- **Capture existing client, opportunity, and product information from Hubspot to include in project requests.**
- **Customize your project- request forms to contain all the information you need to properly evaluate bid and proposal requests.**
- **Upload RFX projects, Questionnaires, and any supporting documentation to a single place**



Hubspot integration

Connect your CRM to your response process

DATASHEET



Keep your teams aligned and projects on-track

Project requestors/creators can track the progress of current projects from the same place they submitted them in Hubspot. When proposal and customer-facing teams are aligned, they become untethered from constant status updates.

- **Check project status on the related Hubspot Deal**
- **Communicate whether a project is “Approved” or “Declined” through Hubspot**
- **Access completed response packets in Hubspot delivered by RFPIO**

