



WORKSHEET

HubSpot partner brief for a logistics business

HubSpot Partners for Logistics and Supply Chain, Compared by Project

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Fill this in once and send it to every partner you speak to. The answers show quickly whether a partner has done your kind of HubSpot work or only your kind of website.

EXHIBIT 1

Field	What to write	Your answer
Company and contact	Legal name, website, and who will own the HubSpot relationship internally	
Business type	Carrier, broker, forwarder, 3PL or warehouse, logistics software, or a mix	
Kind of work	CRM implementation, migration, integration, marketing automation or a Content Hub website, and which comes first	
Current systems	CRM, TMS, ERP, WMS, inboxes, telephony and portals, and who supports each	
Records to move	Contacts, companies, deals, quotes, carriers and emails, with rough counts and the oldest year you need	
Freight records	Records HubSpot needs beyond contacts and deals, such as RFQs, lanes, shipments or vehicle availability	
Data that crosses	Which TMS or ERP fields appear in HubSpot, in which direction, how often, and who owns the connection	

Field	What to write	Your answer
Carriers	How carrier contacts are kept apart from the sales pipeline	
Lead routing	Rules by territory, mode, equipment or vertical, and the response time you want	
Hubs and seats	Which hubs, which edition, how many seats, and who in your team needs one	
Licence and fees	HubSpot licence and required onboarding fee, the partner's fee, and whether one replaces part of the other	
Reporting	The pipeline, quote and win rate reports leadership will read each week	
Adoption	Who is trained, how, and the rule that makes the CRM the only place a deal can live	
Ownership	Who holds admin rights, partner seats and integration credentials if the contract ends	

Meridian Land Ventures LLC, trading as Vektor Group, Tallinn, Estonia