HUBSPOT FOR ATLAS AGENTS

HubSpot

Atlas Canada

1 WHAT IS HUBSPOT?

- HubSpot is a digital platform that helps manage your sales process. It replaces legacy systems like ACM and centralizes tools like lead tracking, email communication, customer notes, and reporting—into one easy-to-use system.

2 WHY IS ATLAS MOVING TO HUBSPOT?

- To improve efficiency, eliminate duplication, and give Agents better tools to manage and follow up on Atlas-generated leads. It also gives Atlas and Agents access to consistent, real-time reporting.

3 WHAT WILL I USE HUBSPOT FOR?

In this first phase, Atlas Agents will use HubSpot to:

- Enter leads
- Manage leads provided by Atlas
- Connect to survey tools (e.g. Yembo)
- Track communications with customers
- View and manage deals in the pipeline
- Access dashboards and performance reporting

4 IS THIS REPLACING ACM?
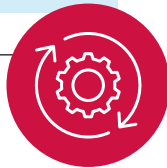
- **Yes.** HubSpot will replace the ACM system for sales and lead management functions.

5 IS TRAINING PROVIDED?

- **Yes.** Live training sessions will be held between September and November. Agents will also receive videos, short cheat sheets, and weekly rollout emails.

6 WHAT IF I'M NOT TECH-SAVVY?

- **No problem.** The rollout is designed to be accessible and easy to follow. You'll get step-by-step guidance and support.

7 WHEN DOES THIS START?

- Training begins in September. The rollout will happen in three phases, and you'll be assigned to a group with a clear timeline and support.

8 WHO DO I CONTACT FOR HELP?

- Your rollout lead or the Atlas HubSpot Support Team. Contact details will be included in every rollout email.