



# Navigating ACM: A Guide to the HubSpot Transition



# Agenda

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4

**Intro to HubSpot**

**Important Changes  
to Lead  
Management**

**ACM Walk-Through**

**Next Steps**

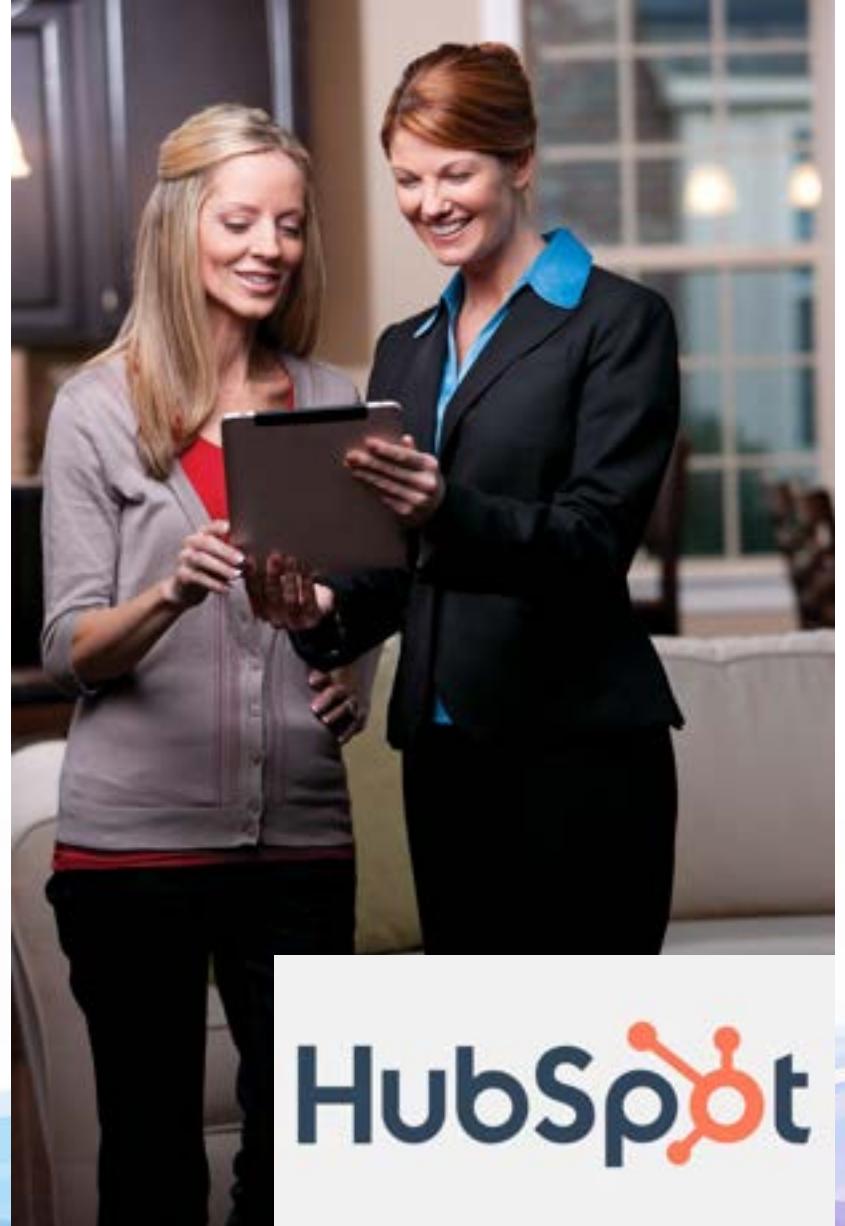


# Introduction to HubSpot

# Introduction: Why HubSpot?

**Why HubSpot and how will it benefit you:**

- All-in-one CRM tool
- Better Reporting
- Seamless Integration
- Scalable for Growth





# Important Changes to Lead Management

# Important Changes:

1

## Instant Quote Enhancement

- Enhanced Instant Quote feature to enable better tracking and optimize the customer journey, resulting in improved lead quality and higher conversion rates.

2

## Lead Manager Sunset

- The management of all leads must be done in AtlasNet Customer Manager (ACM) until we transition to the HubSpot interface in Q4 2025.

# Important Changes:

3

## Lead Management Process Update: ACM

- **Auto-Acceptance of Leads:** The process of accepting leads will be automated. Manual acceptance will no longer be needed.
- **Email Notifications:** You will receive email notifications at the same addresses that currently receive lead notifications with a link to the customer record in ACM.
- **Sales Rep Assignment Changes:** During this transitional period, leads will be assigned to agent offices only rather than to specific salespeople.
- **Declining Leads:** Currently there is no option to cancel leads during this transitional period. As we move into the HubSpot platform we will be putting in place more workflows to help with lead management efficiencies. Contact us if there is a lead outside of your service area.

# Important Changes:

4

## Updating Leads in ACM

### Business Details

#### Business Status

New Customer

New Customer

New Lead

Customer Contacted

Survey Scheduled

Survey/Estimate

Estimated

Booked

Rated/Billed

Lost

Cancelled

Save

### Currently Viewing Williams, Carol

#### Customer Details

First Name: Carol

Last Name: Williams

Customer ID: 1622239

Company: Atlas Van Lines

ODD Identifier:

#### Current Address

Address 1:

Address 2:

Zip: M2J 0G9

City: North York

State/Prov: ON

Country: CA

County: North York (Fairview / Henry)

#### Destination Address

Address 1:

Address 2:

Zip: B2Y 3Y5

City: Dartmouth

State/Prov: NS

Country: CA

County: Dartmouth South Central

#### Current Contact Information

Primary Phone: 1 (647) 984-0918 Ext: Home

Secondary Phone: CC Number Ext: Home

Primary Email: carol.williams@live.ca

Secondary Email:

Do Not Contact:

Lang. Pref: English

Add Email:

Preferred Contact:

Secondary Phone:

Primary Email:

Secondary Email:

Do Not Contact:

Lang. Pref: English

Add Email:

Save:

Cancel:



Atlas  
Canada

# Important Changes:

5

## Changes to Lead Distribution

- **Market Coverage:** Each agent is responsible for specific markets. Multiple agents may cover the same market area. Each agent's territory extends to a 50-mile radius and includes all postal codes within that area.
- **Booking Ratio:** Agents are evaluated based on their closing ratio in ACM. Higher-performing agents receive more leads, but all agents get opportunities to receive leads.



# **AtlasNet Customer Manager (ACM) Walk-Through**

# ACM Platform Walk-Through

## AtlasNet Customer Manager Link

- Customer Job Grid
- Updating Lead Status
- Customer Lookup
- How to Link a Customer

AtlasNet Customer Manager

Atlas System for Customer and Workforce Management

Atlas CM v1.23.1.1 Atlas CRM Service v1.23.1.2

Customer Job Grid Survey Report Job Stop Report Lead Report Jacquelyn McCulloch (jmcclou) ▾

Atlas Video Survey will be sunset on August 12th, 2024. Please utilize the Yembo Survey tool for any video surveys after that date.

Job Grid Actions: Customer Lookup, QuickCalculator

Job Grid Filters: From, To, Agency, Salesperson, Grid Limit, Apply, Clear

All Jobs: New Customer, New Lead, Customer Contacted, Survey Scheduled, Estimated, Booked, Lost, Cancelled

Lead ID	Order Number	Book Agent	Status	Salesperson	CSR	Name	PU	Dec	C
1622068		8360	New Lead			Sullivan, Kalynn	NS	NS	11
1622067		2270	New Customer			ASHLEY, JOE			11
1622066	RC023610	0217	Booked			SU-VELEZ, BROOKE	CA	OR	11
1622065		6850	New Lead			Donnelly, Nakisa	BC	BC	11
1622064		1511	New Lead			Priddy, Patty	TX	CO	11
1622063	RC023600	0217	Booked			DIMINO, JULIUS	OR	CO	11
1622062		2270	Survey Scheduled		MELBAK2	BOZIC, MICANELA	SC	IA	11
1622061	RC023580	2470	Booked	TEEGLEA	vickac2	LONG, DEVIN	VA	GA	11
1622060	RC023570	0208	Booked			TIWARI, ROHAN	WA	CA	11
1622059		1032	Survey Scheduled	johnmags	patcamp	Wendt, Maegen	IN	IN	11
1622058		8318	New Lead			Eddy, Jennifer	AB	AB	11
1622057		2472	New Lead			Eriksson, Beau	MN	NU	11

# Next Steps

# Key Milestones & Timelines

## Phase 1: IN PROGRESS

- Creating Atlas Canada's own HubSpot Instance and moving out of the AWG Instance.

## Phase 2:

- Transitioning Agents from AtlasNet to HubSpot Platform in Q4 of 2025.

# Key Contacts

***Jackie McCulloch***

Marketing Manager

[jmcculloch@atlasvanlines.ca](mailto:jmcculloch@atlasvanlines.ca)

***Scott Madden***

Manager IT

[smadden@atlasvanlines.ca](mailto:smadden@atlasvanlines.ca)

***Abbie Lawrie***

Marketing Coordinator

[alawrie@atlasvanlines.ca](mailto:alawrie@atlasvanlines.ca)

***Jamie Patterson***

VP Growth & Strategic Alliances

[jpatterson@atlasvanlines.ca](mailto:jpatterson@atlasvanlines.ca)