IS YOUR CRM TOTAL EXPERIENCE-READY?

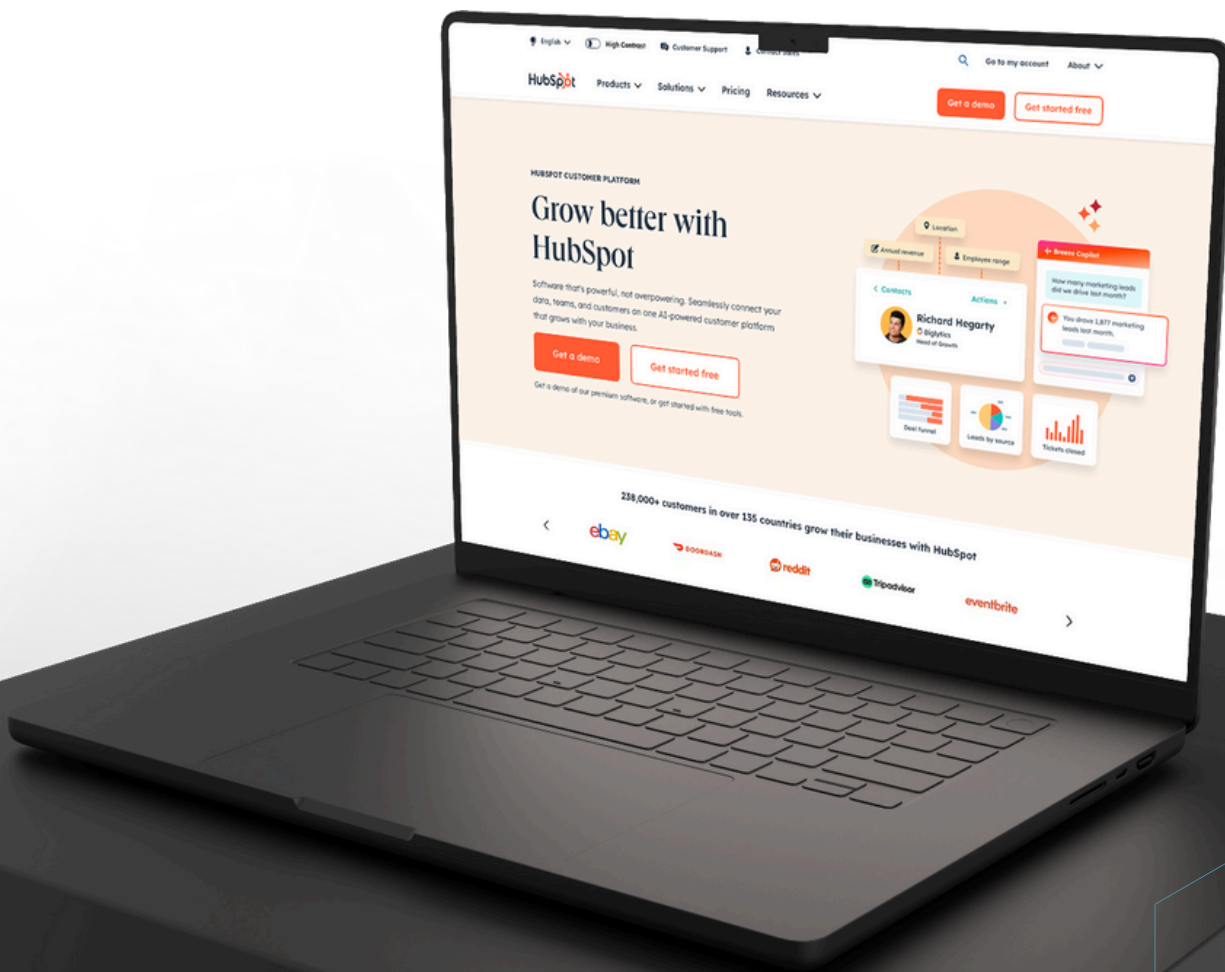## 11 Points to Check for Scalable Business Growth

Managememt Summary

This checklist will help readers quickly assess their current CRM against key criteria that are aligned with a Total Experience (TX) approach. This download provides immediately actionable insights, prompting a desire for further exploration with PixelMechanics.

Why this matters

Achieving sustainable growth requires a powerful CRM that integrates into your entire business ecosystem creating a single source of truth. This checklist will guide you in assessing whether your current CRM supports the key elements of a Total Experience (TX) vision and if it is truly designed to help your business achieve its next level of success.

11-Point Checklist to evaluate your CRM:

Unified Data View

Does your CRM centralize customer data across all touchpoints, providing a complete view of the customer journey?
HubSpot centralizes data for a clear view.

Automated Workflows

Can your CRM automate tasks such as lead nurturing, follow-ups, and reporting to improve team efficiency and minimize mistakes?
HubSpot provides extensive automation capabilities.

Omnichannel Integration

Do your sales and marketing operations provide seamless experiences across email, social media, website live chat?
HubSpot is fully integrated for a unified customer experience.

Personalization at Scale

Does your CRM offer tools for creating custom segments, tailoring content, and personalizing customer interactions at scale?
HubSpot uses AI to segment customers and tailor experiences.

Real-Time Data Analytics

Does your CRM provide dashboards and reporting that show you clearly both how to reach the next customer and identify bottlenecks?
HubSpot provides actionable business intelligence.

State-of-the-Art AI Integration

Does your system offer seamlessly integrated AI-powered tools that enhance various operations from data analysis to personalized communication and predictive forecasting?
HubSpot seamlessly integrates cutting-edge AI throughout the platform.

11-Point Checklist to evaluate your CRM:

Integrated Marketing & Sales

Does your CRM platform unify your marketing and sales efforts to create a cohesive system for customer acquisition and management?
HubSpot combines marketing and sales for unified campaigns.

Scalable Solutions

Does your platform provide room to grow so you are able to quickly expand your reach or your internal teams without requiring complex or confusing workarounds?
HubSpot works for businesses of all sizes.

Employee Empowerment

Does your CRM empower employees to access information, automate workflows, and personalize customer engagement?
HubSpot promotes employee efficiency and productivity.

Mobile Accessibility

Can your team use your tech on the go? Does your system support mobile optimization so your teams can work anywhere, anytime?
HubSpot provides robust mobile access.

Actionable Reporting and Results

Is your CRM able to tell you exactly where your efforts are working, and where they are failing in a format that's easy to understand?
HubSpot simplifies data for faster decision-making.

Ready to transform your CRM into a Total Experience powerhouse?

Let PixelMechanics help your business scale into the future with HubSpot. Visit our website today for a free consultation, or to learn more about how HubSpot can transform your business.

BOOK YOUR FREE CONSULTATION TODAY!

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