

PARTNER PRODUCT LEARNING HOUR

# Client Access Management

July 2024

For Partner Use Only

**CONFIDENTIAL**

Do Not Distribute

# Meet our Speaker

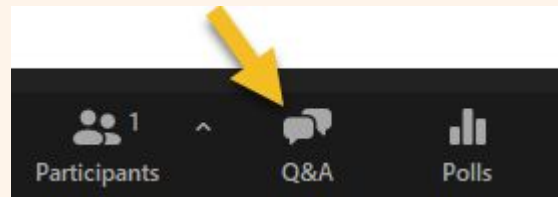


**Lock Whitney**

Product Manager

# Questions?

Please make sure you use the **Q&A feature** on Zoom (not chat) and we'll answer your questions at the end of today's presentation.



**Abby Panozzo**  
Product Lead - Flywheel  
Partner Product Group



**Alina Radko**  
Design Lead



**Javier Riera Peiró**  
Engineering Lead -  
Partners



**Louise Kissane**  
Sr. Business Systems  
Analyst

# Confidentiality Reminder

This presentation contains confidential information. As partners and providers, all of you are bound by Confidentiality obligations under the HubSpot Solutions Partner Program Agreement.

We're sharing this with you to help educate and prepare your business so you can better serve your clients and go to market with HubSpot. Please Use Good Judgement in relation to this presentation and its contents, specifically in relation to those slides marked "Confidential".

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This presentation includes statements regarding planned or future development efforts for our existing or new products or services. These statements are not intended to be a promise or guarantee of future availability of products, services, or features but merely reflect our current plans based on factors currently known to us. They also are not intended to indicate when or how particular features will be offered or at what service tier(s) or price. These planned and future development efforts may change without notice. Purchasing decisions should not be made based on reliance on these statements.

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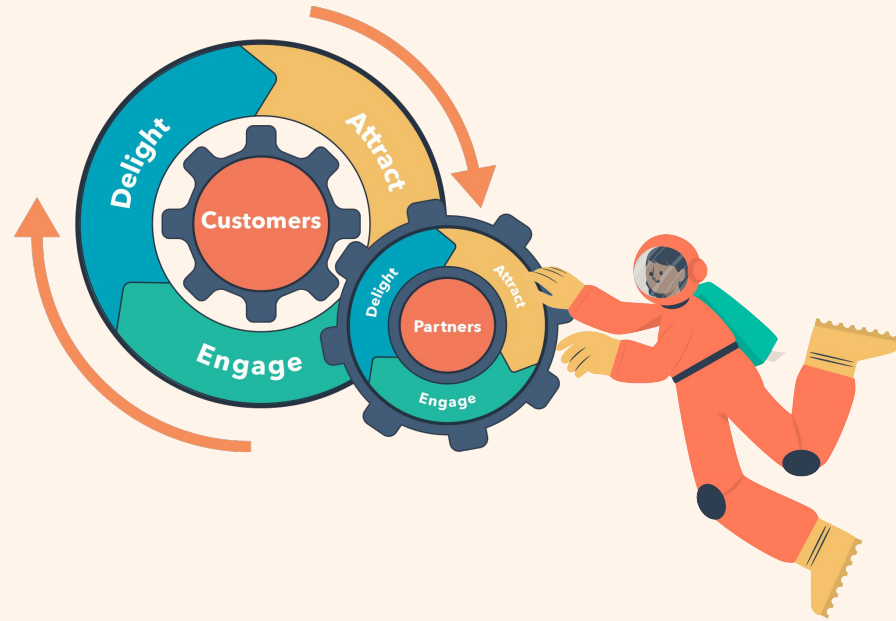
## **Q&A**

Let's talk!

# Introduction

Why are we here today?

# Partners have a huge impact





# By the numbers...



**28K+**

**Partner  
Employees**

Implementing and  
supporting the  
HubSpot product

**55K+**

**Customer  
Accounts**

Benefiting from  
Partner skills and  
expertise

# But there are pain points...



## Ease of Use

// So you literally have to go in and manually add people each time with custom permissions and set everything up all over again [for every new client] - **it's a pain in the butt!** //

- CEO from Platinum Partner [NAM]



## Trust & Safety

// **We don't want everyone being super admin...** but we have a problem with people willy nilly assigning team mates as super admins [in client accounts] //

- CTO from Elite Partner [NAM]


# The Product

How does the product work?



# Partner Seat

< Back to all users



**Lock Whitney**  
Active | lwhitney@hubspot.com | Provider employee  
[View user lwhitney@hubspot.com in Atlas](#)

Seats + permissions

Access

Setup

Profile

### Seat

Seats give access to features across HubSpot. This access can be managed with permissions.

Partner Seat

[Change seat](#)

The **Partner Seat** is a free Seat that gives eligible Partner Employees access to all features in a client's account.



# Partner Admin Permission

Lock Whitney

> Assign a seat

Partner Seat

> Choose how to set access

Manually assign permissions

> Narrow access with permissions

Permissions narrow down access to HubSpot tools and features.

[Learn more about permissions](#)

Partner program

Marketing

Sales

Service

Reports

More

Partner Admin

Let verified Partner Employees manage your account and add or edit other Partner Employees

☒

The **Partner Admin Permission** is a unique Partner permission that includes a variety of permissions currently restricted to super admin as well as the ability for multi-account user management.



# Partner Admin Permission Set

Louise Kissane

> Assign a seat

Partner Seat

> Choose how to set access

Start with a template

▼ Narrow access with permissions

Permissions narrow down access to HubSpot tools and features.  
[Learn more about permissions](#)

Select template

Partner admin

▼

Reset changes

The **Partner Admin Permission Set** is a suitable alternative to super admin for Partner Employees working in Client accounts. It also includes the **Partner Admin Permission**.





# Client Access Manager

**Client Access Manager**













Clients Employees

Manage your employees' and contractors' client account access from one place

Search 

Actions 

Get access link

CLIENT 	YOUR ACCESS TYPE 	TOTAL EMPLOYEES 
 <b>make-a-deal-08934d5a-4b1e-4</b> Hub ID - <b>886618329</b> 	 Partner Admin	2
 <b>make-a-deal-2c1cb966-85fb-4a</b> Hub ID - <b>886618334</b> 	 Super Admin	2
 <b>seatless-corporation.com</b> Hub ID - <b>886868527</b> 	 Partner Admin	4

**Client Access Manager** is a new app in Partner accounts that helps Partner Admins manage Partner Employee access to Client accounts

# Product Demo!





# Feedback

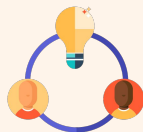
What are we hearing and how are we taking action?

# What **improvements** are we making?



## **Partner Admin Permissions**

How can we make the Partner Admin permission set reliable?



## **Access Management**

How can we further improve Client Access Manager?



# Partner Admin Permissions

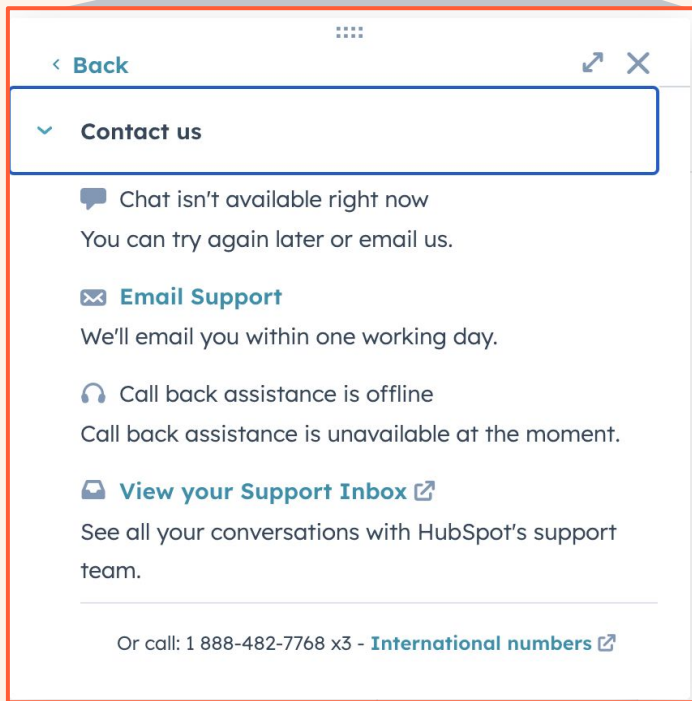
## Fixing gaps in feature access

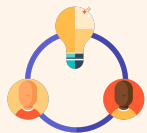
Thanks to your feedback we've been able to add Partner Admin access to features including:

- CRM Development Tools
- App integrations
- Sandboxes
- Custom permission sets
- Product betas
- Deal management settings
- Approval settings

...and more!

# Share *permission issues* with Technical Support





# Access Management

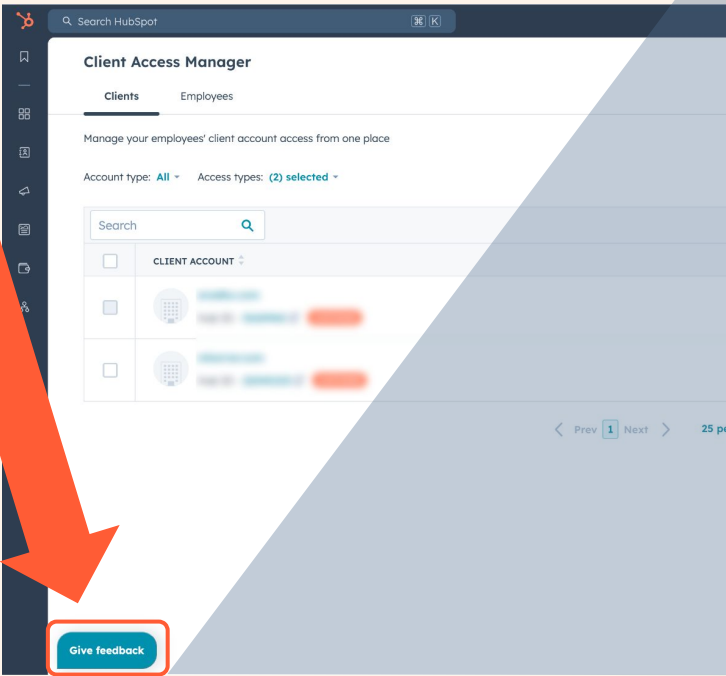
## Making it easy to manage access

Based on your feedback we've improved Client Access Manager with::

- Unified Client list with all Clients
- Unified Employees list with all Employees
- New filters (access type, account type)
- Ability to add an Employee to multiple Client accounts
- Ability to change Employee permissions in multiple Client accounts

and more!

# Share *app feedback* with us **directly**



The screenshot shows the HubSpot Client Access Manager interface. A large red arrow points from the top left towards a 'Give feedback' button located in the bottom left corner of the interface. The button is highlighted with a red border.

**Client Access Manager**

Search HubSpot

Clients Employees

Manage your employees' client account access from one place.

Account type: All Access types: (2) selected


Search

CLIENT ACCOUNT


Prev 1 Next 25 per page

**Give feedback**

### How can we help?



**Report a bug**  
Report an error or potential bug



**Give feedback**  
Make suggestion or add feature request

**Subject line \***

**Details \***

Please provide as much detail as possible. What problem will this solve and who will it help? What is the impact of this suggestion?

Submit Cancel

# What product opportunities **you want next** in the Client Access Manager?

<b>Custom permission sets</b>	When creating users or editing/updating user permissions in Client Access Manager I want to use custom permission sets in client accounts so that I can comply with custom permissions defined by my Clients in their account
<b>Copy/paste permissions from one employee to another</b>	When adding new employee to a client I want to copy paste permission set from another employee with the same role.
<b>Default employee permission sets</b>	As a Partner Admin I want to set a default permission set for a Partner Employee so that I can more quickly add that Employee to future Client accounts
<b>Employee activity in client accounts</b>	I want to see what activities partner employees are doing in client accounts so that i can: <ul style="list-style-type: none"><li>• manage their performance</li><li>• understand the activities that go into service delivery</li><li>• be transparent with clients around activities going into service delivery</li></ul>
<b>Integration of Client access with Confirmation links</b>	When creating a Confirmation link I want to be able to specify the partner admin so that when the confirmation link is confirmed by the customer I have automatic access to the client and can start adding employees to service account
<b>Teams for partner employees</b>	As a Partner Admin adding new partner employees to an existing client, I want to be able to assign a Team to my new Partner Employees in the client account
<b>Timeline of employee management changes on each client</b>	I want to see activity timeline of employees were edited in a given client account: who and when edited employee permissions, added new employee or removed an employee
<b>Overview of managed MRR on each client</b>	I want to be able to see at a glance which client account are not brining Managed MRR

**Vote here**

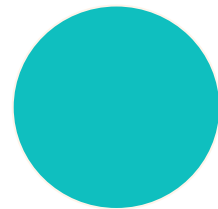


Event code  
**#40 60 356**

# Q&A

Let's talk!





## Before you go...

- Please share your feedback in our survey

**[https://survey.hsforms.com/12Bll86XRTLg1XfgJaou\\_bAz7et](https://survey.hsforms.com/12Bll86XRTLg1XfgJaou_bAz7et)**