

PARTNER PRODUCT LEARNING HOUR

Client Access Management

July 2024

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Meet our Speaker

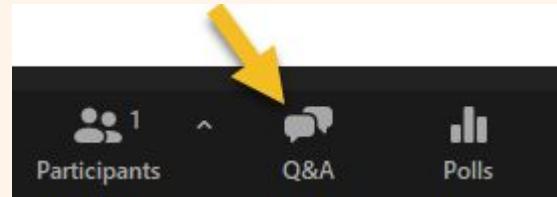


Lock Whitney

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.



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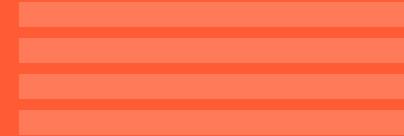
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A Note Regarding Forward-Looking Statements

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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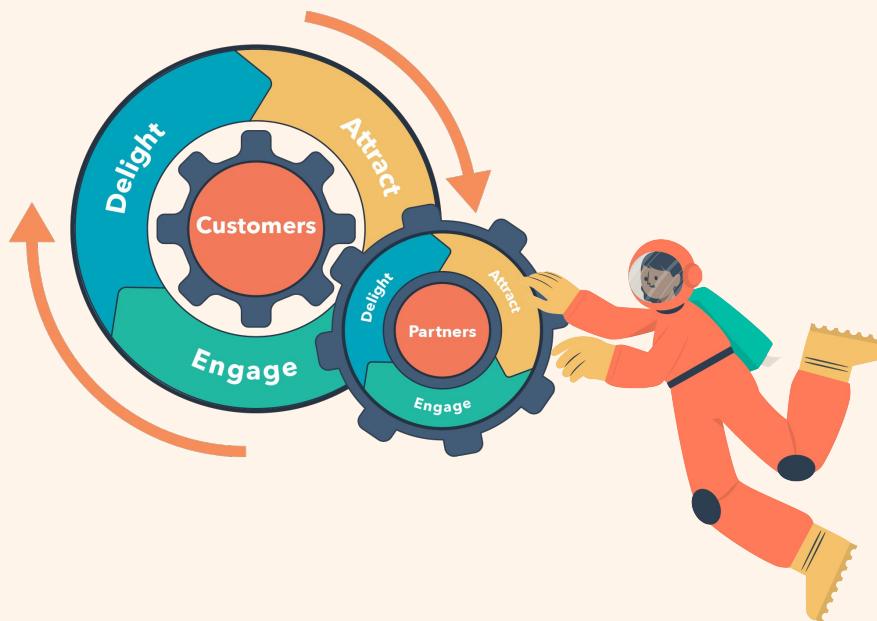
Q&A

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 X

- 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 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 X

- > 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
 make-a-deal-08934d5a-4b1e-4 Hub ID - 886618329 	 Partner Admin	2
 make-a-deal-2c1cb966-85fb-4a Hub ID - 886618334 	 Super Admin	2
 seatless-corporation.com Hub ID - 886868527 	 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



A screenshot of the 'Contact us' support page. The page has a header with a back button and a close button. Below the header, there are three main sections: 1. 'Chat isn't available right now' with a note that users can try again later or email. 2. 'Email Support' with a note that emails will be responded to within one working day. 3. 'View your Support Inbox' with a note that users can see all conversations with the support team. A large red box highlights the 'Email Support' section. At the bottom of the page, there is a note to call 1 888-482-7768 x3 or international numbers.

Or call: 1 888-482-7768 x3 - [International numbers](#)



Access Management

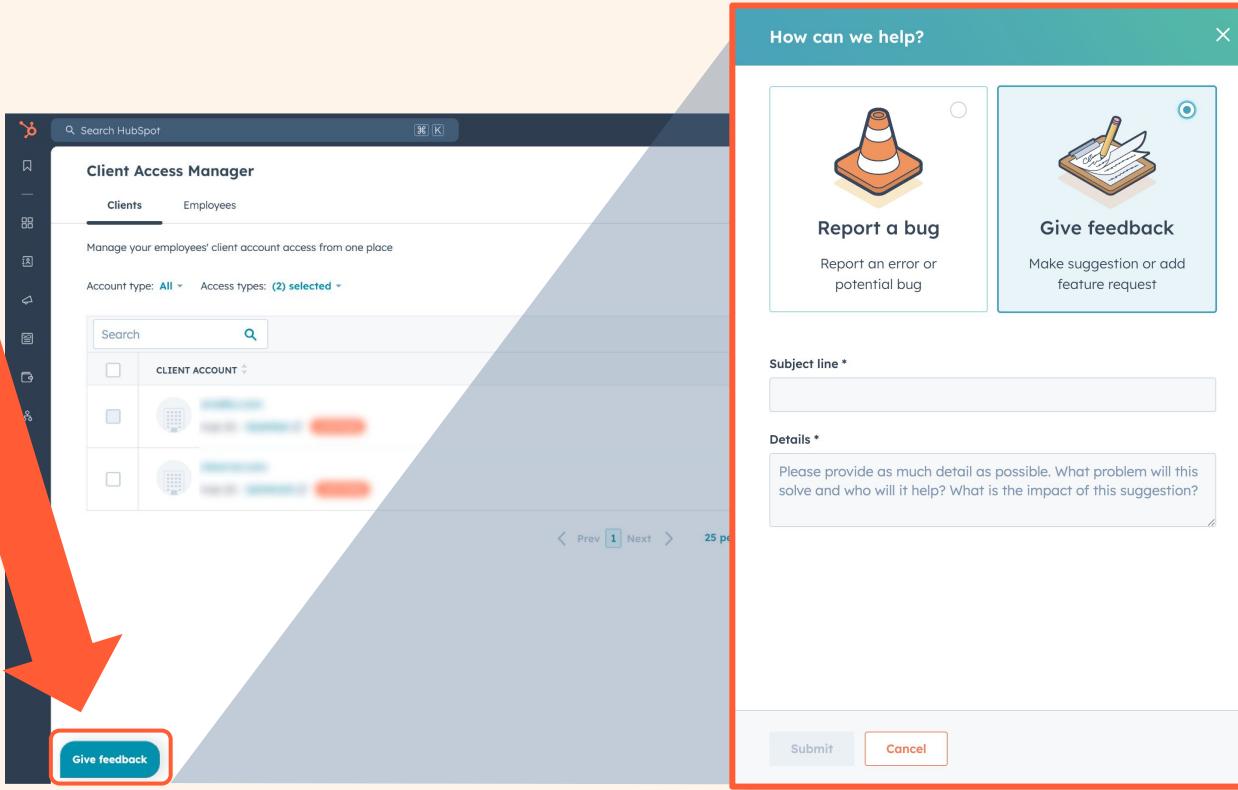
Making it easy to manage access

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 image illustrates a user interface for managing client access within a software application. On the left, the 'Client Access Manager' screen is displayed, showing a list of clients and employees. A large orange arrow points from the 'Give feedback' button at the bottom of this screen to the corresponding button in a modal window on the right. The modal, titled 'How can we help?', offers two options: 'Report a bug' (represented by an orange traffic cone icon) and 'Give feedback' (represented by a clipboard with a pencil icon). Both options include a brief description and a text input field for details. The 'Give feedback' section also includes a note about providing as much detail as possible. At the bottom of the modal are 'Submit' and 'Cancel' buttons.

Client Access Manager

Clients Employees

Manage your employees' client account access from one place

Account type: All (2 selected)

Search

CLIENT ACCOUNT

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?

Custom permission sets	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
Copy/paste permissions from one employee to another	When adding new employee to a client I want to copy paste permission set from another employee with the same role.
Default employee permission sets	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
Employee activity in client accounts	I want to see what activities partner employees are doing in client accounts so that I can: <ul style="list-style-type: none">• manage their performance• understand the activities that go into service delivery• be transparent with clients around activities going into service delivery
Integration of Client access with Confirmation links	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
Teams for partner employees	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
Timeline of employee management changes on each client	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
Overview of managed MRR on each client	I want to be able to see at a glance which client account are not bringing Managed MRR

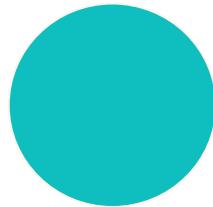
Vote here



Event code
#40 60 356

Q&A

Let's talk!



Before you go...

- Please share your feedback in our survey

https://survey.hsforms.com/12BII86XRTLG1XfgJaou_bAz7et