PARTNER PRODUCT LEARNING HOUR

Client Access Management

July 2024

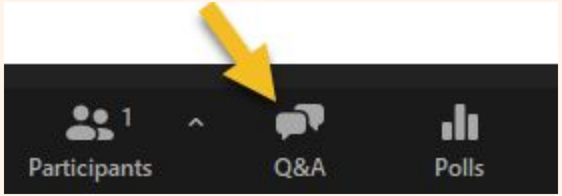
Meet our Speaker

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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Confidentiality Reminder

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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.

These statements are being made as of today July 18, 2024 and we assume no obligation to update these forward-looking statements to reflect events that occur or circumstances that exist or change after the date on which they were made. If this presentation is viewed after this date, these statements may no longer contain current or accurate information.

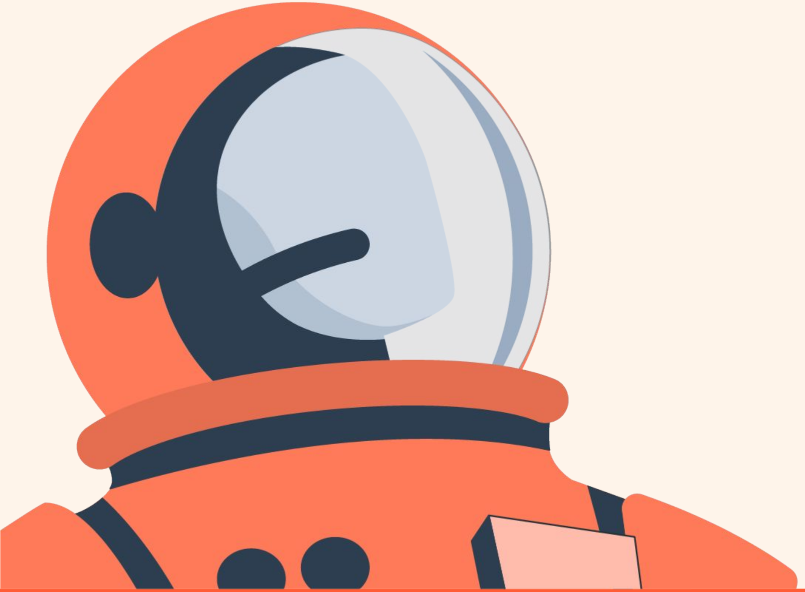
Contents

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

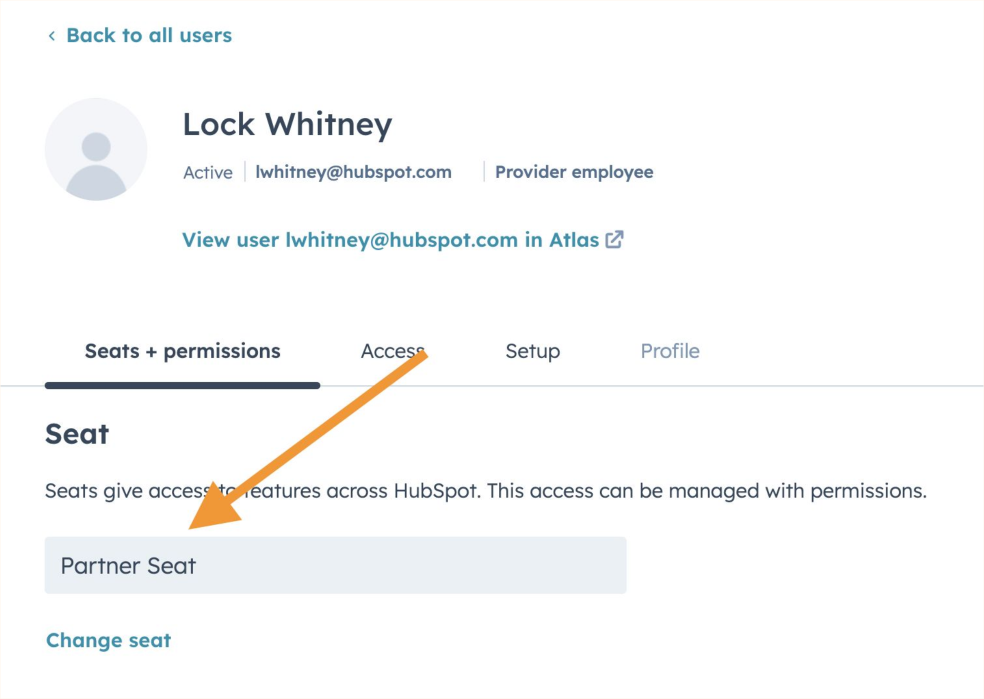
"**We don't want everyone being super admin...** but we have a problem with people willy nilly assigning team mates as super admins [in client accounts]"

- CTO from Elite Partner [NAM]

The Product

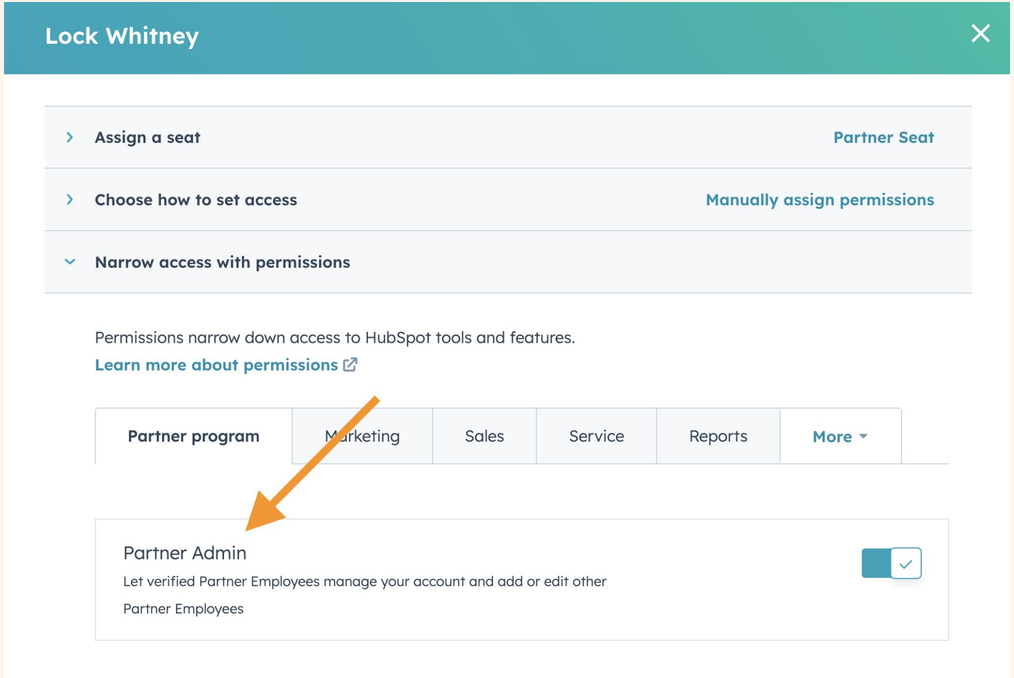
How does the product work?

Partner Seat



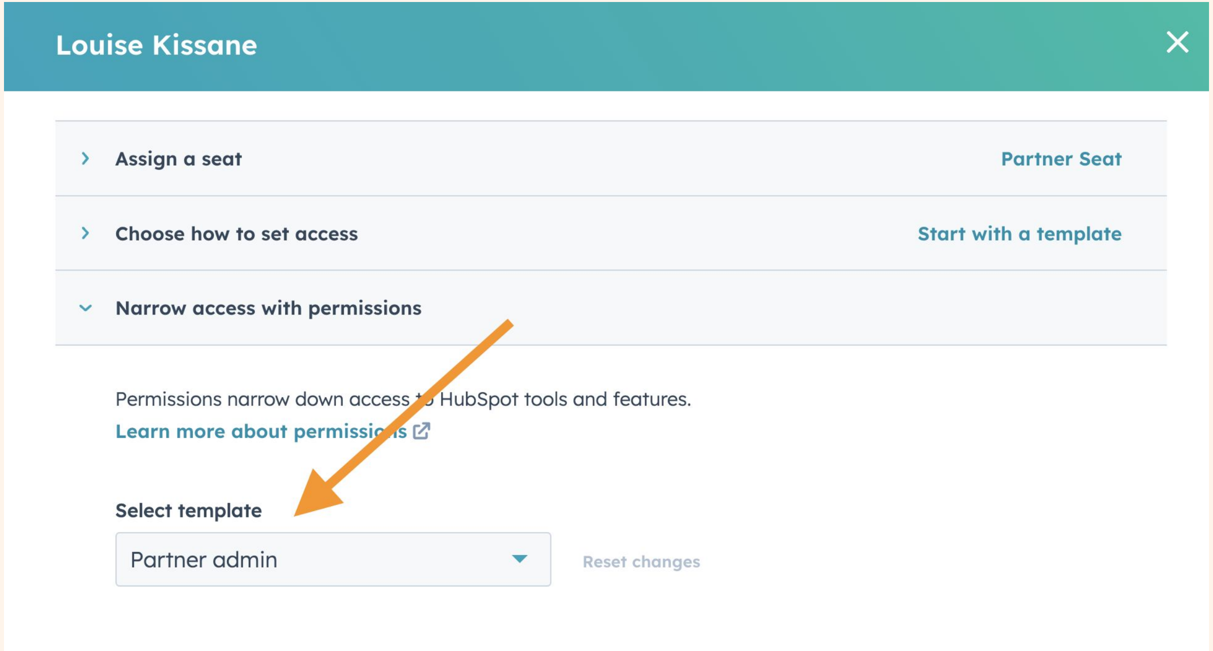
The **Partner Seat** is a free Seat that gives eligible Partner Employees access to all features in a client's account.

Partner Admin Permission



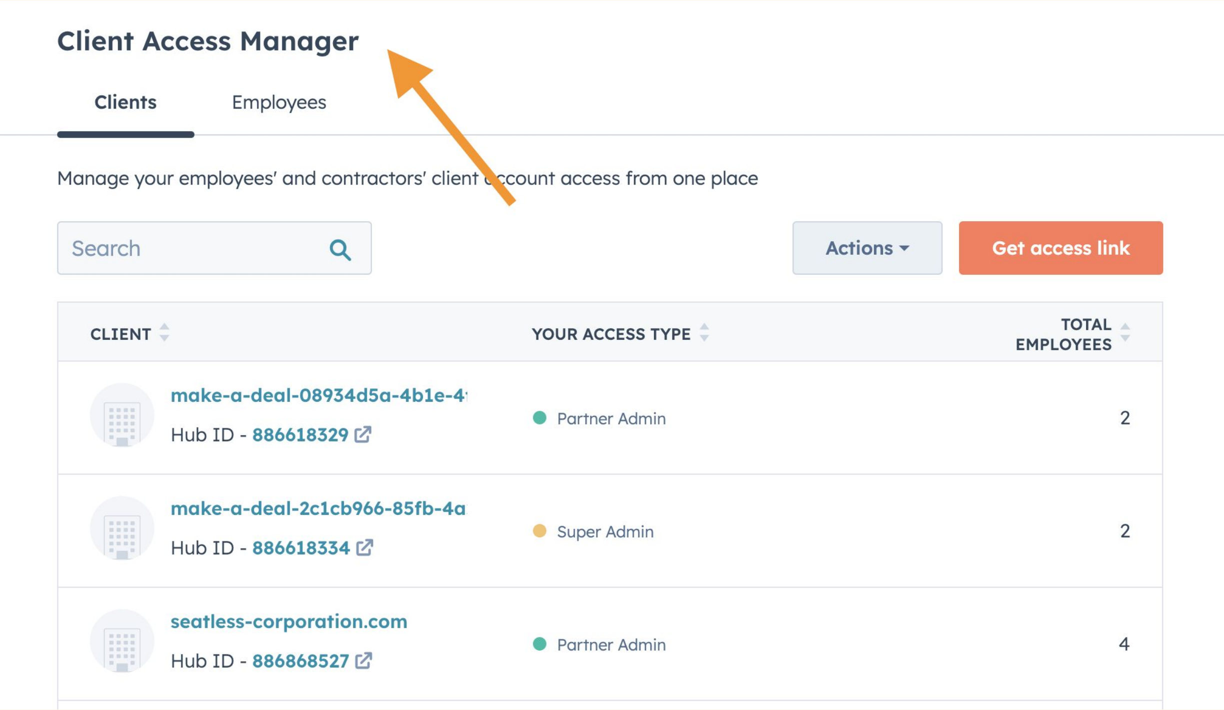
The **Partner Admin Permission** is a unique Partner permission that includes a variety of permissions currently restricted to super admin as well as the ability for multi-account user management.

Partner Admin Permission Set



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 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

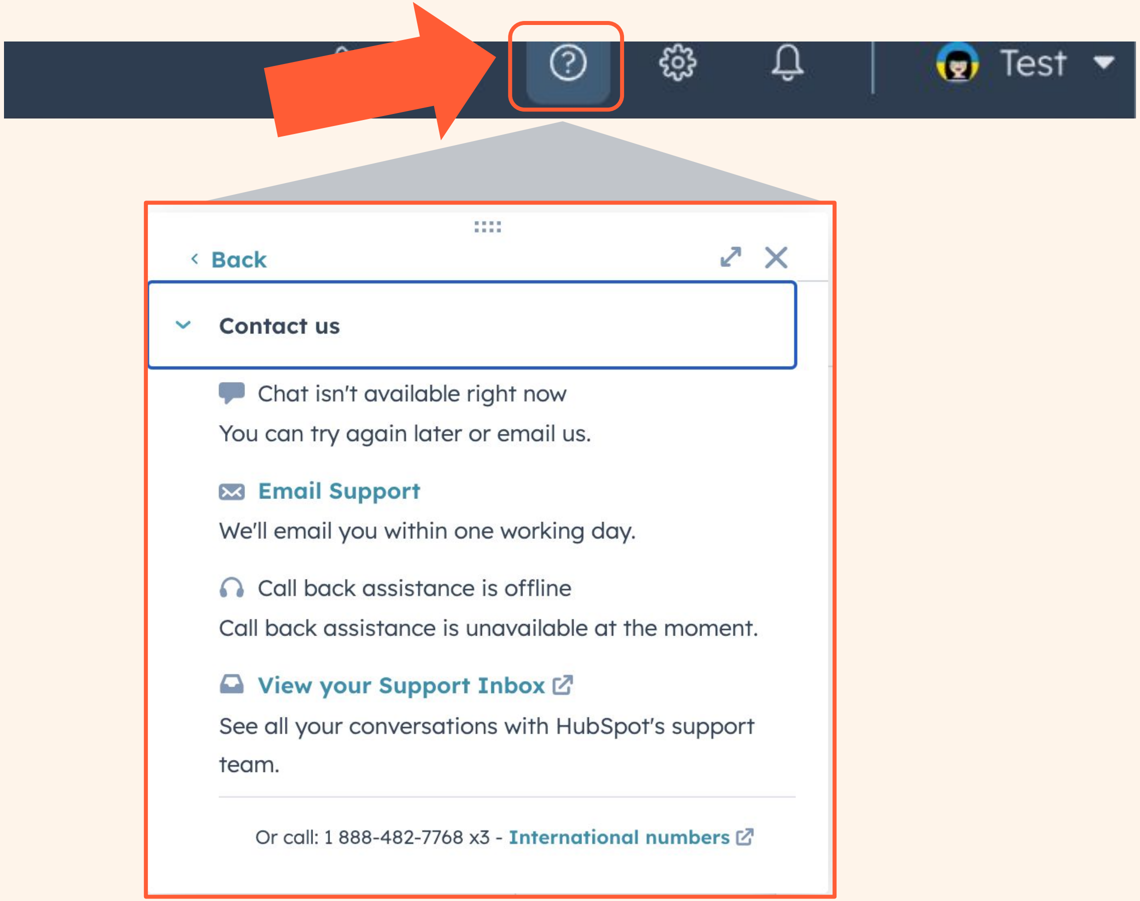
Fixing gaps in feature access

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

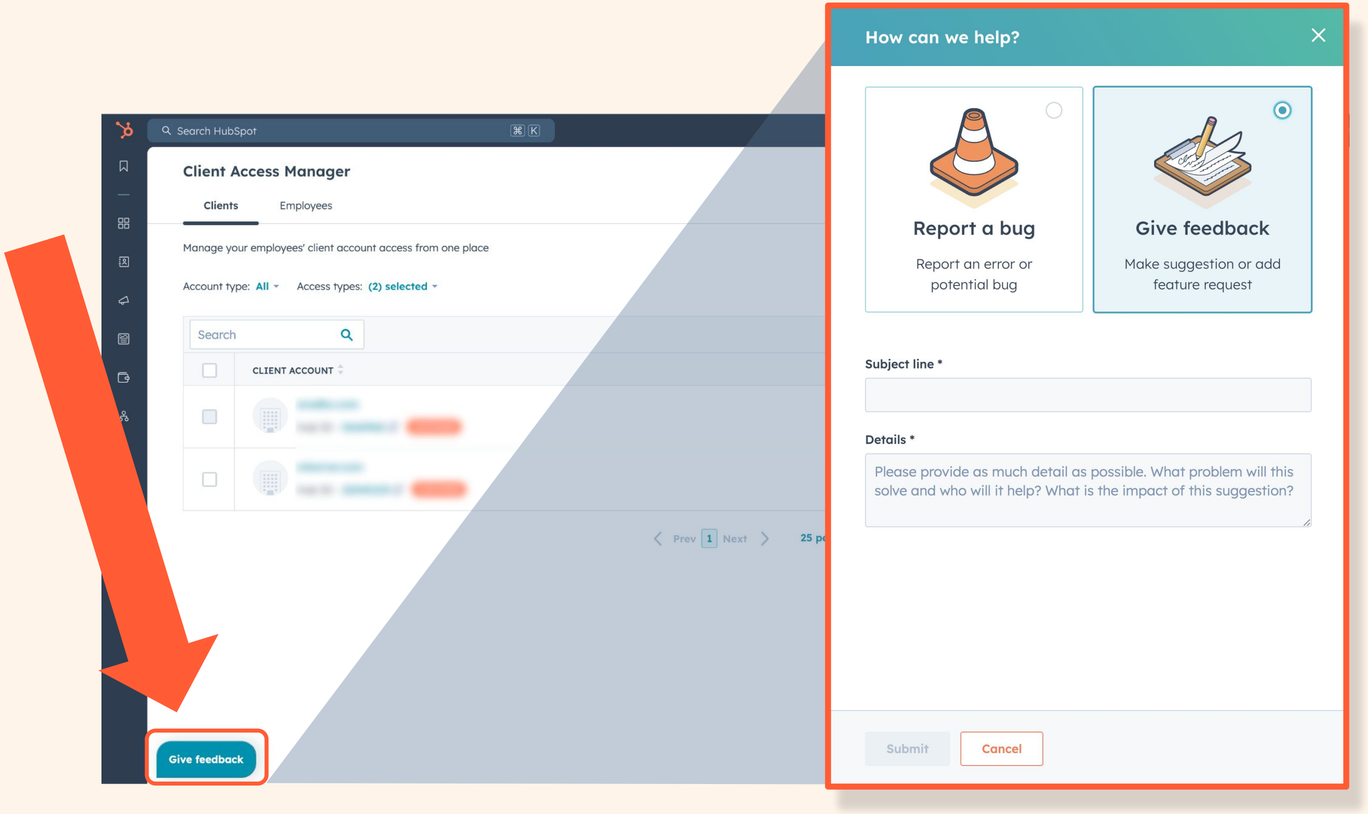
Making it easy to manage access

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



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 Employe 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: • 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 brining Managed MRR

Vote here

slido

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