

# HUBSPOT ENABLEMENT



# DISTRIBUTELY

A New Breed Application



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**DISTRIBUTELY**

A New Field Application

# The Basics

## What does it do?

Distributely allows you to **assign any standard object** (contacts, companies, deals or tickets) to a user in HubSpot through a combination of **rules and routing options**.

It also allows you to **pause someone from the rotation** if they are taking time off, if they work a certain schedule or if they have too many records assigned to them.

## What does it *not* do?

Distributely doesn't decide how to assign and route objects in HubSpot. Users need to set the rules and conditions.

It also doesn't enable any other automation outside of routing, and is most powerful when used in concert with HubSpot Workflows.



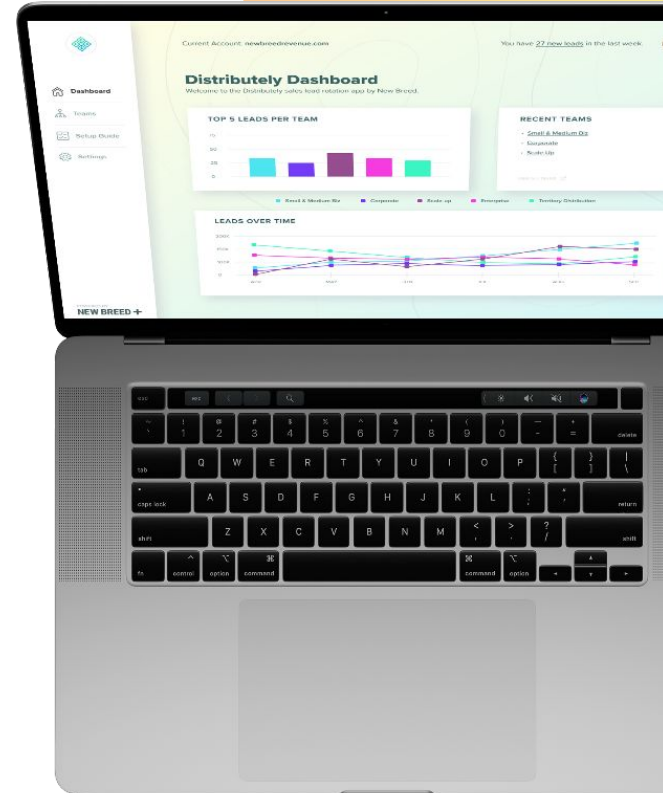
# The Basics

## Why did we build it?

**For Users:** To make it easier to customize object routing based on business and team need

**For HubSpot:** To extend HubSpot's routing capabilities and drive more customer value in Sales and Service hubs.

**For the Market:** Sales, services, and operations professionals need the ability to customize routing options and have come to expect this functionality (especially coming from the Salesforce ecosystem)



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# Value Proposition

The 3 value propositions below are meant to enable HubSpotters to explain why Distributely makes the most sense for HubSpot users. These value props should be used in conjunction with features and use cases to explain the app to potential customers.



## Purpose-built

Distributely is specifically designed to integrate and extend the power of HubSpot workflows which makes it easy to understand how to leverage this tool if you're already using HubSpot. Plus, the app is HubSpot-certified which builds trust with users around security, privacy, reliability, performance, etc.



## Partner-backed

Distributely is built and supported by New Breed, a two-time Partner of the Year and ecosystem-leading RevOps expert. We have unmatched operations and services knowledge and **offer direct support for Distributely customers.**



## Investment

Distributely is intentionally priced in the market so it's a no-brainer for HubSpot users to leverage this tool compared to more-expensive options in the marketplace that are not specifically built for their CRM.



# Getting started is simple for users.

AFTER YOU CONNECT YOUR PORTAL...

## 1.

### SET UP TEAMS

**When you sign in, your teams will be organized by the objects they can route.** (e.g. you will have a 'Contacts' team where you add users and create routing rules for Contact distribution)

## 2.

### SET ROUTING RULES

**Select the HubSpot properties that determine which team and user will be assigned an object.** (e.g. create a condition that sends all companies over X employees to Y sales team member)

## 3.

### CREATE CONTROL

**Weight the routing of objects based on your needs, configure rep availability and set lead caps.** (e.g. automatically route new tickets to the support rep with the fewest open tickets, and set that rep's time zone and available working hours right in the app)



# Distributely Features



## Weighting

Control how many leads or tickets get assigned to each rep within a team



## Capping

Prevent sales and support reps from being overwhelmed with too many leads at once



## Territories

Assign leads and tickets to sales reps based on the territories they are responsible for



## Schedules

Tailor leads and tickets based on time zones, flexible work hours, and more.



## Performance

Send leads to reps at the top of their game with real-time performance routing



## Round Robin

Rotate leads and tickets between your sales reps evenly to give everyone an equal share.



## Triggers and Rules

Decide when and how users will be assigned leads and tickets in each of your teams



## Availability

Adjust leads and tickets based on time off to ensure a lead never slips through the cracks



# Distributely Personas

## SALES

Distribute leads to the right sales reps to increase **deal velocity** and **win rates**

## SERVICES

Distribute tickets to the support reps to **delight customers** and **reduce overhead**

## OPERATIONS

**Consolidate tools** and **spend less time** on manual routing upkeep



# Use Cases | All Personas

Pain Point	Solution	Feature
I have to <b>assign objects to my team manually</b> because our rules are <b>too complex</b> to use HubSpot's native functionality	Configure rules, routing, weighting and capping to manage complex lead assignment processes.	<b>Team Rules, Weighting, Capping</b>
I have team members that <b>work different schedules</b> throughout the week and others that are <b>taking time off</b> . I don't want objects assigned to them when <b>they are unavailable</b>	Set up schedules and availability for your team members to pause them from the rotation based on their weekly schedule or when they are taking time off.	<b>Schedules, Time Off</b>
I have a <b>territory-based teams</b> and I need to make sure that <b>only objects from their territory</b> are assigned to them	Create territory based teams to make sure the right objects are assigned to the right users	<b>Team Rules</b>
I have team members at <b>different ability levels</b> and I need to be able to <b>weight or cap how many objects</b> are assigned to them accordingly.	Configure weighting and capping to make sure that reps are assigned the appropriate number of objects.	<b>Weighting, Capping</b>



# Use Cases | Sales Persona

Pain Point	Solution	Feature
I have multiple sales teams that <b>sell different products</b> to different types of companies and I need to make sure the <b>right leads are assigned</b> to them	Distributely create a set of rules based on the types of companies your team works to make sure the right leads are assigned to the right users	<b>Team Rules</b>



# Use Cases | Services Persona

Pain Point	Solution	Feature
I have multiple service teams that <b>service different products</b> for different types of companies and I need to make sure the <b>right tickets are assigned</b> to them	Create a set of rules based on the types of companies your team works to make sure the right tickets are assigned to the right users	<b>Team Rules</b>



# Use Cases | Operations Persona

Pain Point	Solution	Feature
I have to <b>manage multiple systems</b> and maintain the integration between them to make sure that <b>leads and tickets are assigned</b> to the right person	Consolidate the number of tools and platforms you're using to route leads and tickets to your team.	<b>Distributely &lt;&gt; HubSpot Integration</b>
I <b>don't have time to learn how to code</b> in apex or node to write custom scripts to manage our lead routing process	Avoid writing and updating lines of code with Distributely's simple user interface	<b>Schedules and Time Off</b>
I <b>don't want to act as a bottleneck</b> as the only person who knows <b>understands our lead routing process</b> or how to manage it.	Configure complex routing process that are easy for anyone to understand and update	<b>Weighting and Capping</b>



# Simple pricing with no hidden fees.

We're committed to keeping pricing clear for everyone. If you have a client who is **concerned about cost**, **contact New Breed** and we can work together to figure out the best solution.

Free

**\$0** Per month

Includes up to 5 users

*Buy Starter for additional users*

Starter

**\$100** Per month

Includes up to 10 users

*\$20 / month per additional user*

Professional

**\$300** Per month

Includes up to 30 users

*\$15 / month per additional user*

Enterprise

**Talk  
to us**

Free for New Breed customers

# Distributely customers and why they leverage the app.

The logo for Teamwork, featuring the word "teamwork." in a dark blue, lowercase sans-serif font with a small pink dot at the end of the period.

Teamwork leverages Distributely to route leads based on territory and set working hours based on a sales' rep calendar

The logo for Assembly, featuring a blue right-pointing triangle followed by the word "Assembly" in a dark blue, sans-serif font.

Assembly improved speed to lead follow up when prospects submit forms on their website through Distributely's customizable deal routing functionality

The logo for Viewrail, featuring a stylized blue winged 'V' above the word "VIEWRAIL" in a blue, uppercase sans-serif font.

Viewrail leverages Distributely's custom weighting and capping functionality to ensure reps with the most availability are routed net-new leads to ensure a timely follow-up

“Distributely brings a way to **move away from just a Round Robin rotation**. Setting up teams to have different weights or sales reps capacity is **such a needed option**. Distributely solves that for you and does it in an easy way.”

# Informed by New Breed's Elite expertise.



*Robin*

indigo

intuit.

\$1.2B IN  
FUNDING



springcm



ACQUIRED



vidyard



ACQUIRED

What customers are saying about Distributely.



**Such a needed option”**

Colin Johnson | Viewrail



**Our team is able to  
more quickly and  
efficiently reach out”**

Shannon Walsh | Assembly Legal

# Additional Resources

[Enablement Kit for HubSpotters](#)

[Demo Landing Page](#)

[Distributely Website](#)

[Setup Guide](#)

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[Click here to learn more about the  
New Breed + HubSpot Partnership](#)