

Profile Overview

Finance Leaders - from accountants to CFOs at SMBs - are increasingly showing up in conversations about adopting Commerce Hub and the commerce features offered (payment links, invoices, quotes, subscriptions, automation, reporting and more).

Research tells us finance is involved or consulted in the commerce software decision process roughly 80% of the time and often has significant veto power. Although the SMB CEO/Owner usually makes the final decision, addressing the concerns of the finance leader can be critical in securing adoption & follow through.

Core Job Functions

- Securing funding
- Improving processes
- Minimizing risk

Top Attitudes About Commerce

- "Improving the customer experience is a key priority"
- "I see value in consolidating commerce solutions"
- "We can grow faster because our commerce data and customer data are integrated"

Top Needs for Payments/Commerce

- "Is secure and compliant"
- "Processes payments quickly"
- "Helps us grow the business"
- "Offers the lowest fees/pricing"
- "Lets us do everything on one platform"

Top Motivations to Switch

- More secure
- More innovative
- Lower pricing
- Easier for us to use
- Better customer service

Discovery Questions

- Can you tell me about your current commerce process? How many steps are involved, and how much time and effort does it take to complete each step?
- What's the biggest issue you have today with your current commerce process?
- How do you currently manage and reconcile payments across different systems or platforms?
- What types of reporting and analytics do you currently use to track payment activity and performance?
- What capabilities would you like to see in a new payments software system, and what benefits are most important to you and your organization?
- What's one concern you have about adopting HubSpot payments?

Objection Handling

Cost

ex. HubSpot may be seen as more expensive on a per transaction basis than their current provider

"Processing rates for HubSpot payments are on par with the market and ACH rates are capped so you aren't being "nickled and dimed." Plus, many users find they can consolidate their tech stacks and eliminate their point solutions for quoting & billing, reducing your TCO."

Integrations

ex. HubSpot doesn't have sophisticated enough integrations with core providers like QuickBooks or Stripe

"We have a QBO integration that allows for you to easily create paid invoices, expenses, and refund receipts with our workflows tool. We're currently doing quite a bit of work on our integrations so we would welcome feedback as we build."

Implementation

ex. Switching to HubSpot will take too much time and re-working of processes for a team with limited bandwidth

"HubSpot is considered one of the easiest tools in the market to adopt and our commerce tools are no different. Once you're up and running, your team will reap efficiency dividends."