



Transforming Field Services with HubSpot CRM

Field service businesses face unique challenges in scheduling, communication, and customer management. HubSpot provides the comprehensive solution you need.

Developed & Designed by



Why Choose HubSpot for Field Services?

Centralized Operations

Consolidate scheduling, customer data, and job tracking in one platform. Eliminate silos between office and field teams.

Automation Power

Reduce manual tasks with automated scheduling, notifications, and follow-ups. Save hours of administrative work daily.

Integration Flexibility

Connect seamlessly with QuickBooks, ServiceTitan, FieldAware, and more. Create a unified ecosystem for your business.





Job Scheduling & Dispatching



Custom Deal Pipelines

Organize jobs into stages such as "Quote Sent," "Tech Dispatched," and "Job Completed" to track progress efficiently.



Calendar Integration

Seamlessly schedule visits and synchronize with Google or Outlook calendars for streamlined planning.



Location-Based Assignment

Leverage CRM logic to assign technicians based on the most efficient service areas and routes.



Quoting & Work Order Automation

Generate Digital Quotes

Create and send professional estimates with custom service packages instantly.

Secure E-Signatures

Integrate with DocuSign or PandaDoc for quick work order approvals.

Standardize with Templates

Use predefined service templates for consistency across all job types.

A male technician with short brown hair, wearing a blue long-sleeved work shirt with a small logo on the chest, is looking down at a smartphone he is holding with both hands. He is standing in a workshop or factory setting, with yellow industrial equipment visible in the background.

Technician Enablement & Mobile Access

Mobile-First Design

Access job details, upload photos, and add notes from anywhere in the field.

Automated Checklists

Trigger service protocols or safety checklists for each job type.

Inventory Integration

Associate parts and tools with specific job types for simplified preparation.

Customer Communication & Feedback



Automated Notifications

Send reminders before visits and confirmations after completion.



Real-Time Updates

Notify customers when a technician is en route to their location.



Post-Service Feedback

Trigger satisfaction surveys or Google/Yelp review requests automatically.





Marketing & Lead Generation

Lead Capture

Book service calls directly from your website or landing pages.

Performance Tracking

Measure campaign effectiveness and optimize for better results.



Email Nurturing

Educate customers on seasonal services or available upgrades.

Smart Segmentation

Target customers by service type, frequency, or region.

Partner with CETDIGIT - HubSpot Elite Partner

40%

Arrival Improvement

Increase in on-time technician arrivals
for clients.

60%

Communication Automation

Customer communications automated
through HubSpot workflows.

100%

Team Visibility

Complete transparency across field,
sales, and admin teams.



CETDIGIT Ready to transform your field operations?
Contact us at sales@cetdigit.com or visit www.cetdigit.com

