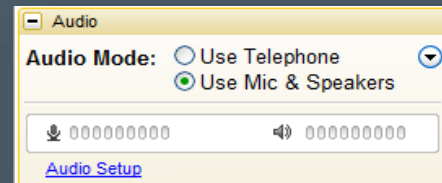


# AN INVESTIGATION INTO SUCCESSFUL INBOUND STRATEGIES



We will be starting at 2:00 pm ET.

Use the Question Pane in GoToWebinar to Ask Questions!

1

Use the hashtag #InboundLearning on Twitter

2

Question of the day

@HubSpotAcademy

#InboundLearning

# INBOUND 2015

Come Together. Get Inspired. Be Remarkable.

SEPTEMBER 8-11 | BOSTON CONVENTION AND EXHIBITION CENTER | BOSTON, MA

Save \$200 on Partner Trainings with the code **HUBPARTNER**

Attend the COS Design & Development I & II Trainings for FREE with codes **KEYCOS1** and **KEYCOS2**

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*Login to modify your registration & add trainings*



HubSpot

**Chris LoDolce**

@chrislodolce



HubSpot

**Mark Kilens**

@MarkKilens



**DO YOU HAVE BUYER  
PERSONAS DEVELOPED?**

# TODAY'S GAMEPLAN

For us all to leave with a repeatable strategy for identifying which HubSpot Projects to do to help you execute successful inbound strategies



# AGENDA

- 1 Get organized
- 2 Assess your situation
- 3 Execute a HubSpot Project
- 4 Analyze



1

GET ORGANIZED

# GET ORGANIZED



Inbound Goals



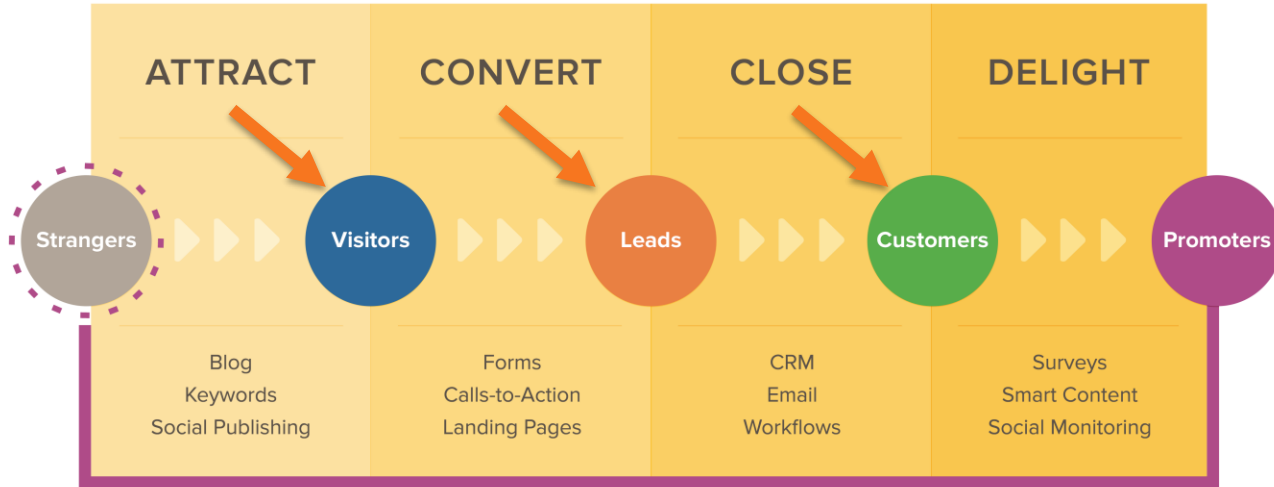
Inbound Habits



HubSpot Projects

# SET YOUR INBOUND GOALS

## Inbound Methodology



by **HubSpot**

**Why is it so important to set visits, leads and customer goals?**

# ANYONE CAN SET A GOAL, BUT NOT EVERYONE SETS A SMART GOAL

*Get 10,000 visitors*

Get more leads than last month

Close 20% of leads to customers

*5,000 twitter followers*

15% email open rates

# INBOUND SMART GOALS

- S** Specific: Visits, Leads or Customers
- M** Measurable: Provide a number
- A** Attainable: Understand benchmarks
- R** Relevant: Relates back to overall end goal
- T** Timely: Include time-frame

# INBOUND SMART GOAL TEMPLATE:

Increase \_\_\_\_\_ by \_\_\_\_\_ ( starting at this amount \_\_\_\_\_ and go to this amount \_\_\_\_\_) by this date \_\_\_\_\_.



## SMART GOAL EXAMPLE:

Increase **visits** by 20% (5,000 per month to 6,000 per month) by September 30th, 2015

Increase **leads** by 20% (100 per month to 120 per month) by September 30th, 2015

Increase **customers** by 20% (5,000 per month to 6,000 per month) by September 30th, 2015

# ADD YOUR GOALS TO YOUR HUBSPOT DASHBOARD

The screenshot shows the HubSpot dashboard with a navigation bar at the top containing 'HubSpot', 'Dashboard', 'Content', 'Social', 'Contacts', 'Reports', and 'Resources'. Below the navigation bar, there is a 'Contacts' section with the subtitle 'All time' and a '+ Add persona' link. A table displays contact statistics: Total (293), Leads (237), Marketing Qualified Contacts (11), and Customers (14). Below the table is a blue banner that reads 'Segment your contacts for better targeting — Create a persona'. Underneath, there are two dropdown menus: 'This Month' and 'Goals', followed by the text 'compared to' and a 'Set Goals' link. Below this is a 'Marketing Performance' section for 'September', showing a line graph for 'Visits' with a 'Today' marker.

Total	Leads	Marketing Qualified Contacts	Customers
293	237	11	14

Segment your contacts for better targeting — Create a persona

This Month compared to Goals Set Goals

Marketing Performance in September

Visits

This screenshot shows the same HubSpot dashboard as the previous one, but with a 'Set your SMART Goal' modal window open. The modal has a title bar and a close button. The main content area contains a blue header 'Set your SMART Goal' and a paragraph: 'Review your monthly historical conversion rates, as well as the median and 25th percentile rates across HubSpot's thousands of customers.' Below this is a table with four columns: 'Your Last Month', 'Top 25%', and 'Median'. The rows represent 'Visits', 'Visits Conversion Rate', 'Contacts', 'Contacts Conversion Rate', and 'Customers'. At the bottom of the modal, there is a form: 'My goal is 500 new visits in 6 months' and a 'Next' button. An orange arrow points from the 'Set Goals' link in the first screenshot to the modal, and another orange arrow points from the 'Next' button in the modal to the 'Marketing Performance' section in the background.

	Your Last Month	Top 25%	Median
Visits	5,504	14,770	1,508
Visits Conversion Rate	0.073%	3.1%	0.93%
Contacts	4	452	14
Contacts Conversion Rate	0.0%	56%	7.1%
Customers	0	255	1

My goal is 500 new visits in 6 months

Next

# GET ORGANIZED



Inbound Goals



Inbound Habits



HubSpot Projects

Habits: a usual way of behaving:  
something that a person does often  
in a regular and repeated way.

- Merriam Webster

# INBOUND HABITS



Daily:



Weekly:



Monthly:



Quarterly:

# INBOUND HABITS - EXAMPLES

- Daily:** Social media monitoring
- Weekly:** Blogging, review analytics
- Monthly:** Email news letter, monthly reporting, monthly goal setting
- Quarterly:** Planning

# SPEND 5 MINUTES WRITING DOWN ALL OF YOUR INBOUND HABITS

Daily:

Weekly:

Monthly:

Quarterly:



# GET ORGANIZED



Inbound Goals



Inbound Habits



HubSpot Projects

Projects: a planned piece of work that has a specific purpose (such as to find information or to make something new) and that usually requires a lot of time.

- Merriam Webster

# HUBSPOT PROJECTS

- Trade show
- New Product Launch
- Webinar
- Contact reengagement campaign
- Survey customers

**SPEND 3 MINUTES WRITING DOWN  
ALL OF YOUR PLANNED Q3  
HUBSPOT PROJECTS**

# INBOUND SMART GOALS

- Visits Goal
- Leads Goal
- Customers Goal

## INBOUND HABITS

- Blogging
- Social Engagement
- Reporting

## HUBSPOT PROJECTS

- Content Campaign
- ?
- ?

The background of the slide is a dark blue-grey color with a repeating pattern of small, light grey lightbulb icons. The icons are arranged in a grid-like fashion, with some appearing slightly more prominent than others.

# 2 ASSESS YOUR CURRENT SITUATION

# USE CASE 1

## Goals:

- Increase visits by 20% (5,000 per month to 6,000 per month) by September 30th, 2015
- Increase leads by 20% (100 per month to 120 per month) by September 30th, 2015
- Increase visits by 20% (5,000 per month to 6,000 per month) by September 30th, 2015

## Assessment:

Currently you are on pace to only reach a 10% increase for your **visits, leads and customers** goals by Sept 30<sup>th</sup>, 2015.

What HubSpot Projects above and beyond your habits can you do between now and Sept 30<sup>th</sup> 2015 to reach your goals?

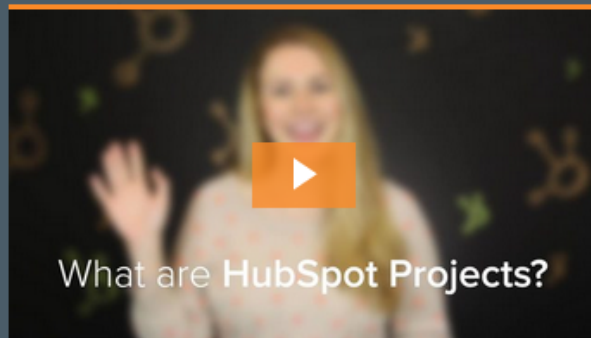




How did this  
exercise make  
you feel?

# HubSpot Projects

Projects are step by step guides to help you quickly reach your goals using multiple HubSpot tools. Like any good teacher, they'll provide extra help when you need it, and basic instructions when you don't.



FILTER BY GOAL:

SELECT A GOAL

[academy.hubspot.com/customer-projects](https://academy.hubspot.com/customer-projects)

ATTRACT MORE VISITORS

Blog Post Optimization

CREATE BETTER CONTENT

Blog Topic Ideas

CLOSE MORE SALES

Contact Re-Engagement

# USE CASE 2

## Goals:

- Increase visits by 20% (5,000 per month to 6,000 per month) by September 30th, 2015
- Increase leads by 20% (100 per month to 120 per month) by September 30th, 2015
- Increase customers by 20% (5,000 per month to 6,000 per month) by September 30th, 2015

## Assessment:

Currently you are on pace to reach a 25% increase for your visits, but only a 5% increase in leads and customers by Sept 30<sup>th</sup>, 2015.

What HubSpot Projects can you do between now and Sept 30<sup>th</sup> 2015 to reach your leads and customers goals?

[academy.hubspot.com/customer-projects](https://academy.hubspot.com/customer-projects)

# USE CASE 3

## Goals

- Increase visits by 20% (5,000 per month to 6,000 per month) by September 30th, 2015
- Increase leads by 20% (100 per month to 120 per month) by September 30th, 2015
- Increase customers by 20% (5,000 per month to 6,000 per month) by September 30th, 2015

## Assessment:

Currently you are on pace to reach a 25% increase for your visits, 30% increase in leads but only 8% of customers goal by Sept 30<sup>th</sup>, 2015.

What HubSpot Projects can you do between now and Sept 30<sup>th</sup> 2015 to reach your customer goal?

[academy.hubspot.com/customer-projects](https://academy.hubspot.com/customer-projects)

The background is a dark blue-grey color with a repeating pattern of lightbulb icons in a lighter shade of blue-grey. The icons are arranged in a grid-like fashion across the entire page.

# 3 EXECUTE A HUBSPOT PROJECT

**JUST DO IT**

## FORM OPTIMIZATION

🕒 SUGGESTED TIME TO COMPLETE: 3 HOURS

This project will walk you through optimizing a specific form in HubSpot.

Completing these steps will allow you to:

- Identify how to use and optimize forms throughout the buyers journey
- Build a more robust lead/customer profile
- Provide context to people who view the form



### Step 1: Pick a form to optimize.

LEARN HOW

#### TO-DO

- 1 Navigate to your Landing Page tool by clicking Content > Landing Pages
- 2 Sort your published landing pages by views, in descending order.
- 3 Pick the highest viewed landing page on the conversion rate is below your company's benchmark. Conversion rates depend on many different elements outside the content of the landing page — industry, B2B/B2C, and seasonality, just to name a few. Your own benchmark conversion rate will be a judgment call as you compare the rates of the various landing pages you've created.

#### PRO TIP

Choose a page with over 100 views, to ensure that your form optimization will have a tangible impact on your total lead number. In addition, in benchmarking your conversion rate in step #3, create a different benchmark for your unique content types (ebooks, webinars, etc.).

Need some help identifying which landing page needs a form facelift?

[Check out this blog post!](#)



But what if it does not work?

Is there something more effective I can be doing with my time?



**Highly effective inbound  
marketers don't get paralyzed by  
these questions.**

# GIVE YOURSELF A DEADLINE AND DO IT

The screenshot displays the HubSpot calendar interface. At the top, there are navigation tabs for 'Social', 'Contacts', and 'Reports', along with a search bar and a notification icon. The main area is titled 'Calendar' and shows a calendar for August 2015. A 'Create Task' dropdown menu is open, listing options: 'Blog post', 'Email', 'Landing page', and 'Custom'. A 'Schedule' button is also visible. A dialog box titled 'Create a custom task' is overlaid on the calendar, containing the following information:

- Task Name:** Complete Forms Optimization Project
- Date:** 08/26/2015
- Time:** 3:30 PM
- Assignee:** Christopher LoDolce (clodolce@hubspot.com)
- Category:** Campaign
- Description:** Currently not on track to hit our leads goal by Sept 30th. Based off my assessment, optimizing forms on landing pages with low conversions should increase the number of visitors that convert to leads.
- Action:** Create task
- Message:** No worries, we'll notify the assignee for you

The calendar grid shows dates from 3 to 10, with a 'Saturday' label for the 6th. The 'Filter By' section on the left includes checkboxes for Content, Blog, Email, Recurring, Landing Page, Social, and Task, all of which are checked. The 'Campaign' section is also visible at the bottom left.

# Each HubSpot Project you execute will provide insights into:



What to do next



How to improve in the future



Enable institutional knowledge that is a competitive advantage for your company

# 4 ANALYZE

# USE CASE 2

## Goals:

- Increase visits by 20% (5,000 per month to 6,000 per month) by September 30th, 2015
- Increase leads by 20% (100 per month to 120 per month) by September 30th, 2015
- Increase customers by 20% (5,000 per month to 6,000 per month) by September 30th, 2015

## Assessment:

Currently you are on pace to reach a 25% increase for your visits, but only a 5% increase in leads and customers by Sept 30<sup>th</sup>, 2015.

What HubSpot Projects can you do between now and Sept 30<sup>th</sup> 2015 to reach your leads and customers goals?

[academy.hubspot.com/customer-projects](https://academy.hubspot.com/customer-projects)

# FORMS OPTIMIZATION PROJECT SELECTED

CONVERT MORE LEADS

## Form Optimization

This project will walk you through optimizing a specific form in HubSpot. If done right, you will be able to convert more leads, provide context to the visitors viewing the form and build a more robust lead/customer profile.

GET STARTED

Step 7: Adjust the look and feel of your forms.

LEARN HOW

Step 8: Report and iterate on your other forms.

LEARN HOW

### TO-DO

- 1 Measure the new performance of your form for 2-4 weeks. At least 100 new visits should come to the page before making any judgements on the change in performance of your page.
- 2 In the meantime, rinse and repeat. Move on to your new highest viewed page and start at the top to improve that form as well. (revisit Step 1 for guidance).

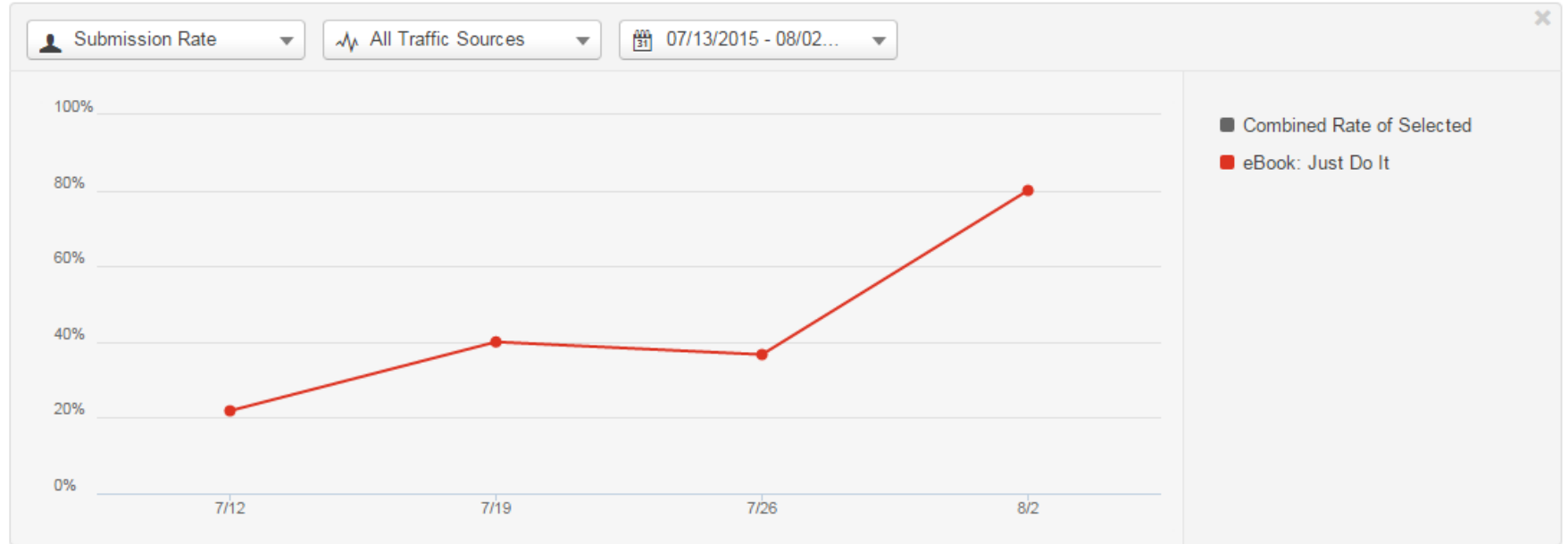
### PRO TIP

If your forms are still not performing the way you would like, consider taking a look at the copy on the CTA and landing page as well as the context of the places you are promoting your landing page - are these aligned? If not, you could be misleading visitors to this page on the value of the offer. Also, take a look at the conversion optimization project.

[academy.hubspot.com/customer-projects](https://academy.hubspot.com/customer-projects)

# RESULTS FROM OPTIMIZING YOUR FORM

## Landing Pages



# WHAT TO DO AFTER ANALYZING A PROJECT?

- Record the results & insights
- Decide if you should repeat the project
- Decided if this should become a habit



How do you currently record and organize insights and learnings from the inbound work that you do?

# WHAT TO DO AFTER ANALYZING A PROJECT?

- Record the results & insights
- Decide if you should repeat the project
- Decided if this should become a habit

# INBOUND HABITS

- Blogging
- Social Engagement
- Reporting
- 

# HUBSPOT PROJECTS

- Content Campaign
- Forms Optimization
- ?



# WHAT TO DO AFTER ANALYZING A PROJECT?

- Record the results & insights
- Decide if you should repeat the project
- Decided if this should become a habit

# REPEAT THE PROCESS

- 1 Get organized (Goals, Habits, Projects)
- 2 Assess your situation
- 3 Execute a HubSpot Project
- 4 Analyze

# RESOURCES

- HubSpot Projects
- HubSpot Partner Projects
- Habits of Highly Effective Inbound Marketers

# NEXT STEPS

1. Subscribe to HubSpot Project updates:  
<http://academy.hubspot.com/subscribe-for-hubspot-project-updates>
2. Submit new HubSpot Project ideas via Tally
3. Submit your completed Project for review by Chris. Email [clodolce@hubspot.com](mailto:clodolce@hubspot.com) Subject line = [HubSpot Project Completed]
4. Just do it!

# HAVE A QUESTION?

Type it in the question pane, now!





THANK YOU.

HubSpot  
Academy 