Your Exam Study Guide

The following guide walks through key lessons from each of the HubSpot Training courses covered in the certification curriculum. Use this additional resource as you prepare for your exam.

HubSpot
CERTIFICATION

HubSpot Academy

Goal Planning & Strategy

I.   Best Practices

- What is SMART goal setting?
- Why is it important to set SMART goals?
- What does the SMART acronym stand for?
- Why is it important to set measurable goals?
- How can you access your current visits, leads, and customer metrics?
- What key pieces of information are needed when entering a SMART goal into your HubSpot Goals application?
- Why is it important to set a due date for your goals?
- Why is it important to examine your current situation before setting SMART goals?

II.   Inbound Methodology

- What is the Inbound Methodology?
- What are four different phases (or actions) that make up the methodology?

Buyer Personas

I.   Why You Need Buyer Personas

- What is a buyer persona?
- What is a buyer persona not?
- How do personas fit into each stage of the Inbound Methodology?
- How do personas benefit your marketing strategy?
    - o   How can personas help create better products and services?

- In what type of organization (i.e. B2B, B2C, Nonprofit, etc) are personas most useful?

II.   How to Create Buyer Personas?

- Why is persona research necessary?
- What categories of information are necessary to build strong buyer personas?
- Should persona research questions from the Persona Profile Checklist be used verbatim? Why or why not?
- How is persona research conducted? Which research technique is best?
- Can personas be created without doing research?
- Can personas be created if you don't yet have customers?
- What are the persona-building best practices?
    o   Why is it important to focus on not just your persona's "what," but also their "why?"
    o   What does it mean for a persona profile to be fictional but realistic?
    o   How are primary personas determined? What is the benefit of creating a primary persona?
- What is the benefit of transforming persona facts into a persona story?

II.   Persona Tool Walk-Through

- Why is it important to create personas in the Contacts tool?
- What key points of your buyer persona's story should you highlight in the internal notes section of the Persona?
- What form field are you creating when building out a persona? Why is this field important?
- What automatically generated lists are created when you publish your persona?

Content Creation

I.   What is Content?

- What is content?
- Why is content the foundation to successful inbound marketing?
- How does content fit into the Inbound Methodology?

II.   How to Create Remarkable Content

- What steps make up the content process?
- What are the three elements of content?
- What is the difference between an offer and a blog post or website content?

- What are the two things you need to know when determining a content topic:?
- How can you use personas to create content?
- What is the Buyer's Journey?
    o What are the three stages?
    o How is each stage described?
- What are the best practices for content creation?
- How much time should be spent on promoting content?
- What are the different types of content distribution techniques?
- What metrics should be considered when analyzing a piece of content?

III.   Calendar Tool Walk-Through

- What scheduled or published pieces of content can you see in the Calendar tool?
- What pieces of content can you schedule new or draft versions of?
- What are custom tasks in the Calendar tool?
    o Can you edit content directly from the Calendar?

Keywords

I.   The Benefits of Keyword Research

- What are keyword phrases?
- What are long-tail keywords?
- Based on the Inbound Methodology, why would a marketer benefit from strong keyword strategy?

II.   How to Identify Keywords

- What are the best practices for selecting the right keywords?
- Why is it important to understand your buyer personas before doing keyword research?
- What are some common keywords that people use at each stage of the buyer's journey (awareness, consideration and decision)?
- What are the benefits of creating blog content around long-tail keyword phrases?
- Who are you optimizing your website pages for?
- How would one go about optimizing website pages and content offerings?

III.   Keyword Tool Walk-Through

- What does "rank" mean?
- What are some of the suggestions the keywords tool will provide?

- What happens when you select the individual keyword phrase inside the HubSpot tool?
- How can one get suggestions on keywords?

Blogging

I.   Benefits of Using the Blogging Tool

- How does blogging increase the volume of search traffic?
- Which stages of the Inbound Methodology does blogging help with and how?

II.   How to Create Quality Blog Posts

- Why should your blog posts be educational? Why should you write about your industry, but not your company?
- Why should you focus on one topic per blog post?
- What are the marks of a successful blog title? Why is each important?
- How can you help readers easily digest your blog post?
- How can you optimize your blog for search engines?
- What are the different types of and places for calls-to-action on your blog? How does understanding the Buyer's Journey help?
- Why should you promote your blog through social media? How can you best accomplish this on your blog itself?
- Be able to analyze a blog post for best practices.

III.   Blogging Tool Walk-Through

- How does the Blogging tool function? How can you effectively use it?
- How can the tool be used to determine which posts are performing best?
- What are blogging blueprints?
- How do you add images and CTAs to posts?
- Which options are available when publishing a post? How do you publish a post?
- How do you control blog settings? What are those settings?

Social Publishing

I.   Why Publish on Social Media

- How does social publishing assist in executing all four stages of the Inbound Methodology?
- What is social proof?
- Where else in HubSpot would you look to analyze your social publishing efforts?
- What are some of the benefits of using HubSpot to publish your social media posts?

II.   How to Get the Most Out of Social Media

- What are the three main components of an optimized social media profile?
- Should we share relevant industry content, even if it wasn't written by us? If so, why? If not, why not?
- Why would a company want to create a social media style guide?
    - What are some things that a company might want to put into a social media style guide?

III.   Social Publishing Tool Walk-Through

- How do bulk uploads work? Which network(s) can you bulk upload to?
- Which social networks can HubSpot publish to?
- When you publish a message to Facebook, LinkedIn or Twitter, can you see the specific person who:
    - Clicked on a post or tweet?
    - Retweeted you?
    - Liked your post?
    - Shared your post?
    - Commented on a post?
- Does HubSpot automatically shorten links if you include them in your posts?
- What specific information can you see about a post published using the Social Media publishing tool?
- What is the process for connecting a social media account for use in HubSpot?

Social Monitoring

I.   Why Monitor Conversations on Social Media

- How does social media monitoring assist in executing all four stages of the Inbound Methodology?
- When looking at the tweets in a social monitoring stream, how does HubSpot's Social Monitoring tool designate whether the tweet is from an existing customer, contact or new user?

- How are tweets from users in different lifecycle stages distinguished from one another?

II.   How to Get the Most Out of Social Monitoring

- Why is segmentation such an important part of an effective social monitoring strategy?
- Why does your company want to implement social media monitoring? Is it more visitors? More leads? More customers? Happier customers? Maybe it's a few of those things? How will social monitoring help you accomplish this goal?
- When considering which keywords to monitor, what should you reference to ensure you are monitoring the right people?

III.   Social Monitoring Tool Walk-Through

- What are the different ways you can refine a social monitoring stream?
- Which social networks can you monitor using the Social Inbox?
- What are the three different types of social monitoring lists you can build?
- How might you monitor only your leads?
- How might you exclude your competitors from showing up in your monitoring stream?
- How can you notify people in your company when tweets match the parameters of your social stream?

Forms

I.   Why Use the Forms Tool

- What is a website form and where are they usually hosted?
- Based on the Inbound Methodology, why would a marketer benefit from creating quality website forms?
- Why is it beneficial to create website forms inside of HubSpot?

II.   How to Create Quality Forms that Convert

- What are the best practices to consider when creating website forms?
- Why would a marketer want to add questions that go beyond the "out of the box" questions already in the software to a website form?
- What does it mean to qualify a lead, and how would one do that with website forms?

- What are the three things a question can help us to uncover that benefit the marketing and sales team? Why are these important?
- How can a person determine the perceived value of an offer? What are some things to consider?

III.   Forms Tool Walk-Through

- How does one create a form?
- How does one create new questions to add to a website form?
- When should a person use the smart fields and/or progressive profiling features?
- Where would one find the embed code for a website form?
- How does HubSpot ensure real contacts are filling out forms with real email addresses?
- How can one do the following in the software:
  o   Receive notifications upon new leads filling out the form?
  o   Disable cookie-tracking?
  o   Turn off the feature which auto-populates fields?
  o   Create a list of email domains to block from submitting a form?

Landing Pages

I.   Benefits of Using the Landing Pages Tool

- What is a landing page, and what is its sole purpose?
- Where does a landing page fit into the lead conversion process?

II.   How to Create Quality Landing Pages

- What is the value exchange that landing pages are based on? How can you determine the value of an offer? How does the Buyer's Journey help?
- What are the marks of a successful landing page header and why?
- What information should you include in the copy on a landing page and why?
- How can you help a visitor easily understand your landing page?
- Why should the length of the form and the form fields asked mirror the value of the offer?
- How can you keep a visitor focused on the landing page?
- Which metrics should you pay attention to when analyzing your landing pages? What percentage should you aim for?
- Be able to analyze a landing page for best practices..

III. Landing Pages Tool Walk-Through

- How does the Landing Page tool function? How can you effectively use it?
- Which landing page metrics can be seen on the main Landing Pages dashboard?
- What should you take into consideration when choosing a landing page template?
- What types of options are available when it comes to modifying your landing pages?
- How do you publish a landing page?
- How does a landing page connect to the other pieces of the lead conversion process?

Calls-to-Action

I. Benefits of Using the Calls-to-Action Tool

- What is a call-to-action, and what is its purpose?
- How does a call-to-action fit into the lead conversion process?

II. How to Create Quality Calls-to-Action

- Why should a call-to-action be action-oriented?
- How do you pick the right words to use a CTA's copy?
- Why does a call-to-action need to include a keyword in its copy? How do you know which keyword to use?
- Why should your call-to-action be attention-grabbing?
- What considerations should you take into account that will help guide its design?
- What are the marks of an appropriately placed call-to-action? How can the buyer's journey help?
- Which metrics should you pay attention to when analyzing your calls-to-action?
- What percentages should you be aiming with each key call-to-action metric?
- Be able to analyze a call-to-action for best practices.

III. Calls-to-Action Tool Walk-Through

- How does the Call-to-Action tool function? How can you effectively use it?
- Where do your call-to-action metrics live?
- What information about your calls-to-action can you gain from the main Calls-to-Action dashboard?
- How do you create call-to-action?

- o What types of design options are available to you when building a call-to-action?
- o What does "image button" mean? How does it work?
- Why would you use an embed code? How does it work?
- How does a call-to-action connect to the other pieces of the lead conversion process?

Thank You Pages

I.   Benefits of Using Thank You Pages

- What is a thank you page, and what is its purpose?
- How does a thank you page fit into the lead conversion process?
- Why does a thank you page outweigh an inline thank you message?

II.   How to Create Quality Thank You Pages

- Why is it important to have your website's navigation on your thank you page?
- How can you best deliver a downloadable offer on the thank you page?
- How can you properly set expectations for the delivery of a non-downloadable offer?
- Why is it important to provide additional direction on the thank you page, and in what forms can this take?
- How can you use the thank you page to move your new lead further into the Buyer's Journey?
- Why is it important to include social media buttons on your thank you page?
- Be able to analyze a thank you page for best practices.

III.   Walk-Through of Thank You Creation

- How can you create Thank You Pages in HubSpot?
- In which HubSpot tool should you use to create your thank you pages?
- What differs between a template used for to build a landing page versus one used to build a thank you page?
- How do you add documents to thank you pages?
- How does a thank you page connect to the other pieces of the lead conversion process?

Contacts

I. Benefits of Using the Contacts Tool

- Which types of business contacts do you want to have in your contact database?
- Why is the Contacts application such a valuable tool for:
    o Marketers?
    o Sales reps?
    o An inbound business as a whole?
- Which stages of the Inbound Methodology are most relevant to using the Contacts tool?

II. How to Best Use Contacts to Close and Delight Contacts and Customers

- How can you figure out the "green lights" and "red flags" that signify that leads are a good or bad fit for your business?
    o What questions should you ask?
    o Who should you ask these questions to?
- What does the property "Lifecycle Stage" track?
    o Why is it important to use this property?
    o What does each "Stage" signify (i.e. Subscriber, Lead, Marketing Qualified Lead, Sales Qualified lead, Opportunity, Customer, Evangelist, Other)?
- Who are the main stakeholders in a successful closed-loop marketing strategy?
    o What are the four steps to consider?
- What do we need to consider ensuring our database is up-to-date?

III. Walk-Through of the Contacts Tool

- What are the different ways you can add a contact into the HubSpot Contacts database?
- How do you create a custom contact property?
- What are the different contact properties in HubSpot? Find them listed under Contacts > Contact Properties.
- How do you delete a contact from the HubSpot database?
- What happens when you "star" a property on a contact record?
- Who has the ability to "star" a property on a contact record?
- What is the one property that serves as a unique identifier for a contact in HubSpot. No two contacts in HubSpot can have the same value for this contact property?
- How can you share a contact record with someone who is not a user in your HubSpot portal?

Lists

I.   Benefits of Using the Lists Tool

- With which other tools in the HubSpot does the Lists tool communicate?
- How does context play an important role in building an inbound business? How does segmentation play a part in t

ii.   How to Best Use Segmented Lists of Contacts

- Why is it so important to have an end goal for a list?
- What is the difference between implicit and explicit data?
    - o   What are some examples of explicit and implicit data that HubSpot collects about prospects and customers?

III.   Walk-Through of the Lists Tool

- What are the differences between a smart list and a static list?
    - o   Can you add individual contacts to both types of lists?
    - o   Can you see the list logic for both smart and static lists even after you create them?
- When building a list, there are several different options and actions you can segment by. What are they?
- How do you know a list is okay to import into HubSpot? What needs to be confirmed?

Email

I.   Benefits of Using the Email Tool

- How do the emails that you send through HubSpot differ than th eons sent to colleagues and friends from Gmail, Outlook, or Apple Mail?
- How can email be used to close contacts into customers?
- How can email be used to delight customers into promoters?

II.   How to Best Use the Email Tool

- Segmentation is a critical component of successful emails. What are some effective ways to segment your Contacts database?
- What are the different ways to add personalization to an email send?
- What are the best practices for writing effective subject lines?
- How can you improve the mobile optimization of your emails?

- How can you improve the click-through rate of your emails?

III.   Email Tool Walk-Through

- Which fields are required in order to send an email?
- How do you clone and email? When is it advantageous to clone an email versus creating a new one?
- What is the process for importing a list of contacts for an email send?
- How do you send an email to an individual contact?
- How would you find out which contacts clicked on a specific link within an individual email send?
- What are the reasons that a contact would be marked as ineligible to receive future emails?

Page Performance

I.   Benefits of Using the Page Performance Tool

- What stages in the Inbound Methodology does Page Performance help with?
- What does website optimization mean?
- Why is it important to optimize and analyze your website pages?

II.   How to Best Use Page Performance Data to Improve Marketing

- What are the best practices for website page performance optimization?
- What are the 5 important on-page SEO elements?
- Why is the page load speed important?
- What is an inbound link? Why is it important?
- What is the best practices click-through percentage for CTA's per page?
- What does "salting the tip jar" mean in the context of Page Performance?

III.   Page Performance Tool Walk-Through

- What view does the Page Performance report default to?
- What information is available under "Page Details?"
- What types of pages are tracked within the Page Performance report?
- What are the different metrics displayed on the Page Performance dashboard? Why are they important to analyze?
- How do you export Page Performance data

Sources

I.   Benefits of Using the Sources Tool

- How does the Sources tool fit into the Inbound Methodology?
- Why is the Sources tool considered the "hub" of HubSpot?

II.   How to Best Use the Sources Data to Improve Marketing

- What are the best practices to use for the Sources tool?
- How often should you be checking the Sources tool?
- What are the different ways you can access the Sources data?
- What questions should you ask yourself when looking at the Sources tool?

III.   Sources Tool Walk-Through

- What's the difference between "Standard View" and "Cumulative View?"
- How do you create a custom Sources Report?
- How do you email a report?
  - o   Who can you send this report to?
- What are the different sources that are shown in the tool?
- What is a default report?
- How are visits, contacts and customers defined?
- What is a visits-to-contacts rate? Contacts-to-customer rate? How can you see this on a Sources graph?
- How is each sources categorized?
- What does offline sources mean
- What is a Tracking URL?

Competitors

I.   Benefits of Reviewing Competitors

- Based on the Inbound Methodology, how can a marketer most benefit from reviewing their competitors?
- Why does a marketer benefit from keeping a pulse on their competitors?
- Why would someone use the HubSpot software when reviewing competitors?

II.   How to Review Competitors

- What are the best practices for reviewing a competitor's data?
- How often should someone review this information?

III.   Competitors Tool Walk-Through

- Where is the information inside of Competitors gathered from?
- What does the Marketing Grade data represent? Why does this data matter?
- What does it mean to look at the "head-to-head" data in the tool?

Sample Exam Questions

Why is a business blog beneficial for SEO?
   a. It creates more pages on your website for search engines to index.
   b. It helps you to get found for the keywords your target audience is searching for.
   c. It enables you to increase your search rankings.
   d. All of the above.

Which social network listed below is BEST for visual content?
   a. Facebook
   b. Twitter
   c. LinkedIn
   d. Quora

You work for a pet supply store. Which of the following calls-to-action would be best for a blog article called "10 Ways Pet Owners are Dressing Up their Pets."
   a. "Refer a Friend to our Store"
   b. "Complimentary Guide: 8 Ways to Raise Your New Dog"
   c. "Download a Free Dog Outfit Coupon"
   d. All of the above are strong calls-to-action for the above article

Even though mail marketing is one of the most expensive inbound strategies, it offers one of the best return-on-investments.
   a. True
   b. False

Answers: D,A,C,B