

The Ultimate **Closed-Loop** Marketing Blueprint



Integrating HubSpot & Salesforce



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marketing software
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THE ULTIMATE CLOSED-LOOP MARKETING BLUEPRINT

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Peanut butter and jelly. Burgers and fries. Pepperoni and pizza. Some things just go together.

Sales and marketing, well, they've had more of an oil-and-water relationship.

In the best enterprises, though, sales and marketing go hand-in-hand. They create a powerful synergy that enables your business to grow.



That is why your organization should encourage the right partnership between these two departments. What a better way to achieve that than combining the best of two worlds?

CRM provider [Salesforce](#), ranked #4 on *Fortune* magazine's world's fastest-growing companies, and the inbound marketing software company [HubSpot](#), ranked the #2 fastest-growing software company by *Inc.*, give marketers a sales and marketing solution like no other.

The integration between Salesforce and HubSpot empowers marketers to speak the same language as their colleagues in sales. It gives the entire organization a 360 view of how a prospect turns into a customer. This closed-loop marketing maps out the trajectory of actions taken by prospective customers. It provides marketers with valuable insights on how to attract more traffic, generate high-quality leads and turn them into happy customers.

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THE NEW WAY
OF MARKETING

1



THE NEW WAY OF MARKETING

The world of marketing has drastically changed. There's been a seismic shift in how consumers can, and should, be marketed to.

Perhaps no one understands this better than those marketers who relied heavily on telemarketing and email blasts to reach prospects and generate leads.

If telemarketing was your thing, the implementation of the Do Not Call Registry in 2004 and the passage of the Do-Not-Call Improvement Act of 2007 left you with about 200 million fewer households to call. In other words, almost everyone in the United States was off-limits.



If email was your marketing weapon of choice, something called a spam filter drove a stake through the heart of your marketing campaigns when Google, Yahoo! and every other email service provider took out the Viagra spammers and your legitimate email blasts right along with them.

If newspapers carried your marketing message to consumers, there were 105 fewer venues to do that in 2009 alone and countless more since.

If you used television to deliver your message, a company called TiVO killed the messenger in 1999. A decade later, DVRs dominate where TV ads used to permeate.

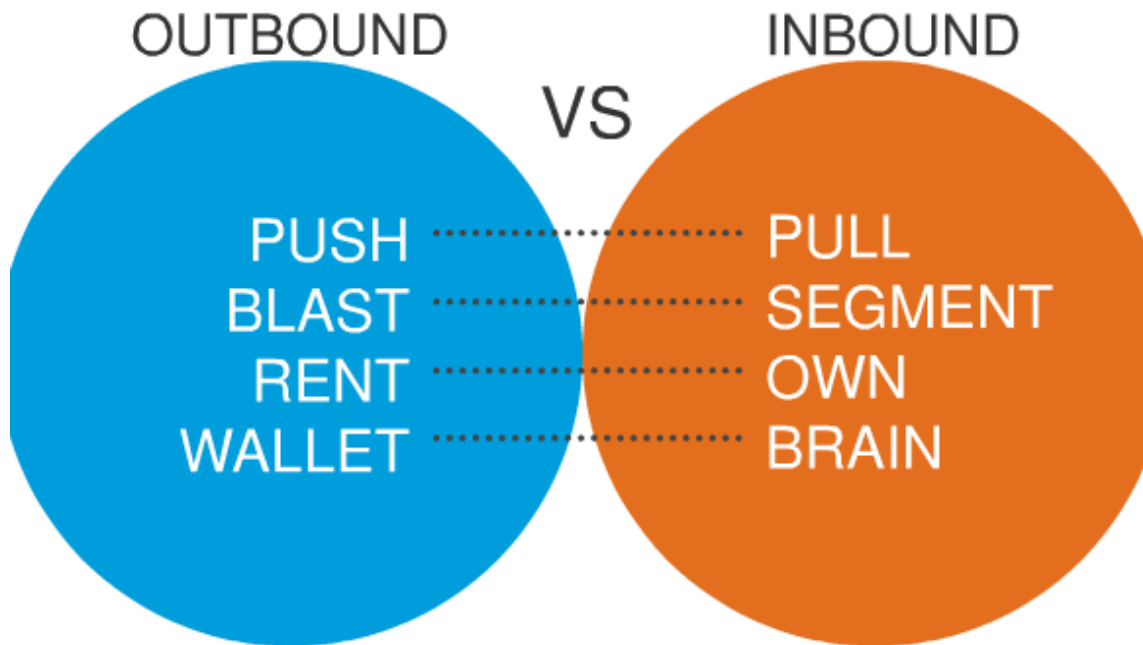
On the surface of it, marketers would seem to have far fewer options to reach consumers. But, scratch that surface and you'll see that consumer and B2B markets haven't disappeared. They, their eyeballs, their interests—and their money—have simply shifted elsewhere.

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The broadcast network, once the dominant marketing medium, has given way to a new type of marketing.

Getting found online is all about pulling people in rather than pushing messages out. This inbound method of marketing is a function of targeting relevant keywords, creating remarkable content and building the right connections. It also uses the intelligence you already have about prospects to create better relationships with them and nurture them in a delightful way. This is precisely what the HubSpot inbound marketing software platform is designed to do.



TOFU TITAN + MOFU MAGICIAN + SOCIAL MEDIA NINJA

The seismic shift in the way people shop today means marketers must develop the marketing resources and assets necessary to succeed online.

That means you need to become, what HubSpot CEO Brian Halligan refers to as, a Top of the Funnel (ToFu) titan, generating and publishing massive amounts of content to attract leads, and a Middle of the Funnel (MoFu) magician, to best manage those leads using marketing tools to segment your customers and feed them very targeted offers and information based on what they need and when they need it.

Each piece of content you create, [Halligan explains](#), acts like a mini-magnet to draw customers in via search engines and social media.

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The right content—content that resonates with customers—becomes highly sharable in social networks. The more web pages and content you create, the more magnets pulling toward you.

Yet, to be effective, the content you publish must be relevant. It must be valuable to people looking to solve their problems. In Halligan’s words, “it must be remarkable.” Because links are the currency of inbound marketing, the more links you have to your content, the more Likes you garner on Facebook, the more times your content is re-tweeted, the more effective and valuable each piece of content is going to be in your sales and marketing efforts.

At the middle of the funnel (MoFu), you use the information HubSpot provides to segment your customers and personalize the experience for them. Because you now know which pages your website visitors have clicked on, which blog posts they’ve read and shared, which webinars they’ve attended, the emails you send are more targeted and the offers you provide them with become more relevant.



WHEN THIS MIDDLE OF THE FUNNEL INFORMATION IS USED TO CREATE A SOCIAL PROFILE OF YOUR CUSTOMERS AND PROSPECTS, AND THAT DATA IS INTEGRATED WITH SALESFORCE, SALES AND MARKETING GAIN TREMENDOUS POTENTIAL.



Both sales and marketing are on the same page when talking to the customer about the things that matter most to them. Both sales and marketing have access to the complete customer profile.

In other words, you’re using each piece of information gleaned from customer actions to create a segmentation factory that gets better and better at marketing and selling to your customers. What exactly is HubSpot’s role in this context?





HubSpot is an integrated software-as-a-service solution that helps marketers get found online. It helps you leverage the web to generate leads, analyze and convert the data those leads generate, and then nurture them throughout the sales cycle to deliver measurable results to the bottom line. Specifically, HubSpot gives you:

- Website and blogging tools to quickly create content
- Search engine optimization tools
- Multichannel analytics to measure the effectiveness of your marketing across channels
- Behavior-driven communications to help you nurture leads throughout the buying process
- The ability to be up and running in hours, not days or weeks

Take HubSpot's all-in-one inbound marketing software and pair it with Salesforce's industry-leading CRM solution and you get the most powerful—yet simple—tools you need to market to a world where Facebook, Twitter, and the rest of the social media universe are the lingua franca of how marketing is done today. You are equipped with insights to identify and improve key performance indicators every step of the way.



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GOODBYE TO
COLD CALLING

2

GOODBYE TO COLD CALLING

It's high time you said goodbye to cold calling.

When you make cold calls, you know little to nothing about the prospect. Even a cold lead, the type generated from outbound marketing, such as an email blast or a response to an advertisement or direct mail piece, gives a salesperson little information: name, title, company, phone number, and email address, maybe a few organizational details.



A warm lead, on the other hand, is the type of prospect generated by inbound marketing methods, such as a whitepaper download or a video download. Engagement with content across different platforms—search, social media, blogs—presents marketers with a more complete picture of the prospect. It provides both sales and marketing with a lead profile containing insights far beyond anything a cold call can offer. Warmer sales calls inevitably lead to more sales.

What does a warm lead generated with HubSpot look like?

Even before a visitor takes action on your website, [you can tell](#) how they arrived at your website, which pages they have viewed and what company they are associated with. Later, when the prospect fills out a form on your website, you will be able to view their [lead history data](#), form data and email communication they have received. What is more, you are also

Back to Leads List

Maggie Georgieva
hub
Open (Owner: Corey Beale) View lead in Salesforce.com

EDIT LEAD DETAILS
REMOVE LEAD
PUBLIC LINK: <https://app.hubspot.com/lead>

LEAD SUMMARY | LEAD HISTORY | FORM DATA | EMAIL COMMUNICATIONS

You are not receiving visit notices for this lead. [ENABLE NOTIFICATIONS](#)

Lead Information

First Name / Last Name: Maggie Georgieva
Email Address: georg20m@gmail.com
Phone: 646-591-2631
State: MA

Company Information

Company Name: hub
Company Web Address: souponmedia.com
Position / Job Title:
Industry: Yes

Lead Overview

LEAD GRADE
100 / 100

LEAD SOURCE
Direct Traffic

SITE ACTIVITY

TOTAL PAGE VIEWS: 2,950
UNIQUE PAGE VIEWS: 619
FORMS SUBMITTED: 289

LEAD NURTURING
Has completed a lead nurturing campaign.

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provided with a score for each lead, a grade that shows how engaged the person is with your content.

What data do you get with HubSpot's Lead Intelligence?

- If a prospect visited your website and which pages they looked at.
- How a prospect arrived at your website (e.g. which keywords they used in search to find you).
- How often a prospect engaged with you online and in what way.
- The lead's LinkedIn and Twitter profiles.
- Which campaigns or promotions they responded to.
- How often they converted by taking a next step, such as completing a form to get a whitepaper or an ebook.

When you can quickly and easily integrate that type of prolific, detailed information into a CRM solution, such as Salesforce, you and your sales team gain actionable intelligence. You get an unparalleled view of the customer before, during and after the sale. You can target your offerings and continue to mine markets for revenues long after the initial inquiry.

What data do you get if you integrate HubSpot & Salesforce?

- The data from HubSpot's lead intelligence can get transferred into Salesforce.com
- Status of the lead (open, closed won, closed lost, duplicate, etc).
- Sales representative who owns that lead.
- A public link to all details.



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CLOSING
THE LOOP

3



In traditional marketing, a lead is generated, passed off to sales and then what? The trail goes cold and it dies. In inbound marketing, on the other hand, when a lead is generated, it triggers a workflow that provides actionable intelligence about the path that lead has taken. It follows visitors from the moment they enter a keyword into a search engine through their conversion on a lead capture form to their ultimately becoming a lead and a customer.



When this intelligence is integrated with the data gleaned from Salesforce, sales and marketing benefit from closed loop marketing. Now, marketing can micro-tune content and campaigns based on actual sales results. Suddenly, salespeople are selling based on direct knowledge of which marketing collateral customers responded to. Together, sales and marketing become more-effective at generating leads and closing deals.

Closed Loop Marketing Works Like This:

Marketing optimizes your website for search engines and social media. The website is designed to include keywords and phrases your customers are most likely to use when searching for your products and services using a search engine, such as Google.

Next, Marketing creates editorial assets—blogs, whitepapers, ebooks, and social media feeds, for example—optimized for two audiences, one human and one technological.

From a customer's perspective, these assets provide timely, relevant content that help customers solve business problems or satisfy their needs. From a technological



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perspective, the content is carefully crafted to optimize search engine results, spreading your message across the web. If your content is enhanced with social media sharing links, such as Facebook, Twitter, or LinkedIn links, as people read the content, they can easily share it with the people in their social networks. This further spreads your message while driving the content's relevance higher in the view of search engines.

As people find your content, click on it, and complete lead capture forms to access it, HubSpot is gathering the data. This data helps you analyze the customer's intentions and determine whether it's time to offer them additional collateral, depending where they are in the sales cycle, or hand the lead off to sales. In fact, HubSpot produces a customized [Lead Score](#) based on the parameters you set, so that you can determine when a lead is ready to be passed over to sales.

This actionable lead intelligence gets transferred over to Salesforce where salespeople can review how qualified their leads are and prioritize accordingly.

Taken together, Salesforce & HubSpot can help you produce new, better, more-focused, more-effective content to deploy to prospects already in your sales funnel and those just entering it.

Sound complex? It's not. Think Amazon.com.

You search Google for a book on inbound marketing. Google returns [Inbound Marketing: Get Found Using Google, Social Media, and Blogs \(New Rules Social Media Series\)](#) by [Brian Halligan](#) and [Dharmesh Shah](#). Along with that search result, Amazon suggests other books on this topic and by these authors.

Each time you search and each time you make a purchase, Amazon uses that information, along with information from like-minded shoppers, to suggest books and other products in which you are likely to have some interest.

As a marketer in a B2B setting, you might further offer ebooks and whitepapers customers can download to learn more about the topic, even as you learn more about them and how best to market and sell to them.

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GET SMART W/
LEAD
INTELLIGENCE

4



With an integrated Salesforce CRM and HubSpot inbound marketing platform, leads co-reside in the sales and marketing systems simultaneously. While sales is working a lead, for example, [marketing is further warming the lead using HubSpot to nurture](#) the person based on behavior-driven actions. HubSpot tracks the prospect's actions and marketing can offer relevant resources accordingly.

Through this powerful integration leads are automatically de-duped. They can be automatically segmented and forwarded to the most appropriate sales representatives. The data is ultimately stored in HubSpot and Salesforce giving sales and marketing access to the customer profile. When a deal is closed in Salesforce, for instance, HubSpot is notified and the lead is categorized as "Closed Won," closing the loop.

LEAD-ING THE WAY: CONVERTING, TRACKING, AND ANALYZING LEADS

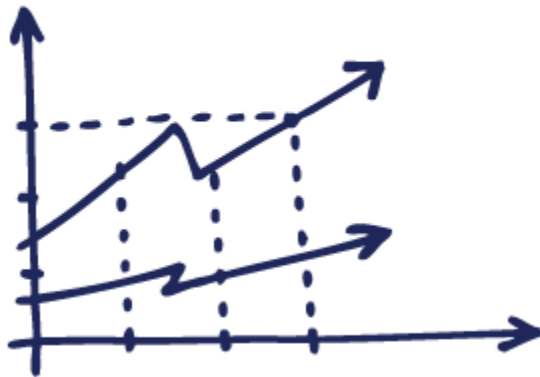
Driving traffic to your website via search results, blogging, and social media is, of course, half the battle. The other half is making those leads count—converting them from passersby to prospects and ultimately, into customers.

[Using HubSpot](#), marketers collect critical intelligence on prospects, from which companies they are coming (even before they click through to a landing page) to which content brought them there.

[HubSpot's Prospect Tracking tool](#) lets you sort prospects by geography and notify the appropriate sales rep without ever leaving the HubSpot application. Once the visitor becomes a lead, HubSpot's [Lead Management Tool](#) captures relevant social media profiles and automatically populates Twitter handles, LinkedIn profiles, and even images. This intelligence helps salespeople to build more personalized relationships and better manage their engagement with prospective customers.



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[Using the analysis tools HubSpot provides](#), marketers can take the data surrounding a landing page conversion and develop new content to further engage prospects, all while passing information about the lead along to sales via Salesforce.

Because HubSpot’s analytics are behavior-driven, marketers can provide communications timed to fill in gaps for customers as they kick the tires and consider your offerings. These behaviors further help you segment leads using information from the profiles HubSpot

builds about prospects both on and off your own Web pages, reaching into their social networks to flesh out their interests in your products.

HubSpot’s tools offer marketers the ability to analyze customer behaviors across all your channels of engagement including social media, billing systems, help desks, email, and mobile, including apps and SMS. [HubSpot’s advanced analytic capabilities](#) let you assess the effectiveness of each channel, how well it is attracting visitors, converting leads, and precisely how much revenue is being driven by any given channel. Because HubSpot integrates with Salesforce, each channel’s impact on the complete customer lifecycle is at your fingertips.

SALES AND MARKETING TO THE POWER OF 2



The disconnect commonly found between sales and marketing organizations often goes beyond the rhetoric and, in fact, may stem in large part from the physical disconnect between these departments and the applications they use to manage customer relations.

[Integration between Salesforce and HubSpot](#) seamlessly binds the two applications together. It gives sales representatives and marketers a shared view of the customer from the first point of contact at the top of the sales funnel all the way through the CRM system. The result is less frustration for sales and marketing professionals, a better experience for the

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customer, and a clear, comprehensive customer profile. The advanced views of customer behaviors in HubSpot give sales a complete history of all online interactions the prospect has taken on your website and from which source the actions originated.



As leads move through the sales funnel, HubSpot monitors their activity, allowing marketing to offer them helpful resources designed to fill in the gaps and flesh out the information they need to make a fully informed decision.

Similar to the way a bookseller, such as Amazon.com, might recommend titles to a customer based on what books they've bought and others who have purchased the same book have bought, HubSpot intelligently makes suggestions to prospects about product information and offers links to collateral they can use to educate themselves in advance of any contact from, or with, sales staff.

While marketing is busy engaging the customer through the company website or social media, sales is being [updated about the customer's activities via email](#) every time a lead visits the website and in what activity they're engaged. Simultaneously, marketing is alerted to improve their campaign effectiveness based on lead behaviors.

Using the closed loop system provided by the integration between Salesforce and HubSpot, marketers gain a complete understanding of the return on investment they've made in specific campaigns and offers. This critical data reveals which campaigns, which offers, which collateral, resulted in demo requests, how often sales was engaged by a particular lead, and most importantly—how many dollars were generated in sales from marketing.

The ease and thoroughness of this intelligence gives marketers a 360-degree view of the funnel, what worked and what didn't. With each new analytics report, you can improve the effectiveness of your marketing spend, adding dollars to the things that work and eliminating investments on offers that are ineffective.

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CONCLUSION





Today's buyers are more connected, better informed, and more discerning than ever before. To go to market and be less connected and less informed than your customers is like trying to win a 21st Century race using 20th Century technology. You not only won't win, you can't compete.

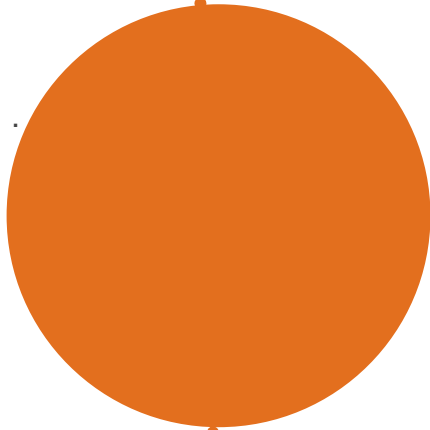
Your customers don't just watch TV anymore—they tweet with their friends and followers across town or cross-country while the show is still on. Your customers don't just surf the Web, they surf the Web while they're at the beach ready to catch the next wave and sharing photos of it with their friends on Facebook.

Investing marketing resources in dead or dying media is not the answer. You already know that. What you don't know is how to leverage the new media **effectively** - how to engage your customers in conversations they want to have, when, where, and how they want to have them.

For all the technological and sociological advances we've seen in the past five years or so, one thing hasn't changed: the customer is always right.

And, now, they want information, they want content, and they want easy access to it, and ways to socialize it. Your job is to give it to them. [HubSpot and Salesforce](#) give you the tools to do that, quickly, easily, effectively.





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