VIDEO 1: WHY USE CONTACTS

Hi, welcome to Introduction to Contacts. I'm Isaac from HubSpot Academy

By the end of this class you will understand why your contact database is the most powerful tool in your Inbound toolbox. You'll leave with a clear vision of how it fits into your strategy, as well as how the Contacts tool works in HubSpot.

So why Use Contacts in HubSpot?

Before we get started, let's define, "What is a contact"?

A contact is anybody your company markets, sells, partners, engages with or employs.

The Contacts tool in HubSpot is used to manage these contacts. It's your central database for keeping track of all the people and companies that have a relationship with your business.

Any database of value should help an organization do 3 things:

One, allow you to see the whole picture of every contact: It should show every touchpoint a contact has had with your company and organize them in one place.

Two, help align Marketing and Sales: Your contact database should allow marketers to easily segment, score and communicate with leads. And it should be just as simple for your sales team to see and interpret how a contact has interacted with your brand.

And lastly, a good contact database should integrate seamlessly with every other tool you use.

Here's how I like to think about it: Your contact database is the nerve center for all of your Inbound efforts. In a lot of ways it works like your brain, listening to inputs, interpreting them, and deciding how to react.

Every tool in HubSpot communicates with Contacts, storing details and context about each contact in one central location - the contact record. It is the back-end "context" system that stores information about your contacts and allows you to use that data to improve the way you market, sell and delight.

What does that mean for marketers? Because every detail and every behavior is stored and easily accessible in Contacts, it's easy to craft relevant marketing that feels more like a 1:1

conversation. You have easy access to all the information you need to understand and engage with your lead database and delight your customers.

What does that mean for Sales? A well-managed, integrated contact database will provide valuable lead intelligence to help sales close more customers. It also organizes the information relative to each contact in one easy-to-read place, which sales can use to prioritize leads. And when sales does call on them, it's not a cold call.

As our contacts move through their path to purchase: finding our website, converting, and eventually becoming customers, you want to gather as much contact information as possible.

The more information you gather, the easier it will be for your marketing and sales team to identify which contacts your business can successfully help and ultimately delight

As mentioned earlier, the contact profile will consolidate all of the different touch-points a contact has had with your brand, making it really easy to personalize your marketing and align your business with the way that people shop and buy online.

Effective inbound companies engage with, delight, and continue to sell to their existing customers. And when your current customers feel satisfied, valued and attended to, their loyalty pays for itself ten times over when these promoters talk to their own networks – strangers to your company – and the whole cycle begins again. A strong contact database is instrumental in this growth process.

Up next, we'll discuss the best practices you should follow to make the most out of your contact database and the individual contact profiles it contains.

VIDEO 2: HOW TO USE CONTACTS

In the last video we discussed the qualities of a good contact database and why that database is an essential part of closing and delighting your customers. But how do you build a first-class, inbound-approved contact database?

The HubSpot Contacts tool is central to every other part of your HubSpot account. You'll use it to keep track of all the different people who have a relationship with your business, to personalize the interactions you have with them, and to attract more contacts like them.

These are the four best practices that will transform your contact database into the foundation of your Inbound Strategy.

First up, let's learn about keeping your Contact Database up-to-date.

Let's discuss how contacts get into HubSpot in the first place. A contact is added to the Contacts tool when they submit a form on your website, are part of a spreadsheet that you import into your account, are manually added, or are added through an integration that you've set up with your account.

The more contacts you have, the bigger your sample size is. The larger your sample size, the more accurate your analysis will be. The result? An improved ability to cater to the needs and interests of your contacts.

Keeping your contact database up-to-date will ensure your database continues to work for you and not against you. There are four simple things you can do:

First, upload all of your current business contacts. Kind of like going to the gym, software increases in value the more you use it. The sooner you enter your contacts into HubSpot, the sooner you'll be able to see all the different ways they interact with your company in one place.

Second, track your contacts as they move through the Buyer's Journey. The most accurate way to do that is to use the Lifecycle Stage field in HubSpot, which we'll talk about a bit later in this video.

Next, if your company uses any other software, confirm that all of your systems are communicating with each-other. That will ensure that we maintain consistency across all our business platforms. This is a huge component of our last step, which is really more of a plea:

Please, please keep your data clean! Whatever it takes, make sure your business has a commitment to keeping the information you have accurate. HubSpot's contact database is incredibly powerful, and is the back-end system that powers much of your Inbound efforts. Analysis is only as good as the data on which it's based. If the information you are working with is sub-par, your marketing and sales will be too.

The next best practice is to personalize HubSpot for your own business, which you do by creating custom contact properties.

Before we discuss custom contact properties, let's define what a contact property is. Simply put, a contact property stores information about an individual contact. Examples of contact properties would be First Name, Last Name and Email address. Out of the box HubSpot comes with a bunch of standard contact properties to get you started.

HubSpot also has properties called company properties. A company property stores information about a group of contacts. Examples of company properties would be Company Name and Number of Employees.

A bit earlier I mentioned that your contact database is like the brain of your Inbound Marketing. It listens to how your leads and customers are interacting with your brand, interprets that information, and decides how to react. If we follow that analogy, the contact properties would be the collective knowledge and memory that is stored in your brain. Contact properties store information like website activity, email engagement, social media activity, form submissions, conversion information, and data from other integrated software. All of that information can then be surfaced elsewhere to power your inbound business by personalizing emails, building lists, triggering marketing automation, defining personas, creating smart content and establishing lead intelligence. Just like the brain, it's a far-reaching and powerful tool.

And just like brains and snowflakes, no two businesses are alike. So, build custom contact properties to make HubSpot your own. HubSpot comes pre-loaded with standard contact properties to get you started, but you can, and should, personalize the tool by creating custom contact properties that are more relevant to your specific business. In fact, you can create up to 1,000 contact properties in your account to store your custom details.

The next best practice is to learn how to tell a story with the contact profile. After all, there's no use gathering all of this information if you don't know what it means!

If you look at an individual contact's profile, you'll probably be struck by just HOW much information HubSpot stores about your leads and customers.

The easiest way to see how a contact has interacted with your company is to look at the contact timeline. The timeline will show you historical information on...well, just about everything. You can see how a contact has engaged with your company through email, social media, and your website. If you've set up integrations with other third party tools, those will be there too. Not to mention any list membership activity, form conversions and their relevant information, as well as custom events you may have set up.

In addition to storing the historical information about a contact, the contact profile is also a valuable window into how a contact is currently being marketed to. You can check what lists they are currently in, workflows that are nurturing them, and get a quick snapshot of the most important information about a contact. You can even trigger specific marketing actions right from their profile.

Our last best practice is to manage the Lifecycle Stage property to ensure accurate closed-loop reporting.

Lifecycle stages help you organize your contacts based on where they are in your sales cycle; marking them as a subscriber, lead, marketing qualified lead, sales qualified lead, opportunity, customer, or evangelist. Since your communication with your contacts will vary depending on their lifecycle stage, it's a critical part of setting up and maintaining your database.

For example, HubSpot's marketing team uses the lifecycle stage property to ensure that our customers don't receive emails intended for prospects and leads.

If you don't want to use the default HubSpot lifecycle stages, no problem. You can create your own custom property and add in your own custom stages that make more sense to you. The concept remains the same. What you are trying to do here is track how people move through your company's buying cycle, and gain valuable insight on how effective our marketing is at actually turning people into customers.

Using lifecycle stages properly ensures that your communications are tailored to the unique needs and concerns of all of your contacts, from first touch to loyal customer and beyond.

Consider this: The majority of the people who first visit your website and fill out your contact forms are likely trying to learn more about a problem they need to solve. Maybe they've downloaded a white paper, or subscribed to your monthly newsletter. Either way, they're really early in their buying process.

And so, as inbound marketers, you're going to want to communicate with that group of people really differently from the contacts who request free trials, consultations, or ask for an estimate from your sales reps.

Think about it this way. When you go to the store to buy clothes, sometimes you're just browsing. But other times, you're looking to make a purchase. There's nothing more frustrating than an overzealous sales associate when you're just window-shopping, or an empty sales floor when you want to buy.

HubSpot allows you to avoid putting someone in that frustrating situation. What if you could tell who is just browsing, and who is eager to make a purchase? Wouldn't that be great?

Now, imagine if you could see what clothes they had in their closet, what pieces they had tried on before, or even if they had discussed your clothing before with a friend?

Now we're starting to see the power of a centralized contact profile, and the contextual advantage of marketing to them with all of the information available in your contact database.

Now you can stop bothering the person who just wanted to check out the new styles in stock, and spend your time finding an open fitting room for someone who wants to buy.

Perhaps the most powerful benefit of using Lifecycle Stages is that it helps align your marketing and sales teams. Closed-Loop marketing gives both the marketing and sales teams insights into which leads are most likely to become customers.

When done well, marketing passes more data to sales, which helps sales prioritize leads, allows them to make warmer calls, and increases their close rate. Together, this all increases sales ROI. Sales reflects on that process, and provides feedback on how marketing's efforts are translating into customers.

The marketing team then analyzes their efforts, which leads to increased lead quality, quantity, and an overall increase of ROI on new marketing campaigns.

And again, here are the best practices for using the Contacts tool in HubSpot. Make sure your database is always up-to-date, customize HubSpot to make it your own, learn how to interpret the contact profile and manage the lifecycle stage of your contacts and you'll be well on the way to inbound success.

VIDEO 3: TOOL WALKTHROUGH

View the user guide or additional resources on the class page for a text version and instructions on how to use the tool.