Video 1: Why should you connect the WordPress Plugin?

Hi there, it's Anni from HubSpot Academy.

Use HubSpot's WordPress plugin to integrate your WordPress website with your HubSpot CRM. You can implement HubSpot forms and live chat on your website and sync your existing forms and form submissions with the HubSpot CRM.

By integrating the HubSpot CRM, you'll be able to track contact activity across your website and your businesses, including pages your contacts viewed on your site, forms they submitted, conversations they had with your Live Chat, emails they received from your company, and more.

Video 2: How the WordPress plugin works in HubSpot

Let's take a look at the functionality of the HubSpot WordPress Plugin. First, you can integrate all your WordPress forms with HubSpot, so that your form submissions are tracked in your CRM.

In your WordPress account, in the left sidebar menu, navigate to "HubSpot" and click "Forms." Then, in the upper right, select "Create form." Build out your form and click "Submit."

A pop-up screen will appear with the shortcode for the form. Copy the shortcode, navigate to a WordPress page or post, then paste the shortcode into the page editor.

Publish the page to take your HubSpot form live on your WordPress page.

Now, let's say a customer goes to your site and completes the form.

You can view submissions to the form in HubSpot by navigating back to the forms dashboard in WordPress. Hover over a form and click the "Actions" dropdown menu, then select "View submissions."

Next, use Chatflows to add live chat to your website and let site visitors chat with you in real time. You can also set up automated chatbots to respond to your visitors when you aren't online.

In HubSpot, on the top navigation bar, go to "Conversations" and click "Chatflows." Complete the necessary fields to create a chatflow, decide who should see this chatflow and when to show the chatflow. Then, click "Save." On the top right, click to toggle the switch on.

Now, let's test out the chat from your WordPress page. We'll open WordPress in a separate browser tab. The chatflow will appear in the bottom right of the webpage. When someone visits your page and begins a conversation, you can respond to them directly from your inbox in HubSpot.

Let's say you wanted a more detailed view of a specific contact. Click on their name and you'll be taken to their contact record in HubSpot's free CRM, where you can view their live chat record, recent form submission info along with page visits, and any other recorded activities.

Video 3: How to connect the WordPress plugin

Let's go through how to install the plugin directly from your WordPress account. Log in to your WordPress account. In the left sidebar menu, navigate to "Plugins" and click "Add New." Search for the "HubSpot All-In-One Marketing" plugin.

In the upper-right, click "Install Now." Then, click "Activate." In the left sidebar menu, navigate to and click on "HubSpot."

If you haven't set up your HubSpot account yet, you'll be prompted to create a HubSpot account. If you're already a HubSpot user, you may be automatically logged in to your account. If not, click "Log in to your account" to finish the installation process.