



## Prospecting in HubSpot, Part 2: Connecting With Your Contacts

### Video: Creating Tasks

Hey, it's Kyle from HubSpot Academy. Here's a sobering statistic for you: On average, salespeople only spend about 36% of their day selling. 36%! If you're in sales, you've probably felt the frustration of having a bunch of meaningless tasks standing between you and your quota. Whether that's data entry or internal processes or simply trying to find the right information, there are a lot of things that can get in the way of actually selling.

But you're a Sales Hub user, and Sales Hub has a ton of tools designed to help with this very problem. So let's take a look at how these tools can help you cut through the clutter and get down to business. Specifically, let's talk about how Sales Hub can help you work through a list of contacts.

### Product Tutorial

To access your contacts, go up to the main navigation, click the **Contacts** dropdown menu, and then select **Contacts**. In this example, we're going to take a look at my contacts using a view I've already set up. This is a list of people I need to follow up with today. The properties I've used to filter my contacts come standard with HubSpot CRM. First is **Lead Status**, which I have set to **Open**. I use this status for contacts I've reached out to but haven't gotten a response from. Next is **Last Contacted**, and I have that set to **Last Week**, so these are people I haven't reached out to in the past week. That's a good group to check in on. The third filter I have here is for **Sales Email Opened Date**.

### (End Product Tutorial)

Every email you send with HubSpot is tracked. Email tracking lets you know whenever an email you sent gets opened or clicked. Normally, you send an email, and you have no idea if the person ever saw it. But now, even if people don't respond, you can start to see who is passively engaging with you.

And this isn't just for emails you send inside of HubSpot CRM. With the HubSpot mobile app, you can send tracked emails from your phone and get real-time notifications when someone opens or clicks your email. And if you install HubSpot's free email extension on your computer, you'll get real-time notifications about your emails on your desktop, too. Real-time notifications function as signals that will guide you to your most interested prospects. For example, if you see that someone has opened your email and is viewing a document right now, try giving them a call. It's probably a good time to talk. And that's way more effective than calling blindly.

### Product Tutorial

You can see all your notifications by going to the main navigation and clicking on **Contacts** and then selecting **Activity Feed**. You can also access the activity feed on the mobile app if you're using that. But for now, let's stay here on the contacts page and keep working on this filter. Because HubSpot is tracking the emails I send, this **Sales Email Opened Date** property gets updated with the most recent date a contact opened an email. I have that set to **is known**, which means all these people have opened an email from me at some point – so I know I'm getting through.

### (End Product Tutorial)

Now, there's no reason you have to use this exact collection of filters. You and your team can probably come up with a set of filters that will work much better for your process. Once you have that, there are a whole bunch of HubSpot tools to help you work through your contact list. The first is tasks. Let's take a look.



## Product Tutorial

So here I am, looking at my **Follow-up** list. Let's create some tasks for me to complete. You can select individual contacts, or click up here to select all of them. Then, to create tasks for them, come up above the list of contacts and click **Create tasks**.

That opens up this sidebar here, giving us a few options. First is the task **Title**, but we'll just stick with the default there. Next is the **Type**. For this example, we'll select **Call**. You'll see what that does in just a minute. You can also set a **Priority** if this is an especially urgent task, but we'll skip that because these aren't especially urgent. Next is who the tasks will be **Assigned to**, so that can be left as me. If the due date comes up and the task hasn't been completed, an email reminder will be sent to the person who the task is assigned to. And if you're using the mobile app, you can get a notification on your phone. Let's set the **Due Date** as **Tomorrow at 5 PM**.

And finally, we come to **Queue**. Task Queues is a tool that tees up all your tasks for you. It's like a playlist for tasks. If you haven't created any task queues in your HubSpot account yet, you can do that here by clicking the **Create a new queue** button. All a queue needs is a name. In this case, I'm making a list of people I need to follow up with, so I'll call this **Follow-ups** and save it. And now I'll click **Create**, and I'll get one task for each of my selected contacts, and all those tasks will be put into my **Follow-ups** task queue.

As soon as you're done creating your tasks, this banner appears, and you can click the link to go straight to your tasks page. But if you're a little too slow and the banner disappears, or if there are other things you need to do first, you can always get to your tasks by going up to the main navigation, clicking on **Sales**, and selecting **Tasks** from the dropdown menu.

Before we go there, I want to show you how to create a single task. For this example, let's open a contact record by clicking on a person's name. This is a contact record. There are lots of things you can do here, but for now let's focus on creating a task. To do that, come over to these buttons on the left side of the screen and click on the one that says **Task**. This little window opens, and you see all the same options we saw before when creating tasks in bulk, with the added ability to add additional details in this notes section.

## (End Product Tutorial)

You can also access tasks in the HubSpot mobile app if you're on the go, and you can create tasks in Slack if you're using HubSpot's Slack integration. For more details on all the way to use tasks, check out the additional resources.

## Video: Working Through a Task Queue

Now that you know how to add contacts to a task queue, let's take a look at how to work through that queue.

## Product Tutorial

To get to the Tasks page, go up to the main navigation, click on **Sales**, and select **Tasks** from the dropdown menu. This is the tasks section of HubSpot. If you're a sales rep, you should become deeply familiar with the content on this page. On the right side of the screen, you can get a sense of your overall performance for the week. Here, you can also access your activity feed to see who's engaging with you and what meetings you have coming up. Similar to Contacts and Companies pages, you can organize your tasks into tabs. Notice the **Follow-ups** queue we just created is here. Click on it to see the tasks we added to that queue. You can search, filter, and sort these tasks however you want. If there's a particular task you want to complete immediately, simply click on the task to be taken directly to the associated record. Because we want to complete all these tasks, let's navigate to the top right corner and click **Start tasks**.



Here's the first record in my queue. This is a contact record, but company records look pretty much the same. Here on the left is a bunch of information about this contact. This isn't all the properties on this record; these are just the ones that I've chosen to have visible here.

To change what's visible, click the **View All Properties** button. That brings us to this screen, which shows all the contact properties that exist inside the CRM. Select the ones to display on the contact record by hovering over a property on the right and clicking **Add to About**.

To re-arrange the way these properties are displayed, go over to the left side and drag-and-drop the properties into a new order. To remove one of these properties so that it no longer displays on the contact record, click the **x** beside the property. The list of properties you see here will appear on every contact record you view. So, figure out which properties matter most to you and set them up once – that way, you'll always see the properties you're most interested in.

Okay, let's return to the contact record by clicking **Back to contact record**. On the right, you can see all the other records that are associated to this contact, such as their company and any deals they're involved in. This area in the middle is the contact timeline.

The contact timeline is core to HubSpot CRM. This is where all the actions the contact takes are saved and stored. Normally, you might be searching several different systems to piece this story together, but with the contact timeline, you can see it all in one place. Company records also have timelines, which pull together information from all the contacts associated with that company.

Regardless of whether you're on a contact or company record, click the **Filter activity** dropdown menu and check the appropriate boxes to display only the activities relevant to you. If you want to dig deep into a particular kind of activity, click on the appropriate activity tab up at the top of the timeline. For example, if you want to see all the emails you've sent back and forth with this person, you can see those here, under the **Emails** tab.

## Video: Calling Your Contacts

As you work through your task queues, spend some time on each contact record, making sure you understand the person's context and why you're reaching out. People are far more likely to engage with you if you make it clear that you understand their situation and have a way to help them. And as you work with your contacts, keep in mind that the tools in Sales Hub were designed to help you craft a personalized outreach for every person you work with. Let's go back to our contact record and see how.

## Product Tutorial

Remember when we created these tasks, we set the task type as call? Because of that, when the task queue brought us to this page, the calling pane was open. You can use HubSpot's native calling feature to make and record calls directly from the contact timeline. Normally, to make a call, you have to pick up a phone and manually dial the number listed in your CRM. But not in HubSpot. To make a call, simply click the dropdown menu and select **Call from browser** to call through your computer with a headset, or **Call from phone** to have the CRM call your physical phone and connect you. And while you're on the call, you can take notes about what you're talking about. If you're using Sales Hub Enterprise, calls made and recorded via HubSpot's native calling feature are automatically transcribed and saved alongside the recorded call on the contact timeline, but you should still take notes during the call so that you can see an overview of what you discussed.

It's also worth noting that, if you're using the HubSpot mobile app, you can search for contacts, companies, or deals on your phone and call or text them right from there. But for this example, we'll stick with the desktop version.



Let's say you call the first person in your task queue, and they don't answer. You leave them a voicemail and promise to send them a follow-up email with a piece of content you think they'll find valuable. Great. Click the **Hang up** button in the calling pane to end the call, finish writing your notes, and then click **Save call**. Then come over here on the left and click this **Email** button, and then an email pane will open where you can compose your message.

### (End Product Tutorial)

Quick side note: When we created all those tasks, if we had set the task type to Email, then the emailer would be open on each record we work through as part of the task queue. But since we set the task type to Call, the calling pane will be open. We're still free to send an email after the call, but in general, when you're creating tasks, set the task type to the action you're going to do first. That way, your first step will be ready to go right when you come to each record in your queue.

### Video: Using Templates and Documents

Alright, when you create an email in HubSpot, there are several tools that will help you out. First is templates. Templates is a tool you can use to build and share email templates. Normally, you either have to write each email from scratch, which takes a lot of time, or you copy-paste the message from one email to the next, which can lead to silly mistakes and generic writing. But with email templates, you can have a standard structure for every email that automatically populates the subject line and body of the email, which saves you a lot of time, and then you can personalize the email to make it more impactful. So you're increasing your efficiency and your effectiveness all at the same time. And, if you're using the HubSpot mobile app, you can use templates for the emails you send from your phone, which can save you from touchscreen typos. Let's go back to our task queue and see what the templates tool looks like.

### Product Tutorial

Here we are back on this contact record, and here at the bottom of the screen is the email pane. Across the top are all of the tools you can use when composing an email, and the first is templates. If you haven't created any templates yet, you can do that by going up to the main navigation and clicking on **Conversations** then selecting **Templates** from the dropdown menu.

If you want a step-by-step guide for creating templates, be sure to check out the additional resources. For this example, we'll just use some templates I've already created. To get to them, let's go back into the email pane and click the **Templates** button. That opens this window where all of my templates are listed out.

Every template has a name, which is only used internally. Your contacts will never see what the template is named, so feel free to name it whatever makes the most sense for you. That way, you can search for templates based on what they're for. You can see here I've created a few different templates for following up. For this example, let's select **First Follow-up**. I click on its name, and it gets inserted into my email.

Notice that the template filled in the subject line and the body of the email. And see how it's pulling in information from the properties on the contact record? Here it inserted the person's name; here it inserted their company's name.

Templates can also insert information about the person sending the email, so here it inserted my name and phone number. This is part of the magic of email templates – you can use the same template for a bunch of different people, and it'll be a little bit different each time.

### (End Product Tutorial)



Personalization tokens are great because they'll save you a little bit of time and help you avoid silly mistakes like misspelling a contact's name. But personalization tokens will only take you so far. You should be customizing every email you send. If you create a template and send it without manually adding any information, you risk falling into all the same traps as you would if you weren't personalizing the email at all.

Think about it: How many times have you gotten an email that has your name in the greeting – or even in the subject line – but it turns out to be totally irrelevant to you? How often do you actually engage with an email like that? Mmm, probably about never. Your buyers are no different. They're smart, and they'll know right away if you're sending them an email that you've sent to a thousand other people. Even if you're offering them something they might actually need, people won't engage with you if you make them feel like a name on a list.

What this means for you as you're creating your templates is that you need to make sure there's room for you to drop in things that are unique to the recipient. These fill-in-the-blank areas are the secret ingredients that make templates resonate with your contacts. Having placeholders in your template that require you to personalize the email each time you send it will make the recipient feel like you wrote the email just for them.

As you add personalization tokens and fill-in-the-blank areas to your templates, have a goal of referring to your contacts twice as often as you refer to yourself. Make sure the email is primarily about them and their needs. This is especially important when you're first establishing a relationship with the person. Your ability to help them will only matter if you can prove that you understand what they need help with. How you do this is up to you. You might put a few blank lines up at the top so you can reference a previous conversation, or add a few lines at the end to reference an upcoming meeting. Let's take a look.

In this template, you can see there are several references to the person's situation. This email is primarily about them. There's also this reminder to share a helpful piece of content.

To share that helpful piece of content, we'll use another Sales Hub tool: documents. The documents tool is a repository for sales documents that gives you total visibility into who views what and for how long. Normally, if you send a contact a document as an attachment, you have no way of knowing whether they opened it, let alone how much time they spent looking at it. With documents, you can see when they opened it and how long they spent on each page. It also gives your prospect the option of contacting you if they have any questions. Let's get back to that email we're crafting and see what this looks like in action.

## Product Tutorial

We are back in our email. Let's insert a document. By clicking this **Documents** button, we bring up a list of all the documents I've uploaded into HubSpot. Similar to when we selected a template, we can look through this list for the document we want and click on its name to add it to the email. The document then gets inserted as a link in my email. When the recipient clicks that link, they'll be taken to a viewer where they can view the document. You'll get a notification every time they view it. You'll also be able to see how long they spend on each page.

## Video: Booking Meetings

So we've just created a nice, personalized email to send to my contact. Hopefully they'll respond. But as much as I'd love them to write me back, what I really want this person to do is meet with me. Well, there's a Sales Hub tool for that, too, and it's called meetings.

Meetings is a tool that lets your prospects book time with you without the back and forth. Meetings syncs directly to your Google or Office 365 calendar so that prospects can only see available time slots. Normally when you want to schedule a meeting with someone, there's the endless back and forth of, "How's Monday at noon?" "I can't do Monday—how about Tuesday morning?" "I'm in meetings that morning—how about the afternoon?" And so on. But



with the meetings tool, your prospect can find a time on your calendar that works for them and book a meeting directly. This lowers the barrier of entry for people who want to talk to you, so you'll get more people booking meetings sooner.

There are a lot of different options for creating meetings links in Sales Hub. For each link you create, you can control how long of a meeting a person can book through that link, how much advance notice they need to give you, and what times of day and what days of the week they can book you. You can also create team meetings links that pull availability from multiple people's calendars. So if you want your prospects to book time with you and a sales engineer, for example, you can create one link that looks at both calendars. And, if you use Zoom for videoconferencing, HubSpot has a native integration with Zoom that can automatically add a Zoom link to the event's location. It's a lot to consider, so be sure to check out the additional resources for help creating the best meeting link for your process. For the purposes of the email we're creating, let's keep the meeting link simple. We just want this person to book time with me, so we'll add my personal meeting link to the email.

### Product Tutorial

Let's return to the email we are sending. For the purposes of the email we're creating, let's keep the meeting link simple. We just want this person to book time with me, so we'll add my personal meeting link to the email. Let's click the **Meetings** dropdown menu and select my personal meetings link. It gets inserted right into the email. There is a lot to consider, so be sure to check out the additional resources for help creating the best meeting link for your process.

### Video: Scheduling Emails and Follow-up Tasks

This email is looking really good. Without a whole lot of effort and without taking very much time, we've crafted an email that's relevant and helpful to the person we're sending it to. There's just one last thing to consider before we send it, and that's what time it is.

You might find it's most convenient for you to work through a task queue like this first thing in the morning or in the mid-afternoon, but is that the best time for your contact to receive it? Particularly if you're working internationally, it might be the middle of the night for the person you're sending this to. Not to worry—that's why HubSpot CRM has email scheduling. Let's take a look.

### Product Tutorial

Here on our email, we can click send right now – but we can also schedule the email to be sent out later. That way, you can write emails when it's convenient for you and have them delivered when it's convenient for your contacts. And, if you're using Sales Hub Professional or Enterprise, HubSpot will actually recommend the best time to send this email to this contact, so you don't have to guess.

One more thing to notice before we schedule this, though, is this checkbox: **Create a follow-up task**. To make sure this contact doesn't get forgotten after we send complete this task, we can create a task to remind us to follow up with them again later on. We're going to do just that in our email here. Using the dropdown menu, we'll select the number of business days before the follow-up task is created. Next, let's click **Send Later** to schedule the email, and then we're done.

One last thing I want to point out here on the contact record is this option to create a note, right here under the **New note** tab. Notes are for internal communication with your teammates. Anything you save in a note will be invisible to your contacts. But let's say you need help with this particular contact for some reason. You can add a note here and at-mention a teammate.



The note will then be visible on the timeline, and your teammate will get an email telling them that you've mentioned them. If they're using the mobile app, they can also get a notification on their phone. Then they can come in here and take whatever action you need them to. Or, if you just needed some information from them, they can click this **Add Comment** button and reply to you right on the note.

Okay, now you're done with this contact and ready to move on to the next one. To do that, just click the **Next** button, and you're on your way.

As you move from one record to the next in your task queue, you can use any combination of Sales Hub tools to meet the needs of the people you're reaching out to. This will make your outreach much more relevant and helpful for your contacts, and much easier for you.

### **Video: Using Sequences**

If you have Sales Hub Professional or Enterprise, then you have some additional tools that'll help you prospect faster and better.

First is Sequences. Sequences is a tool that automates a series of emails and tasks. Remember with task queues, you queue up all the people you want to reach out to, then you send an email and set a follow-up task to remind you to check on whether they've responded. Sequences takes care of all that for you. And, if you're using Sales Hub Professional or Enterprise, you have the ability to enroll multiple people into a sequence quickly using Sequence Queues. Let's see what that looks like.

### **Product Tutorial**

Let's go back to my saved filter that shows me all the people I need to follow up with. I'm going to select them all again, but this time, instead of creating tasks for them, I'm going to click **Enroll in sequence**. Then I select the sequence I want to enroll them all in, and I'm brought to this screen here.

You can see all of your contacts listed over here on the left. On the right, you see the steps of the sequence. Remember when I selected a template to send in the task queue? I had three different follow-up templates, but I was only able to select one. This time, I have all three of them queued up, and they're scheduled to send three days apart.

To edit the sequence for a particular person, click on their name, and you can modify the emails and tasks here on the right. In the top left corner, there's an **All contacts** button. Click that to adjust when the first step of the sequence will be executed and how long the system waits before executing the next step. On tasks, you'll also see this **Continue without completing task** checkbox. By default, when a sequence creates a task, it pauses until that task is marked complete. If you check this box, the sequence will continue on whether the task is completed or not.

It's important to note that there are no limits on the number of contacts you can enroll into your sequences on a given day, but there is a limit to the number of emails the sequences tool can send from your email inbox in a given day. If you hit the limit set by your email provider, they can ban you from sending emails for a while, which would be bad news for you. To help you avoid that, sequences limits the number of emails you can schedule for a single day, and once you hit that limit, it will direct you to schedule the email for a different day. This way, you never have to worry about sequences running afoul of your email provider's rules. When you have the sequence set up and personalized the way you want it, click the **Enroll** button in the bottom right corner to enroll these contacts into this sequence, and you're done.

### **(End Product Tutorial)**



It's important to note that sequences only continue if the person doesn't respond. If someone replies to an email in a sequence, the rest of the emails will be cancelled. And, because Sales Hub is one big, interconnected suite of tools, the sequence will also be terminated if they book time on your calendar using a meetings link, even if they don't bother responding to your emails. This way you don't have to worry about the automated system sending emails to people you're active corresponding with.

It's also worth noting that there's a property called **Now in sequence** that automatically gets updated when you enroll someone in a sequence. If you add that property to your saved filter, then you'll never have to worry about double-hitting anyone who's already enrolled in a sequence or forgetting about someone whose sequence has ended.

And there's your whirlwind tour of HubSpot's tools for sales outreach. Now that you've seen how all these tools fit together, the best thing to do is jump right in and give them a try. Used correctly, they'll help you sell faster and better. Enjoy!