

Marketing Made Easy with Marketing Hub Enterprise **Activity Workbook**



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Before getting started

**** Please save this worksheet to the desktop on your computer. ****

This way, your progress will be saved correctly as you complete each section.

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Introduction

HubSpot Marketing Hub Enterprise makes revenue attribution reporting, team management, and adaptive testing simple, giving you the power to create better customer. Say goodbye to countless hours of software management. Marketing Hub Enterprise offers the power and flexibility scaling companies need to succeed with a user-friendly interface that you've come to expect from software.

Marketing leaders and operations professionals now have the ability to quickly create and expertly manage powerful campaigns from beginning to end, so you can rest easy knowing that your team is doing what's best for your brand and your customers.

What are you waiting for? Get started with HubSpot Marketing Hub Enterprise today.

Teams in HubSpot

Activity: Brainstorming Your HubSpot Teams

HubSpot makes it easy for you, as a super admin, to control what parts of the HubSpot software your various teams have access to. Teams gives you the ability to group HubSpot users into teams by region or division to match internal organizational structure. With team permissions, you can allow users to view, communicate, and edit contacts, deals, and tickets, by user, team, or everything in the database.

With your business in mind, answer the questions below:

- How do you currently segment reports?
- How do you segment out who can view which contacts?
- How do you route leads, meeting links, conversations, and notifications?

Pro tip: When thinking through how to structure your teams, we recommend one of two ways: geographically (for example: the North American team) or functionally (for example: by role).

Activity: Assigning User Roles

Roles eliminates the need of applying permissions on a user-by-user basis. Instead, if you have two members on a team that require the same access, you can assign them to a role and the corresponding permissions you set will automatically apply. This way, you don't spend time configuring permissions for each user, and as an admin, you can see multiple users' permission sets at once.

Ask yourself the following questions:

- If you're currently using roles, what are they? What do users in each of these roles have access to?
- If you aren't currently using roles, brainstorm the permissions sets that could apply to one or more people at your company? What types of information would they need access to in order to succeed?

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Activity: Auditing Your Partitioning

Admins can also grant access to content, such as landing pages, blog posts, emails, forms, CTAs, and website pages, by team.

With this in mind, examine the permissions currently assigned to members across team.

- Who needs access to your brand content, such as site pages and blog posts? When do users need Publishing permission, as opposed to just Read or Write?
- How are your permissions currently granting access to your email tool? Who can currently contact customers through this channel?
- Who is currently creating your forms and CTAs? How are you ensuring consistency of brand and voice are brought to each of these conversion tools?

HubSpot AI in Action

HubSpot AI makes managing your data hygiene, content personalization, and security a breeze for your growing marketing team. It adds power to your favorite HubSpot tools, without adding complexity or flashy taglines. Let's see it in action.

Activity: Powering Your SEO Strategy with HubSpot AI Insight

The HubSpot SEO tool utilizes machine learning to see what content you're already an authority on and provide suggestions on what you can do to increase your website authority.

If you are new to the SEO tool, start by creating a topic cluster:

- Brainstorm a new core topic you want to build a topic cluster around with your team. This should be something you can use to build website authority, making you a thought leader on the subject.
- Once you identify your core topic, navigate to the **Marketing** dropdown menu and hover over **Planning and Strategy**.
- Click **SEO**.
- In the upper right-hand corner, click **Add a topic**. In the next screen.
- Enter your topic and click **Add**.
- Select the checkbox next to the topic and click **Create Topic**.

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Looking at the topic you just created, answer the following questions:

- Why did you select this core topic?
- How does this core topic align with your buyer persona and their interests?
- What type of content will you create to support this core topic?

If you have been using the SEO tool, turn to your Recommendations tab:

- To do so, navigate to the **Marketing** dropdown menu and hover over **Planning and Strategy**.
- Click **SEO**.
- At the top-left, select the **Recommendations** tab.
- At the top-right, click **Add new URL**.
- Enter in your website domain. When you're done entering the domain, select **Add URL**.
- Wait for HubSpot to scan the domain.
- Once HubSpot is done auditing the URL provided, click **View Recommendations**.

Looking at your recommendations, answer the following questions:

- How long will it take to implement these changes?
- What's the impact of making these changes?
- How can you prevent issue like these occurring on future content?

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Activity: Running an Adaptive Test

When experimenting with your content, the first thing you need to decide is, “What am I going to test on this page?” In any test, there is a *control* and a *variable*. The element that stays the same is known as the *control* and the element that you change in the hopes of improving your results is known as the *variable*.

Select a page to be your control. Write the name below.

There are countless possibilities for changes you can make to test your page’s effectiveness. A few essential elements can have a huge impact on your page’s performance.

These are: **CTAs, copy, layout, and media.**

Choose an element you will change in your variable. Answer the following questions:

- Why did you choose this variable?
- How are you planning to change this variable?
- Why do you think this change will better align with your persona?

Using the changes you’ve catalogued above, run an adaptive test.

- In your HubSpot account, navigate to the **Marketing** dropdown menu and then hover over **Website**. Depending on the page you’ve selected to test, click either **Website pages** or **Landing pages**.
- Hover over an existing page with a form module and click **Edit**, or create a new page.
- In the upper left, click test **Run a test**.
- In the dialog box, select **Adaptive test**, then click **Next**.
- By default, one page variation is added. To create additional variations, click **Add variation**.
- Make edits to the variation titles as needed, or click the trash icon delete to delete a variation.
- Click **Create variation(s)**.

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- You can create variations for an existing page from the landing pages or website pages dashboard. Hover over the page you want to test, then click the **More** dropdown menu and select **Run a test**.
- To select another page variation in the page editor, click the adaptive test dropdown menu and select the page name of a variation to open it in the page editor.
- You can add, rename, or remove page variations until they're published.
- In the upper left, click the adaptive test dropdown menu and select **Manage test**.
- Click **+ Add variation** to add more page variations.
- To remove a variation from the test, click the trash icon delete next to the variation.
- Click **Save changes**.

Leveraging Event Tracking in HubSpot

Events track when a visitor performs a specific action on your website. From clicking a CTA to viewing your pricing page, events record granular site interactions. Once this information is captured, you can segment contacts into lists, trigger workflows, and create funnel reports that help you track contacts through specific customer journeys.

Activity: Create an Event in HubSpot

- In your HubSpot navigation menu, select Reports > Analytics Tools.
- In the Analytics Tools home, select Events.
- In the Events home, select Create event.
- Enter the name of your event. In the Event type section, select Submitted form.
- Click Next.
- If using a Submitted form event: In the dropdown menu, select your HubSpot form.
- If using a Visited URL event: In the Page URL field, enter your page URL.
- If using a Clicked element event: Enter the ID, Class, or jQuery selector of your website element.
- If you want to create an event for an element on a specific page, enter the page URL.

Based on the event you've created, answer the following questions:

- What type of event did you create?
- Where on your site does this event live?
- What is the lifecycle stage or lead status of visitors most likely to interact with this event?

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Activity: Create an Event Funnel Report

In the famous words of Peter Drucker, “What gets measured, gets improved.” With this in mind, create event funnel report to track how visitors are reacting to different areas and elements on your site.

To start, list the top five events you would expect a visitor to complete throughout your customer journey. Why these events in particular?

Using the events you’ve written above, create your funnel report. To do so:

- In your HubSpot account, navigate to the **Reports** dropdown menu and then click **Reports**.
- On the top-right of the following screen, select **Create custom report**.
- On the left, click **Funnel**.
- On the right, select **Events**. At the top-right, click **Next**.
- In the “**Data tab**,” configure the filters for your report.
- Use the “**Tag**” dropdown menu to report on a specific event tag or all event tags.
- Use the “**Completion date range**” dropdown menu to choose the time frame for your report.
- At the top of the page, click the “**Visualization tab**” to customize your event pipeline and chart:
- Use the all dropdown menu to specify how records have moved through your event funnel.
- Click “**Add event**” to add up to five events you want to include in your report.
- To reorder the events in your pipeline, click on an event and drag it into place.
- To remove one of your selected events, click the **X**.
- After you've made your selections, click **Run report**. You can continue to adjust your filters and visualizations in the report builder. Click the **Data** tab to adjust the tags and time frame of your report.
- Once you've finished making your selections, click “**Save**” to add this report to your list of saved reports or add it to a dashboard.

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Looking at your report answer the following questions:

- How do the results align with your expectations?
- Are there any points or drop-offs that are surprising? Why or why not?

Closing the Loop with Multi-Touch Revenue Attribution Reports

With multi-touch revenue attribution, marketers get credit for driving business growth by tying revenue to every marketing action, and marketing execs make better strategic decisions rooted in business value instead of vanity metrics. Unlike most attribution solutions, HubSpot's attribution is built for real people, not data scientists. And it connects every customer interaction to revenue, automatically.

Activity: Create a Multi-touch Revenue Attribution Report

- On the top-right of the following screen, select **Create custom report**.
- On the left-hand side, select **Attribution**. On the right, click the box next to Revenue. At the top-right, click **Next**.
- Under the **Explore** tab, select the report that best aligns with your question. At the top-right, click the **Configure** tab if you'd like to build your report from scratch.
- Use the **Chart** dropdown menu to customize the visualization of your attribution report.
- Using the **Close date range**, **Deal pipeline**, and **Deal Type** dropdown menus, narrow down the scope of data you're bringing into your report.
- Dimensions are different categories of business data that you can measure with attribution report.
- Then choose your attribution model.
- Use the table below the visualization to drill into your revenue data and examine different contact interactions more granularly.
- At the top-right, click **Save** once you've finished customizing your report.

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Activity: Revenue Scavenger Hunt

Using both sample and custom reports found in your attribution builder, answer the following questions:

- What type of content influenced your highest value deals to close?
- Which channels influenced the least revenue?
- Which landing page helped generated the most revenue in the last 30 days? Marketing email? What type of content offer/experience was this providing to your personas?
- If you have multiple pipelines, which content type is helping drive the most revenue? Interaction source?

Try answering each of these questions using a variety of attribution models. How do your answers change based on the models you use?

Helpful Hint: How do you analyze a multi-touch revenue attribution report?

Figure out what's working, and double down on it. Look at the revenue results from different channels and see where you had the most success. Use this information to decide what marketing efforts to invest in moving forward. For example, if you notice that your Facebook campaigns drove a ton of revenue, run more Facebook campaigns!

Multi-touch attribution reports should be run *monthly* to understand the broader business impact of your marketing channels. While revenue is important, you should also dig into some of your other metrics for a more complete picture.

Creating Connections with Account-Based Marketing

Marketing Hub Enterprise comes with a starting set of tools to run a successful Account-Based Marketing (or ABM) program – including company scoring, properties, and templates, and out-of-the-box reports. That said, this strategy is not for everyone. Use the guide below to determine if your company is a good fit for this type of approach.

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Activity: Brainstorm if Account-Based Marketing is Right for You

Answer the following questions:

- Are you a B2B company?

If you answered yes, great! Account based marketing, or ABM, is a B2B strategy where marketing and sales work together to close big, complex deals at a discrete number of target accounts.

If not, a standard inbound marketing and sales strategy is likely more aligned with your customer base.

- Can your product be purchased with a credit card?

If you sell the sort of product that someone can pay for using their credit card, you probably won't see big enough returns from ABM to make it worth the investment. ABM is all about increasing the efficiency and frequency of closing big deals. The higher your price point, the more likely ABM will be worth your while.

- How many people are involved on the buyer's side?

If it's one or two, ABM probably isn't a good fit for you. You *could* use ABM if you wanted to, but it's unnecessary. That would be like using a sledgehammer to put a nail into a wall. Total overkill. But if it's three or more, you should definitely consider ABM as an option.

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- Is there typically a buying committee for your product?

Similar to the point made above, the more people involved on the buyer's side, the more benefit you'll see from ABM. So, if your team often finds themselves selling to a buying committee of half a dozen people, you should absolutely be using ABM.