Inbound Sales & HubSpot CRM Services

Discover the range of services we can deliver to your business to help you increase your revenue and grow your company

Sales process mapping

In order to map the sales process, and make recommendations to streamline and automate certain parts, it is important that understand some fundamental things:

1. What defines a lead, MQL, SAL and opportunity, and when do they convert into each of these?

1. At what stage do the salespeople engage?

1. How are leads passed to sales?

1. What is the sales process? I.e. SAL, connect, exploratory, goal planning, proposal sent, closed won/lost.

1. What are the current conversion rates at each stage of the sales process?

1. How big is your sales team(s), and what is their structure?

Once this is established, we can then begin to map the sales process to the HubSpot tool within the 'Deal' feature. This allows us to monitor the sales pipeline effectively, but also in the future create conversion reports to ensure that our sales forecasts are as accurate as possible.

The HubSpot deals tool allows us to apply the likelihood (as a percentage) that a particular opportunity will convert into a piece of business at a particular stage of the sales process.

For example, someone who is at the first stage of the process may only have a 10% chance of turning into a piece of business. A company at the final stage of the sales process may have an 80% chance to turning into a customer. This links directly to reporting, so if there is a deal worth £1,000 at the start of the process (10% likelihood), HubSpot will forecast £100 against the month that particular opportunity is due to close.

By creating a separate report that monitors the actual conversion rate between stages of the process, we can refine this to make our forecasting as accurate as possible.

Lead management

The information gathered in the first stage will inform this. We will have identified the lead handover process from marketing to sales, and at which stage the sales people will get in touch. A lot of sales teams will only contact marketing-generated leads when they become an MQL. Here is where we will position the idea that leads higher up the funnel are also good. We'll come back to this.

We will consult on the use of automated lead assignment based upon lead characteristics. For example, a lead in the industrial sector, would be assigned to the industrial sales team/person. If there was a team, we can also set up automated rotation of leads so everyone gets an even number.

We can then also apply automation to the sales process. For example, when someone becomes an opportunity, we can automate the process of creating a deal in the deals pipeline, automatically assign revenue and close date to this, as well as then being able to apply forecast and conversion reports. Additionally, we can look at task automation, CRM segmentation and smart lists.

At this stage, if the client engages with us RE: top of the funnel leads, we can start talking about lead scoring. This also leads into the next stage of the process.

Sales enablement

Sales enablement is summarised by HubSpot as the process of adapting technology and automation to enable sales teams to sell more, and faster.

Based upon the desired lead management process, as defined in the previous stage, there is sometimes a requirement to deliver lead information and follow-up information directly to salespeople's inboxes.

For example, if someone converted on a BoFu offer, such as a consultation, we could send set up an automated email to be sent to the relevant sales person, based upon the prospects characteristics. We could also include in the email a summary of the questions that need to be asked, or ways in which the conversation could be opened effectively. We could also give them an email template to use if they can't connect on the phone.

This type of information works really well for ToFu leads. If someone downloaded a guide, we could present the assigned sales person with examples of content that are directly related to the first piece they engaged with.

We can also create sales tasks automatically. If a lead comes in, is assigned to a sales person, an email is sent to that sales person, and then a task/reminder is automatically set up in HubSpot to ensure they follow-up.

If a client doesn't engage with the idea of following up ToFu leads, we can now position lead nurturing on the marketing side.

If a client has sales pro, we'd give them some pointers on templates, sequences, meetings and prospects, and how to use them effectively. A paid service could be for us to write a series of templates for them or provide them with an example.

Inbound Sales Training

Defining your buyer's journey

Traditional sales teams don't tend to look at their buyers needs when building their sales process. Instead, a criteria is usually laid in front of them that their prospects need to meet. This usually results in a 'box ticking' exercise, as opposed to a supportive process that guides them through their buying journey. As a result, the seller and buyer become misaligned, and minimal value is given to the buyer. It's more important than ever for sales people to add value above and beyond the information buyers can find online - what is the need for someone to speak with a sales person if they can find out the information on their own?

Developing a sales process that supports your buyer through the journey

In order to develop an inbound sales process, you need to understand what value your sales team can be adding at the awareness, consideration and decision stages to support buyers. We will explore a four-part process:

- Identify
- Connect
- Explore
- Advise

Define your ideal buyer profile

The **Identify** stage of the sales process is arguably the most important. If you're identifying the wrong prospects, and they turn out to be people that you can't help, or won't ever buy your product, sales becomes an expensive ordeal. We need to identify which buyers you can help, and which buyers you can't help. In turn, this increases conversion rates through the sales process, and results in much better quality conversations being had by your sales team.

We will look at how to identify the right prospects to engage with, and how to prioritise active vs non-active buyers using trigger events.

How to engage with prospects

The final part of inbound sales training covers how to **connect** with, **explore** and **advise** opportunities, based upon their position in the buying process, how active they are, and what their pains and objectives are.

HubSpot CRM Training

Closed-loop reporting

Marketing and sales data typically live in separate systems, there's not a good integration between the two or you simply aren't sure how to do it. This isn't the case for HubSpot users.

The biggest benefit that comes with HubSpot is the fact that all your data is stored in one place. This means it is much easier to run insightful and thorough reports that tie marketing and sales performance together in one environment.

We'll look into the HubSpot reporting tools, and how you can use them to align sales and marketing.

Sales enablement

Sales enablement is summarised as the art of using technology to enable sales teams to sell more, and faster. HubSpot's CRM system comes with a wealth of features as standard, such as 'Deals', email tracking, 'Tasks' and its intuitive contact view.

Deals is an agile-board-style pipeline that allows you to track where each of your opportunities are in the sales process, as well as inform revenue forecasting revenue reports based upon the conversion rates at each stage of this funnel.

Email tracking gives users real-time notifications as to when prospects open emails, or click on links included in those emails. These can be used as great sales triggers.

Tasks enable sales people to manage their days more effectively, and assign jobs to individual contact records in the CRM. The CRM then pushes notifications directly to your email inbox at set times before a task is due to be complete, as well as after if left incomplete.

HubSpot Sales Starter/Pro opens up a whole host of other tools, such as Templates, Sequences, Prospects, Meetings and Messages. All these tools have one aim: making the lives of salespeople easier, and more efficient.

Our training will cover how to use all these tools effectively, as well as examples of the content used and when to deploy.

CRM Overview

72% of CRM users would give up all the extra features, outside of the core contact/lead management tools, just to get a CRM that's easier to use.

Now let's talk about your business!

Find out how to grow your business with a predictable leads pipeline.

Book your consultation