MIND THE GAP

ALIGNING SALES AND MARKETING WITH HUBSPOT SALES

#INBOUNDPARTNERDAY

ELISE BECK

PRODUCT MARKETING MANAGER
HUBSPOT SALES

#INBOUNDPARTNERDAY

MIND THE GAP

ALIGNING SALES AND MARKETING WITH HUBSPOT SALES

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FROM ZERO TO 60

WITH HUBSPOT SALES

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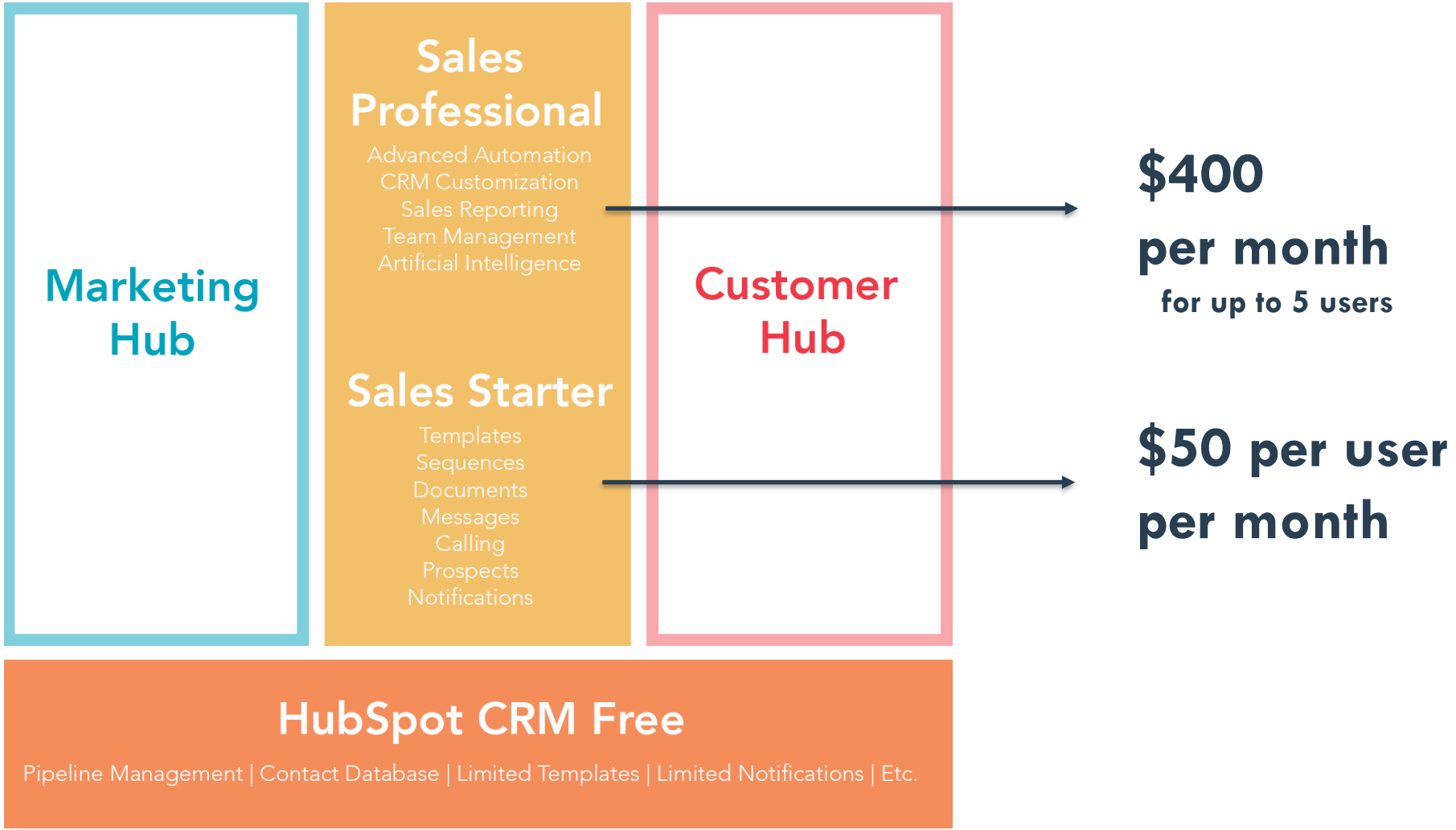
PERSONA RESP

Are you using the sales products?

Are the sales products part of your service offering?


Marketing Hub
Sales Professional
Advanced Automation
CRM Customization
Sales Reporting
Team Management
Artificial Intelligence
Sales Starter
Templates
Sequences
Documents
Messages
Calling
Prospects
Notifications
Customer Hub
$400
per month
for up to 5 users
$50 per user
per month
HubSpot CRM Free
Pipeline Management | Contact Database | Limited Templates | Limited Notifications | Etc.

Be humble.
Be simple.
Bring joy to others.

30
20
10
1/min
x 100

1 Getting Started

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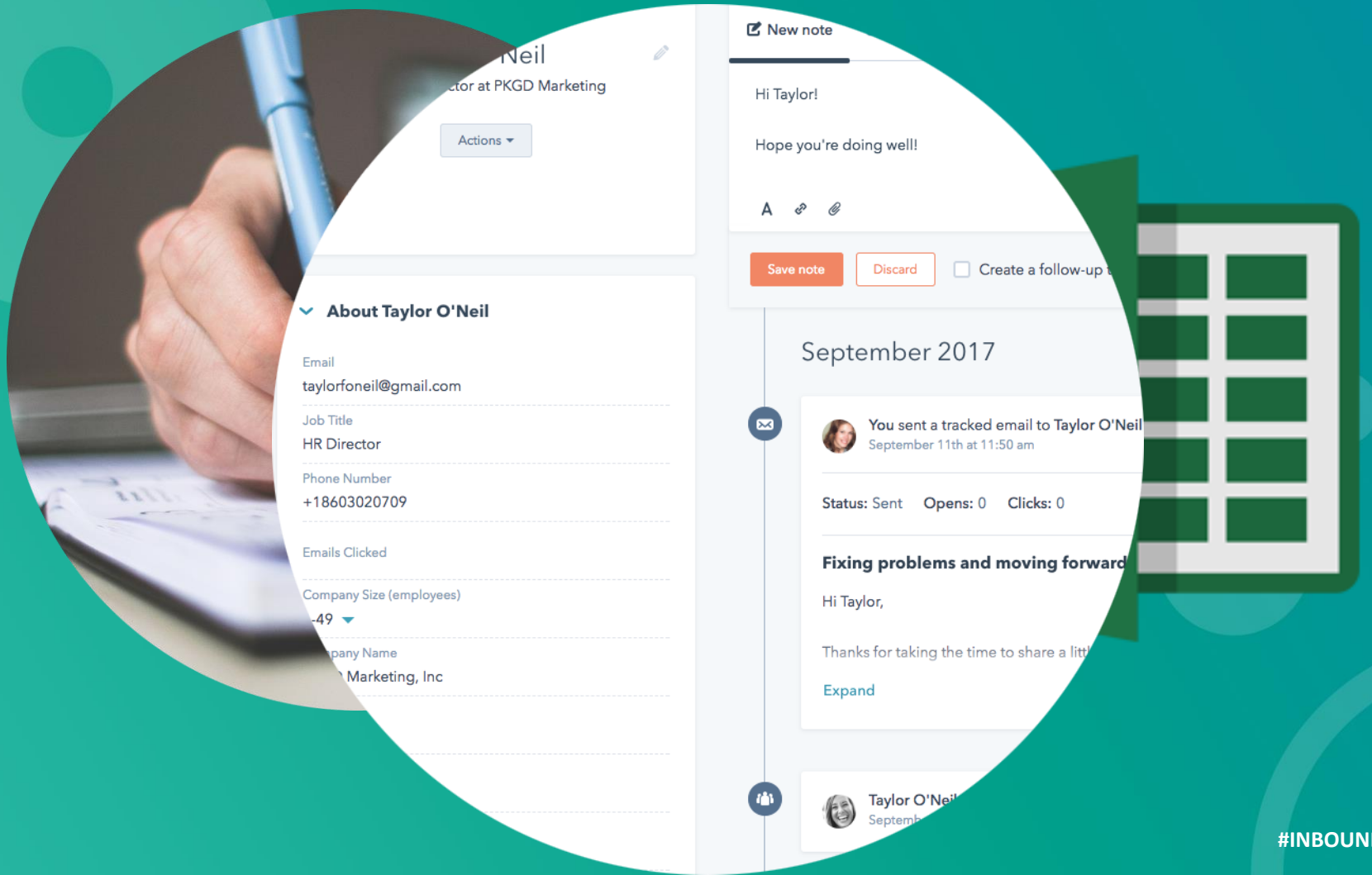

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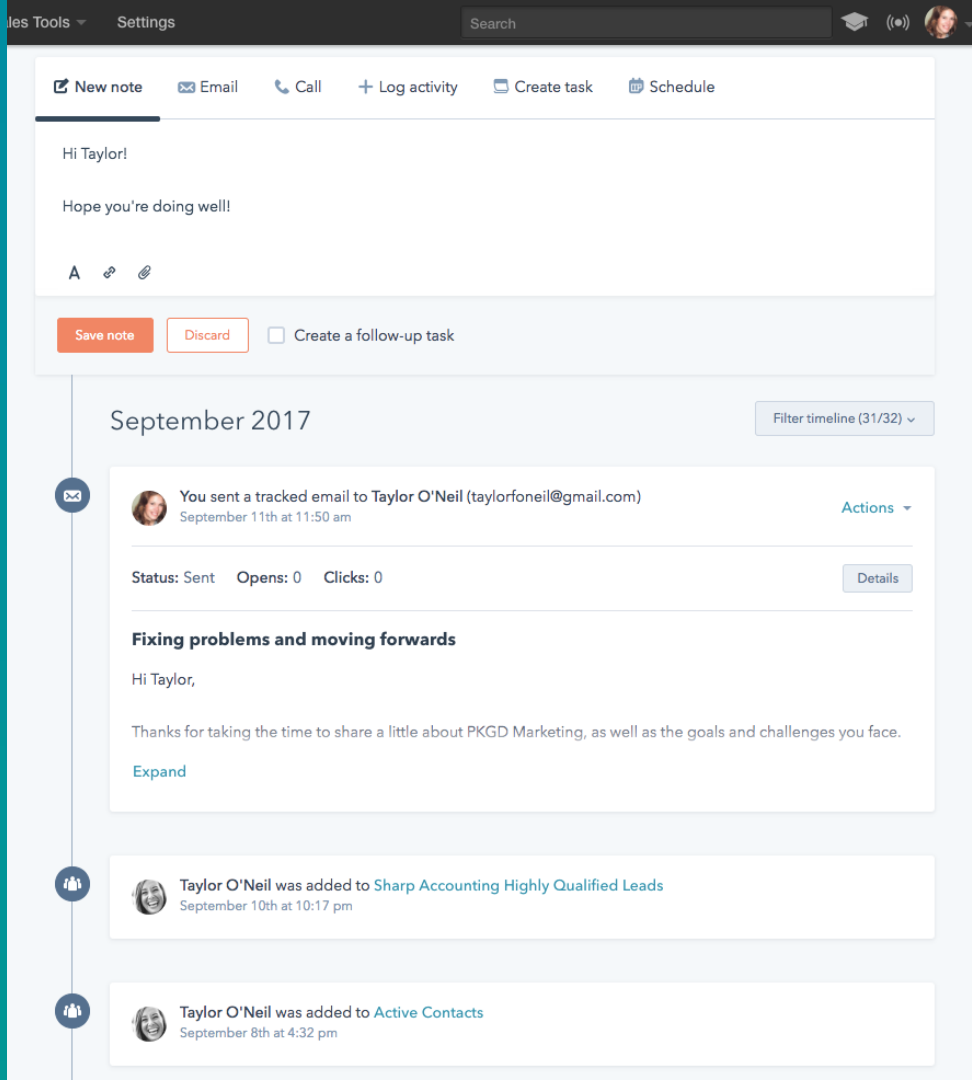
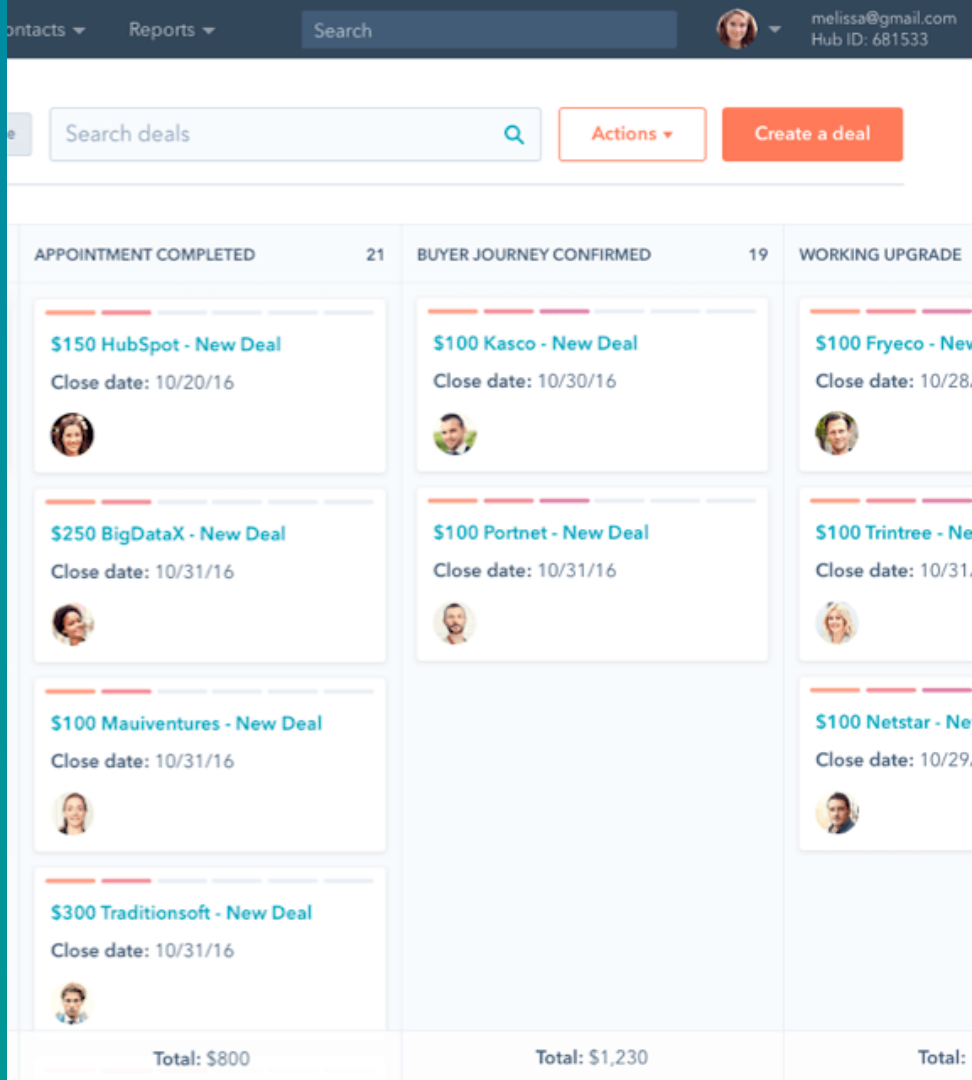
Let’s talk about HubSpot CRM free…

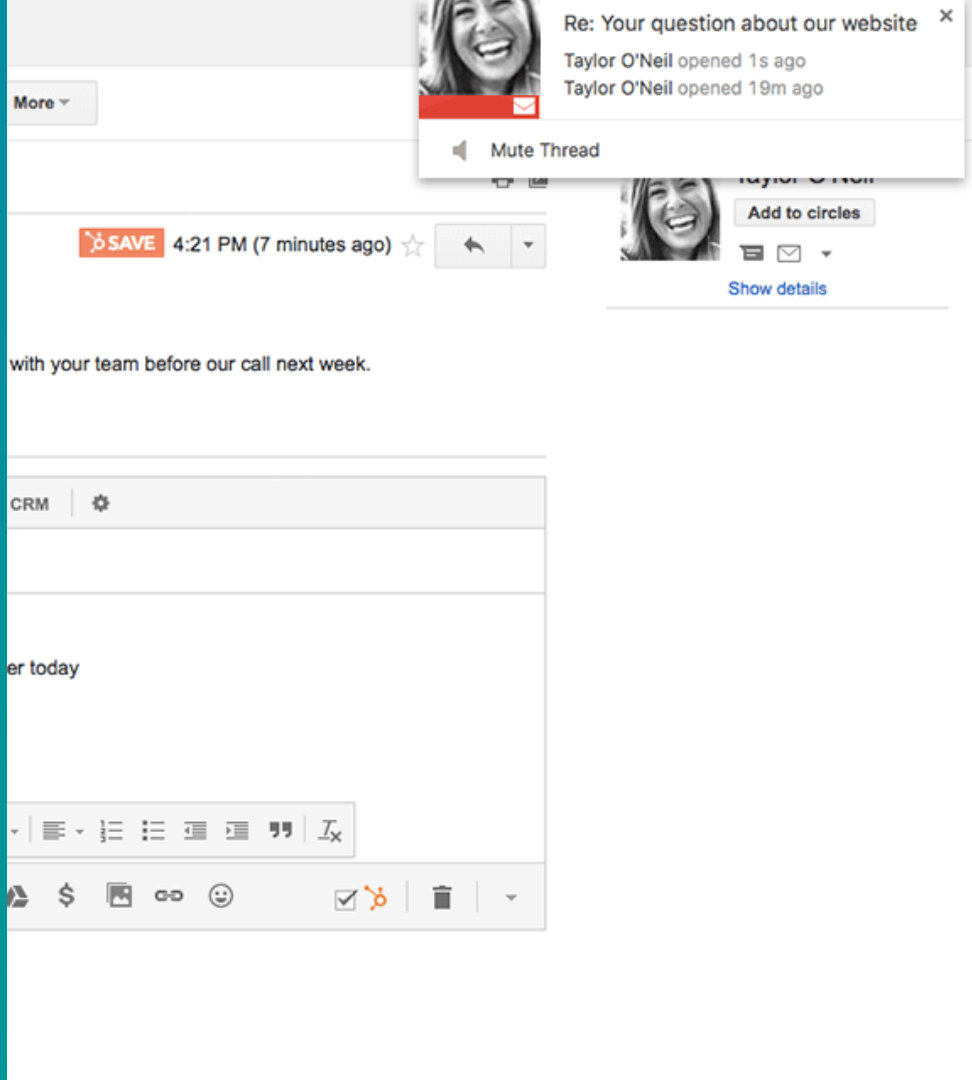
1. Managing your sales process.
2. Email tracking and productivity
3. Meetings!!!



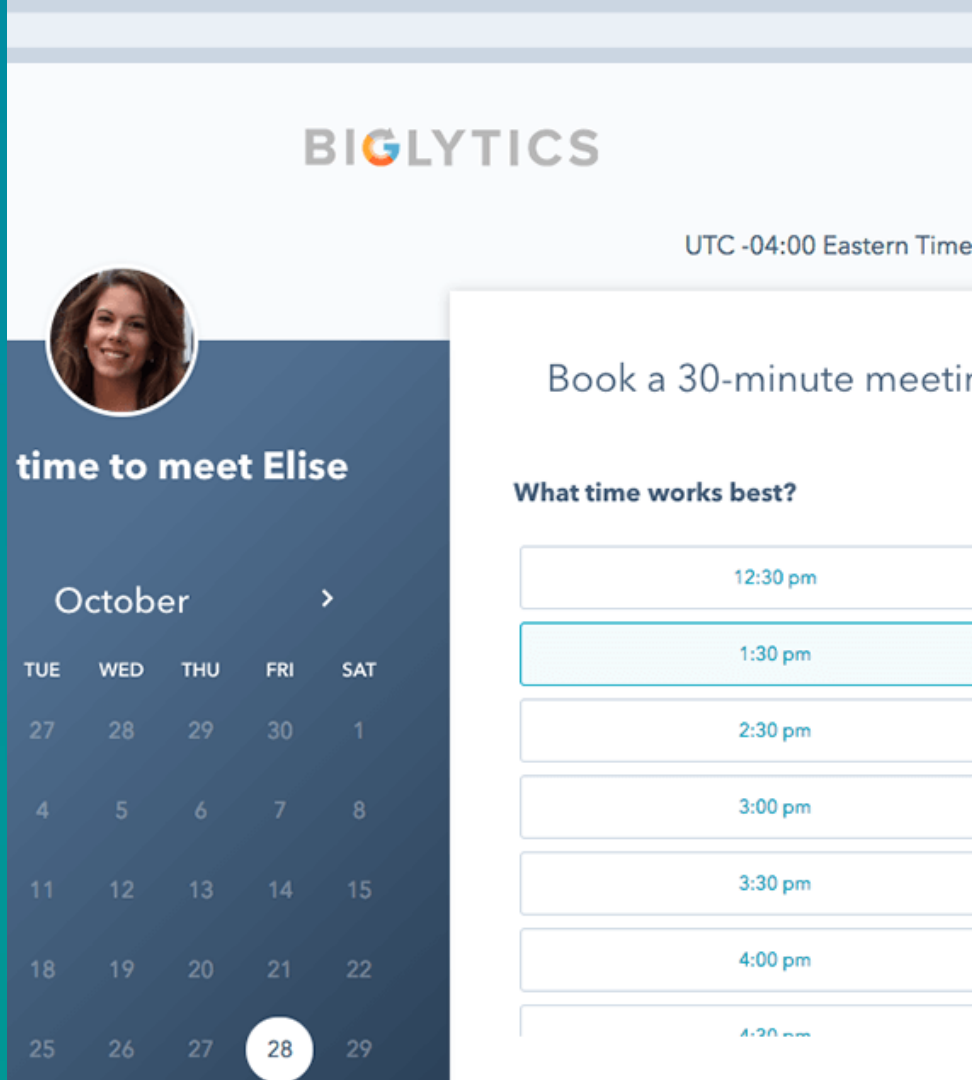
Managing your sales process



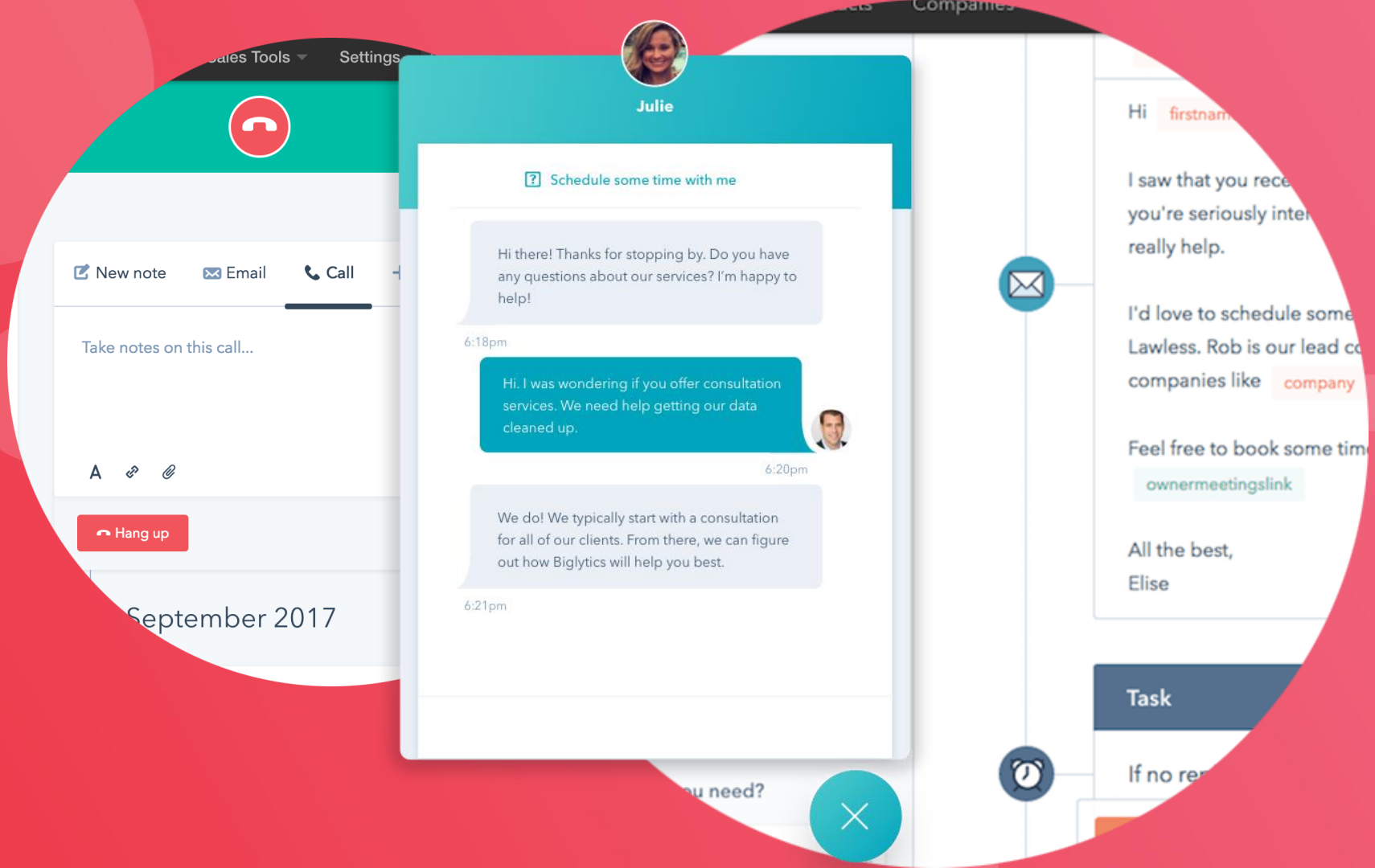
Email tracking and productivity



Meetings

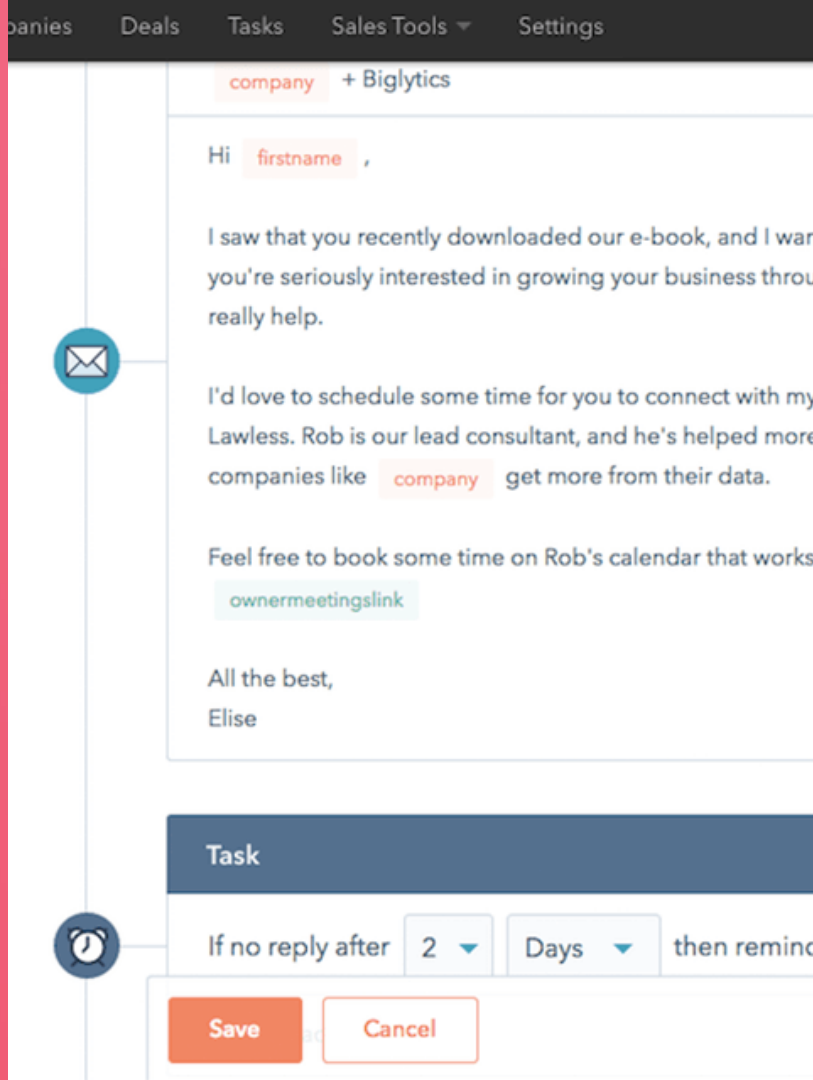

BIGLYTICS
UTC -04:00 Eastern Time
time to meet Elise
Book a 30-minute meeti
What time works best?
October
TUE WED THU FRI SAT
27 28 29 30 1
4 5 6 7 8
11 12 13 14 15
18 19 20 21 22
25 26 27 28 29
12:30 pm
1:30 pm
2:30 pm
3:00 pm
3:30 pm
4:00 pm

2 Growing Up

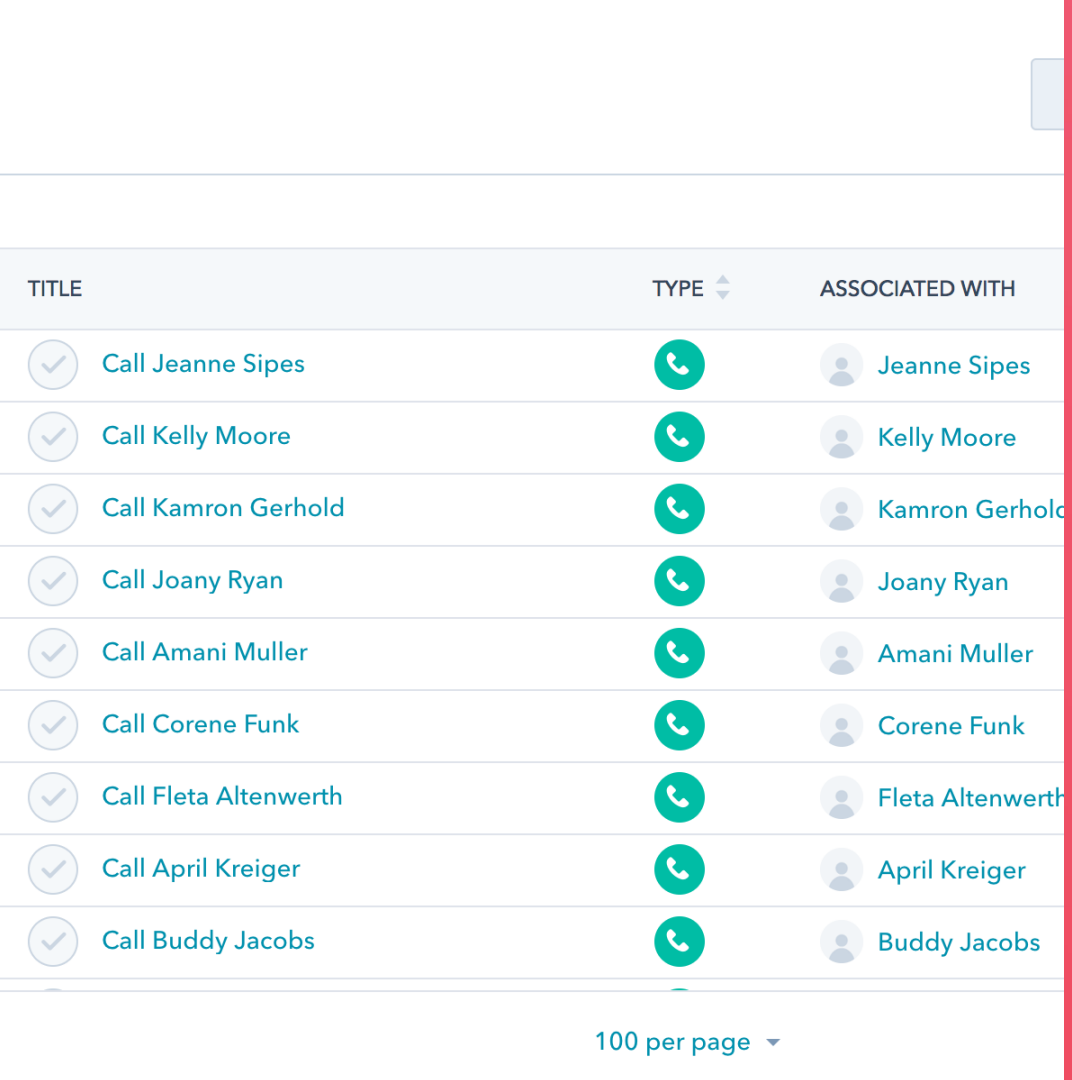

Sales Tools
Settings
New note
Email
Call
Take notes on this call...
Hang up
September 2017
Julie
Schedule some time with me
Hi there! Thanks for stopping by. Do you have any questions about our services? I'm happy to help!
6:18pm
Hi. I was wondering if you offer consultation services. We need help getting our data cleaned up.
6:20pm
We do! We typically start with a consultation for all of our clients. From there, we can figure out how Biglytics will help you best.
6:21pm
Hi firstnam
I saw that you rece
you're seriously inte
really help.
I'd love to schedule some
Lawless. Rob is our lead c
companies like company
Feel free to book some tim
ownermeetingslink
All the best,
Elise
Task
If no re

Let’s talk about HubSpot Sales Starter…

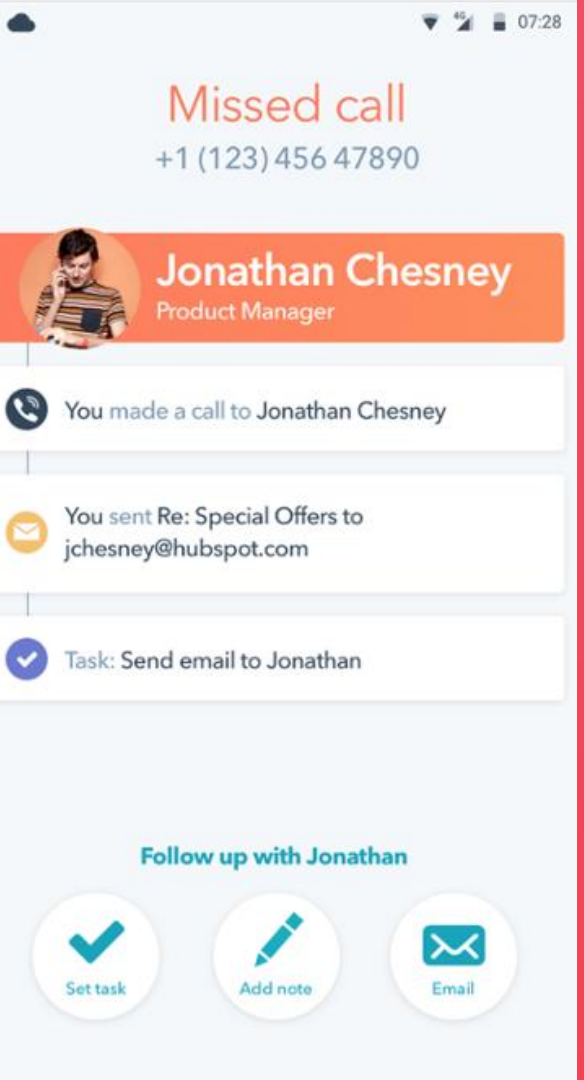
1. Calling
2. Templates, Documents, Sequences
3. Meetings and Messages



Calling

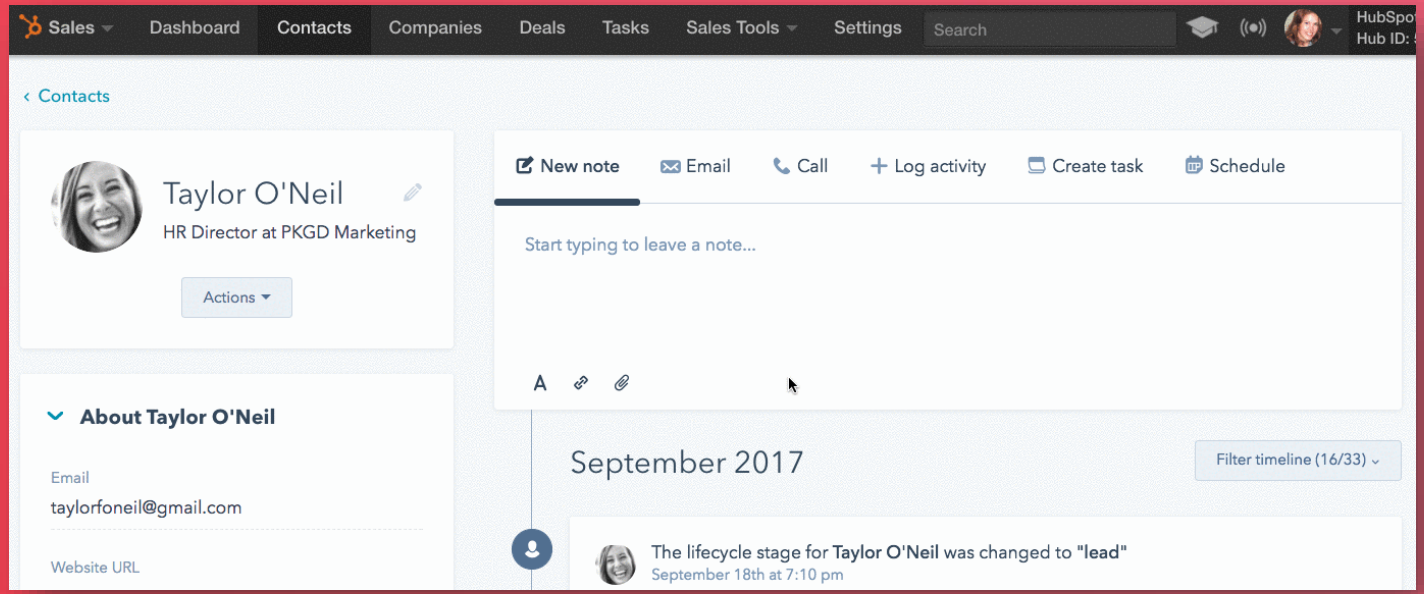

TITLE
TYPE
ASSOCIATED WITH
Call Jeanne Sipes
Jeanne Sipes
Call Kelly Moore
Kelly Moore
Call Kamron Gerhold
Kamron Gerhold
Call Joany Ryan
Joany Ryan
Call Amani Muller
Amani Muller
Call Corene Funk
Corene Funk
Call Fleta Altenwerth
Fleta Altenwerth
Call April Kreiger
April Kreiger
Call Buddy Jacobs
Buddy Jacobs
100 per page

Task Queues

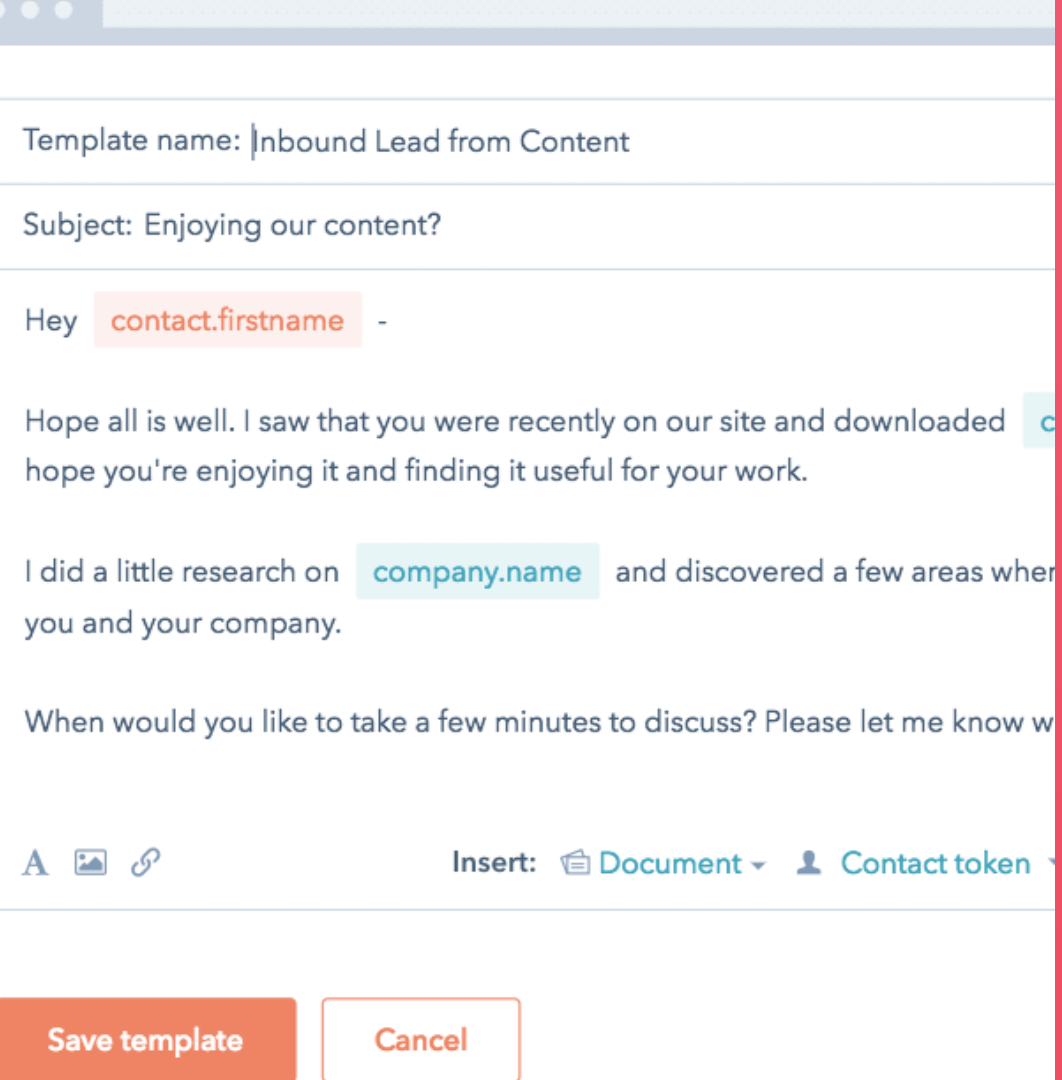

07:28
Missed call
+1 (123) 456 47890
Jonathan Chesney
Product Manager
You made a call to Jonathan Chesney
You sent Re: Special Offers to jchesney@hubspot.com
Task: Send email to Jonathan
Follow up with Jonathan
Set task
Add note
Email

Caller ID

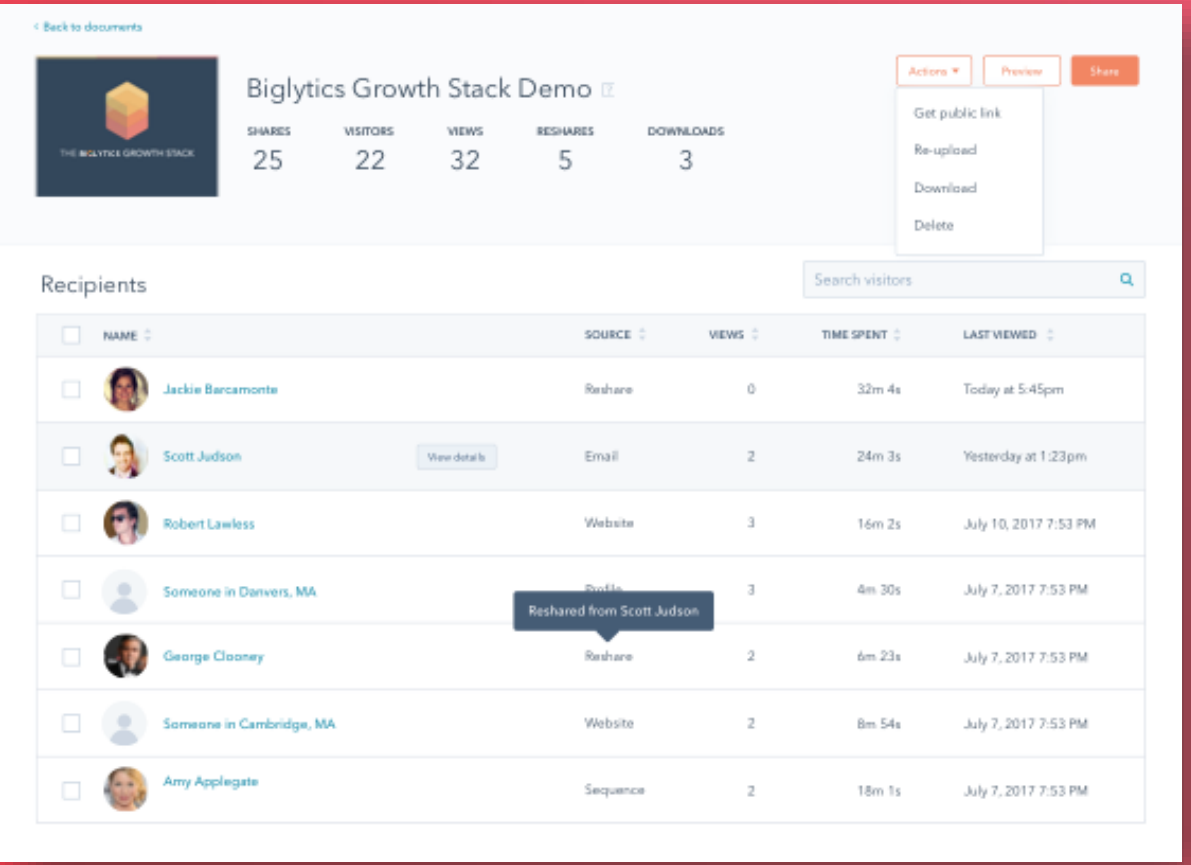
Snippets


Sales
Dashboard
Contacts
Companies
Deals
Tasks
Sales Tools
Settings
Search
Contacts
Taylor O'Neil
HR Director at PKGD Marketing
Actions
About Taylor O'Neil
Email
taylorfoneil@gmail.com
Website URL
New note
Email
Call
Log activity
Create task
Schedule
Start typing to leave a note...
September 2017
Filter timeline (16/33)
The lifecycle stage for Taylor O'Neil was changed to "lead"
September 18th at 7:10 pm

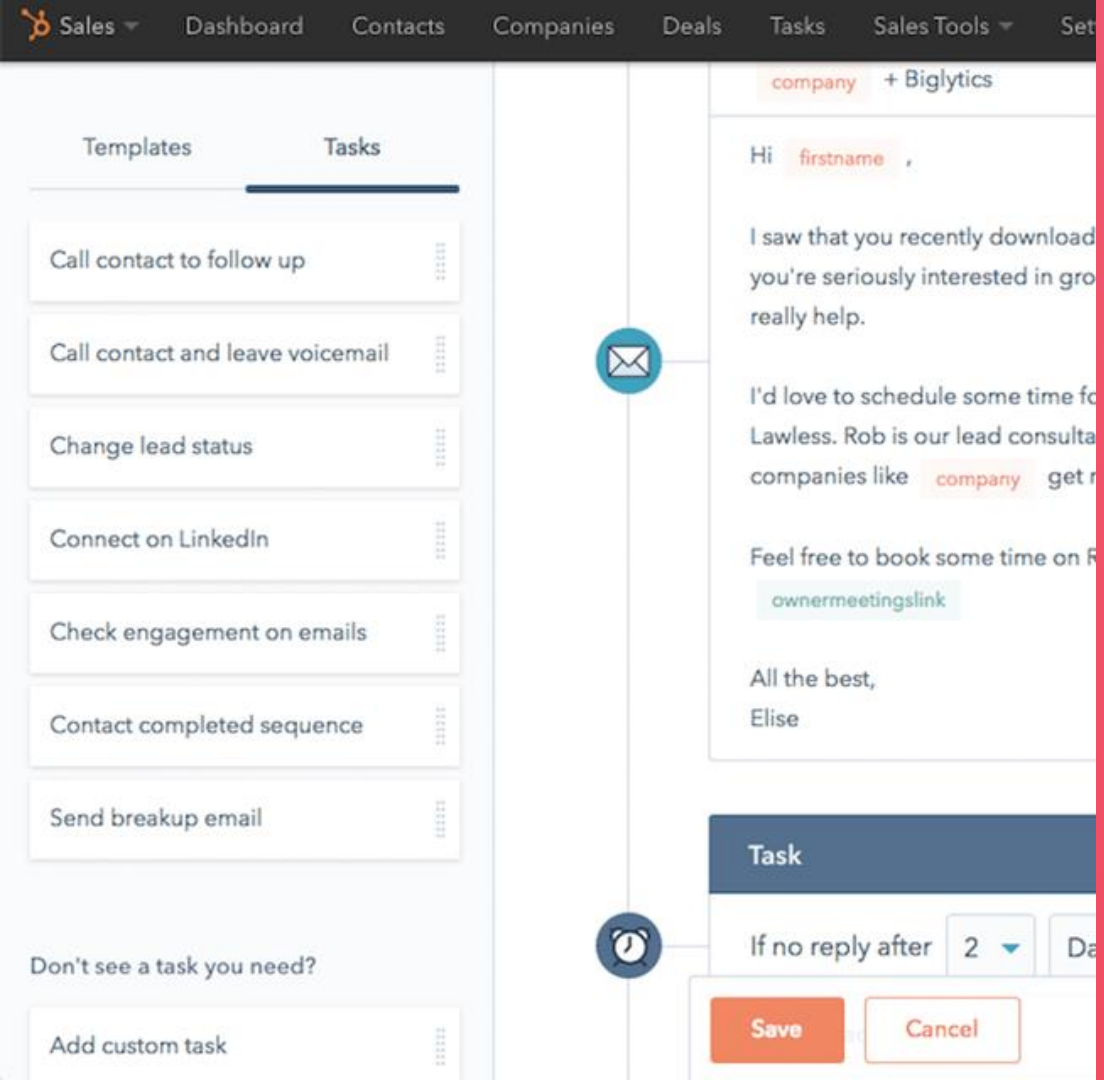
Templates, Documents, & Sequences


Template name: Inbound Lead from Content
Subject: Enjoying our content?
Hey contact.firstname -
Hope all is well. I saw that you were recently on our site and downloaded
hope you're enjoying it and finding it useful for your work.
I did a little research on company.name and discovered a few areas wher
you and your company.
When would you like to take a few minutes to discuss? Please let me know w
Insert: Document Contact token
Save template
Cancel

Templates


Back to documents
Biglytics Growth Stack Demo
SHARES 25
VISITORS 22
VIEWS 32
RESHARES 5
DOWNLOADS 3
Actions
Preview
Share
Get public link
Re-upload
Download
Delete
Recipients
Search visitors
NAME
SOURCE
VIEWS
TIME SPENT
LAST VIEWED
Jackie Barcamonte
Reshare
0
32m 4s
Today at 5:45pm
Scott Judson
View details
Email
2
24m 3s
Yesterday at 1:23pm
Robert Lawless
Website
3
16m 2s
July 10, 2017 7:53 PM
Someone in Danvers, MA
3
4m 30s
July 7, 2017 7:53 PM
Reshared from Scott Judson
George Clooney
Reshare
2
6m 23s
July 7, 2017 7:53 PM
Someone in Cambridge, MA
Website
2
8m 54s
July 7, 2017 7:53 PM
Amy Applegate
Sequence
2
18m 1s
July 7, 2017 7:53 PM

Documents


Sales
Dashboard
Contacts
Companies
Deals
Tasks
Sales Tools
company
+ Biglytics
Templates
Tasks
Call contact to follow up
Call contact and leave voicemail
Change lead status
Connect on LinkedIn
Check engagement on emails
Contact completed sequence
Send breakup email
Don't see a task you need?
Add custom task
Hi
firstname
,
I saw that you recently download
you're seriously interested in gro
really help.
I'd love to schedule some time fo
Lawless. Rob is our lead consulta
companies like
company
get
Feel free to book some time on
ownermeetingslink
All the best,
Elise
Task
If no reply after
2
Da
Save
Cancel

Sequences

Meetings & Messages

Meetings

Create Group Meetings link

Select a team meeting type

Group Availability

Use this when you'd like multiple people from your organization to be invited to a meeting with a prospect.

View examples

Round Robin Availability

Use this when you want a prospect to be able to choose a time that works best for them and book a meeting with a single member of your team.

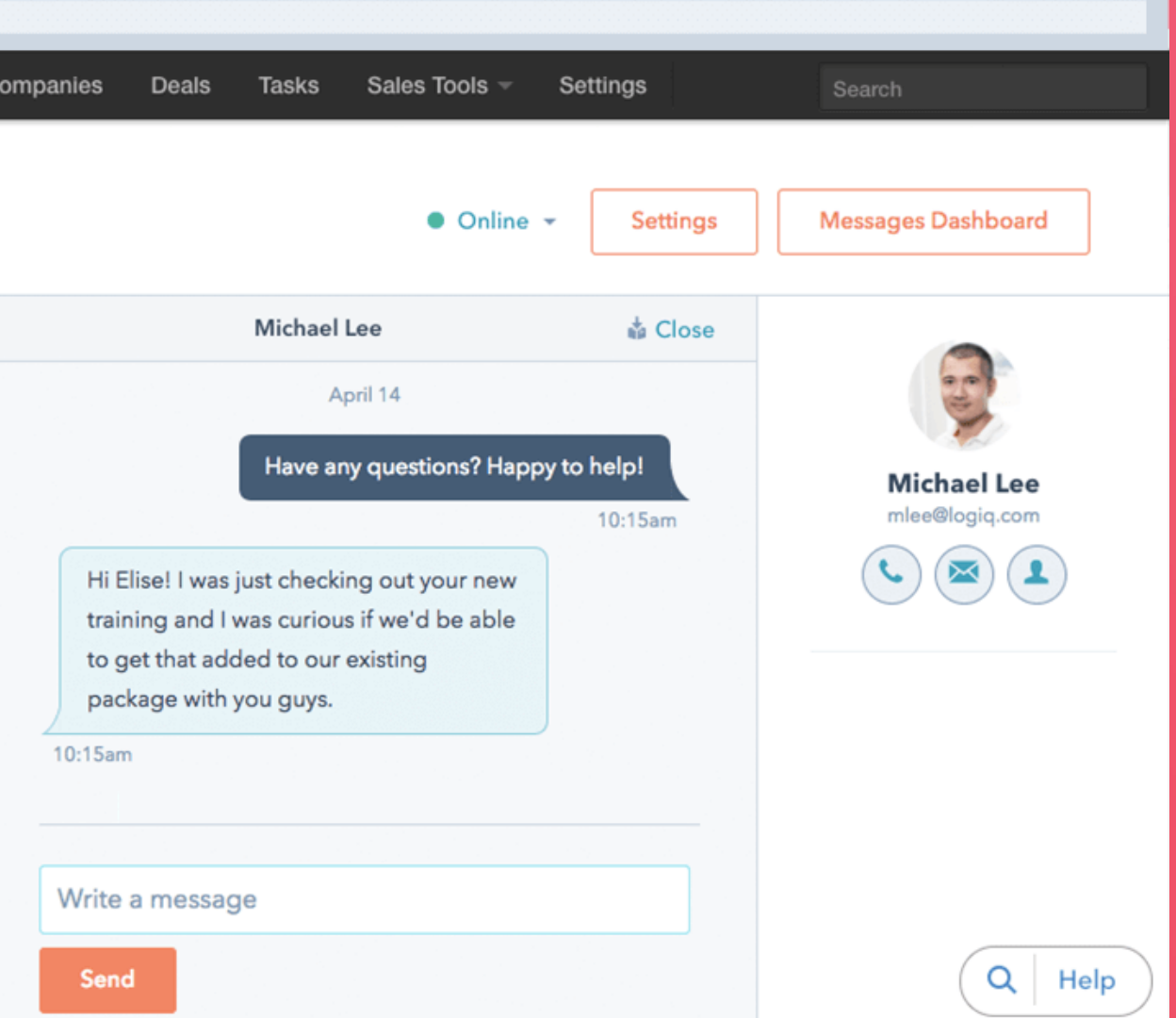
View examples

Team members

Choose the team members you'd like invited to this group meetings link.

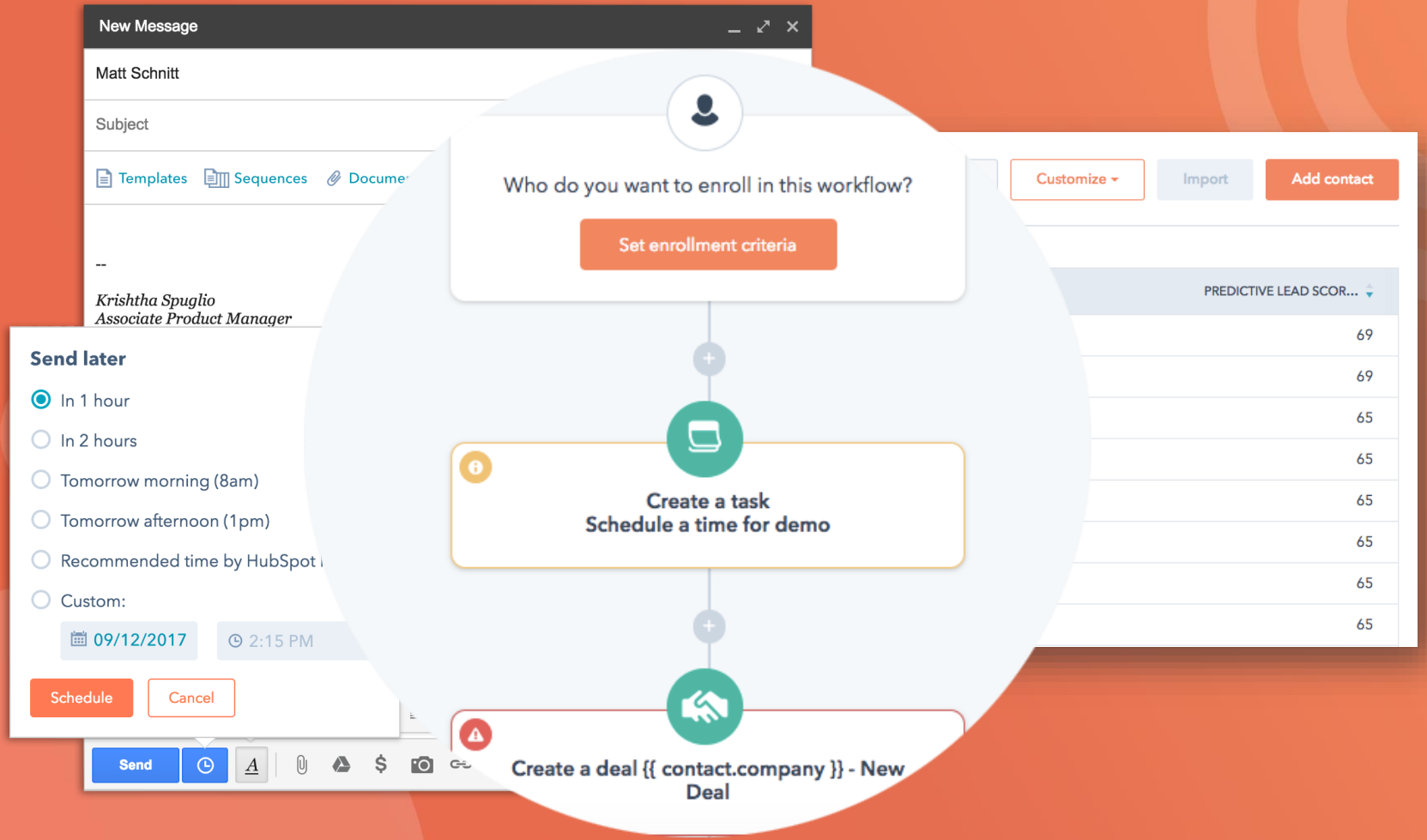
Cancel

Next


ompanies
Deals
Tasks
Sales Tools
Settings
Search
Online
Settings
Messages Dashboard
Michael Lee
Close
April 14
Have any questions? Happy to help!
10:15am
Hi Elise! I was just checking out your new training and I was curious if we'd be able to get that added to our existing package with you guys.
10:15am
Write a message
Send
Michael Lee
mlee@logiq.com
Help

Messages

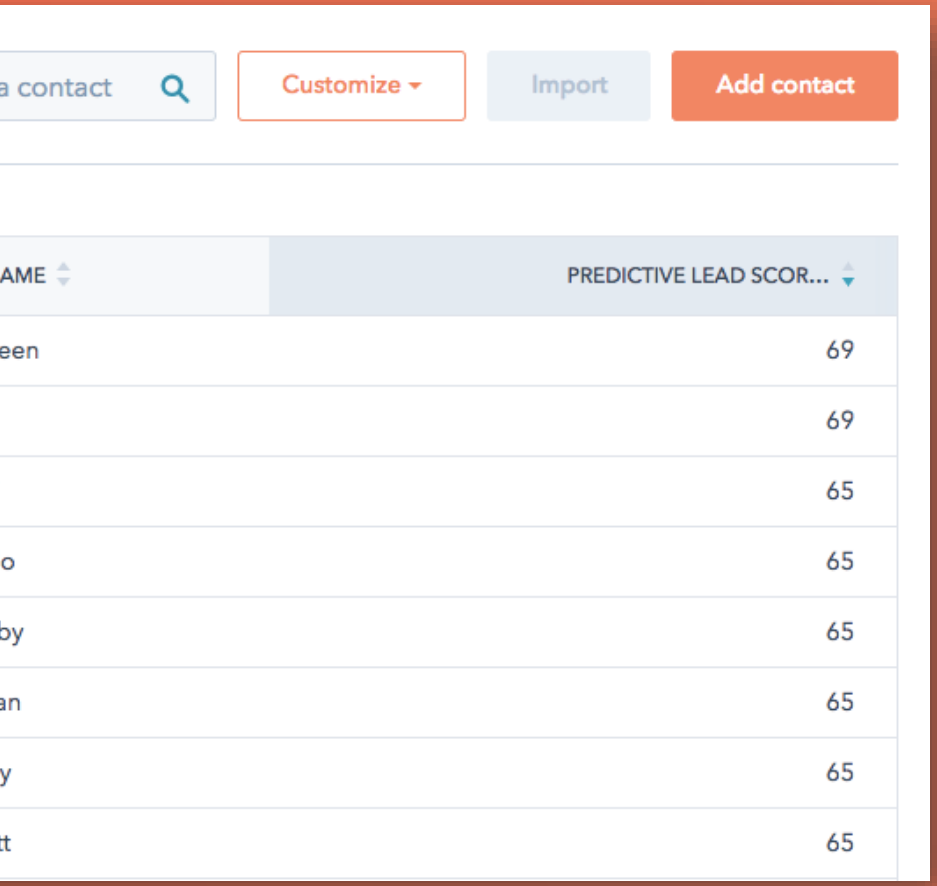
3 Gearing up


New Message
Matt Schnitt
Subject
Templates
Sequences
Docume
--
Krishtha Spuglio
Associate Product Manager
Send later
In 1 hour
In 2 hours
Tomorrow morning (8am)
Tomorrow afternoon (1pm)
Recommended time by HubSpot
Custom:
09/12/2017
2:15 PM
Schedule
Cancel
Send
Who do you want to enroll in this workflow?
Set enrollment criteria
Create a task
Schedule a time for demo
Create a deal {{ contact.company }} - New Deal
Customize
Import
Add contact
PREDICTIVE LEAD SCOR...
69
69
65
65
65
65
65
65

Let’s talk about HubSpot Sales Professional…

1. Artificial Intelligence
2. Workflows
3. Advanced CRM Features
4. Reporting

Artificial Intelligence



Predictive Lead Score

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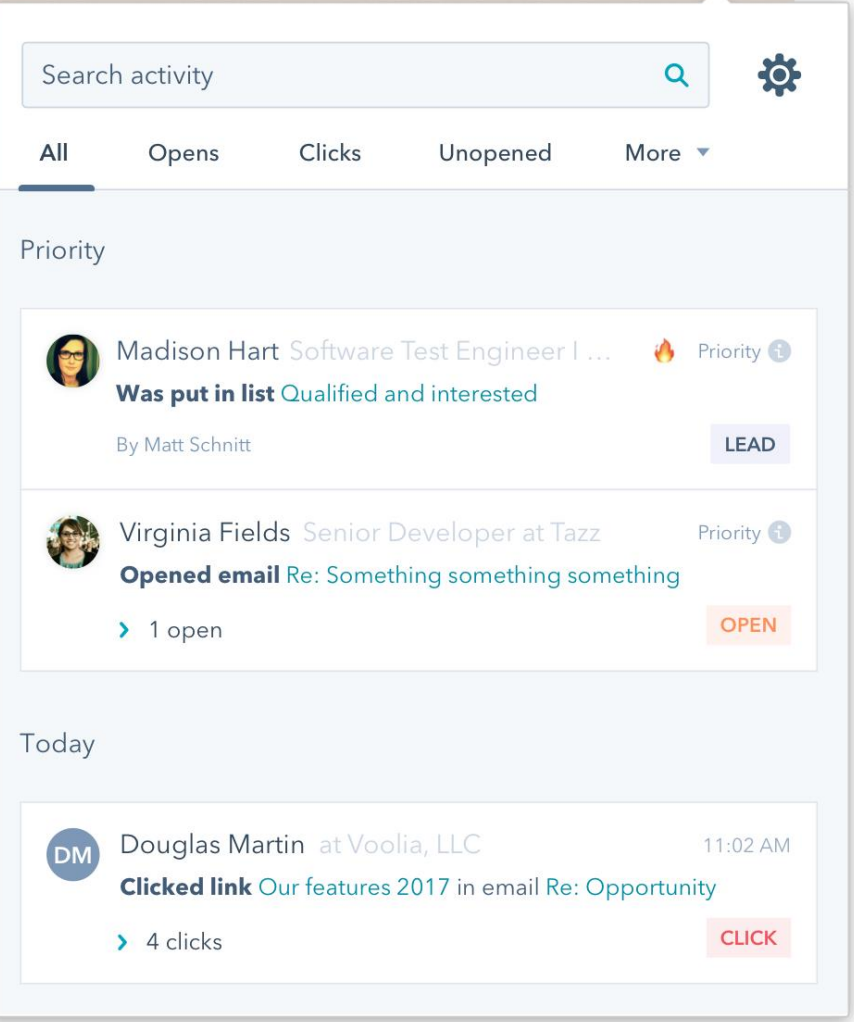
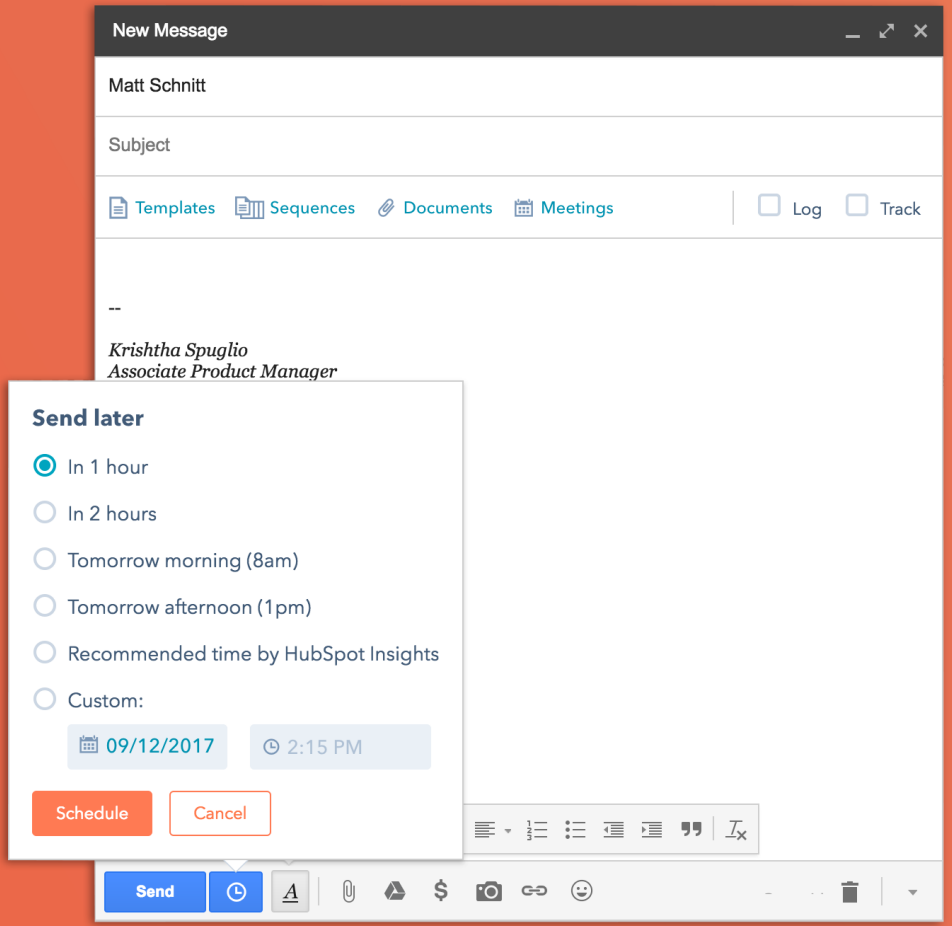


Smart Notifications

#INBOUNDPARTNERDAY



Smart Send Times

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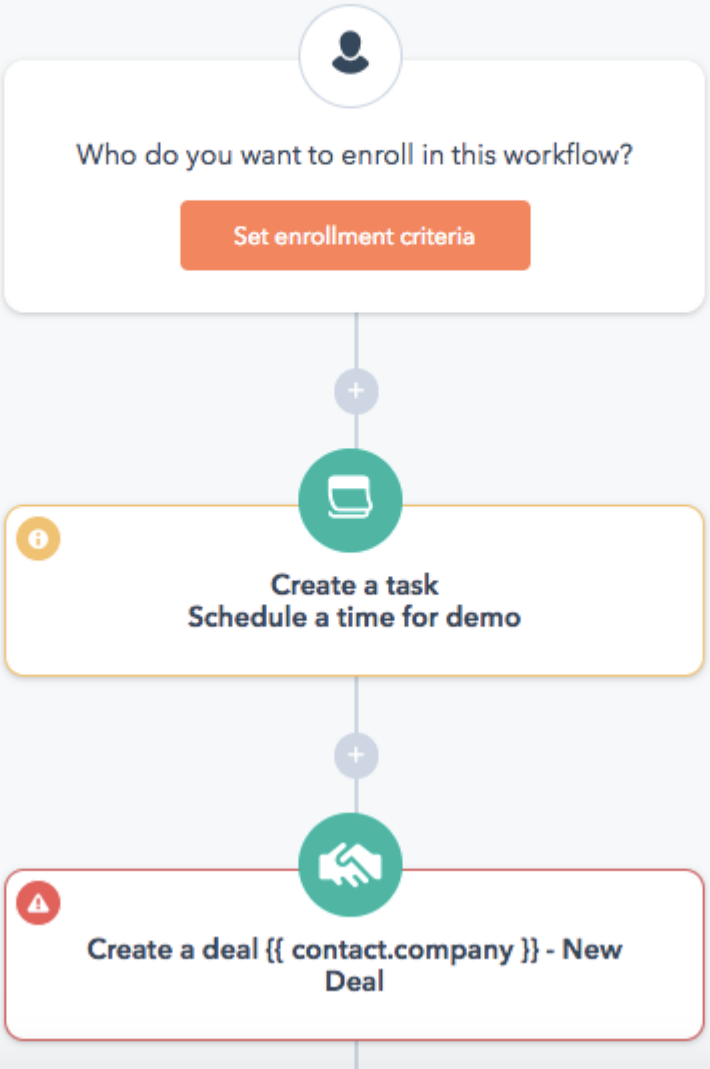
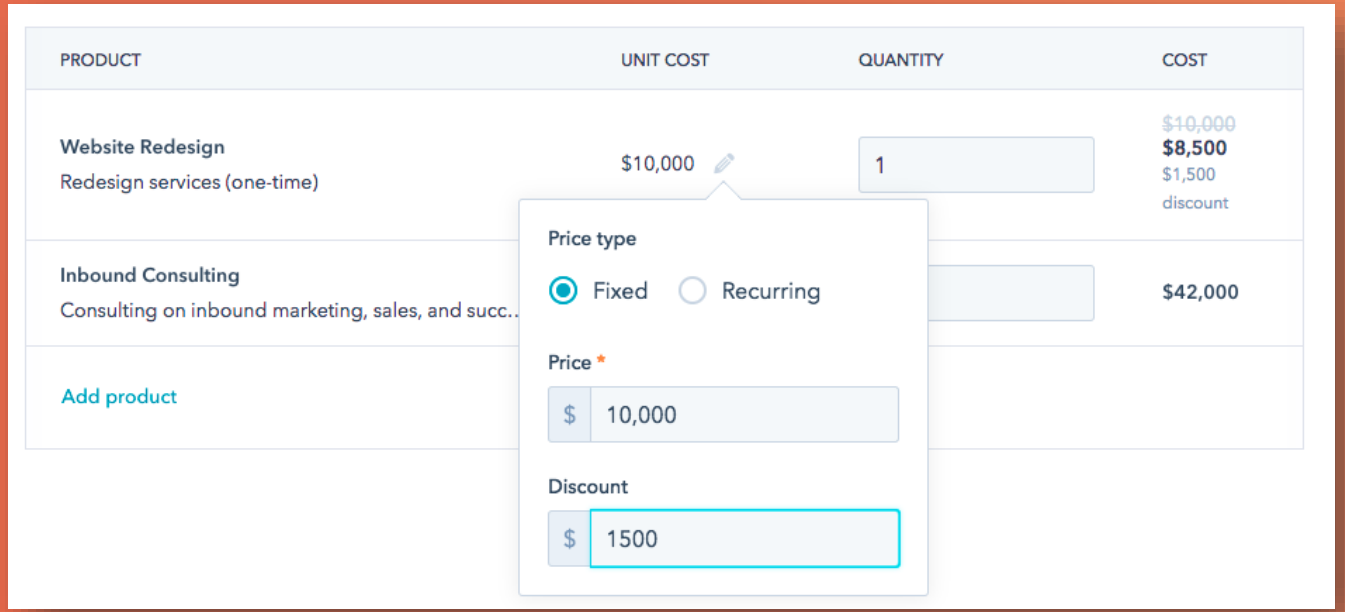
Workflows


Who do you want to enroll in this workflow?
Set enrollment criteria
Create a task
Schedule a time for demo
Create a deal {{ contact.company }} - New Deal

Advanced CRM Features

Products



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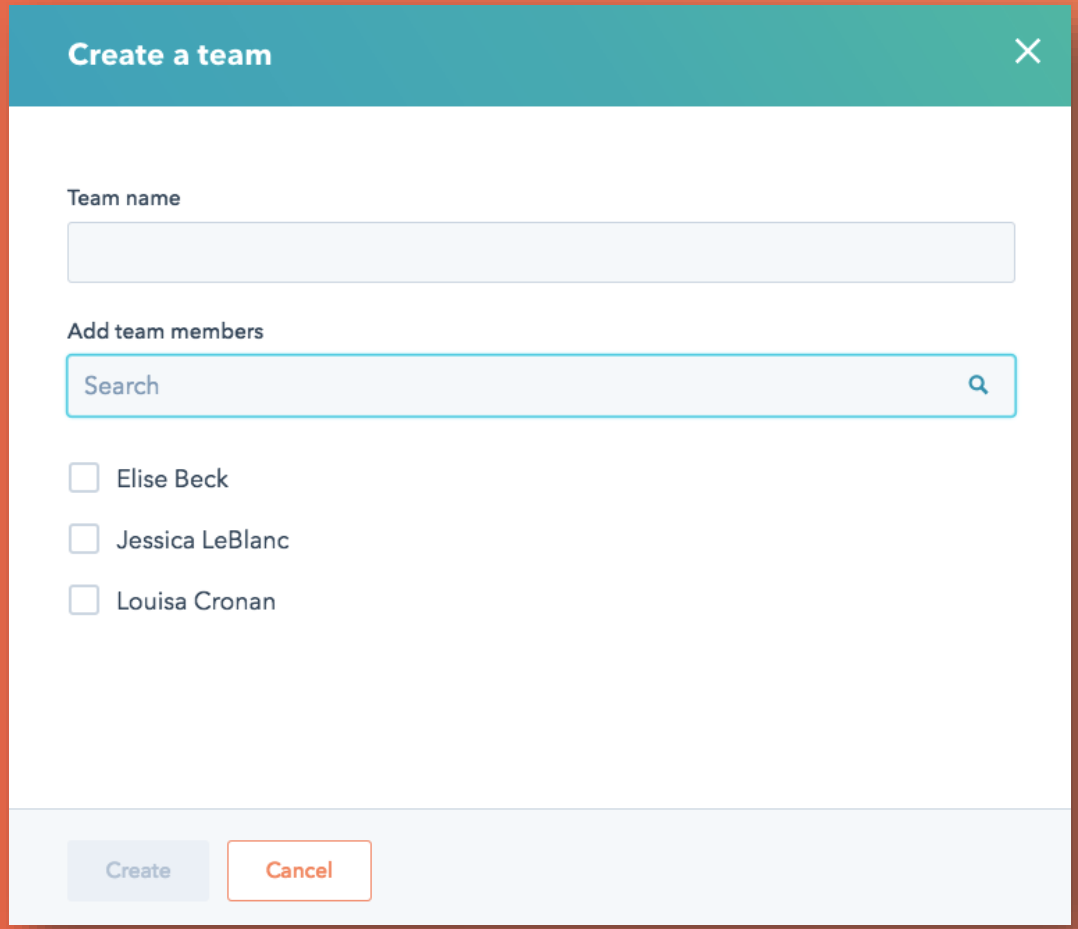
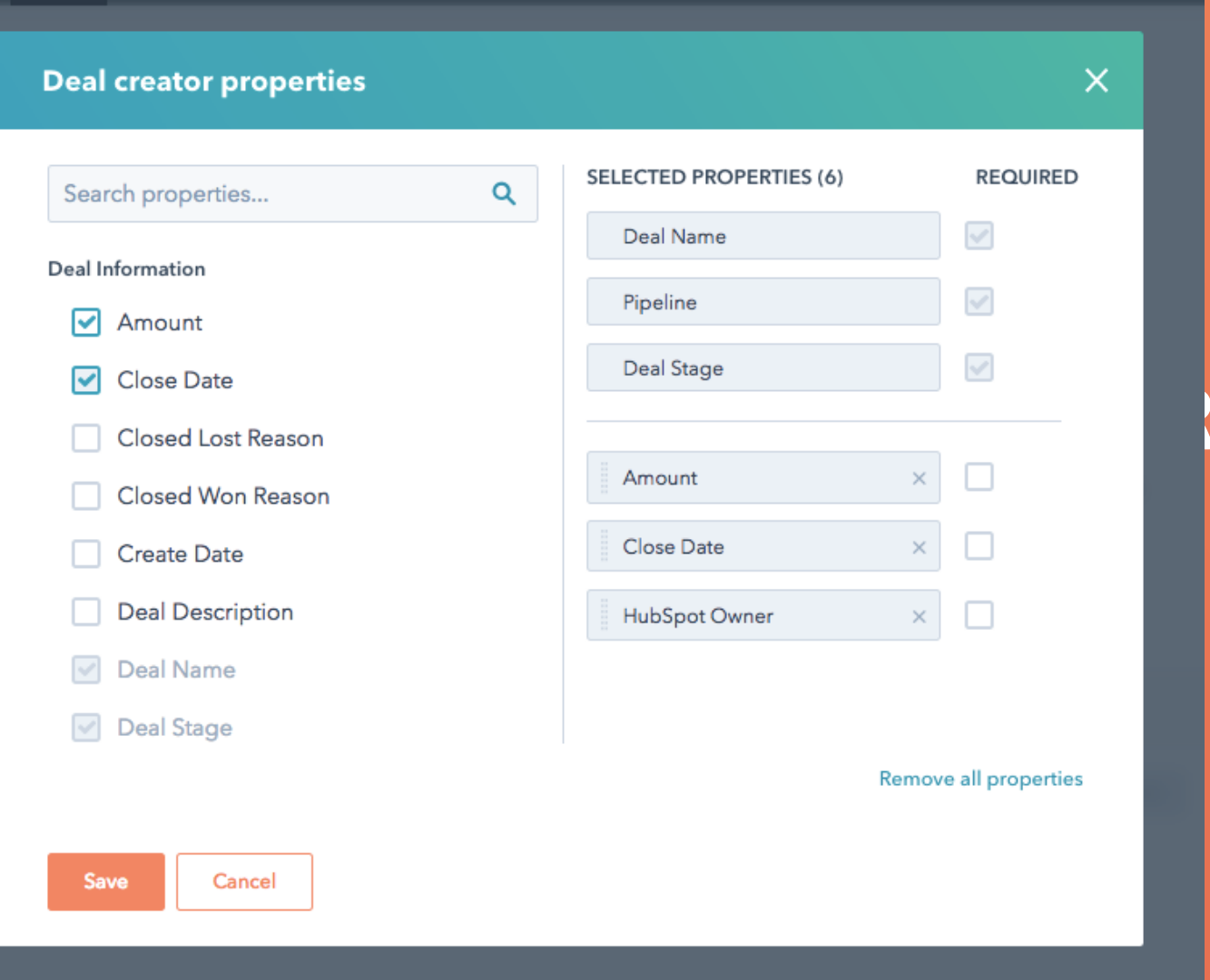

Create a team
Team name
Add team members
Search
Elise Beck
Jessica LeBlanc
Louisa Cronan
Create
Cancel

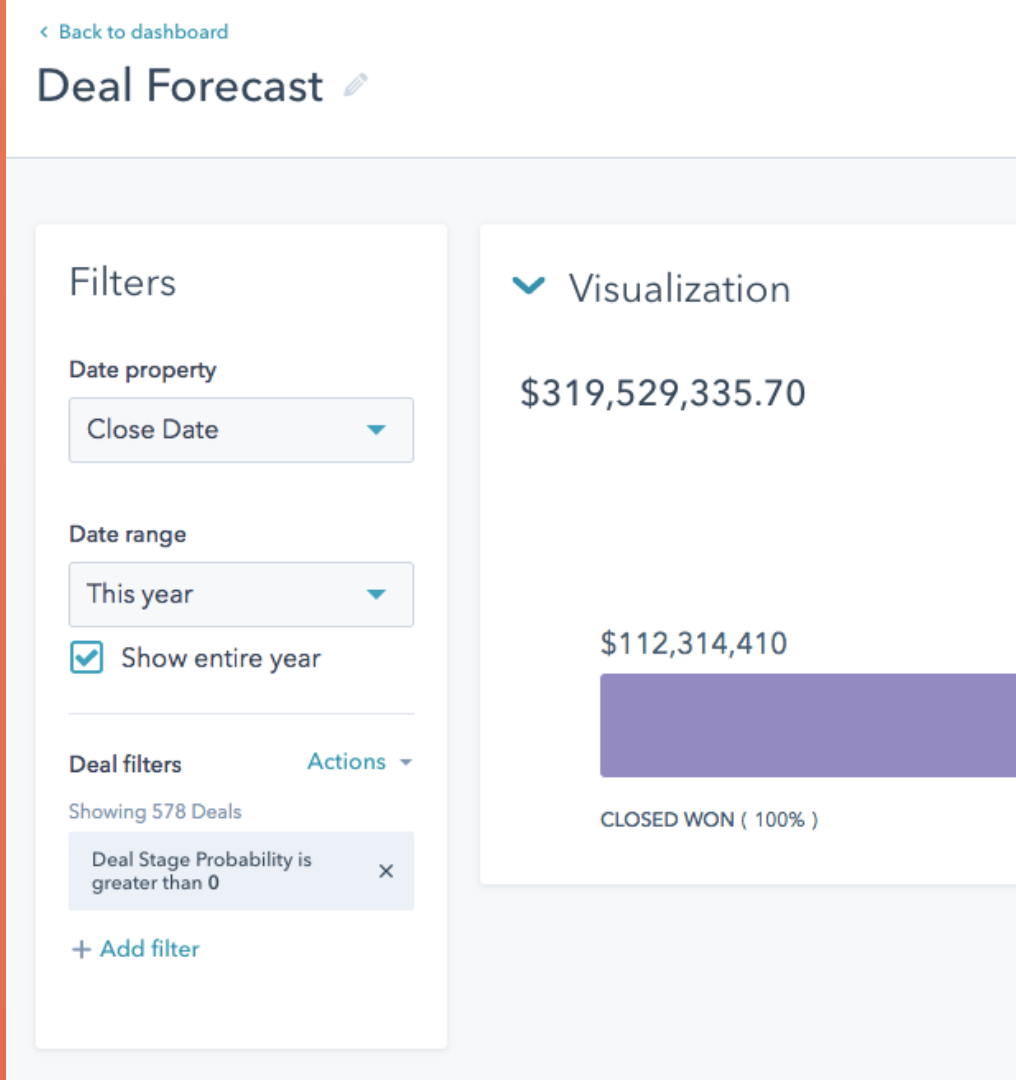
Teams



Required Field

#INBOUNDPARTNERDAY

Reporting


Back to dashboard
Deal Forecast
Filters
Date property
Close Date
Date range
This year
Show entire year
Deal filters
Actions
Showing 578 Deals
Deal Stage Probability is greater than 0
+ Add filter
Visualization
$319,529,335.70
$112,314,410
CLOSED WON (100%)

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- INTERMISSION -

- ASK THE EXPERTS -

ELISE BECK
PRODUCT MARKETING MANAGER

BRAD COFFEY
CHIEF STRATEGY OFFICER

SCOTT JUDSON
PRODUCT MANAGER

KRISHTHA SPUGLIO
PRODUCT MANAGER

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