

# MIND THE GAP

ALIGNING SALES AND MARKETING WITH HUBSPOT SALES



ELISE BECK

PRODUCT MARKETING MANAGER  
HUBSPOT SALES

#INBOUNDPARTNERDAY

# MIND THE GAP

ALIGNING SALES AND MARKETING WITH HUBSPOT SALES



# FROM ZERO TO 60

WITH HUBSPOT SALES

#INBOUNDPARTNERDAY

PERSONA RESE

Checklist



Yes



No

**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.**





# 1 Getting Started



#INBOUNDPARTNERDAY



Neil

Director at PKGD Marketing

Actions ▾

▼ About Taylor O'Neil

Email  
taylorfoneil@gmail.com

Job Title  
HR Director

Phone Number  
+18603020709

Emails Clicked

Company Size (employees)  
49 ▾

Company Name  
Marketing, Inc

New note

Hi Taylor!

Hope you're doing well!

A 🔗 📎

Save note

Discard

☐ Create a follow-up task

September 2017



You sent a tracked email to Taylor O'Neil  
September 11th at 11:50 am

Status: Sent   Opens: 0   Clicks: 0

**Fixing problems and moving forward**

Hi Taylor,

Thanks for taking the time to share a little

[Expand](#)



Taylor O'Neil  
September 11th at 11:50 am

# Let's talk about HubSpot CRM free...

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

The screenshot displays the HubSpot CRM interface. At the top, there's a navigation bar with 'Sales Tools' and 'Settings'. Below this is a search bar and a row of action buttons: 'New note', 'Email', 'Call', '+ Log activity', 'Create task', and 'Schedule'. The main content area shows a note with the text 'Hi Taylor!' and 'Hope you're doing well!'. Below the note are icons for text, link, and image, followed by 'Save note' and 'Discard' buttons, and a checkbox for 'Create a follow-up task'. A timeline for 'September 2017' is shown below, with a 'Filter timeline (31/32)' button. The timeline includes three events: 1. 'You sent a tracked email to Taylor O'Neil (taylorfoneil@gmail.com)' on September 11th at 11:50 am, with status 'Sent', 0 opens, and 0 clicks. 2. 'Taylor O'Neil was added to Sharp Accounting Highly Qualified Leads' on September 10th at 10:17 pm. 3. 'Taylor O'Neil was added to Active Contacts' on September 8th at 4:32 pm.

les Tools ▾ Settings

Search

🎓 (●) 👤

✍️ New note ✉️ Email ☎️ Call + Log activity 📅 Create task 📅 Schedule


Hi Taylor!

Hope you're doing well!

A 🔗 🖼️

Save note Discard ☐ Create a follow-up task

September 2017 Filter timeline (31/32) ▾

✉️  You sent a tracked email to Taylor O'Neil (taylorfoneil@gmail.com) Actions ▾  
September 11th at 11:50 am


Status: Sent Opens: 0 Clicks: 0 Details


**Fixing problems and moving forwards**

Hi Taylor,

Thanks for taking the time to share a little about PKGD Marketing, as well as the goals and challenges you face.

[Expand](#)

👤  Taylor O'Neil was added to Sharp Accounting Highly Qualified Leads  
September 10th at 10:17 pm










👤  Taylor O'Neil was added to Active Contacts  
September 8th at 4:32 pm

# Managing your sales process

contacts ▾ Reports ▾ Search

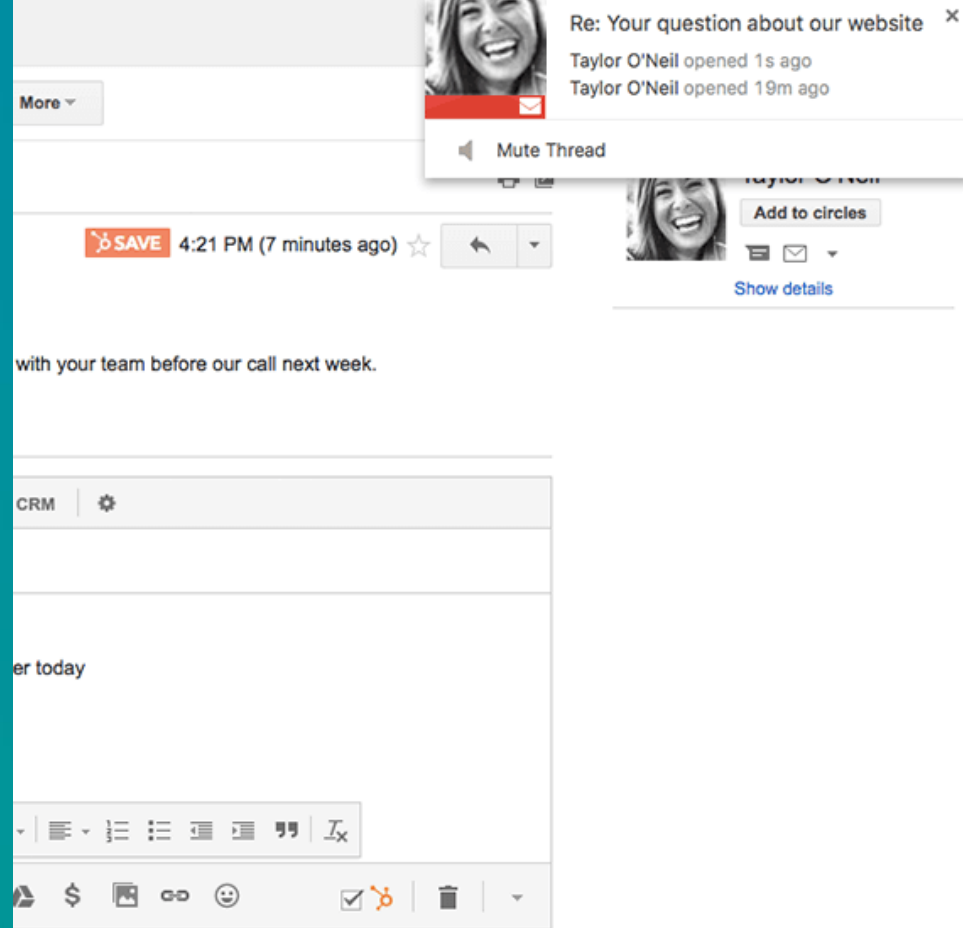
melissa@gmail.com  
Hub ID: 681533

Search deals 🔍 Actions ▾ Create a deal

APPOINTMENT COMPLETED 21	BUYER JOURNEY CONFIRMED 19	WORKING UPGRADE
<div><div>\$150 HubSpot - New Deal</div><div>Close date: 10/20/16</div><div></div></div>	<div><div>\$100 Kasco - New Deal</div><div>Close date: 10/30/16</div><div></div></div>	<div><div>\$100 Fryeco - New Deal</div><div>Close date: 10/28/16</div><div></div></div>
<div><div>\$250 BigDataX - New Deal</div><div>Close date: 10/31/16</div><div></div></div>	<div><div>\$100 Portnet - New Deal</div><div>Close date: 10/31/16</div><div></div></div>	<div><div>\$100 Trintree - New Deal</div><div>Close date: 10/31/16</div><div></div></div>
<div><div>\$100 Mauventures - New Deal</div><div>Close date: 10/31/16</div><div></div></div>		<div><div>\$100 Netstar - New Deal</div><div>Close date: 10/29/16</div><div></div></div>
<div><div>\$300 Traditionsoft - New Deal</div><div>Close date: 10/31/16</div><div></div></div>		
Total: \$800	Total: \$1,230	Total: \$1,230



# Email tracking and productivity



# Meetings

BIGLYTICS

UTC -04:00 Eastern Time



time to meet Elise

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

Book a 30-minute meeting

What time works best?

12:30 pm

1:30 pm

2:30 pm

3:00 pm

3:30 pm

4:00 pm

4:30 pm

The background is a solid pink color. In the top-left corner, there are three overlapping circles of different sizes, all in shades of pink. In the bottom-right corner, there are two large, concentric, light-pink arcs that form a partial circle.

2

**Growing Up**





New note   Email   Call

Take notes on this call...

A    

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 inter  
really help.

I'd love to schedule some  
Lawless. Rob is our lead co  
companies like company

Feel free to book some time  
[ownermeetingslink](#)

All the best,  
Elise

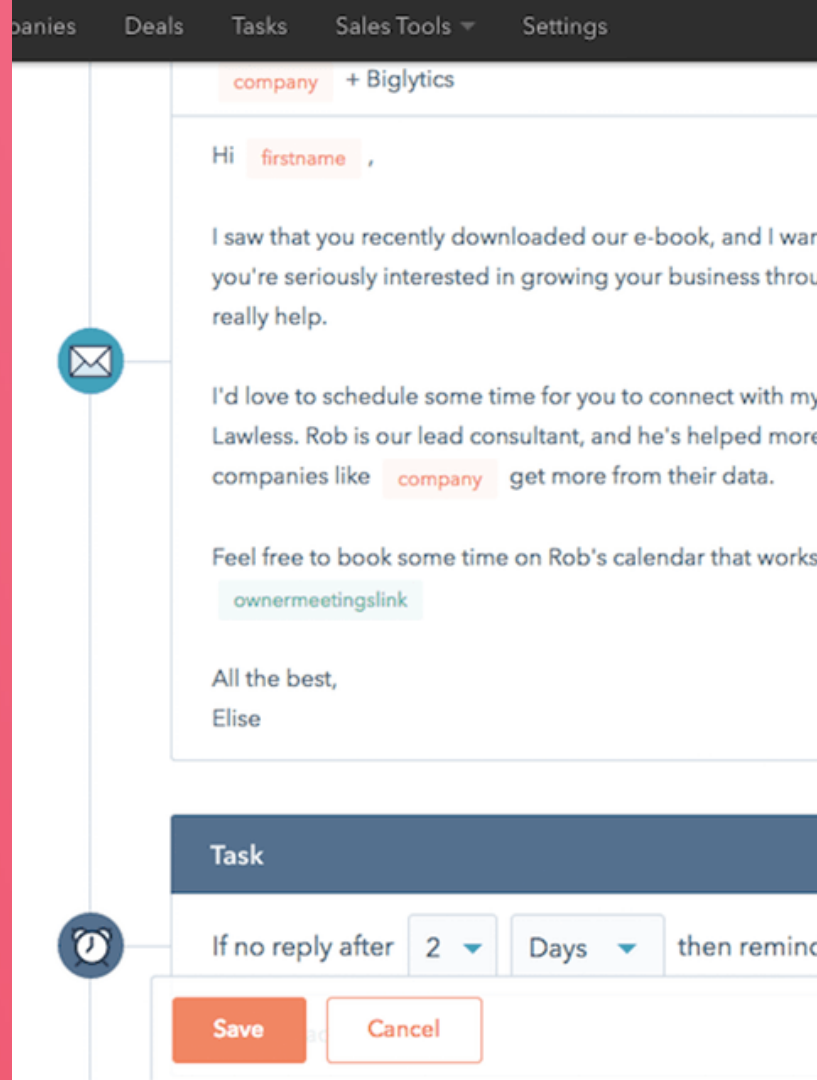
Task

If no re



# Let's talk about HubSpot Sales Starter...

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






























# Calling



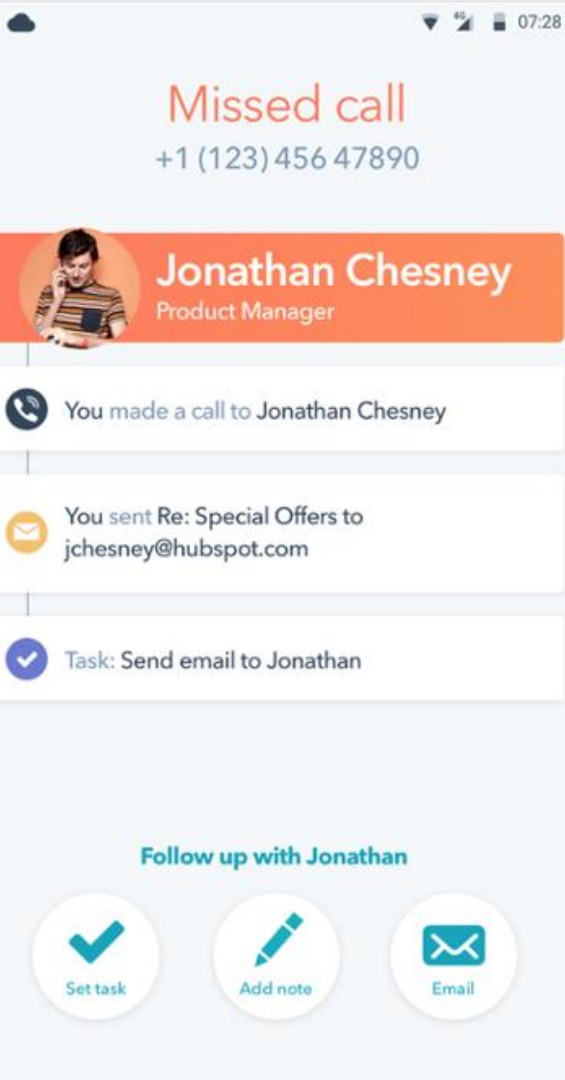




TITLE	TYPE ▴ ▾	ASSOCIATED WITH	
 Call Jeanne Sipes			Jeanne Sipes
 Call Kelly Moore			Kelly Moore
 Call Kamron Gerhold			Kamron Gerhold
 Call Joany Ryan			Joany Ryan
 Call Amani Muller			Amani Muller
 Call Corene Funk			Corene Funk
 Call Fleta Altenwerth			Fleta Altenwerth
 Call April Kreiger			April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

100 per page ▾

# Task Queues



# Caller ID

# Snippets

Sales ▾

Dashboard

Contacts

Companies




Deals

Tasks


Sales Tools ▾

Settings

Search

   HubSpot  
Hub ID: 5

< 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...

A  

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 c  
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 where  
you and your company.

When would you like to take a few minutes to discuss? Please let me know w

A  

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



<input type="checkbox"/>	NAME	SOURCE	VIEWS	TIME SPENT	LAST VIEWED
<input type="checkbox"/>	Jackie Barcamonte	Reshare	0	32m 4s	Today at 5:45pm
<input type="checkbox"/>	Scott Judson <a href="#">View details</a>	Email	2	24m 3s	Yesterday at 1:23pm
<input type="checkbox"/>	Robert Lawless	Website	3	16m 2s	July 10, 2017 7:53 PM
<input type="checkbox"/>	Someone in Danvers, MA	Profile	3	4m 30s	July 7, 2017 7:53 PM
<input type="checkbox"/>	George Clooney	Reshare	2	6m 23s	July 7, 2017 7:53 PM
<input type="checkbox"/>	Someone in Cambridge, MA	Website	2	8m 54s	July 7, 2017 7:53 PM
<input type="checkbox"/>	Amy Applegate	Sequence	2	18m 1s	July 7, 2017 7:53 PM

Reshared from Scott Judson

# Documents

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



company + Biglytics

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 r

Feel free to book some time on F  
[ownermeetingslink](#)

All the best,  
Elise

Task

If no reply after 2 ▾ Da

Save

Cancel

# Sequences



# Meetings & Messages





## 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

# Meetings

Companies

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  Documents


--

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



Create a deal {{ contact.company }} - New Deal

Who do you want to enroll in this workflow?

Set enrollment criteria



Create a task  
Schedule a time for demo



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





Find a contact



Customize ▾

Import

Add contact

NAME ▴ ▾	PREDICTIVE LEAD SCOR... ▴ ▾
Green	69
	69
	65
o	65
by	65
an	65
y	65
tt	65

# Predictive Lead Score

Search activity



All Opens Clicks Unopened More ▾

Priority



Madison Hart Software Test Engineer I ...



Priority ⓘ

**Was put in list** Qualified and interested

By Matt Schnitt

LEAD



Virginia Fields Senior Developer at Tazz

Priority ⓘ

**Opened email** Re: Something something something

> 1 open

OPEN

Today



Douglas Martin at Voolia, LLC

11:02 AM

**Clicked link** Our features 2017 in email Re: Opportunity

> 4 clicks

CLICK

# Smart Notifications

#INBOUNDPARTNERDAY

New Message

Matt Schnitt

Subject

Templates Sequences Documents Meetings Log Track

--

*Krishtha Spuglio*  
Associate Product Manager

**Send later**

☒ In 1 hour

☐ In 2 hours

☐ Tomorrow morning (8am)

☐ Tomorrow afternoon (1pm)

☐ Recommended time by HubSpot Insights

☐ Custom:

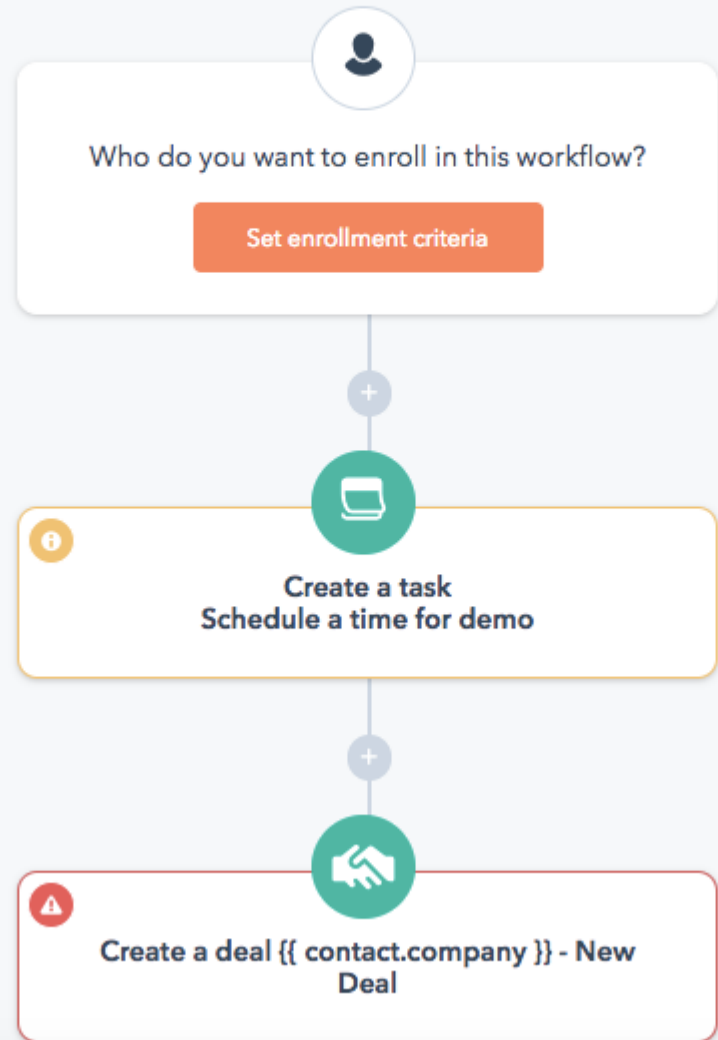
09/12/2017 2:15 PM

Schedule Cancel

Send

# Smart Send Times


# Workflows



# Advanced CRM Features



# Products

PRODUCT	UNIT COST	QUANTITY	COST
<b>Website Redesign</b> Redesign services (one-time)	\$10,000 	<input type="text" value="1"/>	<del>\$10,000</del> <b>\$8,500</b> \$1,500 discount
<b>Inbound Consulting</b> Consulting on inbound marketing, sales, and succ...		<input type="text"/>	<b>\$42,000</b>
<a href="#">Add product</a>			

**Price type**

☒ Fixed ☐ Recurring

**Price \***

**Discount**

## Create a team



Team name

Add team members

- ☐ Elise Beck
- ☐ Jessica LeBlanc
- ☐ Louisa Cronan

Create

Cancel

# Teams

## Deal creator properties



Search properties...



### Deal Information

- ☒ Amount
- ☒ Close Date
- ☐ Closed Lost Reason
- ☐ Closed Won Reason
- ☐ Create Date
- ☐ Deal Description
- ☒ Deal Name
- ☒ Deal Stage

### SELECTED PROPERTIES (6)

### REQUIRED

Deal Name



Pipeline



Deal Stage



Amount



Close Date



HubSpot Owner



Remove all properties

Save

Cancel

# Required Field




# 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% )



#INBOUNDPARTNERDAY

The background is a solid orange color with several abstract circular shapes. In the top right corner, there are three concentric, light orange circular outlines. In the bottom left corner, there is a large, solid orange circle. In the middle left area, there is a smaller, solid orange circle.

- INTERMISSION -

## - ASK THE EXPERTS -



ELISE BECK  
PRODUCT MARKETING  
MANAGER



BRAD COFFEY  
CHIEF STRATEGY  
OFFICER



SCOTT JUDSON  
PRODUCT MANAGER



KRISHTHA SPUGLIO  
PRODUCT MANAGER