SUCCEEDING WITH VIRTUAL SALES IN 2020

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Customer Success Manager @ HubSpot

Hi, I’m Jonas

Customer Success Manager since Aug 2019

Work with our Sales Hub customers on a daily basis and help them save time, accelerate sales cycles and close more deals

Agenda

Uncover More Leads

Connect With More Leads

Close Deals Faster

Manage Your Pipeline

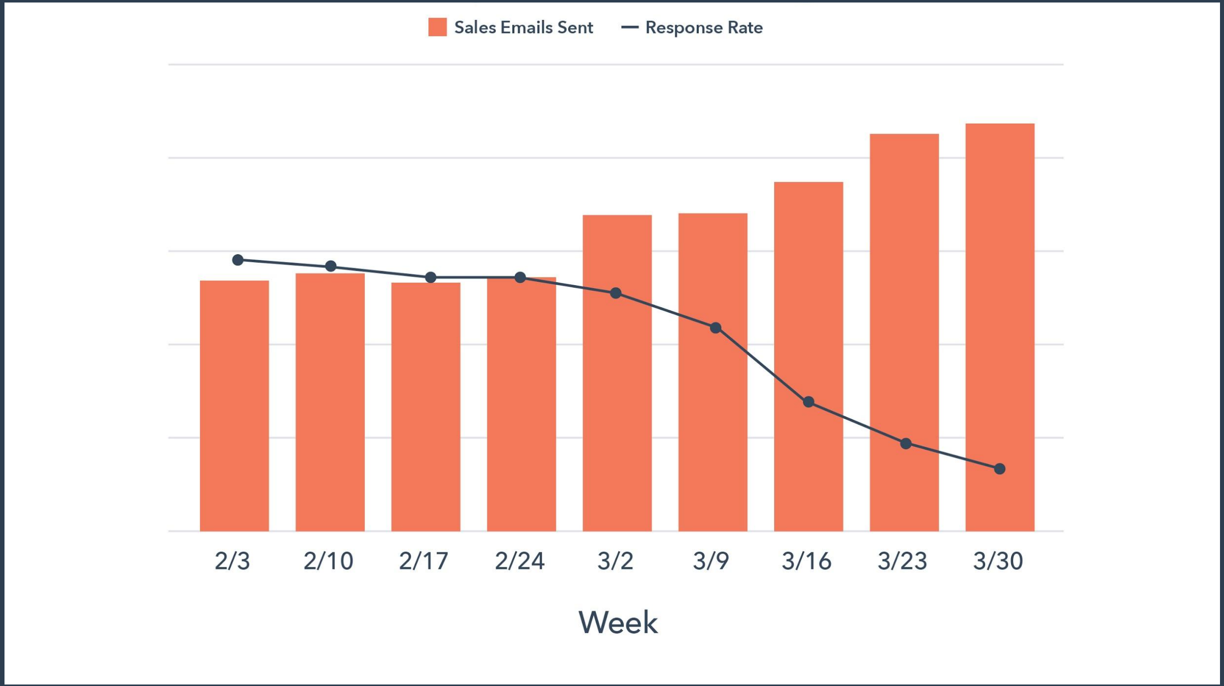
"Responses to sales outreach have decreased, suggesting that sales strategies need to be adjusted to reflect the current buying reality."

Kipp Bodnar

Chief Marketing Officer

HubSpot

Sales teams are sending much more emails but responses are declining



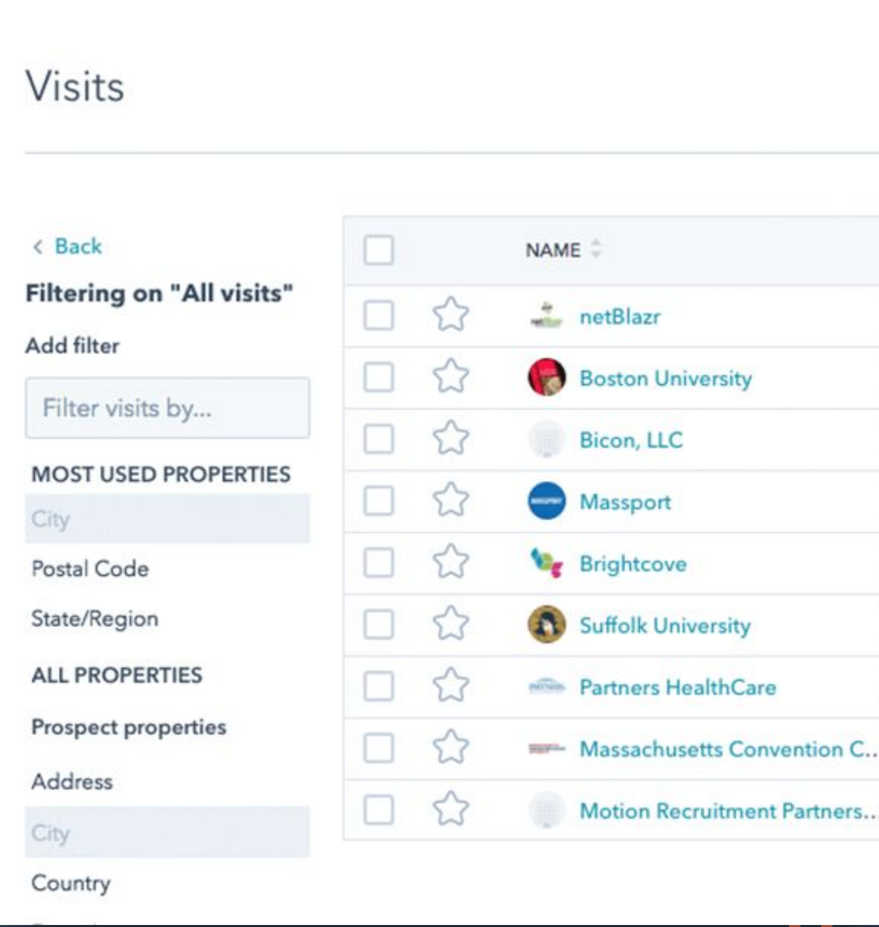
Do you relate?

Uncover New Leads

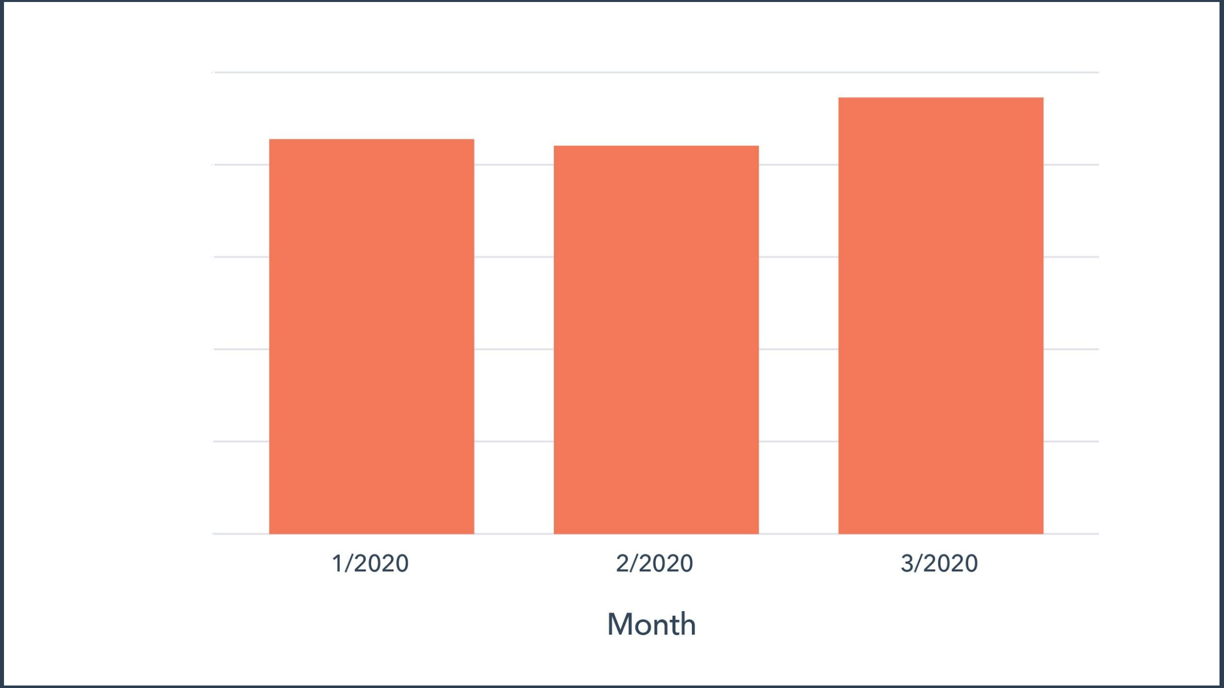
Prospects

Track prospects' visits to your site in real time, determine which companies are the most engaged, and set up custom email notifications for your team.

Sort prospects using dozens of different filtering criteria like geography, company size, number of visits, and more.

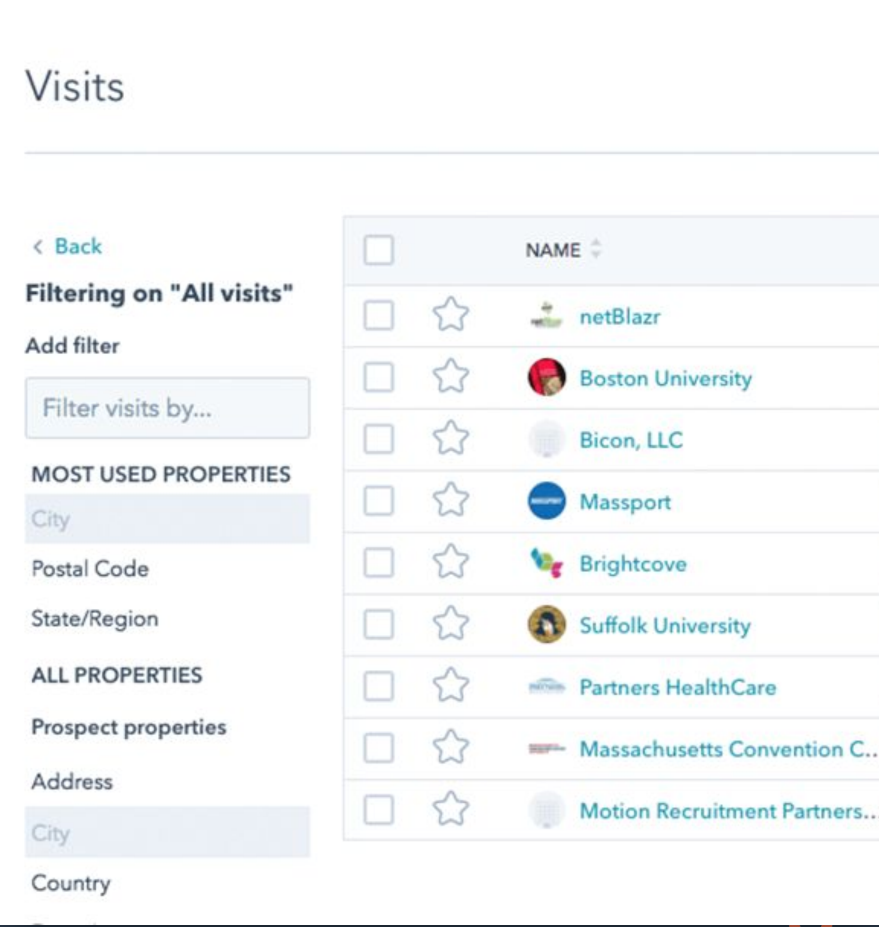


Monthly website visits are increasing



Best practices

1. Get a daily report of companies visiting your website
2. Add relevant companies to your database and let HubSpot pull in key information
3. Prioritize by filters such as visited more than one page, more than 1 visitor or visited in the last week
4. Check the company on LinkedIn and identify key decision makers

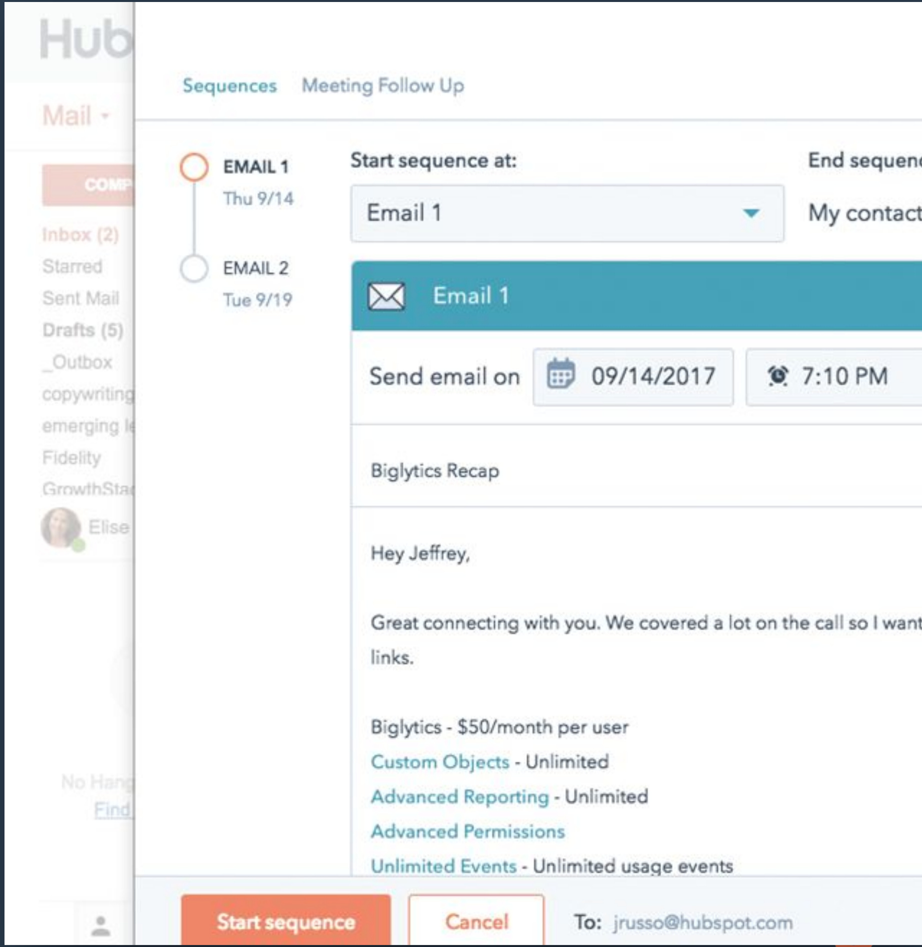


Sequences

Tee up a timed series of email messages based off your templates with Sequences.

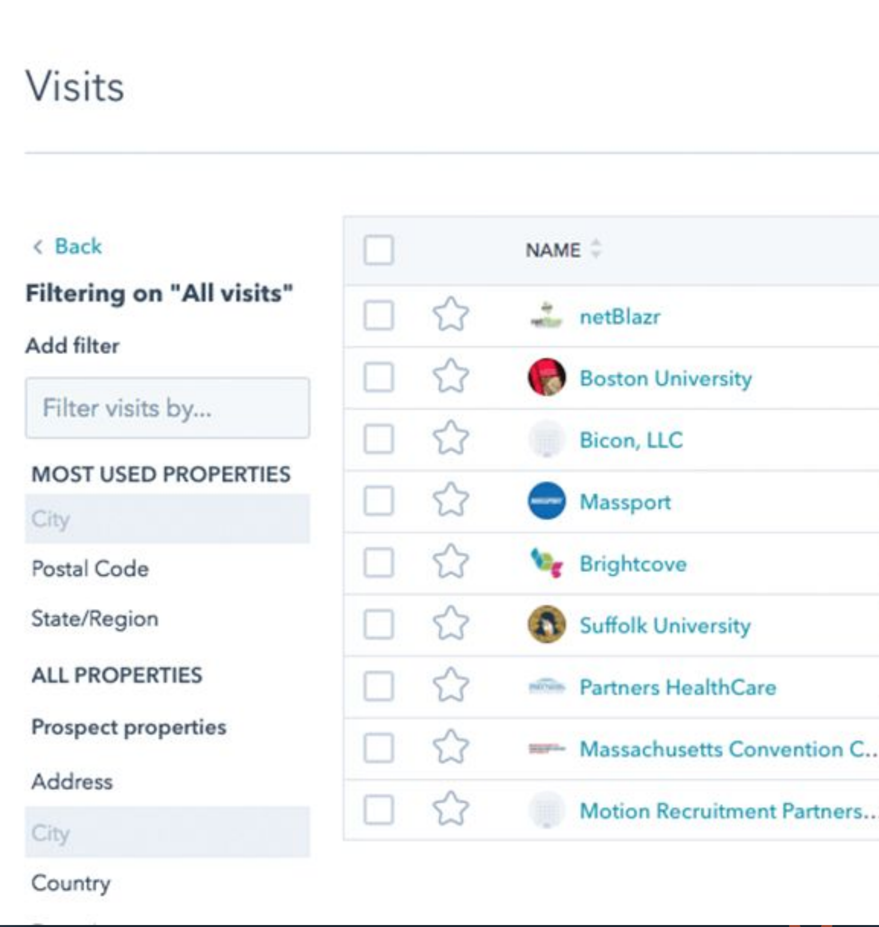
Automate your outreach & follow-up by enrolling your prospects with just a few clicks.

Use smart send times to ensure maximum open rates.

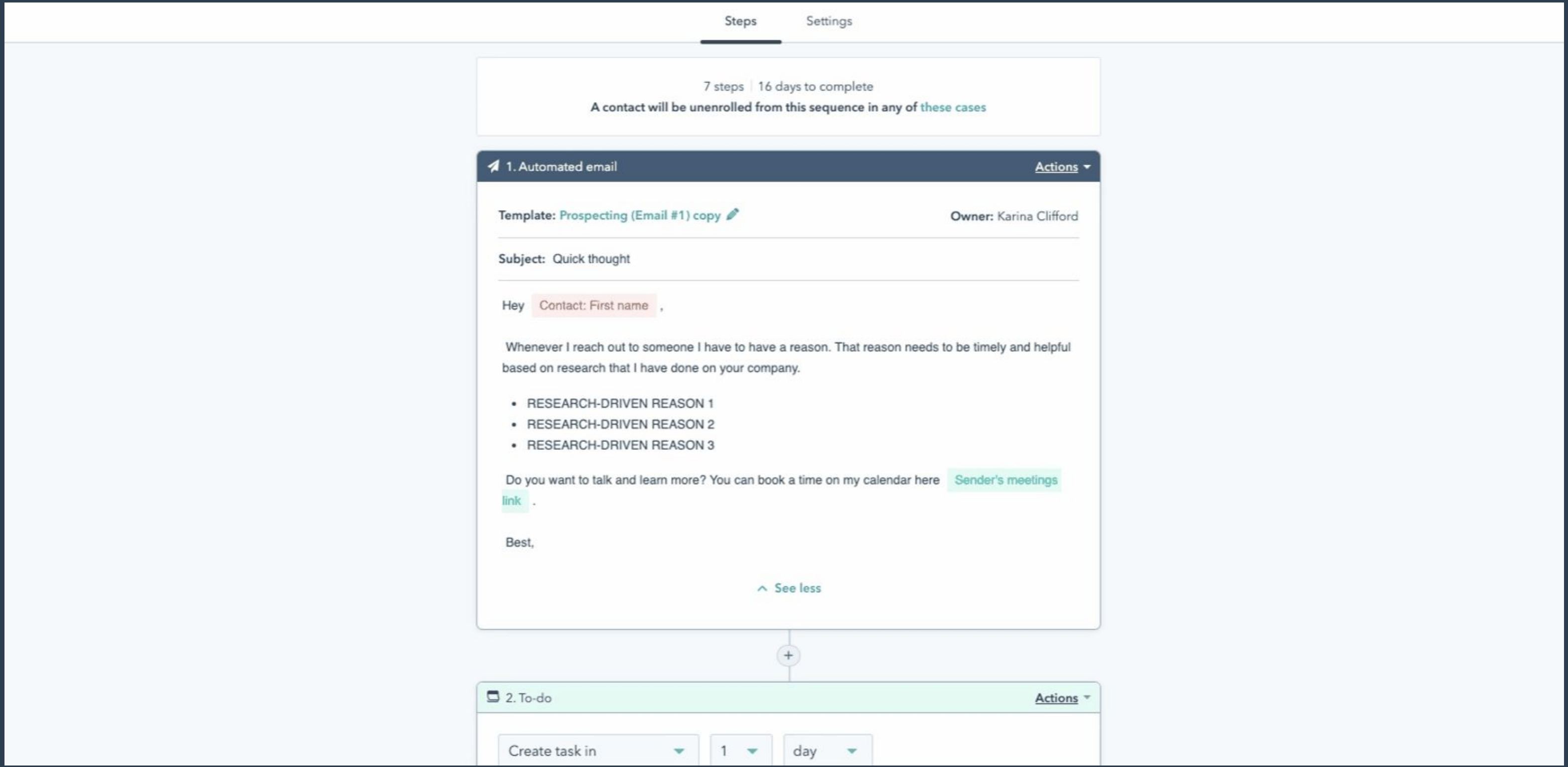


Best practices

1. Have a clear goal in mind for your sequence
2. Don't just email
3. Personalise as much as possible with tokens, e.g. first name, company name, video links
4. Include a 'break-up' message

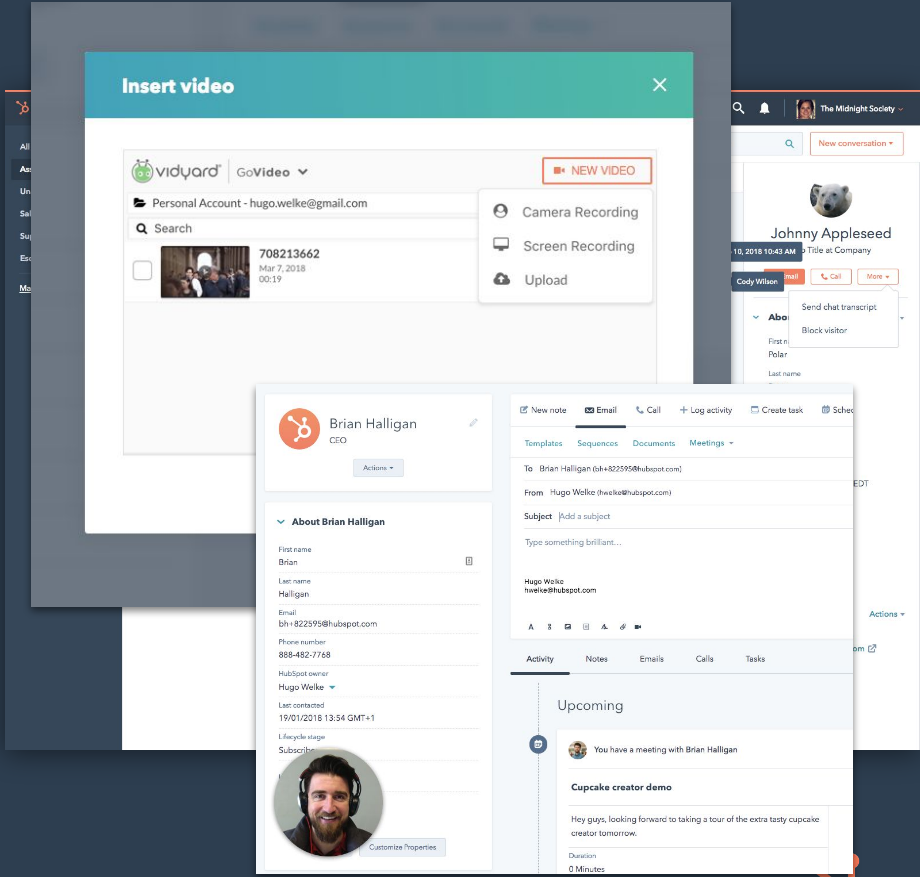


Here's an example



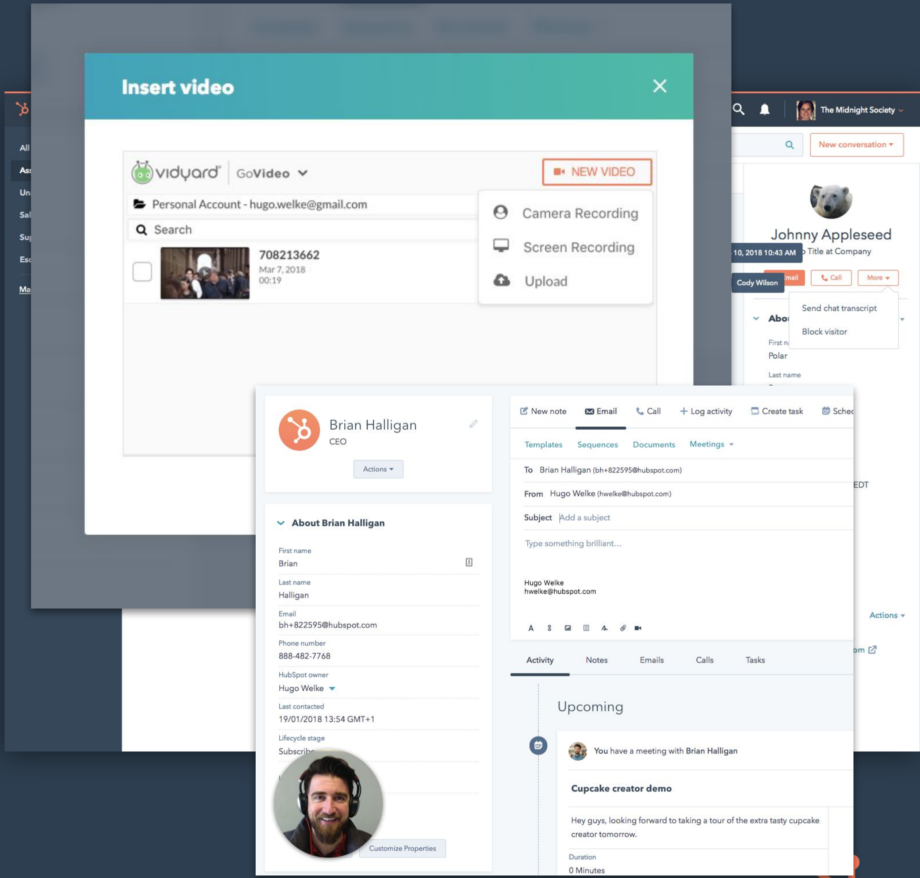
Selling with videos

Salespeople can build stronger relationships with prospects by creating, sharing, and tracking personalized videos right from HubSpot CRM. It is a major differentiator, especially in Sales



Best practices

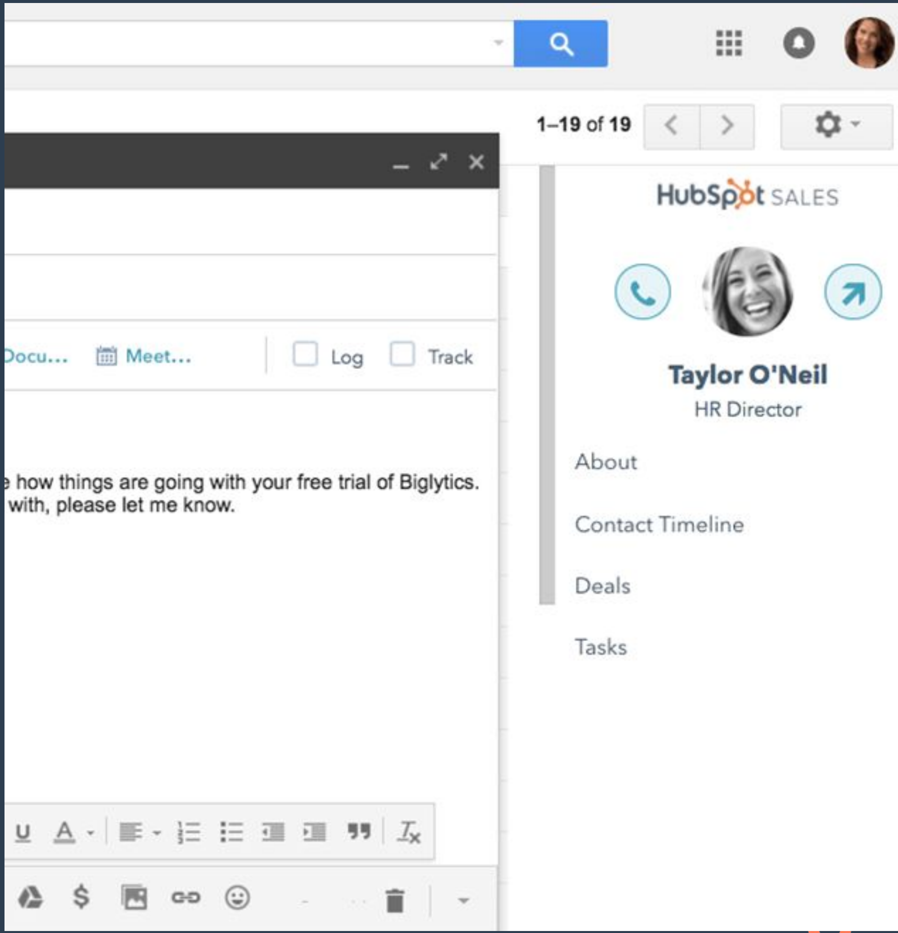
- Keep it short, 30 to 90 seconds
- Use your camera to make it more personal
- Provide a tip or ask a thought-provoking question
- Share a few key takeaways from the content you linked to in your email
- Describe your company's mission and why it relates to your prospect



Notifications

Use notifications to follow up seconds after a lead opens an email, clicks a link, or downloads an important document. Our built-in activity stream automatically logs each lead's email actions inside your browser or in Sales Hub.

Open, click, and reply data helps you hone in on which email templates and sequences are most effective.

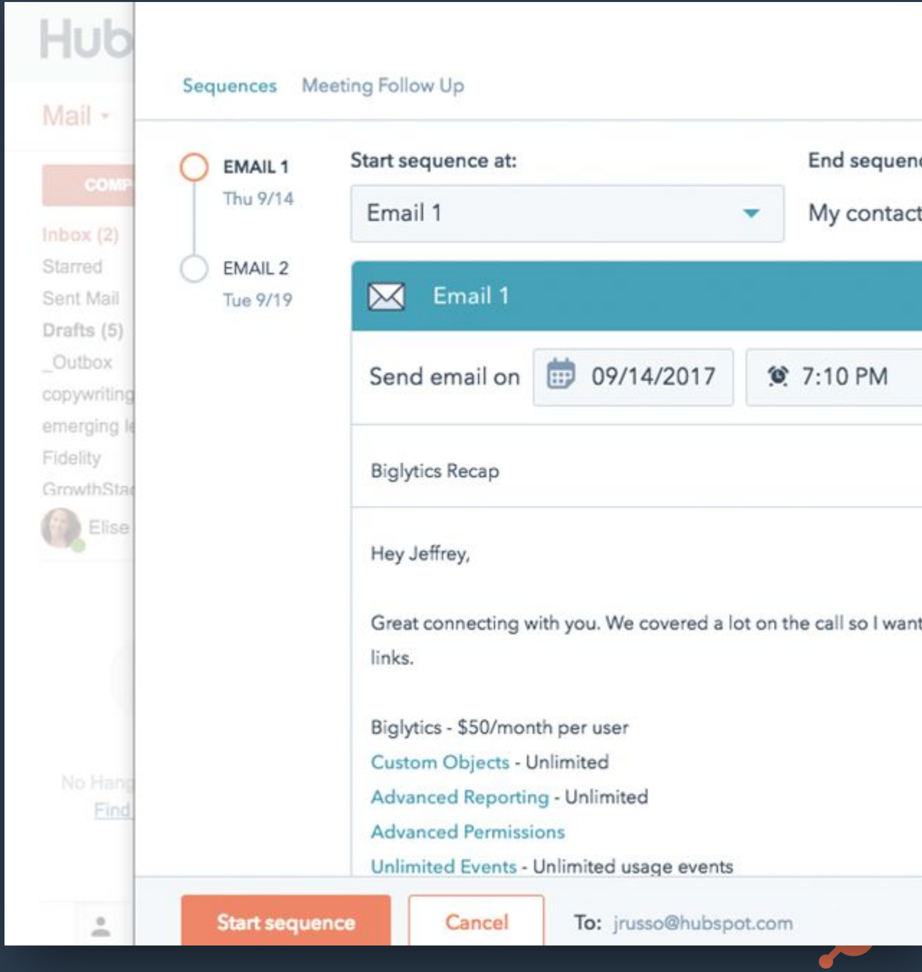


Connect With More Leads

Templates & Snippets

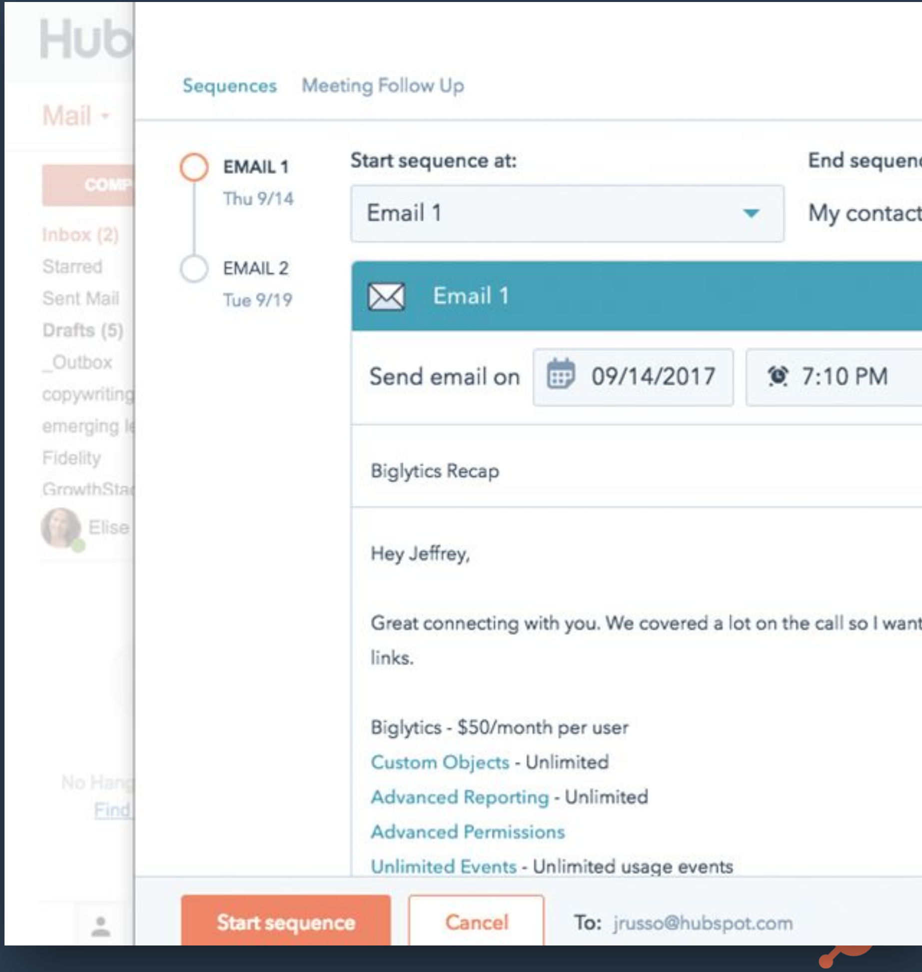
Craft personalized templates for every stage of the sales process, and share them across your team.

Save time by saving short “snippets” of text you can easily drop into your emails using keyboard shortcuts.



Best Practices

- Again, keep it short and simple
- Personalise, personalise, personalise
- Focus on your value over the product you're selling
- Analyse your templates



Here are two examples

Template 1: Business Value

[Contact Name],

In working with other [industry or position], one of the key issues they're struggling with is [key issue].

This past year we helped numerous companies to [Business Driver], resulting [money saved, revenue added, productivity increased].

If this is something you're challenged with too, let's set up a quick call. I have some ideas that might help.

All the best,
[Name]

Insert: Document Contact token Company token Meetings link

Template 2: Company Announcement

[Contact Name],

Because I work so much with [targeted industry], I constantly follow industry news. Recently I noticed that you've [company action taken].

Usually when that happens, [business issue] becomes a priority. That's why I thought you might be interested in finding out how we helped [similar firm] get going quickly in their new direction – without any of the typical glitches.

If you'd like to learn more, let's set up a quick call. How does [Day, time] look on your calendar?

Regards,
[Name]

P.S. If you're not the right person to speak with, who do you recommend I talk to?

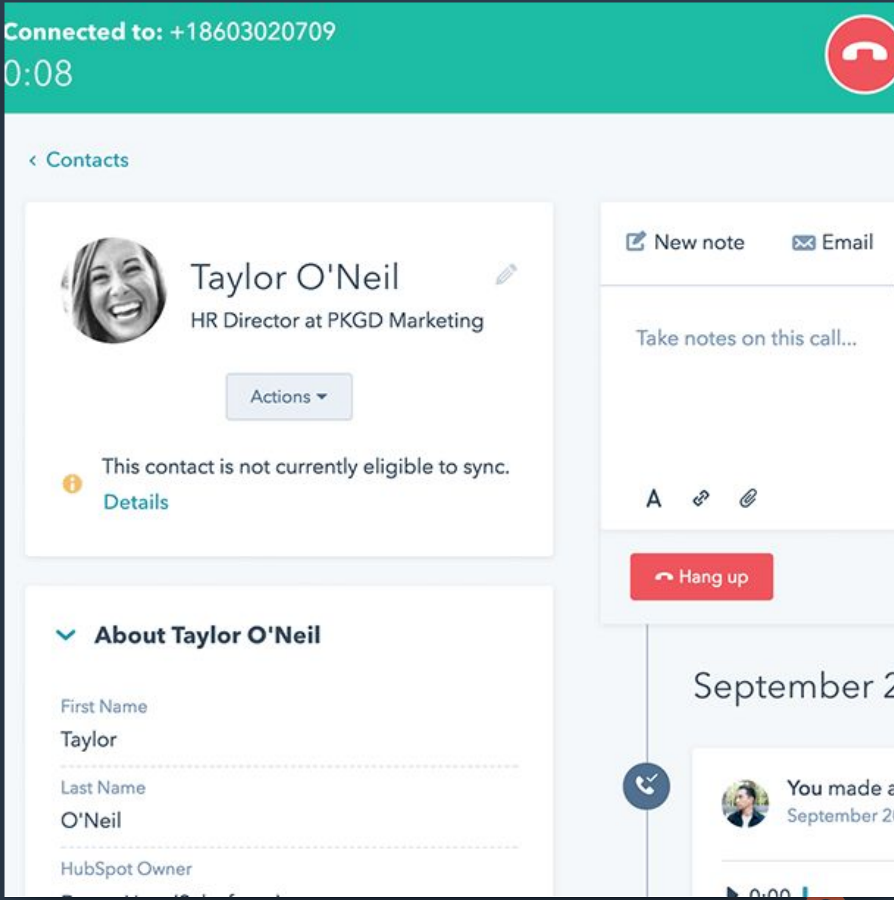
Insert: Document Contact token Company token Meetings link

And you guessed it

Sequences!

Calling

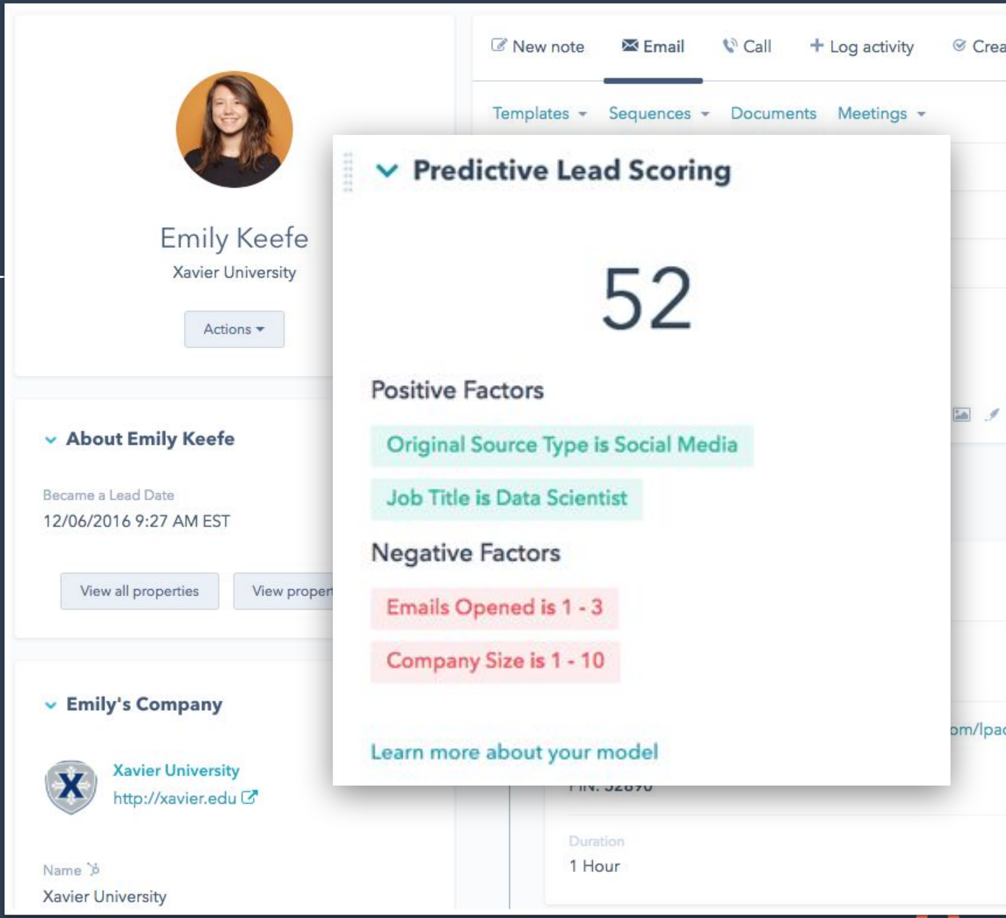
Use data from your HubSpot CRM to prioritize your best calls, and set up a daily calling queue. Just one click connects you to a prospect through Voice Over IP or your desk phone.



Close Deals Faster

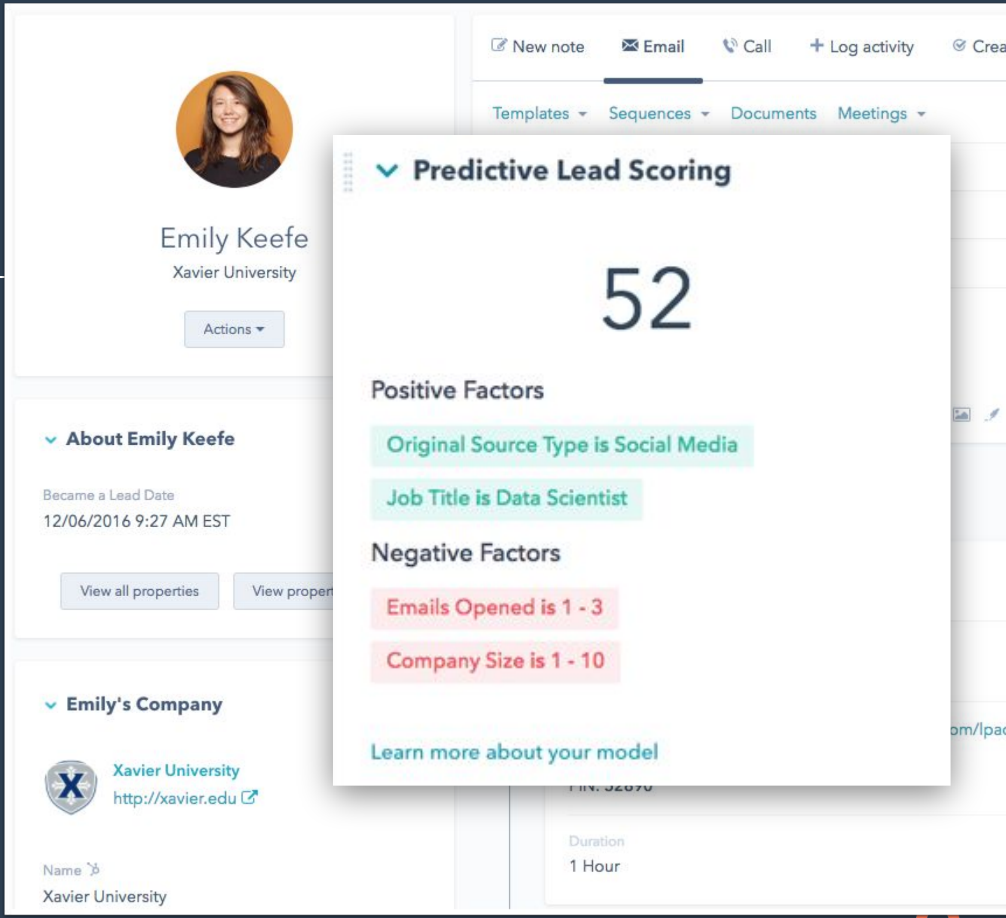
Predictive Lead Scoring

Predictive Lead Scoring takes hundreds of demographic and behavioral factors into account to automatically score contacts based on their likelihood to buy so you know which leads to focus on first.



A few notes

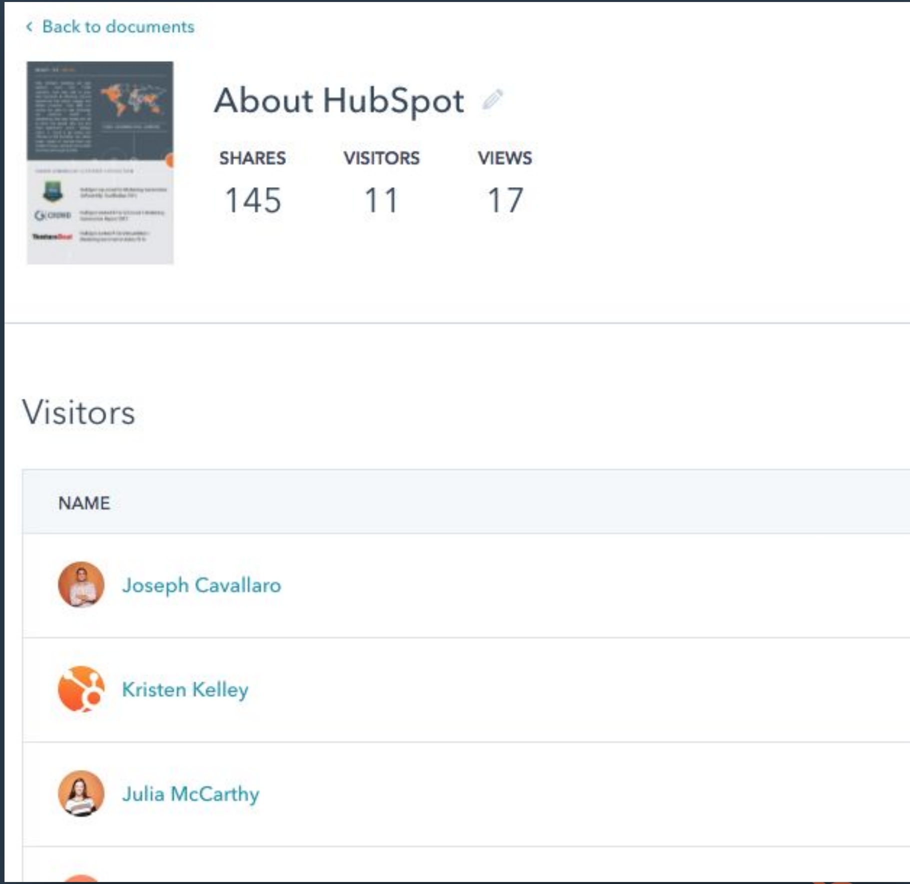
- Both engaged and unengaged contacts in HubSpot inside HubSpot
- Marking contacts as customers for at least three months.
- At least 500 contacts in HubSpot that are marked as Customers.
- At least twice as many contacts who are marked as non-customers.



Documents

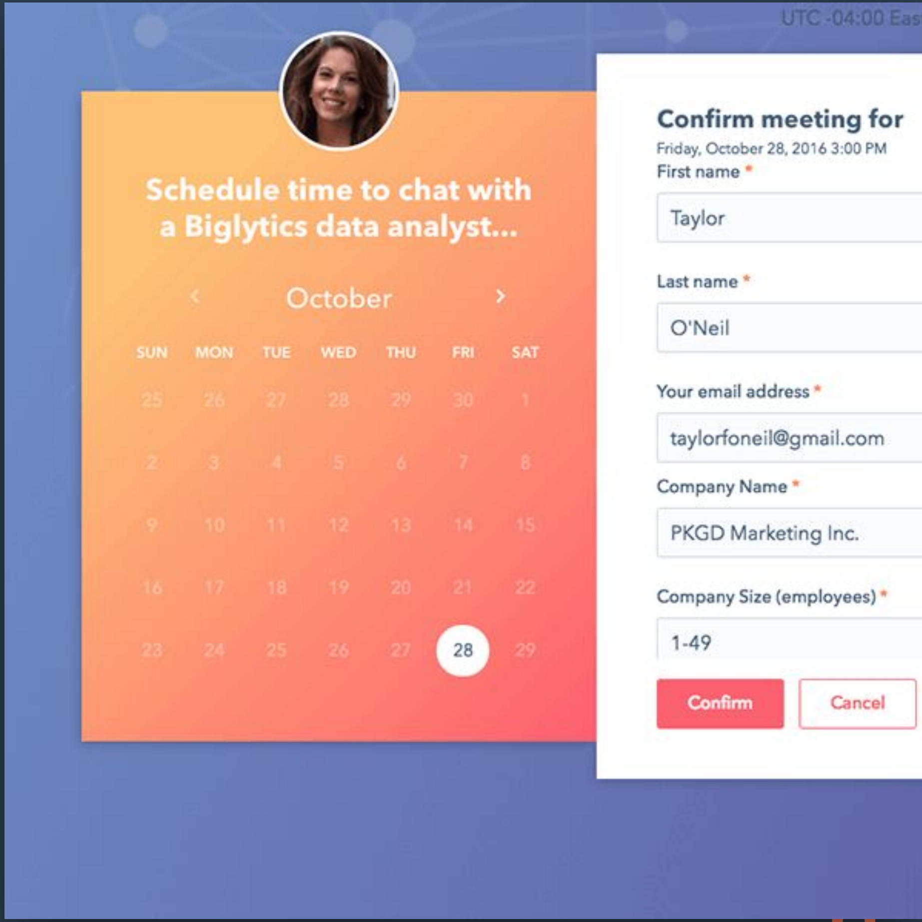
Build a library of helpful sales content for your entire team, share documents right from your Gmail or Outlook inbox, and see which content closes deals.

When a lead clicks an email link to open your document, or shares it with a colleague, we'll notify you instantly on your desktop.



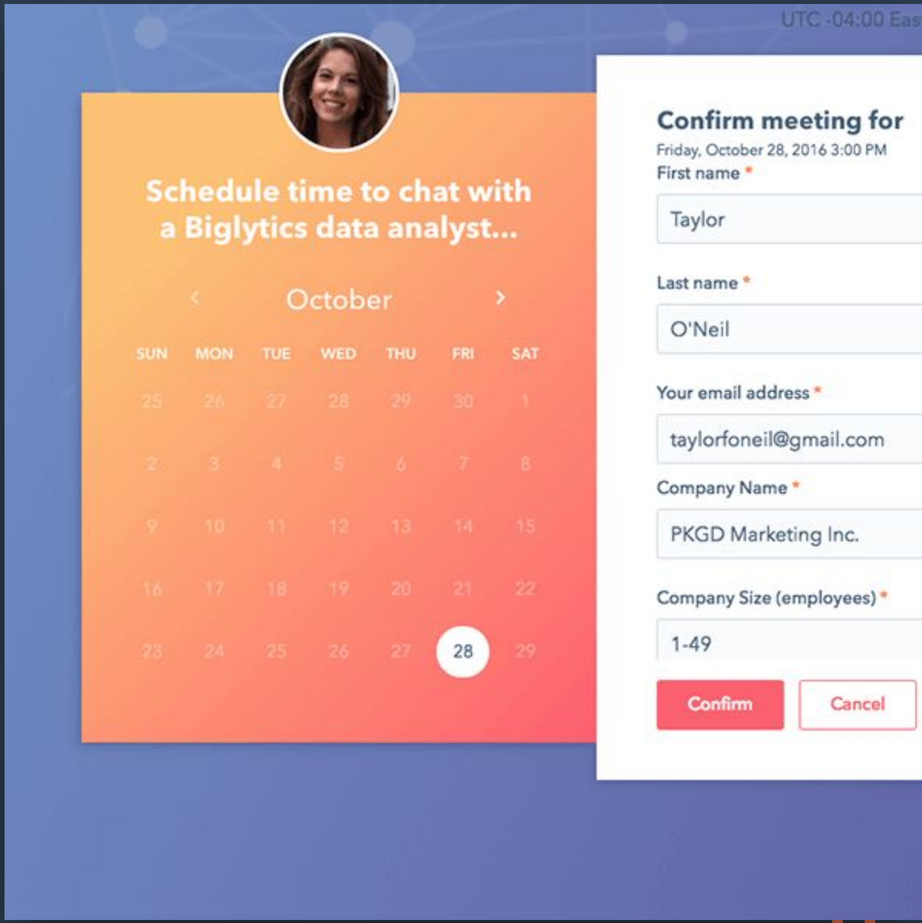
Meetings

Put the power to book meetings in the hands of your prospects. Meetings sync to your Google or Office 365 calendar, so your schedule is always up-to-date. As prospects book meetings, automatically create new records or log the activity in your CRM.



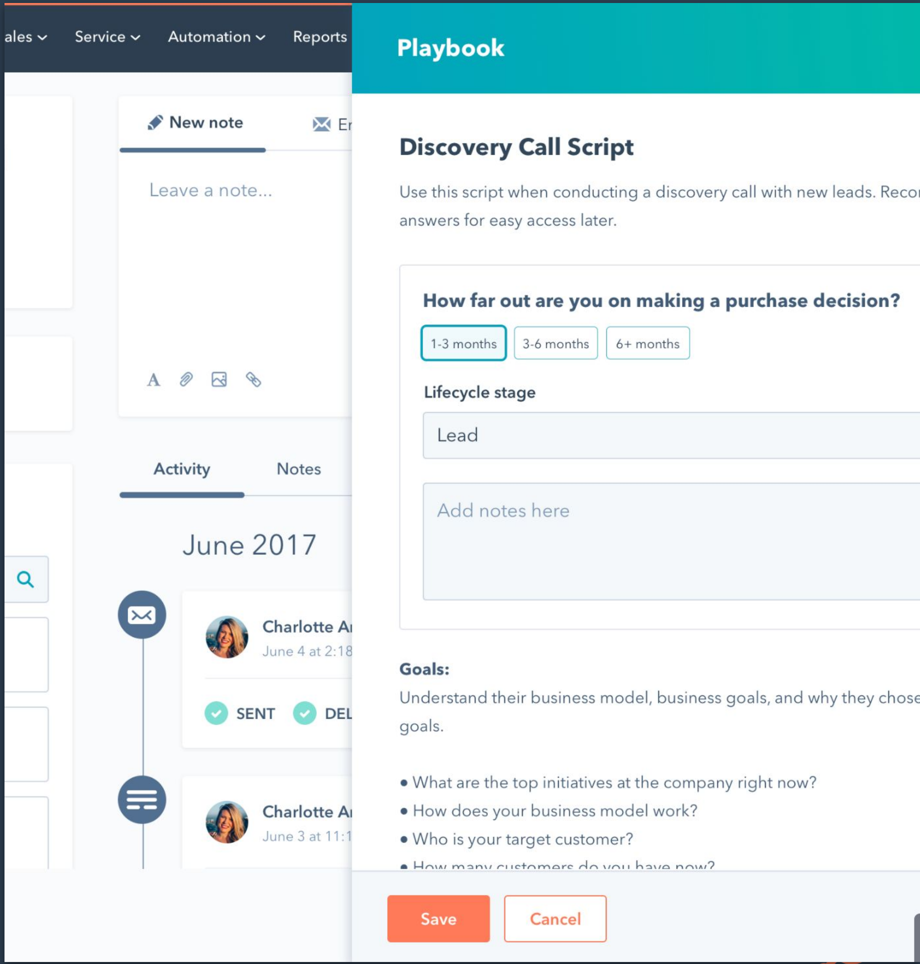
Best Practices

- Have a meeting link embedded on your website or on standalone page
- Include the link in your signature
- Personalise the subject line
- Send pre-meeting reminders
- Integrate with Zoom for simplicity
- Don’t ask too much of your customers



Playbooks

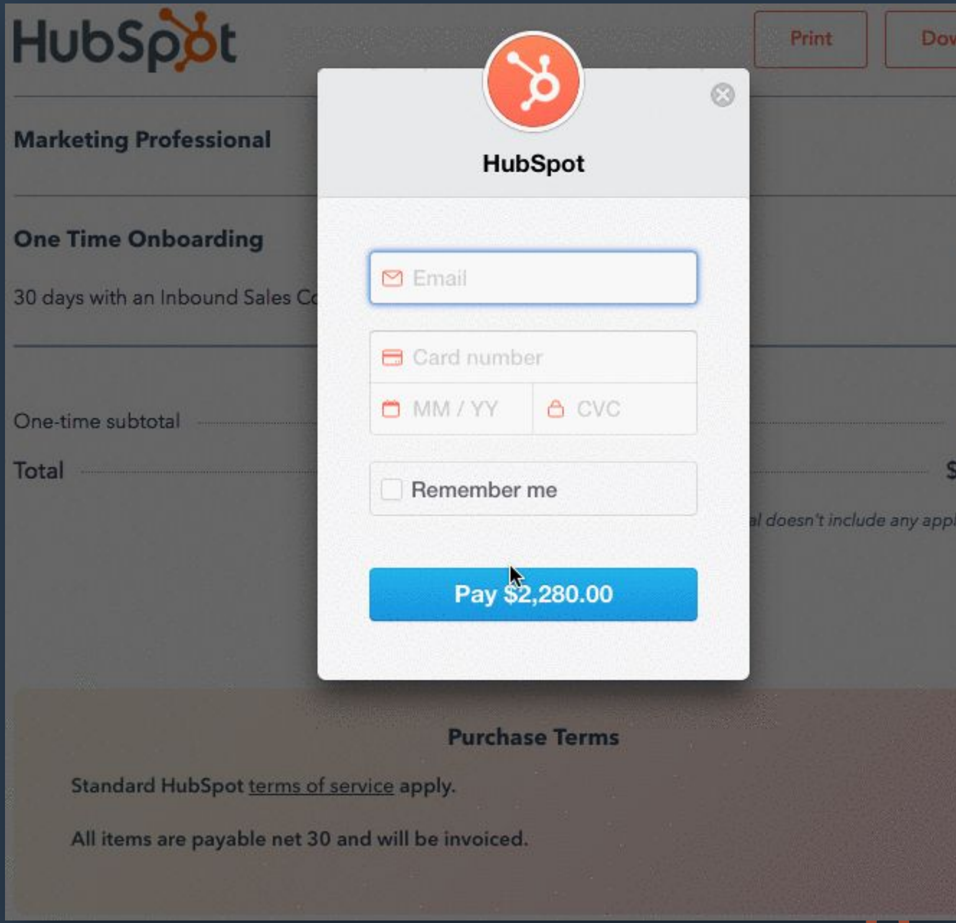
Build a library of sales best practices and resources. Use rules-based automation to surface recommended content to your sales team, right inside of HubSpot.



Products & Quotes

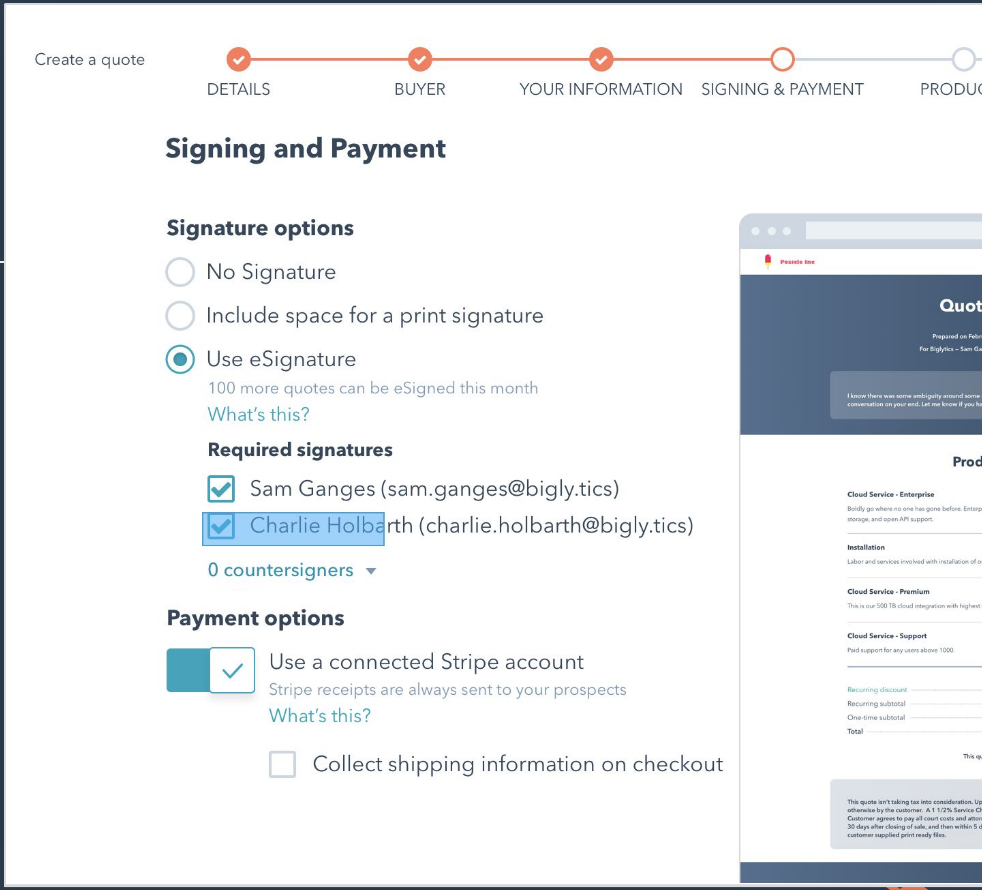
Products makes it easy to build a library of products that your sales team can easily add to deals inside HubSpot.

Quotes allows your sales reps to quickly configure a quote right inside HubSpot using your contact, company, and product data. Send a shareable link to your quote, and even allow your lead to pay using a credit card.



eSignature

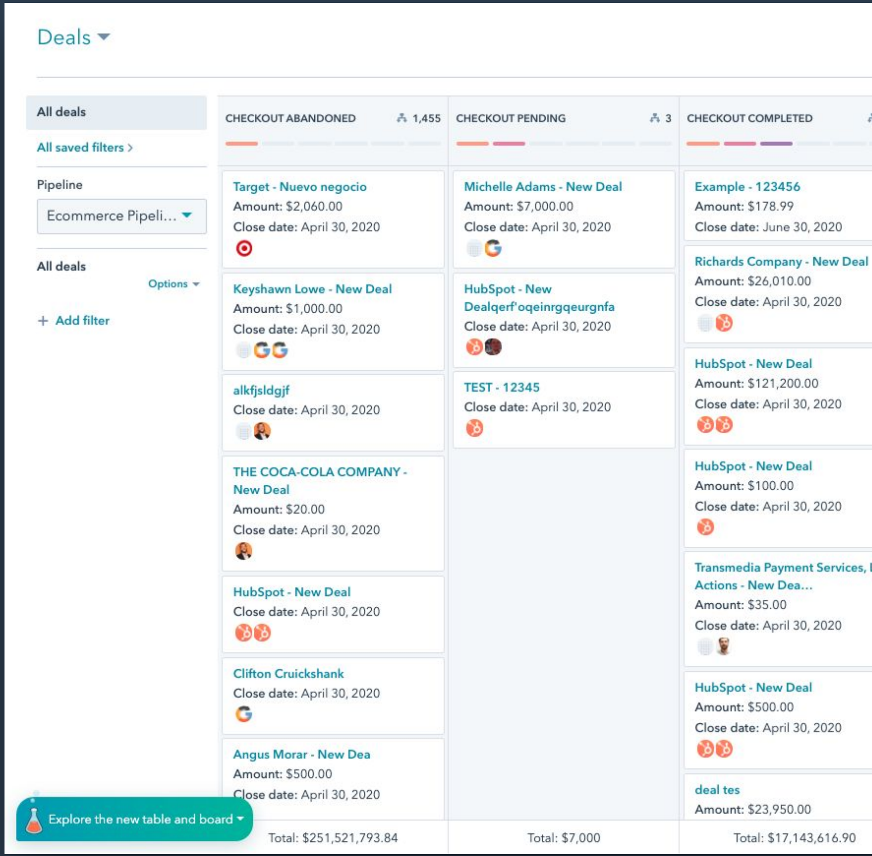
Collect signatures on quotes and other documents right inside of HubSpot.



Manage Your Pipeline

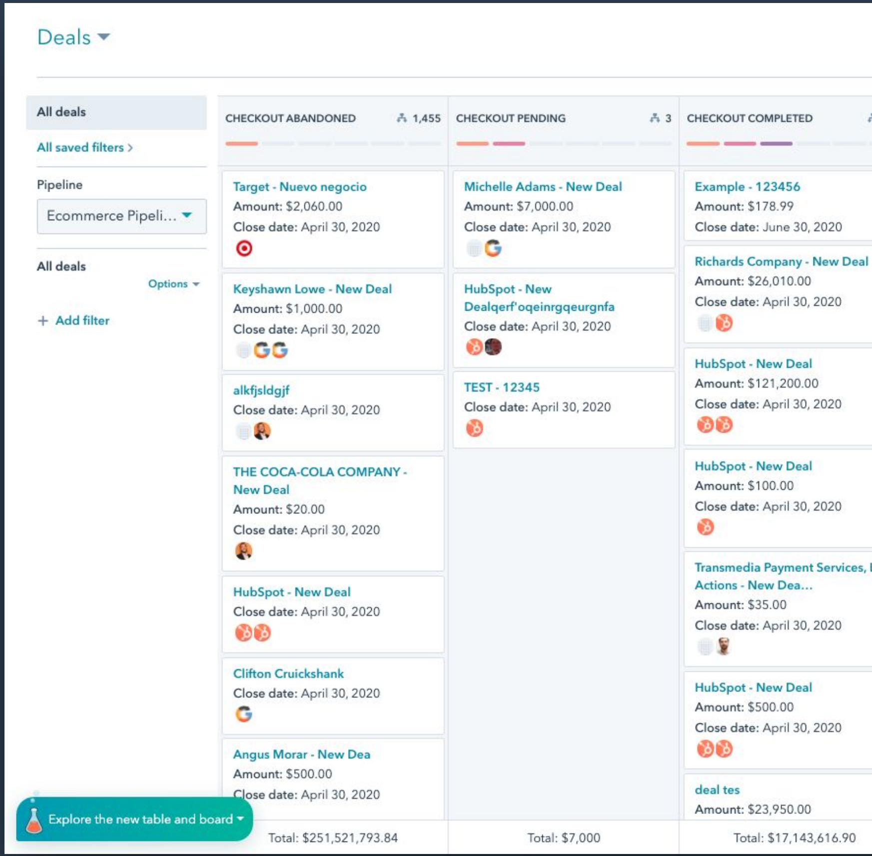
Pipelines

Never let a lucrative deal slip through the cracks again. Add deals with a single click, assign tasks, and track progress in your dashboards.



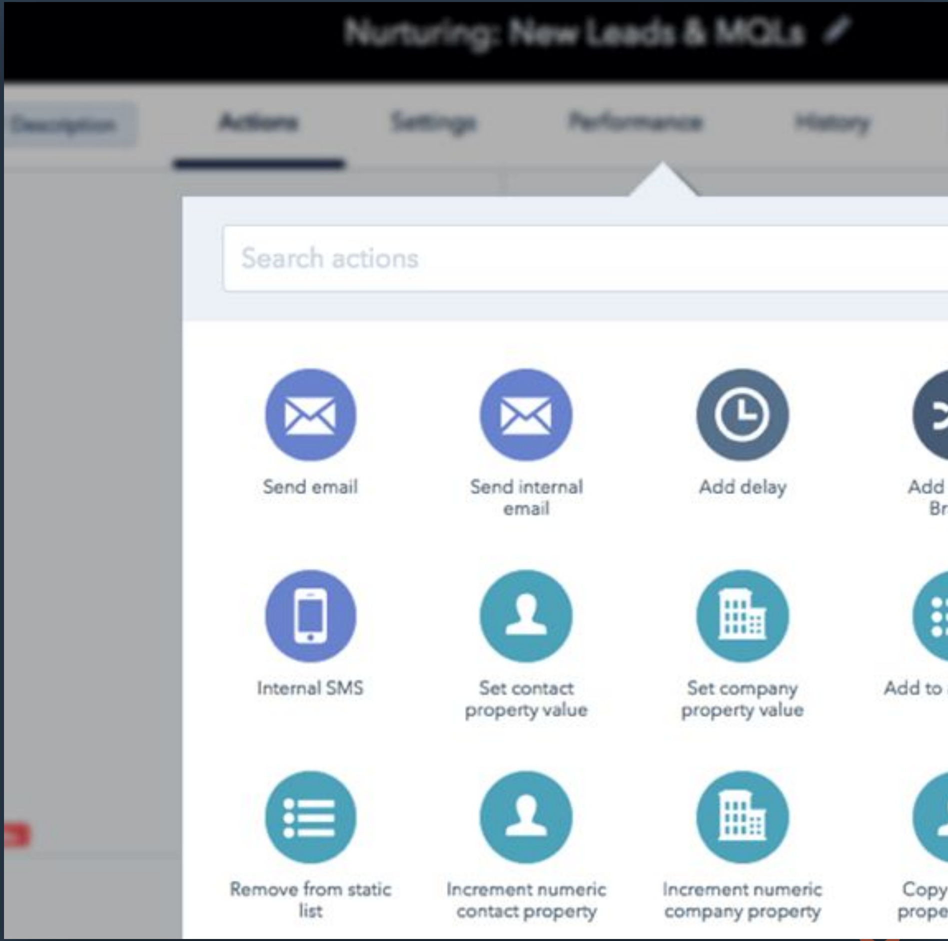
Best practices

- Match pipelines to your sales cycle
- Don’t skip over deal stages
- Use workflows to create deals and automate deal stages



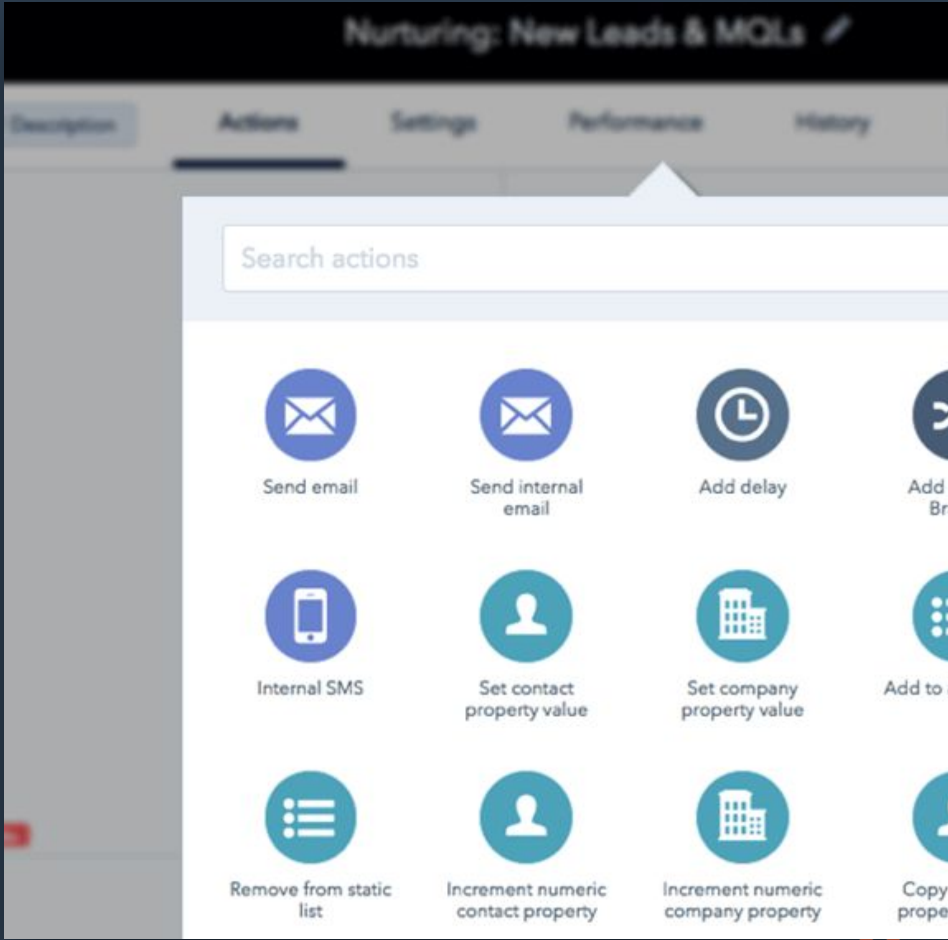
Automation

Automate common management tasks like assigning leads, alerting reps when contacts take specific actions, creating tasks, and more.

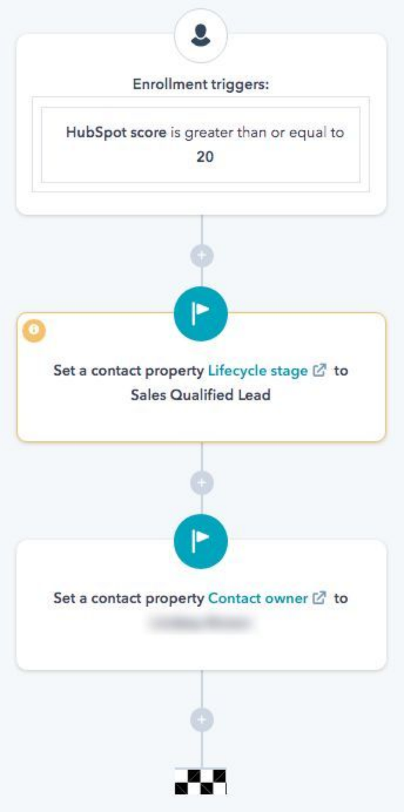


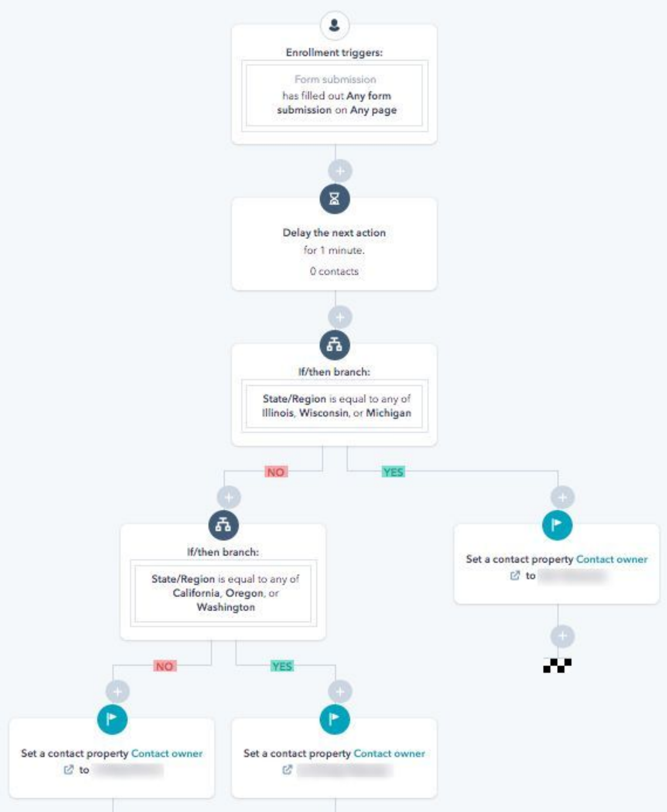
Best practices

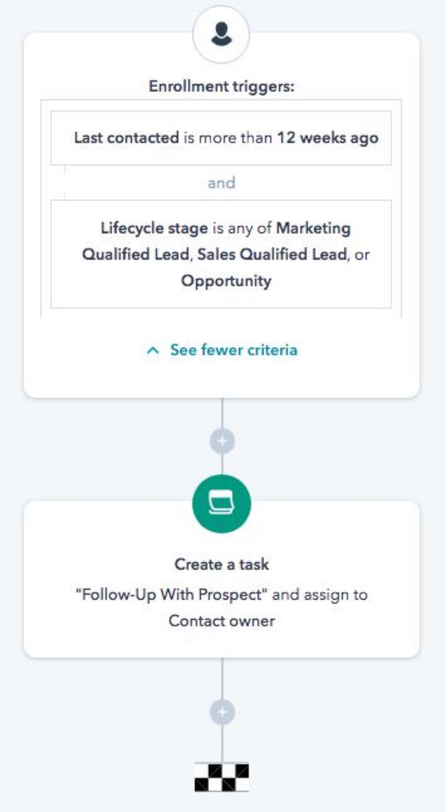
- Get instantly notified when a contact has seen a key page or filled out a form on your website
- Automatically assign leads and create tasks
- Update lead status, lifecycle stage and more
- Automatically create or update deals
- Re-engage with leads



Here are some examples

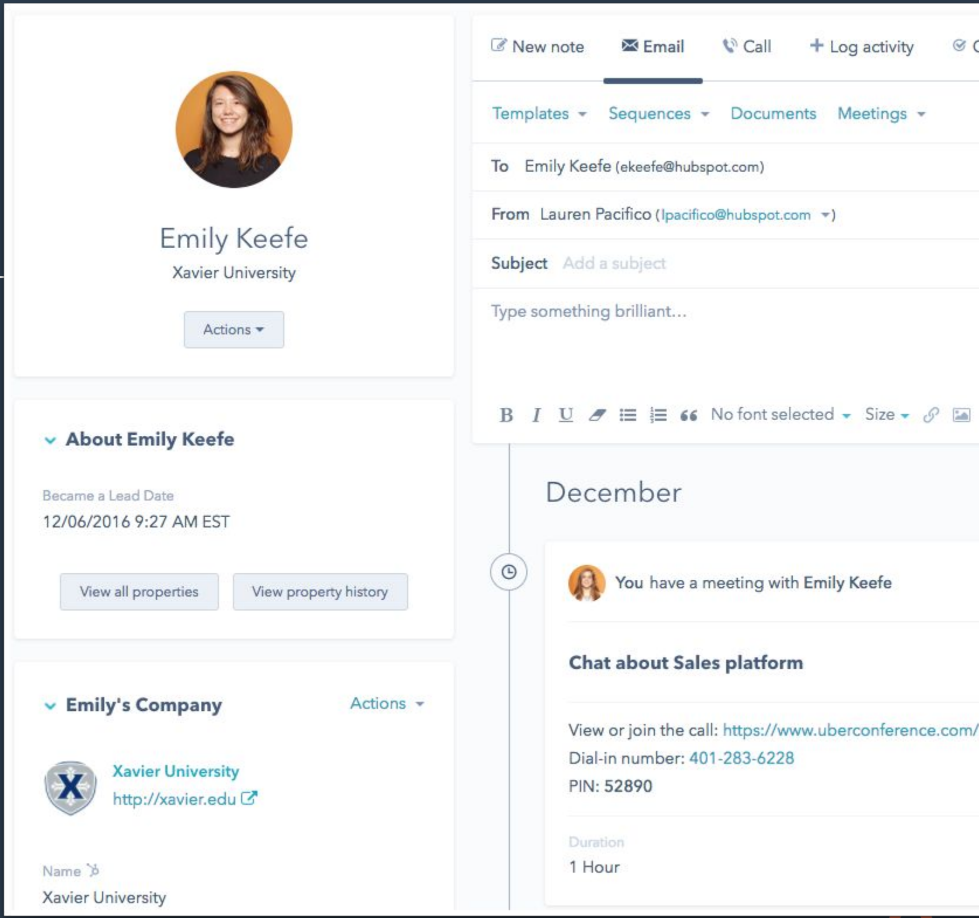






Connected with your favorite tools

Right out of the box, Sales Hub is deeply connected to HubSpot CRM and you other favorite tools.



Key Takeaways

Key Takeaways

01

Make it personal

Personalization tokens and sales videos make it easy for you but go a long way

02

Be quick

Setup notifications and use the tools available to you for a prompt response

03

Streamline & Scale

With sequences & automation to generate and close more deals faster

Thank you

Q&A

Ressources: Uncover New Leads

1. Track prospects
2. Prospects FAQ
3. The Ultimate Guide to Sales Prospecting
4. The Email Sequence That Earned Us $100,000 in 30 Days
5. 25 sales email templates that convert
6. Automate Email Prospecting Without Losing Your Soul
7. How HubSpot and Vidyard Work Together
8. How the HubSpot Sales Team Used Video to Engage More Prospects
9. Add videos to your HubSpot content
10. Set up user notifications in HubSpot
11. View your sales notifications in the activity feed
12. Enable notifications from the HubSpot mobile app

Ressources: Connect with more leads

1. The Best Free HubSpot Tool You Aren't Using
2. How to Simplify Your Sales Communication Using Snippets
3. Create and use snippets
4. Create and send templates
5. 12 CRM-Ready Sales Email Templates to Send Today
6. Getting Started With 1:1 Sales Nurturing Using Sequences
7. Register your phone number for calling
8. Make calls

Ressources: Close deals faster

1. How to Use Predictive Lead Scoring
2. Lead Scoring 101
3. Determine likelihood to close with predictive lead scoring
4. Set up the meetings tool
5. Create and share meetings links
6. Create a team meetings link
7. Embed the meeting widget on a page
8. Use HubSpot's integration with Zoom
9. Upload and share documents
10. Using Attachments vs Using Documents in Your Sales Process
11. Using HubSpot Playbooks to Increase Sales Efficiency
12. The Ultimate Guide to Creating and Using a Sales Playbook
13. Use products
14. Create and share quotes
15. Use e-signatures

Ressources: Pipeline Management

1. Pipeline Management Training 101
2. Sales Pipeline Stages: A Visual Guide
3. Sales Pipelines: A Comprehensive Guide for Sales Leaders and Reps
4. 10 HubSpot Workflows Every Sales Team Needs
5. How to Use Automation to Keep a Tight Sales Pipeline
6. Sales Automation: The Ultimate Guide
7. How to Use Deal Automation to Remove Friction From the Sales Process
8. Automate tasks on deal stages