Create Sales Nirvana:
Using HubSpot Sequences to Improve Email Prospecting

Join us February 27th to learn about using HubSpot Sequences to:

Create more predictable revenue streams
Save hours on prospecting and follow-up
Increase response rates

Presented by: FFCT HubSpot Fairfield County User Group

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Agenda & Speakers

- What are Sequences?
- Strategies for Sequences
- Demonstration of Sequences
- Presenters:
  - Keith R. Reynolds, Vice President, Senior Marketing Advisor
  - Kelly Burke, Inbound Marketing Content & Sales Enablement Specialist

What Are HubSpot Sequences?

Workflows vs. Sequences

HubSpot says: Sales nurturing - Lower volume, higher stakes

Marketers use HubSpot Workflows to automate tasks that take multiple steps based on rules. Rules can be based on behaviors or data we have in a customer record.

A marketing department uses Workflows for a higher throughput of leads who are (in most cases) earlier on in their journey.

For Sales, the number of contacts they are nurturing at any given point in time may be smaller, but the stakes are higher.

In a lot of cases, there is more background - a past email exchange or conversation – that increases the expectations for how specific future follow-ups will be.

Using Sequences starts when a sales rep manually enrolls one of their contacts in a highly specific flow.

When to Use Sequences

Workflows is a better fit when...	Sequences is a better fit when...
- You are sending stylized or image-rich emails	- A 1:1 relationship has been established between a prospect and a sales rep
- The action can be triggered automatically	- The content of the communication needs to be highly targeted
- Instant follow-up is required	- A reply to an email should stop or alter what the next step is
- A salesperson hasn't yet been assigned to a contact	
- You expect a large number of contacts being sent through the flow	

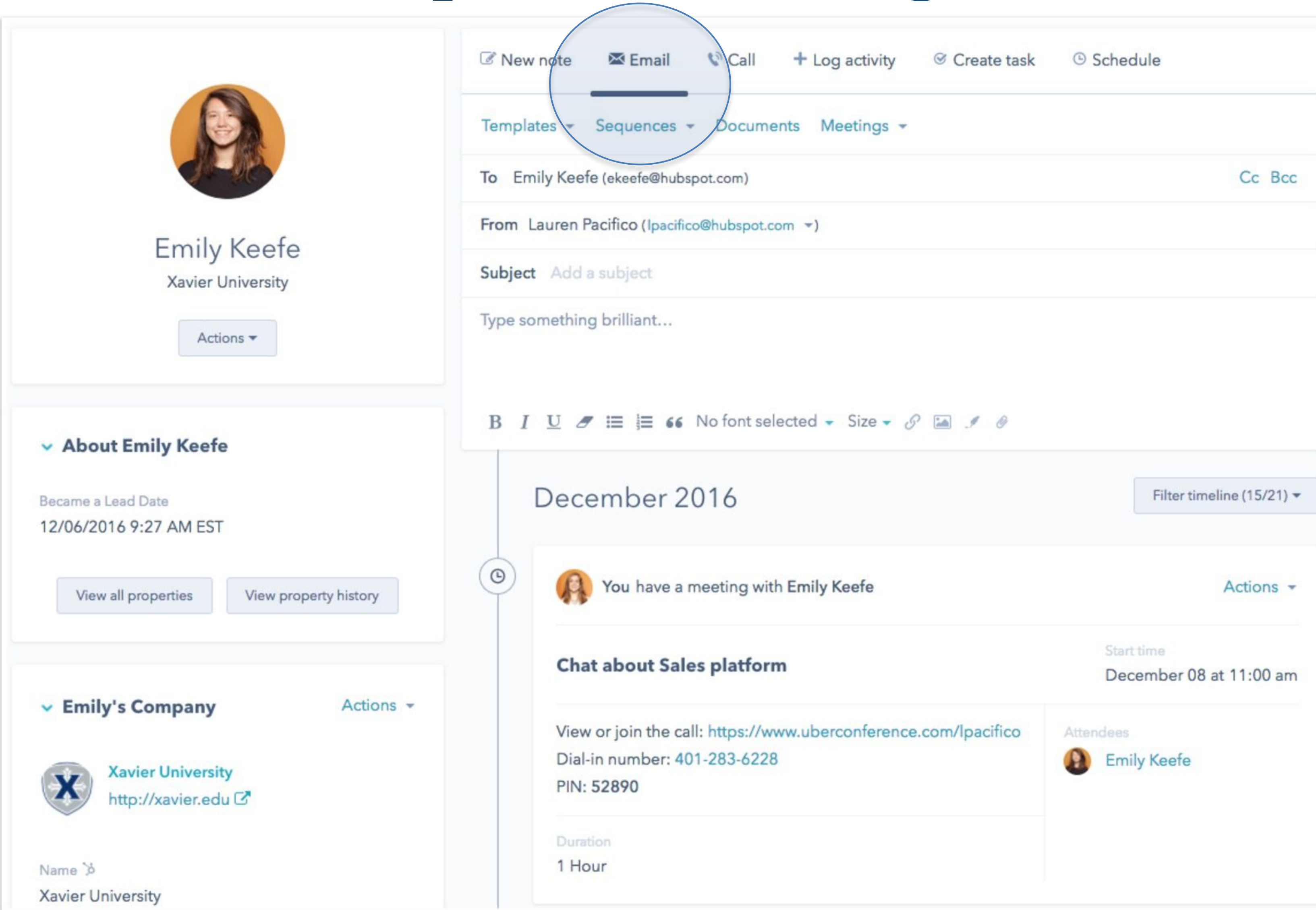
HubSpot Sales Pro Navigation

- **Contacts, Companies** and **Deals** are your primary CRM databases. Go here to reference information about your leads and customers.
- **Tasks** shows an overview of any tasks you've created in the CRM. This page can be used to help prioritize and organize your daily tasks.

HubSpot Sales Pro Navigation

- **Notifications** will bring you to your email tracking activity stream.
- **Templates** contains all of the email templates created by you and your team. Go here to create new templates, or view performance metrics. These templates can be used when crafting emails to contacts either in the CRM or in your email client.
- **Sequences** will bring you to a dashboard listing all of the Sequences created by you or your team. Come here to craft a new Sequence, or edit one that already exists. Enrolling a contact in a Sequence will take place on a contact records in the CRM or in your email client.
- **Documents** shows a listing of all the documents added by you or your team, as well as document performance. You can add new documents here, or share one that already exists. Once again, documents can also be added when crafting an email in the CRM or in your email client.
- **Prospects** contains 3 elements: a website visit activity stream, HubSpot's Company Insights database and a News/Events stream.
- **Meetings** will present you with a dashboard of all the default Meeting links, as well as any others that you may have created. Go here to create new Meetings links or modify Meetings settings. Meetings links can be copied directly from this page, or added into you email templates.
- **Call Queue** contains a list of contacts that you have added to the call queue. From this page you can add more contacts to the queue, or start calling. Contacts can be added to the Call Queue from their contact record as well.

HubSpot CRM Navigation



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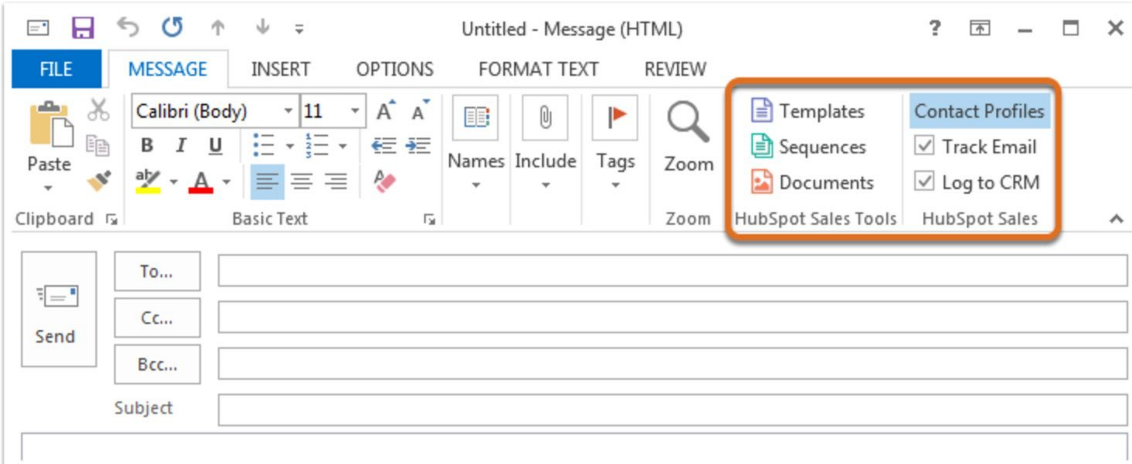
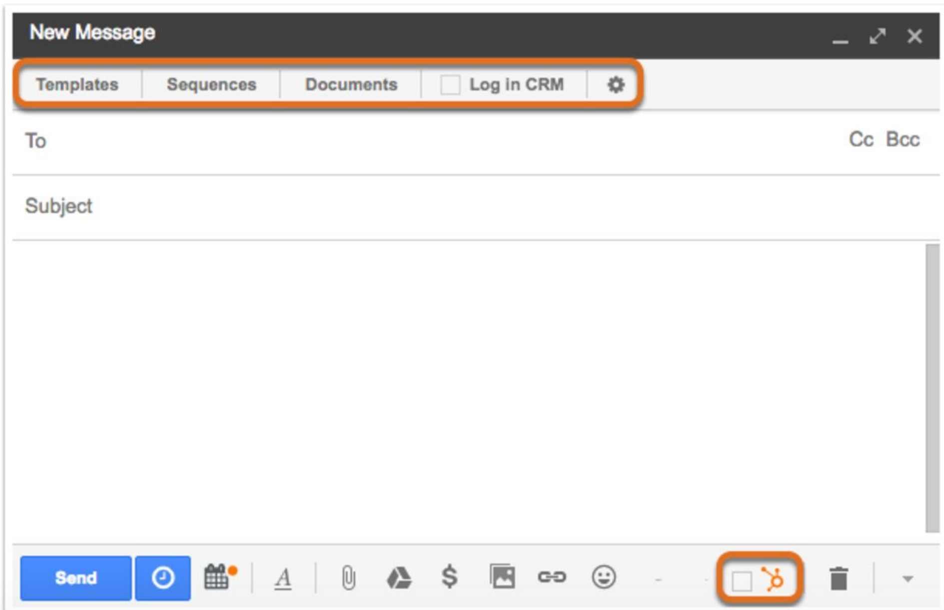
HubSpot Sales Extension





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Ways to Use Sequences

Depending on your sales process, there are a lot of different ways that a tool like Sequences might be helpful. Here are some common starting points to consider -

- **Automating follow-ups.** This is the obvious one. You've ended a call with a prospect who is weeks, months, or a quarter away from taking whatever the next step is. Using Sequences, you can tee up your follow-up for the appropriate day and time.
- **Illiciting a response.** You are hoping to get in touch with a new prospect and plan to reach out several times over the coming weeks. Sequences makes it easy to kick this process off once, and not have to keep track of where many different prospects are in your process. If someone replies, the sequence stops.
- **Nurturing prospects over the long term.** If your sales process typically spans many weeks or months, chances are you'll be reaching out to stay in touch with your prospects at various points along the way. Nurturing them over time with useful content is a great way to build trust and a rapport, and Sequences can take care of the actual sends.

(Other) Ways to Use Sequences

While time savings is a big part of what a tool like Sequences can offer, you shouldn't overlook the ways in which a tool like Sequences can help you step up your effectiveness, too.

- **A shared library of approaches -** Sharing a sequence is a great way to make sure everyone on your team benefits when someone find an approach that works.
- **Scheduling messages when the details are most fresh in your mind -** Chances are that if you write and schedule a follow up when the details are freshest in your mind, the end result is going to be more relevant and targeted to the individual prospect than it would if you are writing a follow up from memory three months later, or operating off notes you had to dig up.

Bonus Round

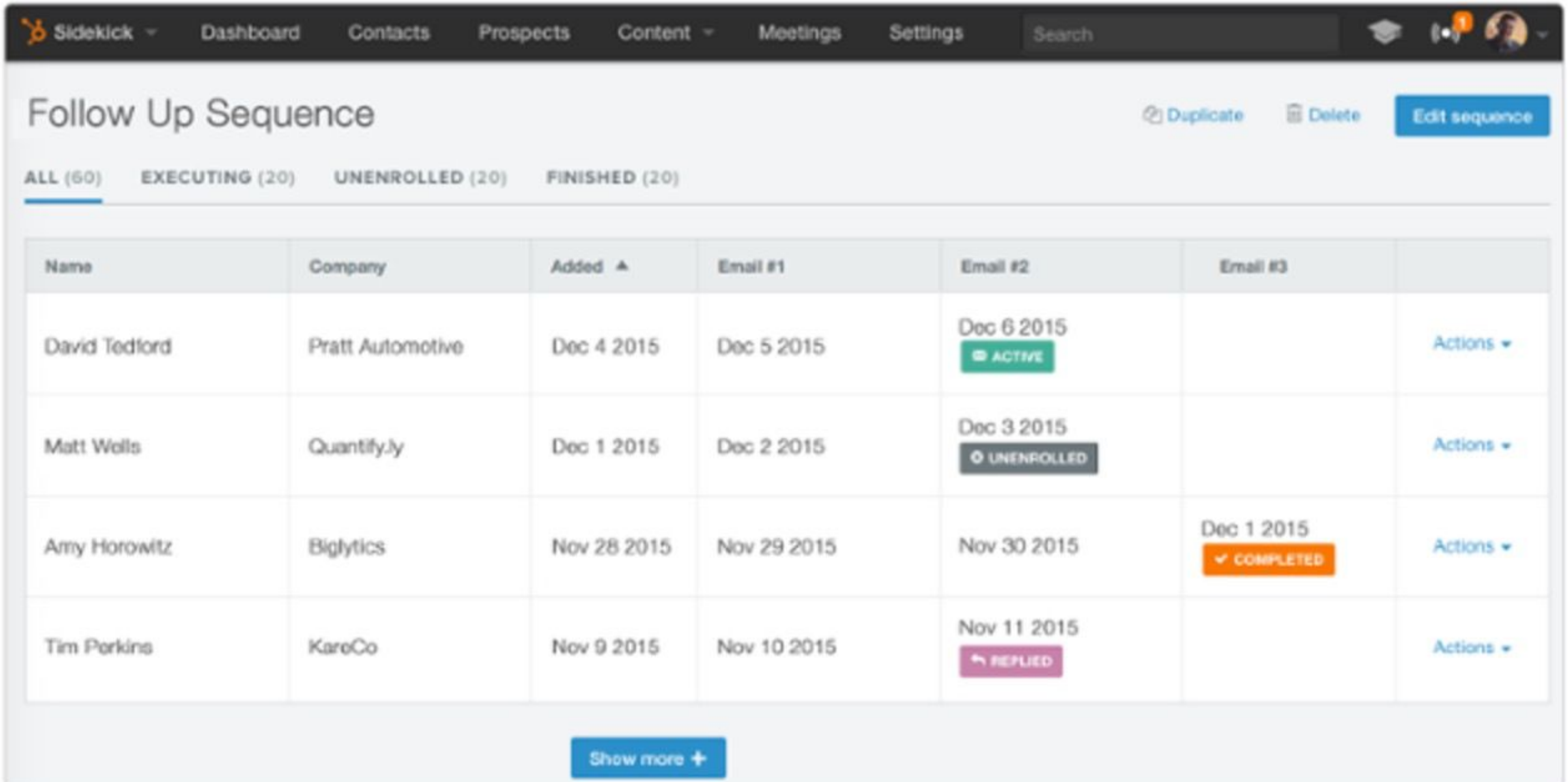
Using Meetings, Templates and Sequences together

Last updated: February 1, 2017

Meetings, Templates and Sequencesare each separate tools, though they work well when used together. This article will give an overview of each of these tools, and highlight some common ways that the tools work in conjunction. We will cover...

AVAILABLE FOR:	
Marketing:	N/A
Sales:	Professional

Monitoring Your Sequences



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Who is Austin Lawrence?

- Marketing Strategy, Consulting and Big (Money-making) Ideas
- Inbound Marketing / Lead Generation & Nurture
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"Our Inbound Journalism Expertise Gets Results."

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Thanks for coming!

Save the date:
Our next HUG event is **April 17**

Look out for email announcements

Connect with us on LinkedIn: **Fairfield County HUG**

If you have ideas for future presentations and would like to collaborate with us, please email Suzanne at SM@austinlawrence.com.

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