1.Getting Started

1.0 Update your profile

1.0.1 Download Hubspot on your mobile phone

The HubSpot mobile app allows you to take HubSpot's marketing and sales tools on the go. The HubSpot mobile app can be installed on iOS devices running iOS 11 or later or on Android devices running Android 5.0 or later.

- Open the **App Store** on your device.
  - iOS: Search for the HubSpot app, then tap Get to download and install the app.
  - Android: Search for the HubSpot (CRM & Sales) app, then tap Install to download and install the app.
- Tap Open or open the HubSpot app on your device.
- A *"HubSpot" Would Like to Send You Notifications* prompt will appear. If you want the HubSpot app to send you notifications, you must allow push notifications. Learn more about enabling notifications from the HubSpot app.
- Enter your HubSpot credentials and tap Log In. If you're a user in multiple HubSpot accounts, you'll be prompted to select which account you want to access.

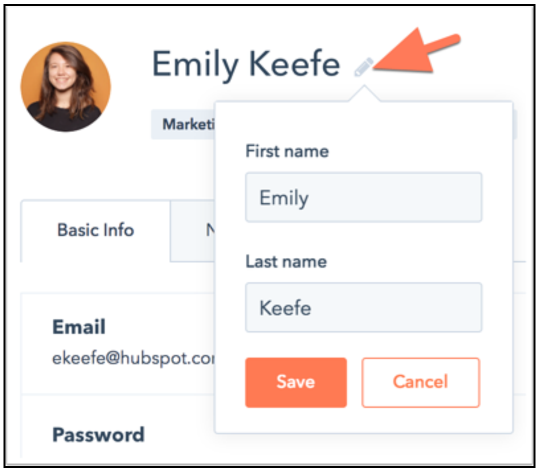
1.0.2 Update your profile photo

- In your HubSpot account, click your **account name** in the top right corner, then click **Profile & Preferences.**
- Click the **pencil icon** next to your profile photo.
- Upload a new profile photo.
- Click **Save.**

1.0.3 Update your First Name & Last Name (Optional)

- In your HubSpot account, click your **account name** in the top right corner, then click **Profile & Preferences.**

- Click the **pencil icon** next to your name.
- Edit the **First name** and **Last name** fields as needed. *Eg: If you prefer to be called Professor or Coach in your emails, please change your First name to Professor or Coach, ie First Name = Professor, Last name = John Smith.*
- Click **Save.**



1.0.4 Update your email signature

You can set up a signature for your HubSpot user profile, which will be used for your emails sent through the CRM.

- In your HubSpot account, click your **account name** in the top right corner, then click **Profile & Preferences.**
- Scroll down to the *Signature* section and click **Edit signature**.
- Enter your signature in the text box. Format the text, add links, or insert images using the icons in the Simple editor. Or, click HTML and edit the HTML of your signature.
  - First Name Last Name
  - Startup Course
  - Meeting Link (Insert URL)
- Add your **meeting link.** See how to create a meeting link below.
- Click **Save.**

1.1 Connect your Google Calendar with Hubspot

The Google Calendar and Outlook Calendar two-way integration with HubSpot allows you to simultaneously log a meeting in your CRM, create a calendar event for that meeting, and send invites to meeting guests. Additionally, if you create a meeting event in Google Calendar or in Outlook Calendar with a HubSpot contact, the event will appear on their contact record timeline.

Please note: You can connect either the Google Calendar integration or the Outlook Calendar integration to HubSpot. Both integrations cannot be installed at the same time.

- In your HubSpot account, click your **account name** in the top right corner, then click **Integrations.**
- In the upper right, click **Connect an app.**
- Use the **search bar** to search for the Google Calendar integration. Hover over the integration and click on **View integration.**
- In the dialog box, click **Connect to Google Calendar.**
- You'll be redirected to Google to sign in or choose a Google account if you have multiple accounts.
- Click **Allow.**
- You'll be redirected back to HubSpot with a dialog box indicating that Google Calendar for HubSpot was installed.

1.2 Connect your Outlook Calendar with Hubspot (If you do not have Google Calendar)

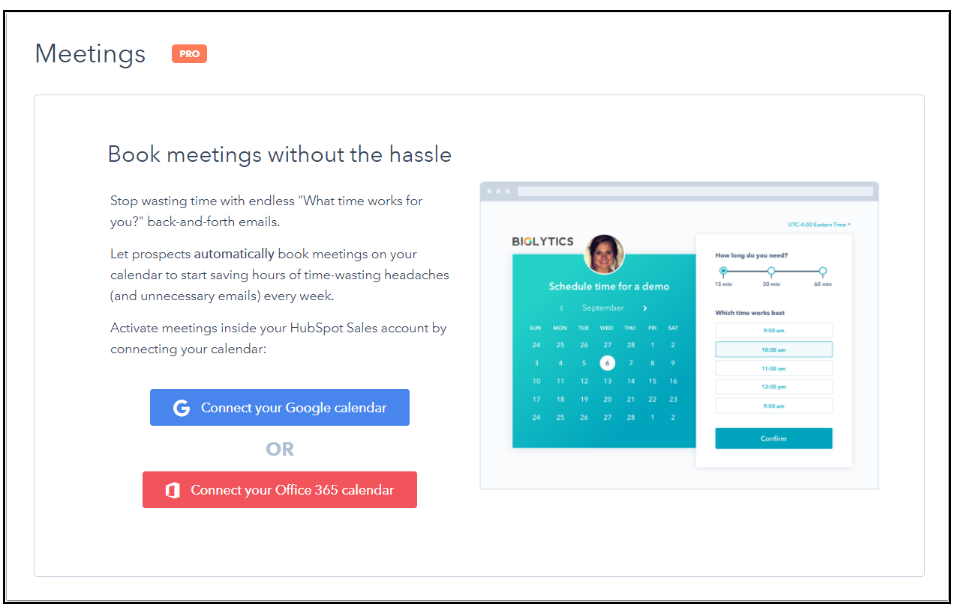
- In your HubSpot account, click your **account name** in the top right corner, then click **Integrations.**
- In the upper right, click **Connect an app.**

- Use the **search bar** to search for the Google Calendar integration. Hover over the integration and click on **View integration.**
- In the dialog box, click Connect to **Outlook Calendar.**
- You'll be redirected to Office 365, where you can log into your account.
- After entering your login credentials, you'll be redirected to HubSpot with a dialog box indicating that Outlook Calendar was installed.

1.3 Connect your calendar with Hubspot Meetings

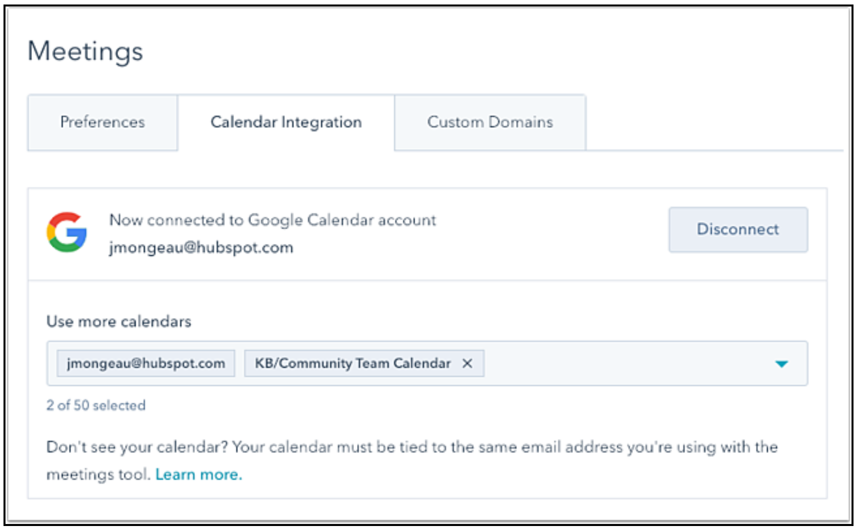
Connect your **Google** or **Office 365 calendars** with the meetings tool to allow your calendars to sync to HubSpot. If you have an event on your connected calendars, the meetings tool will show that you're busy during the event time.

- In your HubSpot account, click the **settings icon** in the main navigation bar.
- In the left sidebar menu, navigate to **Sales > Meetings.**
- Check if your email provider is compatible with meetings.
- Click **Connect your Google Calendar** or **Connect your Office 365 Calendar.**
- When prompted, click **Allow** to give the meetings tool access to your calendar.



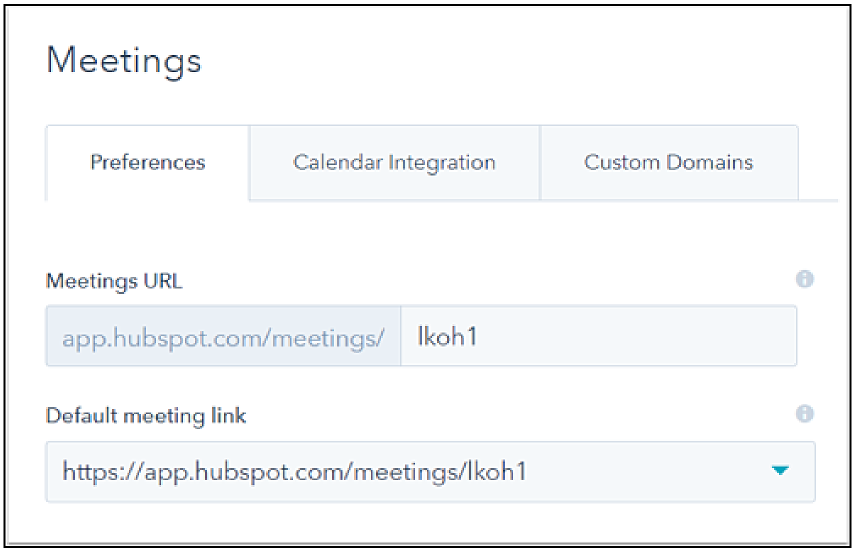
Once you've set up the integration, you'll see your default personal calendar in your meetings settings. You can then connect additional calendars:

- In your HubSpot account, click the settings icon in the main navigation bar.
- In the left sidebar menu, navigate to **Sales > Meetings.**
- Click the **Calendar Integratio**n tab.
- Click the **Use more calendars** dropdown menu and select any additional calendars.
- Click **Save**.



1.4 Setup your meeting preference

- In your HubSpot account, click the **settings icon** in the main navigation bar.
- In the left sidebar menu, navigate to **Sales > Meetings.**
- In the *Meetings URL* field, customize your meetings URL. Changes to your meetings URL will apply to all new links going forward, but will not change existing meetings links.
- Select your default meetings link from the **Default meeting link** dropdown menu.



1.4 Create and Share meeting links

Once you have connected your calendar and customized your meetings tool preferences, you can create meetings links to share with your contacts so they can easily book time with you. The meetings links will sync with your connected Gmail or Office 365 calendar so your appointments will always be up-to-date.

1.4.1 Create a meetings link

- In your HubSpot account, navigate to **Sales > Meetings.**
- In the upper right, click **Create meeting link**, then select **Personal.**
- Continue setting up your meetings link following the steps below.

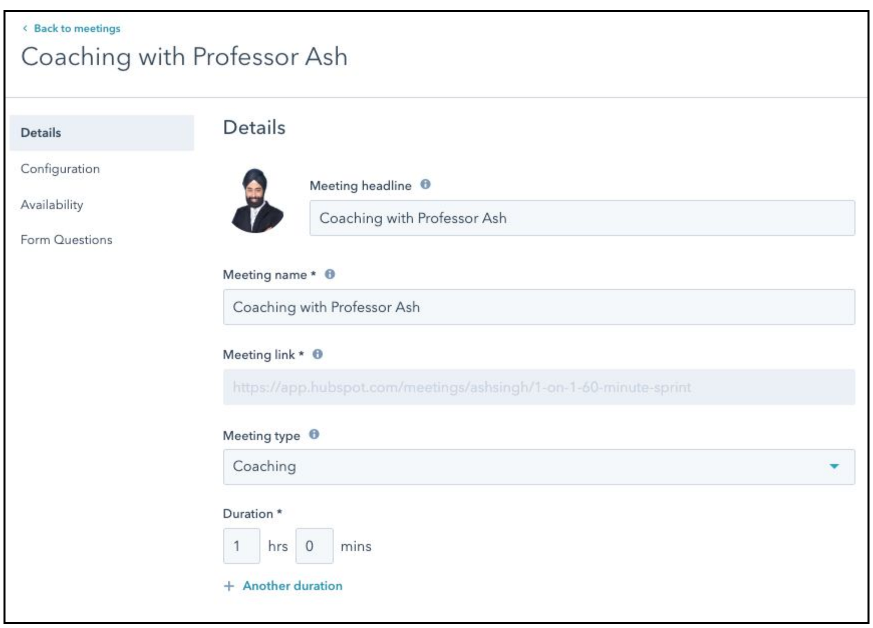
1.4.2 Customize your meeting detail

Reference:

- https://app.hubspot.com/meetings/ashsingh/1-on-1-60-minute-sprint

On the ***Details page***, edit the meeting's basic information.

1. **Meeting photo:** this photo will display at the top of your meetings link page. Hover over the photo and click Change photo to edit it.
2. **Meeting headline:** this headline will display next to the meeting photo at the top of your meetings link page.
3. **Meeting name:** the internal name that appears in your meetings dashboard and used when you insert the meetings link into an email.
4. **Meeting link:** the link that prospects use to book this meeting. The link can be edited by paid *Sales Hub* or *Service Hub* users only. This value is not editable after creation. In order to have a link at a new URL, you will need to create a new link.
5. **Meeting type:** choose a meeting type from the dropdown menu.
6. **Duration:** the length of time visitors can book you for when clicking this meetings link. Click + Add duration to add more options.
7. When you're done editing your meeting details, click **Next.**



1.4.3 Customize your meeting configuration

- **Location:** https://zoom.us/j/4169998778
- **Invite subject:** [Coaching]: Coach <Your Name> x {Contact: First name} {Contact: Last name}
- **Invite description:**
    - Review any assignments and progress from the last coaching session (if any).
    - Digging deep into 1-2 focus areas.
    - Here's where the meeting will take place:
        - Join Zoom Meeting: https://zoom.us/j/4169998778
        - One tap mobile
        - +16475580588,,4169998778# Canada
        - Dial by your location
        - +1 647 558 0588 Canada
        - +65 3158 7288 Singapore
        - +1 646 876 9923 US (New York)
        - +1 669 900 6833 US (San Jose)
        - Meeting ID: 416 999 8778
        - Find your local number: https://zoom.us/u/aULdz7Kt8
    - If you need help with ZOOM, you can refer to this help article - https://support.zoom.us/hc/en-us/articles/201362033-Getting-Started-on-Windows-and-Mac
    - Need help?
        - Please contact my Academic Director, Roy at roy@startupcourse.com if you need any immediate assistance.
    - Note to Coach:
        - Click here to access student's URL: https://app.hubspot.com/contacts/2698030/deals/board/view/all/?775386
- **Language:** English
- **Date and number format:** Select your region

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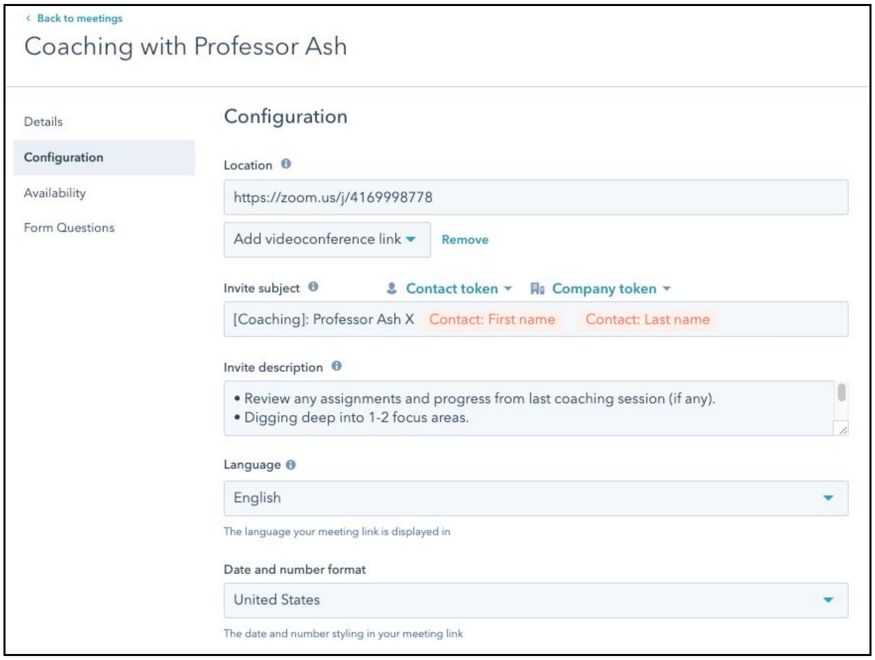
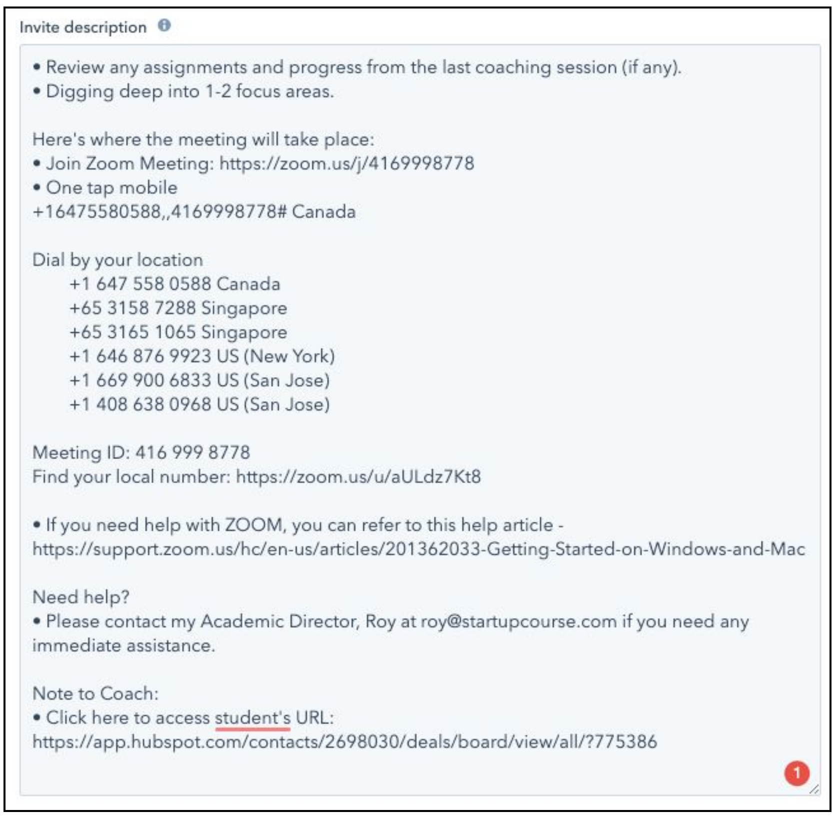
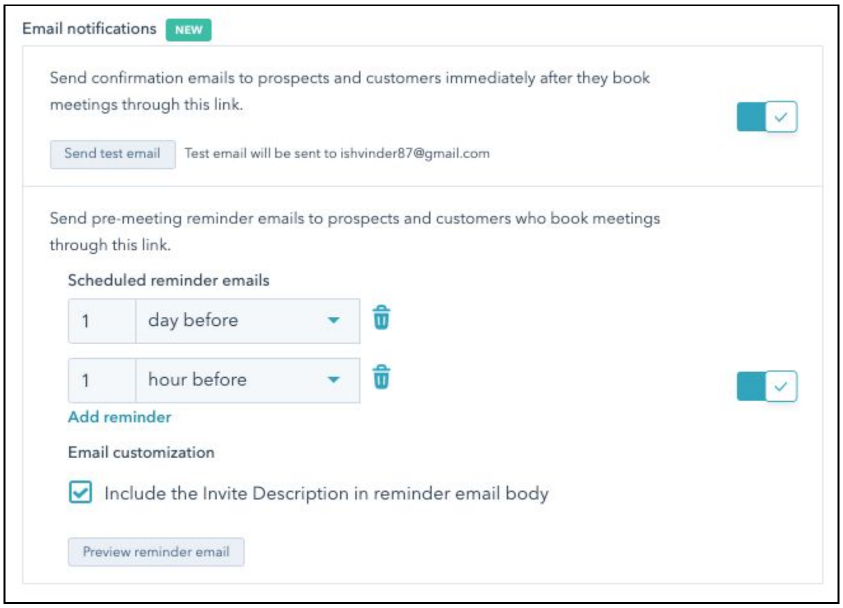




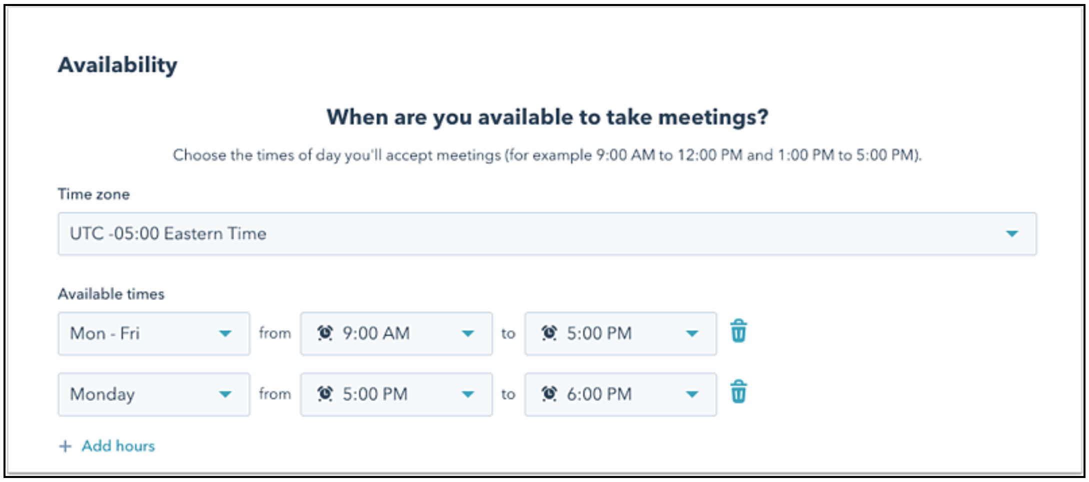
- **Email notifications:**
    - Select **Yes**
    - Enter 1 day before
    - Enter 1 hour before



1.4.4 Set your availability

Decide on which days and times you will accept meeting bookings.

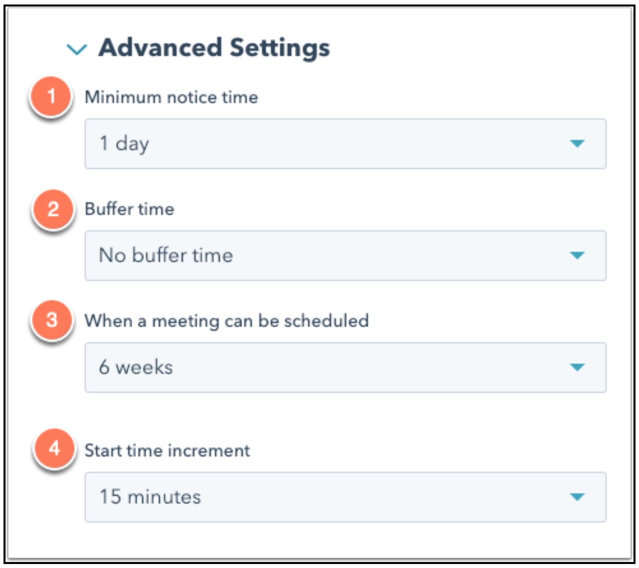
- Click the **Time zone** dropdown menu and select a timezone.
- Use the **dropdown** menus to set your availability. You can set individual times for each day of the week, or apply the same availability to every day, Mondays - Fridays, or weekend days.
- You can also overlap available time slots. For example, if you're available for meetings Monday - Friday from 9am-5pm, but work later on Monday nights, click + Add hours, then extend your hours for Monday evenings.



After adding your available times, customize your advanced scheduling options:

1. Minimum notice time: the minimum amount of time before a meeting that someone can book time with you.
2. Buffer time: padding of time around each of your meetings. The buffer time allows you to prevent meetings from being booked too closely together (e.g., if you have a meeting from 1:00 - 1:30pm and have a buffer time of 30 minutes, the next available meeting time would be 2:00pm).

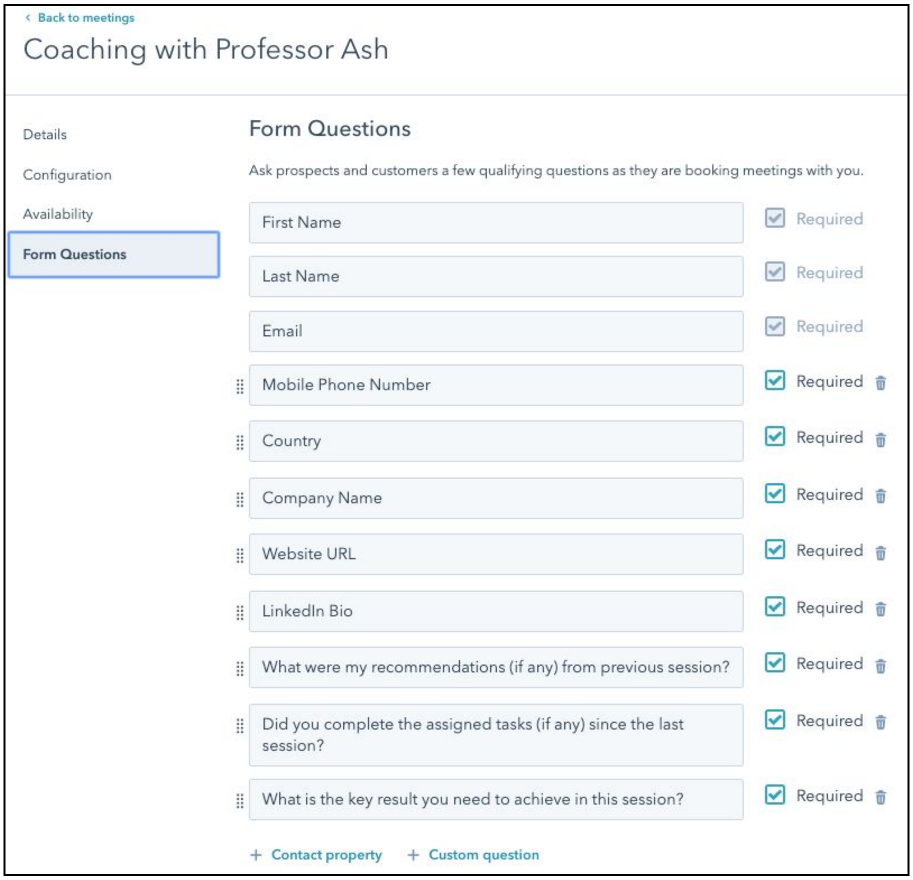
3. When a meeting can be scheduled: number of weeks from now that people can book time on your calendar. If you are creating a meetings link for an event or conference, you can specify a custom date range for booking. Click the When a meeting can be scheduled dropdown menu and select Custom date range. Click the date picker fields and set your time range. A custom date range cannot be longer than 10 weeks.
4. Start time increment: set the frequency of your meeting start time. For example, if you are available between 10am and 12pm for a 60 minute meeting, and your start time increment is 15 minutes, a prospect can book 60 minutes with you at 10:00am, 10:15am, 10:30am, etc.



1.4.5 Customize your form questions **(Please seek assistance from our team)**

Reference:

- https://app.hubspot.com/meetings/ashsingh/1-on-1-60-minute-sprint

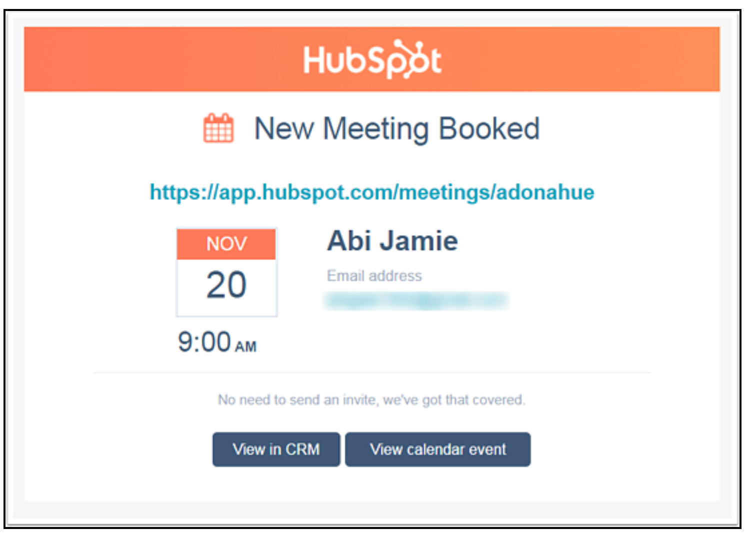


1.4.6 Share your meeting links

Once you've created your meetings links, you can share it with your contacts or embed it on your website. If the contact has booked a meeting in the past, the meeting's form fields will then pre-populate with the contact's past responses.

- In your HubSpot account, navigate to **Sales > Meetings.**
- Hover over the meetings link and click **Copy link.**
- Share the link with your contacts by adding it as a hyperlink in the body of your email or email signature.
- You can also embed the link on your website. To do so, hover over the link, click the **Actions** dropdown menu, then select **Embed.** Then add the embed code to your website pages.

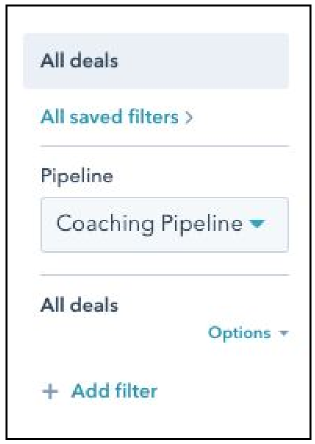
After someone books a meeting, you'll get an email alert with the booking time and the contact's name. You can also click to view the contact in the CRM or view the calendar event in your integrated default personal calendar (if you have additional calendars integrated, the invitation will not be added to them). The prospect will also receive a calendar invitation with all of the meeting details.



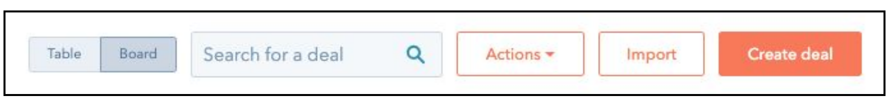
2.0 Schedule a coaching session with a student

2.1 Find your student

- In your HubSpot account, navigate to **Sales > Deals.**
- On the left panel, select the Pipeline **Coaching Pipeline.**

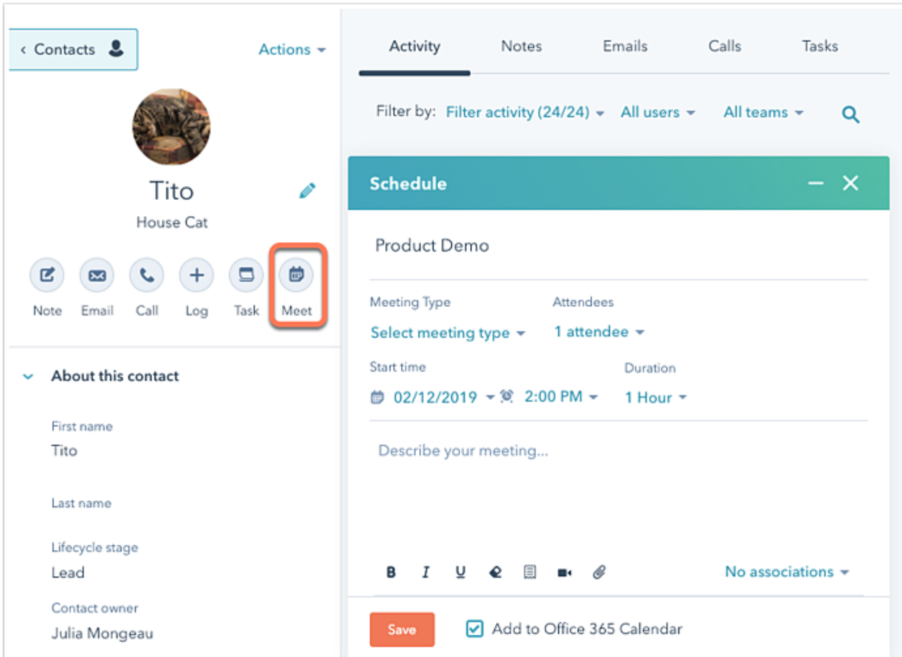


- Locate your student in the respective **pipeline stage.**
- Alternatively, on the top right, search for the student's name in the **search bar**.



- Click on the student's name. This would open the student's **deal dashboard.**
- On the top right section, click into the student's contact profile. This would open the student's **contact dashboard**.

In the left panel, click the Meet icon to create a meeting event. In the window that opens at the bottom of your screen, enter you meeting details. When your meeting is created, a corresponding event will be added to your Google Calendar or Outlook Calendar and the contact will receive a meeting invitation.



2.1 Calling your student

2.1.1 Calling your student with Zoom.

- Please refer to the Zoom Guide here.

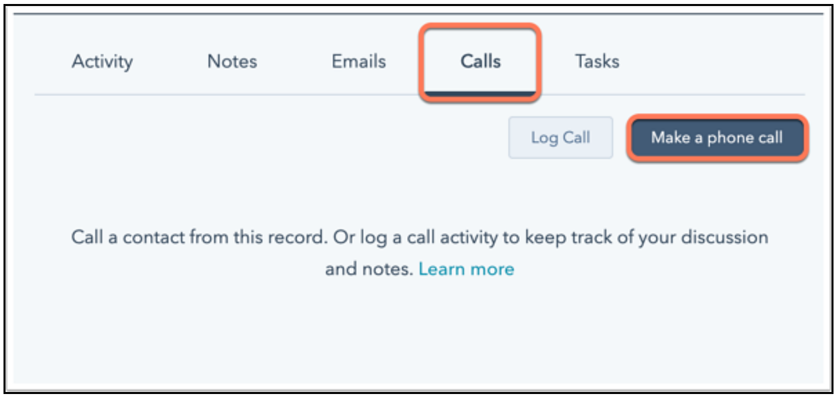
2.1.2 Calling your student with Hubspot.

The HubSpot calling tool lets you reach your contacts in HubSpot. You can connect right from your browser or phone and record the call if you choose. At the end of your call, everything is automatically logged to your HubSpot CRM.

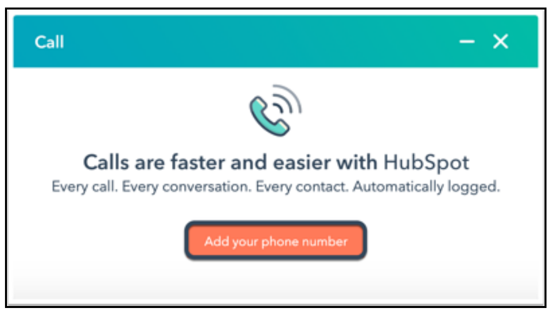
Before you can start making calls, add your phone number to HubSpot and verify it. The phone number registration process for calling with HubSpot is user-specific. While two or more users can use the same number in your account, each user must register the phone number individually. Before you register a phone number, make sure your country is supported for calling**.**

- In your HubSpot account, navigate to **Contacts > Contacts.**
- Click the name of your student.
- On the contact record, click the **Calls** tab.

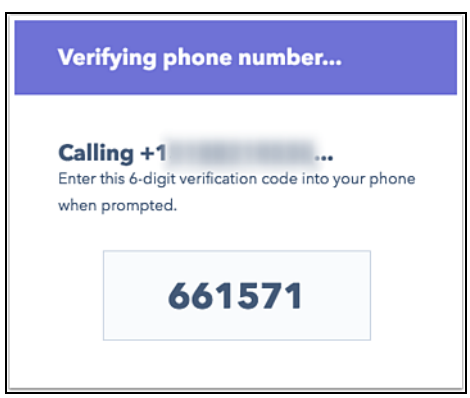
- Click **Make a phone call** to register your phone number.



- In the window that opens at the bottom, click Add your phone number.
- In the dialog box, enter your phone number and an extension (if applicable). Then, click Register.



- Next, you'll receive a phone call to verify that you have access to the phone number added. When prompted, enter the verification code that appears on your screen.
- Once this is completed, a confirmation message will appear. You can now make calls with HubSpot's calling too.

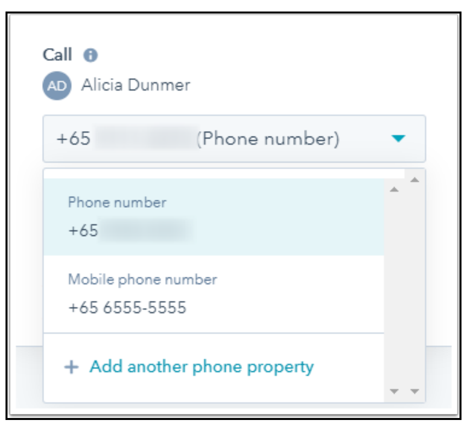


You can place a call through a physical phone, like a desk phone or cell phone, or through your browser.

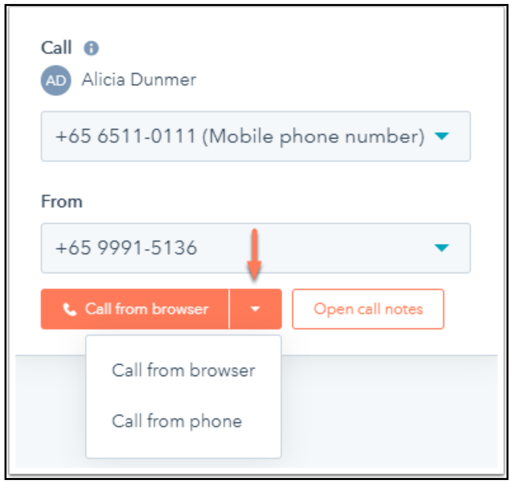
Please note: you must include the country code when dialing to or from a country supported by calling outside of the United States. The format may include a "+" or not. HubSpot will also dial the number set for the contact's *Phone number* property. If your contact does not have a value for *Phone number*, add a phone number.

2.1.2.1 Call from your phone

- In your HubSpot account, navigate to **Contacts > Contacts.**
- Click the **name** of your student.
- On the contact record, click the **Calls** tab.
- Click **Make a phone call.**
- In the dialog box, click the Call dropdown menu to select the phone number to call. By default, the calling tool will use the phone number stored in the *Phone number* property. If the contact's phone number is stored in a different property, such as *Mobile phone number*, you can select that property instead. You can add an existing property to this list by clicking + Add another phone property.



- In the dialog box, click the From dropdown menu to select the phone number to call from.
- Click **Call from phone**. If the option is set to *Call from browser*, click the dropdown menu and select Call from phone.

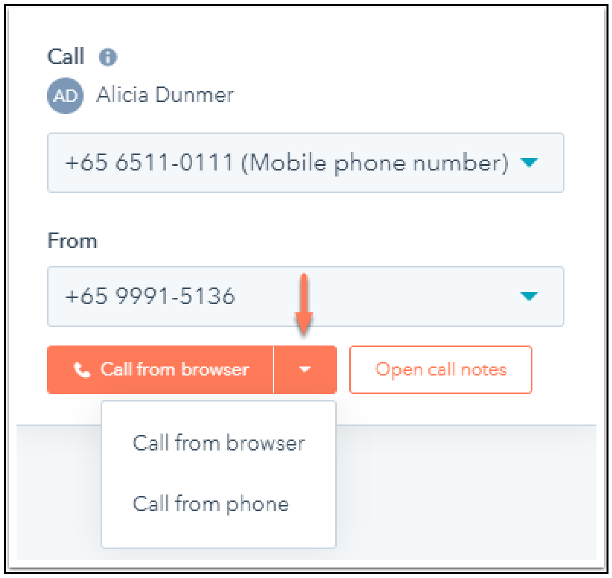


You'll receive a phone call from an automated system, which will connect you with your contact. The recipient's caller ID will display the phone number you've selected in the *From* dropdown menu.

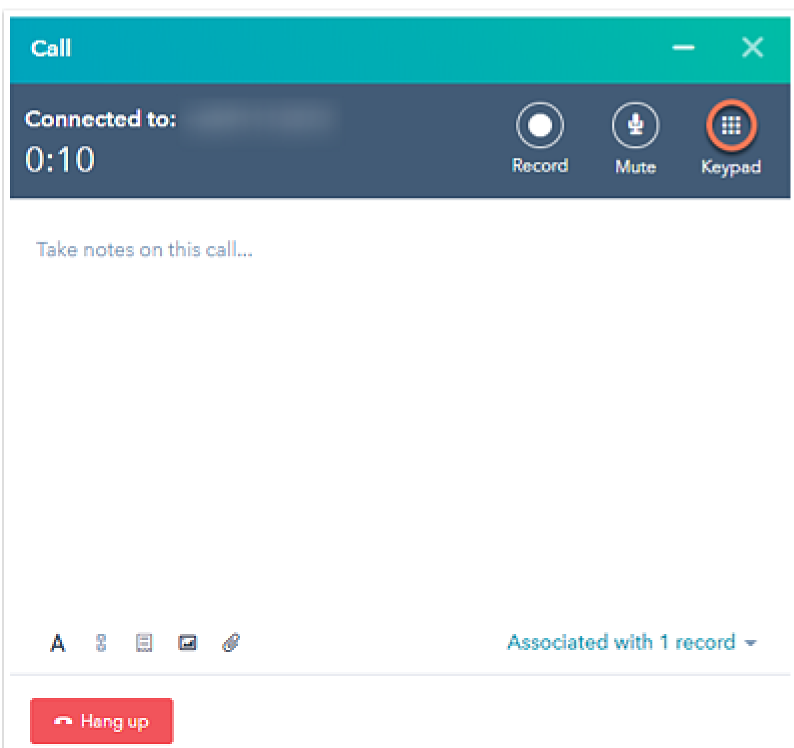
2.1.2.2 Call from your browser

- In your HubSpot account, navigate to **Contacts > Contacts.**
- Click the **name** of your student.
- On the contact record, click the **Calls** tab.
- In the dialog box, click the Call dropdown menu to select the phone number to call. By default, the calling tool will use the phone number stored in the *Phone number* property. If the contact's phone number is stored in a different property, such as *Mobile phone number*, you can select that property instead. You can add an existing property to this list by clicking + Add another phone property.
- In the dialog box, to change the phone number you are calling from, click the From dropdown menu and select the phone number to call from.

- Click **Call from browser.** If the option is set to Call from phone, click the dropdown menu and select Call from phone.

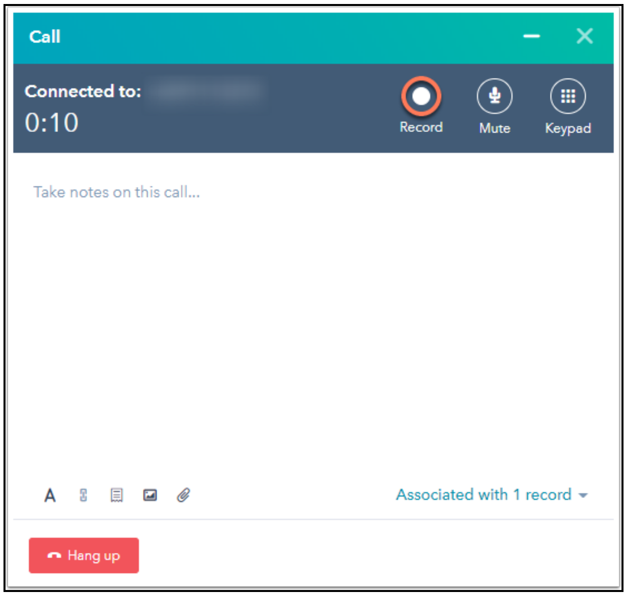


- The recipient's caller ID will display the phone number you've selected in the *From* dropdown menu.
- To enter an extension, click the Keypad icon in the upper right of the pop-up box.

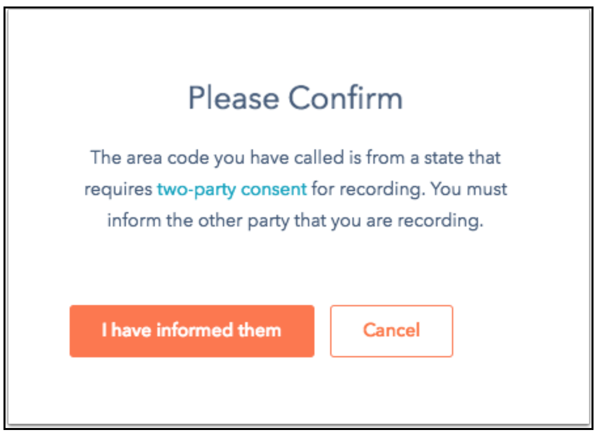


2.2 Record you call and notes

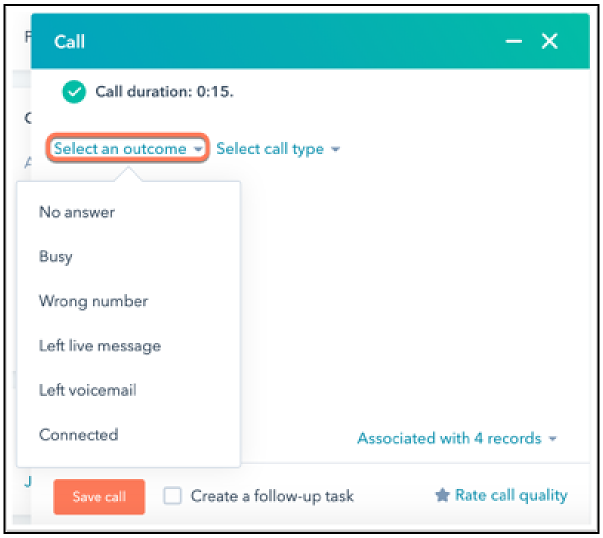
- Once the call is connected, in the pop-up box, click Record to record the call. You can also type notes during the call.



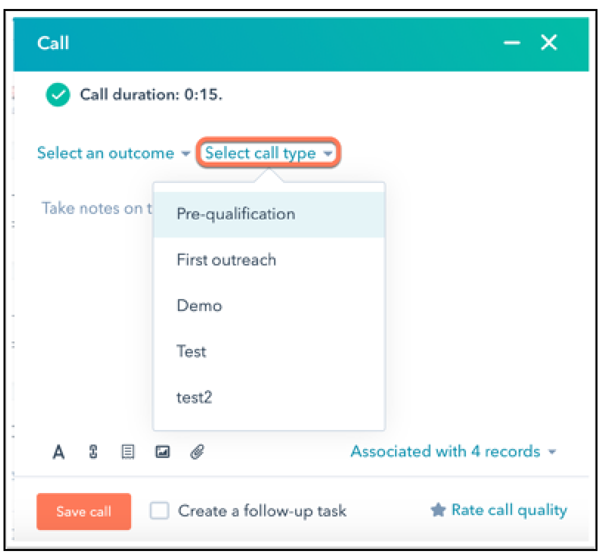
- Call recording will be automatically enabled for one-party consent states. For all other areas, you'll need to get consent from the party you are calling in order to enable recording. In this case, you'll receive an alert after clicking Record. Make sure you inform the contact that you're recording the call, then click I have informed them.



- When the call ends, you can add any additional notes and click the Select an outcome dropdown to select the call outcome.
- **Please note:** if you stop recording during a call, **none** of the call recording will be saved.

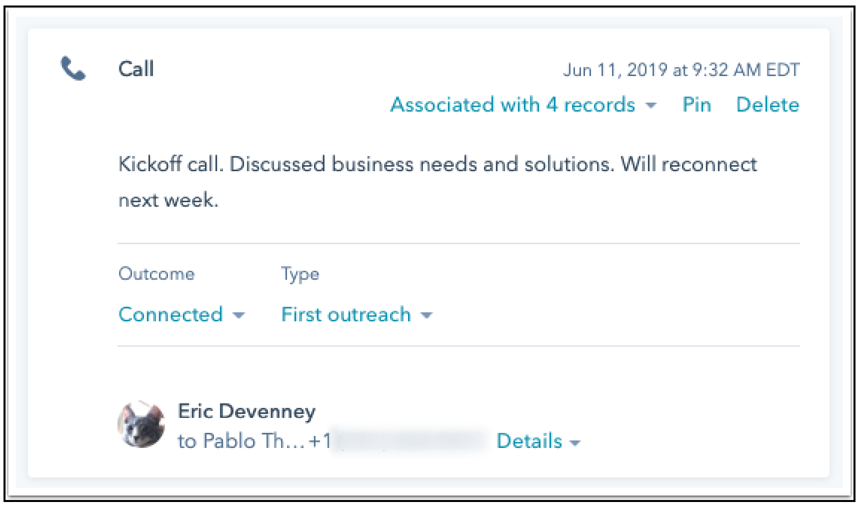


- If customized call and meeting types are enabled, you can click the **Select call type** dropdown menu to select the call type as **Coaching**.
- Click **Save call** to save the call on the contact timeline.



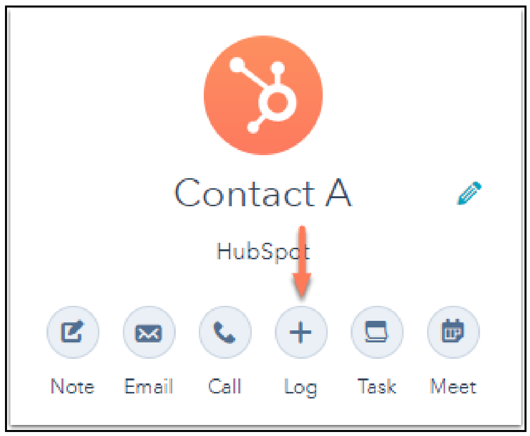
After you save the call, it will appear on the contact timeline.

- To edit the records associated with the call, click the **Associations** dropdown menu.
- To pin the activity to the top of the contact timeline, click **Pin.**
- To remove the call from all associate record timelines, click **Delete.**
- To edit the call outcome, click the **dropdown menu** under *Outcome*.
- To edit the call type, click the **dropdown menu** under *Type*.
- To see additional details about the call, click the **Details** dropdown menu.



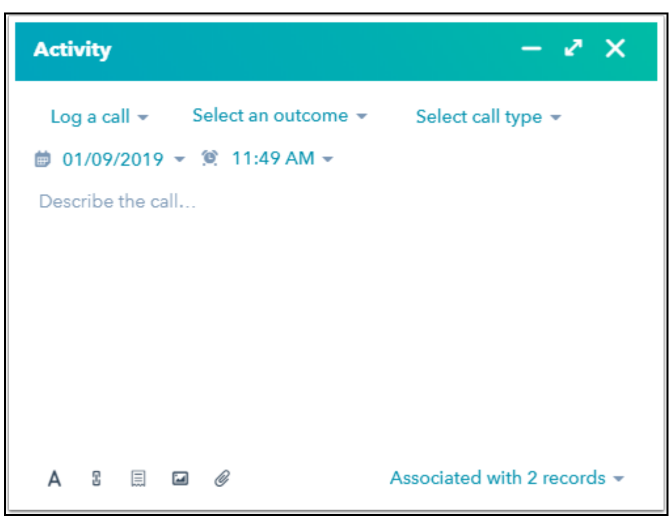
3.0 Log an assessment or coaching session

- In your HubSpot account, navigate to **Sales > Deals.**
- On the left panel, select **Coaching Pipeline.**
- Locate your student in the respective **pipeline stage.** Alternatively, on the top right, search for the student's name in the **search bar**.
- In the left panel, click the Log icon add.



In the dialog box, click the Log a call dropdown menu to select the type of activity to log (i.e. Log a call, Log an email, Log a meeting).

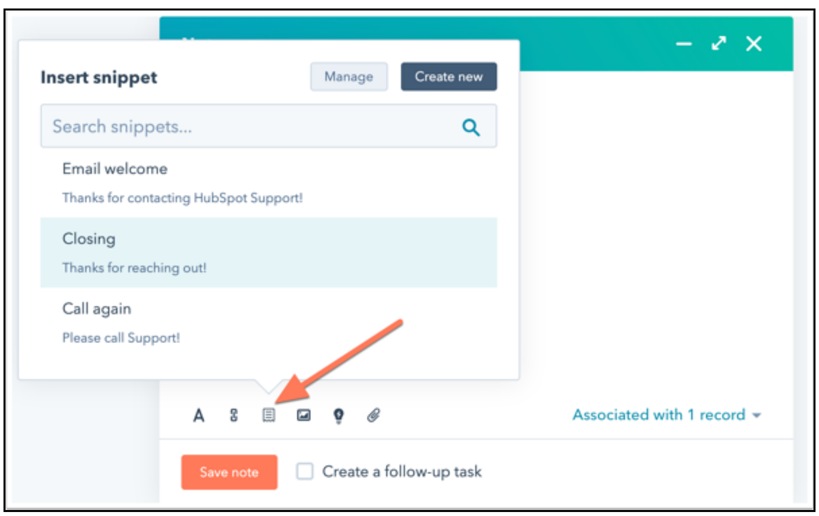
- When logging a call, click the **Select an outcome** dropdown menu to categorize the call's outcome.
- Click the **Select call type** dropdown menu to categorize the call's nature, such as **assessment** or **coaching**.



- Click the date and time to update the date and time of the activity. Click the icons in the formatting bar to format your text.

Use snippets to leave notes about prospects or students. There are **two ways** to add a snippet:

1. Type the # symbol into the text editor. Start typing the snippet shortcut, then select the snippet from the dropdown menu. The snippet will automatically populate in the text editor.
    - For an assessment call, enter **#logassessment**
    - For a coaching call, enter **#logcoaching**
2. At the bottom of the text editor, click the snippets icon, then select a snippet from the dropdown menu.
    - For an assessment call, enter **Assessment Call Snippet**
    - For a coaching call, enter **Coaching Call Snippet**



- When you're done, click **Log activity**. The activity will now appear in the record's timeline.

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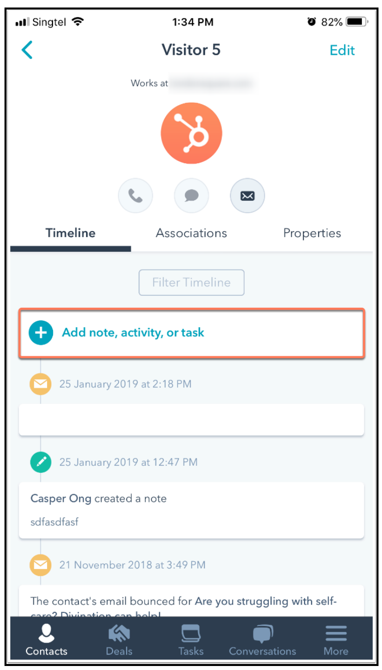
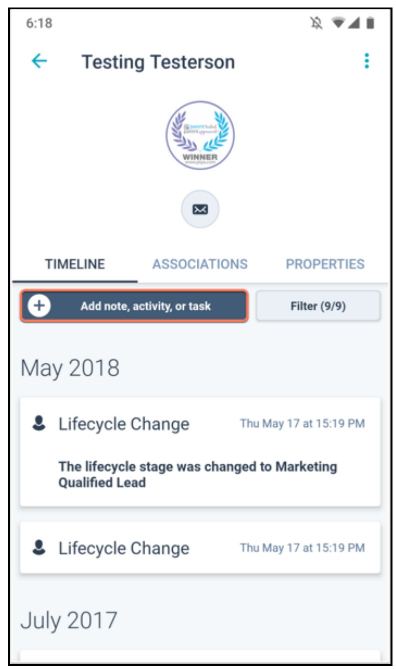
If you are using the Hubspot Mobile App

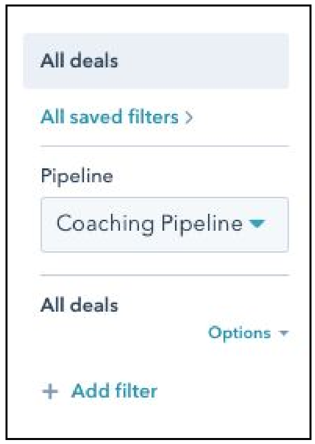
- Open the HubSpot app on your device.
- In the bottom navigation menu, tap Contacts.
- To log a note, activity or task on a contact record, tap the name of a contact. To log a note, activity, or task on a company record, tap the Companies tab, then tap the name of a company.
- In the *Timeline* tab, tap Add note, activity, or task.
- Enter the details for your note, activity, or task, and then tap Save. The note, activity, or task will now appear in the record's timeline.



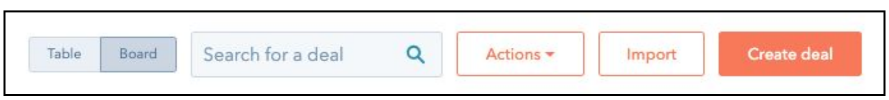


4.0 Move student deal after your coaching session

- In your HubSpot account, navigate to **Sales > Deals.**
- On the left panel, select the Pipeline **Coaching Pipeline.**



- Locate your student in the respective **pipeline stage.** Alternatively, on the top right, search for the student's name in the **search bar**.



- **Drag and Drop** your student into the next stage.
- Click **Save.**