



Sales Enablement in HubSpot

Lisa Isbell, CEO, Inbound Marketing Shop, LLC



Today's Agenda

1. THE VISION: Marketing-Driven Sales Enablement
2. THE EXECUTION: HubSpot-Powered Sales Enablement
3. Psychology for sales and marketing (and HR, and customer service....) Teams- October 2019 HUG.

Definition

Sales Enablement

noun

The processes, content, and technology that empower sales teams to sell efficiently at a higher velocity.

THE VISION:

Marketing-Driven Sales Enablement



It's pretty common to think of your business as a funnel.

THE PEOPLE COMING OUT
OF THE BOTTOM OF YOUR
COMPANY FUNNEL CAN
HAVE A **HUGE IMPACT** ON
THE PEOPLE GOING INTO
THE TOP OF IT.

Marketing-Driven Sales Enablement

- Robust Definitions
- Transparent Accountability
- Sales-Focused Content

Marketing-Driven Sales Enablement

- Robust Definitions
- Transparent Accountability
- Sales-Focused Content

MARKETING AND SALES NEED A
SHARED UNDERSTANDING OF
WHAT A QUALIFIED LEAD IS.

IDEAL CUSTOMER PROFILE

A checklist of the most basic attributes someone needs to have in order to be successful as your customer.

Sample B2C Ideal Customer Profile

- Wants to live in Huntsville
- Has an annual income of at least \$90,000
- Has a credit score of at least 700
- Can pass a background check

Sample B2B Ideal Buyer Profile

- Healthcare companies
- Located in the U.S.
- Strong online presence (website, social media, etc.)
- Big (>1,000 employees on LinkedIn)

What are the key traits a person or organization has to have in order to be a **good fit** for your offering?

List them out and turn them into a checklist.

	Key Traits
<input checked="" type="checkbox"/>	~~~~~
<input checked="" type="checkbox"/>	~~~~~
<input checked="" type="checkbox"/>	~~~~~
<input checked="" type="checkbox"/>	~~~~~
<input checked="" type="checkbox"/>	~~~~~

Lead Qualification Matrix

	Leads
Good Fit	
Poor Fit	

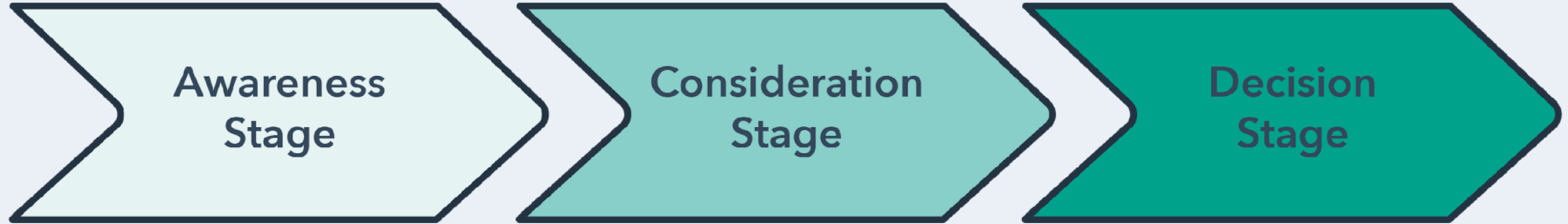
Lead Qualification Matrix

Leads	
Good Fit	QUALIFIED
Poor Fit	UNQUALIFIED



NOT ALL QUALIFIED LEADS
ARE READY TO TALK TO SALES.

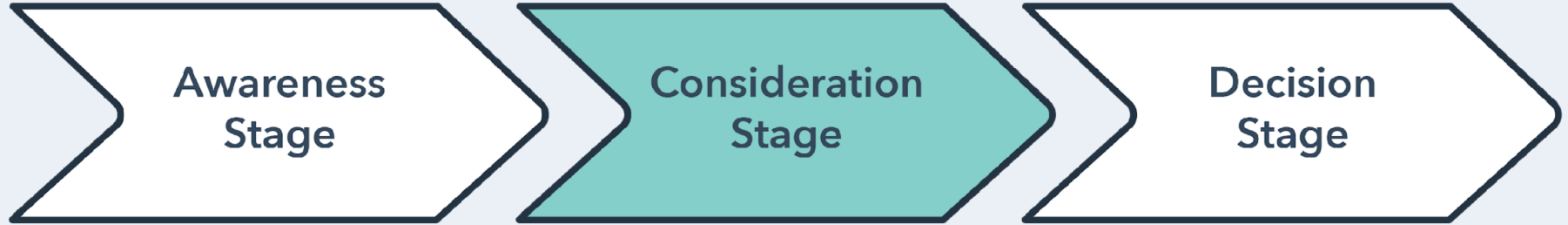
The Buyer's Journey



The Buyer's Journey



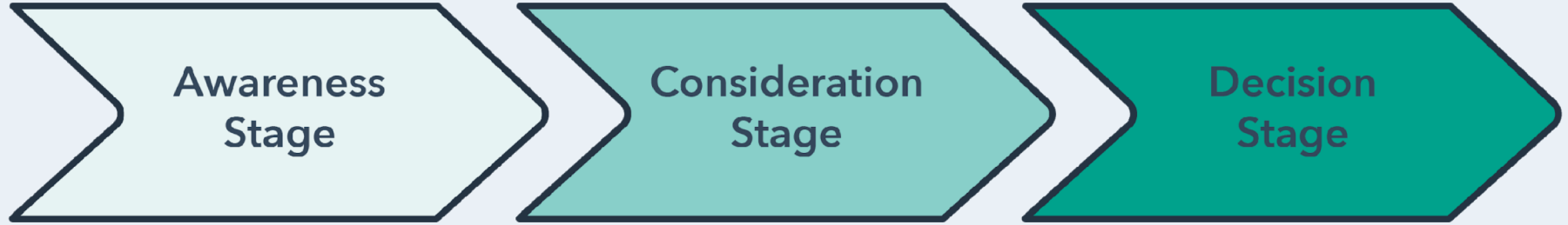
The Buyer's Journey



The Buyer's Journey



The Buyer's Journey



Lead Qualification Matrix

	Sales-Ready	Unready
Good Fit		
Poor Fit		

HAND RAISER

Someone who explicitly asks to talk to sales.

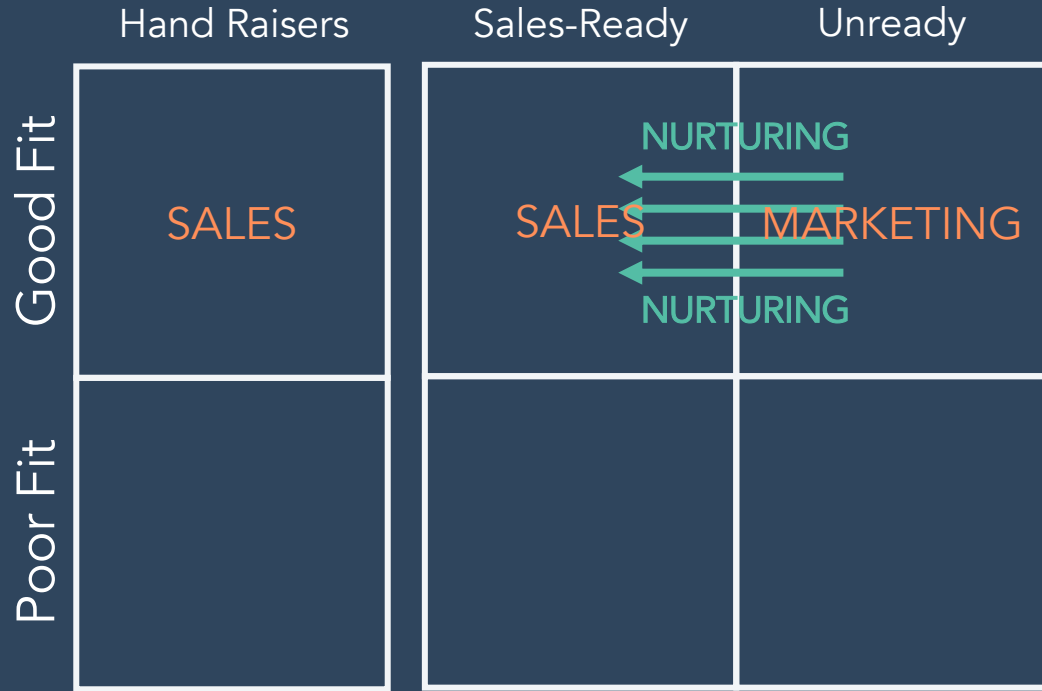
Lead Qualification Matrix

	Hand Raisers	Sales-Ready	Unready
Good Fit			
Poor Fit			

Lead Qualification Matrix

	Hand Raisers	Sales-Ready	Unready
Good Fit	SALES	SALES	MARKETING
Poor Fit			

Lead Qualification Matrix



Lead Qualification Matrix

	Hand Raisers	Sales-Ready	Unready
Good Fit	SALES	SALES	MARKETING
Poor Fit			

THE MORE LEADS YOU HAVE,
THE HIGHER YOUR **LEAD**
QUALIFICATION STANDARDS
CAN BE.

Lead Qualification Matrix

	Hand Raisers	Sales-Ready	Unready
Good Fit	SALES	SALES	MARKETING
Poor Fit	LOW VOLUME: SALES HIGH VOLUME: MARKETING		

If You Have a Lot of Poor-Fit Leads

1. Where are they coming from? Are particular sources sending you bad leads?
2. Why are they coming to you? Is there something wrong with your messaging?
3. Who should they be buying from? Can you redirect them?
4. How do they feel about your company? If they love you, don't discourage their evangelism.

Marketing-Driven Sales Enablement

- Robust Definitions
- Transparent Accountability
- Sales-Focused Content

SERVICE-LEVEL AGREEMENT (SLA)

An agreement between a service provider and its customer that guarantees a certain output.

Creating an SLA

1. What is your company's revenue goal?
2. How many sales do you need to achieve that goal?
3. How many marketing qualified leads do you need to get that number of sales?

SAMPLE SLA

“Every month, marketing will deliver 50 qualified leads to sales, and sales will contact each of those leads within 24 hours of receiving it.”

Lead Qualification Matrix

	Hand Raisers	Sales-Ready	Unready
Good Fit			
Poor Fit			

Lead Qualification Matrix

	Hand Raisers	Sales-Ready	Unready
Good Fit	$\begin{array}{c} \text{CLOSE RATE} \\ * \\ \text{SALE PRICE} \\ = \\ \text{LEAD VALUE} \end{array}$	$\begin{array}{c} \text{CLOSE RATE} \\ * \\ \text{SALE PRICE} \\ = \\ \text{LEAD VALUE} \end{array}$	
Poor Fit			

SAMPLE SLA

"Every month, marketing will deliver \$100,000 in lead value to sales, and sales will contact every marketing qualified lead within 24 hours of receiving it."

Marketing-Driven Sales Enablement

- Robust Definitions
- Transparent Accountability
- Sales-Focused Content

THE MORE **EDUCATION** YOU CAN
PROVIDE YOUR PROSPECTS BEFORE
THEY MEET WITH SALES,

THE MORE **QUALIFIED** THEY'LL BE
WHEN THEY GET THERE.

Questions Your Content Should Answer:

- What is your product?
- How much does your product cost?
- What are the common problems with your product?
- How does your product compare to your competitors'?
- What's required to be successful with your product?

Content Matrix

Persona	Pain	Feature	Content
VP of Marketing	Admin Work	Automation	Blog Post: "Intro to Workflows"
			Ebook: "Marketing Automation 101"
	Content Creation	CMS	Video: "HubSpot's CMS"
			Blog: "What Is a CMS?"
			Blog: "Why CMS Matters"
		Content Strategy	Ebook: "2018 Content Strategy Guidebook"
			Video: "Pillar Pages"

Marketing-Driven Sales Enablement

- Robust Definitions
- Transparent Accountability
- Sales-Focused Content

THE EXECUTION:

HubSpot-Powered Sales Enablement

Saved Filters

- Who should sales be working with?
- When should they work with them?
- What action should they take with them?

The screenshot shows a CRM interface with a top navigation bar containing 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Automation', and 'Reports'. The 'Contacts' section is active, displaying a search bar and buttons for 'Customize', 'Import', and 'Create contact'.

On the left, a sidebar shows 'All contacts' with '128 contacts' and an 'Options' dropdown. It includes two active filters: 'Job title is known' and 'First name is known', along with an 'Add filter' button and 'Save'/'Reset' buttons.

The main area displays a table of contacts with columns for 'NAME', 'JOB TITLE', and 'ASSOCIATED COMPANY'. The table lists 15 contacts, including Christopher LoDolce, Gina Jepson, Cliff Maxwell, Nicole Sahin, Chris Hardy, Andrew Moravick, Mark Roberge, Hubert Graves, Ricky Golucky, Waldo Cranston, Robert Lawless, Frances Bergman, Andrea Brax, and Jenny Tutone.

At the bottom, there is a pagination bar showing 'Prev', '1', '2', 'Next', and '100 per page', along with a 'Help' button.

	NAME	JOB TITLE	ASSOCIATED COMPANY
<input type="checkbox"/>	Christopher LoDolce	Professor, Customer Training	HubSpot
<input type="checkbox"/>	Gina Jepson	VP	WEST SHORE VISITORS BUR...
<input type="checkbox"/>	Cliff Maxwell	Chief of Staff	Innosight
<input type="checkbox"/>	Nicole Sahin	CEO	Globalization Partners, LLC
<input type="checkbox"/>	Chris Hardy	Senior Project Manager	HAYSTACKID LLC
<input type="checkbox"/>	Andrew Moravick	Research Analyst, Marketing ...	Aberdeen Group
<input type="checkbox"/>	Mark Roberge	Senior Lecturer	Harvard Business School
<input type="checkbox"/>	Hubert Graves	Owner	Influence group
<input type="checkbox"/>	Ricky Golucky	CEO	Prosperity, Inc.
<input type="checkbox"/>	Waldo Cranston	President	Supreme Management
<input type="checkbox"/>	Robert Lawless	Associate Product Manager	HubSpot
<input type="checkbox"/>	Frances Bergman	President	Trinity Management Services...
<input type="checkbox"/>	Andrea Brax	President	firstmanagement.com
<input type="checkbox"/>	Jenny Tutone	Owner	theeccentricstage.com

Lead Scoring & Workflows

HS Lead Scoring: MQLs

73 contacts

Show more info

The contact property **HubSpot Score** is greater than or equal to 35.

and

The contact property **Lifecycle Stage** is not equal to any of Customer or Opportunity.

and


Contact is not a member of **PMG Team Members**.

and

The contact property **HubSpot Score** is less than or equal to 64.

and

Contact is not a member of **Lead Status: Unqualified**.



Enrollment triggers:

The contact property **HubSpot score** is greater than or equal to 10.

AND

The contact property **HubSpot score** is less than or equal to 30.

AND

The contact property **Lifecycle stage** is not equal to Customer.

[^ See fewer criteria](#)

SLA Enforcement

- Shared visibility between marketing, sales, and services
- “Rejected” lead status
- New MQLs (report)
- Became MQL Date (saved filter)



Helpful Blogpost:

<https://blog.hubspot.com/customers/do-it-in-hubspot-sales-enablement-certification>

Playbooks

- Interactive guides available on contact record.
- Provide sales reps with easy access to all kinds of info.
- Collect vital information during calls.

The screenshot displays the HubSpot CRM interface for a contact named Charlotte Arrowood, Marketing Manager at Biglytics. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The left sidebar shows the contact's profile, 'About Charlotte' section, and a 'Playbooks' section with a search bar and three items: 'Discovery Call Script' (384 views), 'Prospecting 101' (198 views), and 'Closing the Deal' (154 views). The main content area is titled 'Playbook' and shows the 'Discovery Call Script' for a 'Sales qualified lead'. The script includes a question 'How far out are you on making a purchase decision?' with radio button options for '1-3 months', '3-6 months', and '6+ months'. Below this is a 'Lifecycle stage' dropdown menu. A text box contains a note about Charlotte being based in Dallas and interested in moving all sales and marketing to a single platform. At the bottom, a 'Goals' section lists objectives like understanding the business model and goals, followed by a list of questions to ask during the call, such as 'What are the top initiatives at the company right now?' and 'What is your target customer?'.

But, my sales team won't
talk to me/my marketing
team???

(Sales avoiding Marketing)

Grow Better!

Lisa Isbell, Inbound Marketing Shop LLC

[@GoogleEyes](#)

lisa@inboundmarketingshop.com

205-482-2680

