PITTSBURGH Internet Consulting

HUBSPOT CRM FOUNDATIONS

HubSpot

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HubSpot CRM Foundations Training

DON'T GIVE UP! GET HELP

You will get out of HubSpot what you put into HubSpot

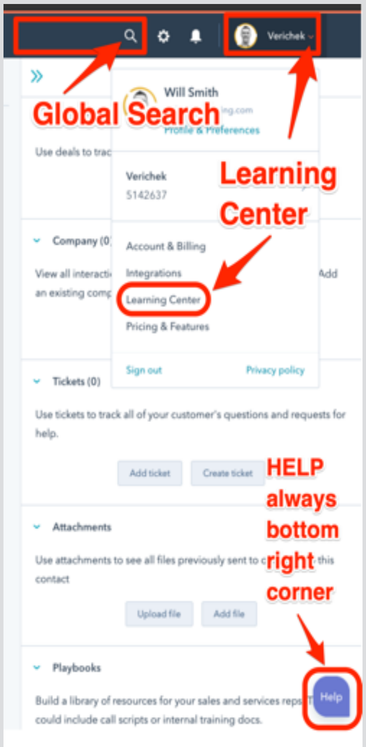
- Work in it everyday, and keep your data clean - you will have actionable data.
- Occasionally use HubSpot - you will see marginal, sporadic results.

Stuck? Get Help

Help Button
- Always at the bottom right of your screen
  - Knowledge Base
  - Help suggestions
  - Ask the HubSpot Community
  - Support Inbox

Learning Center
- Take classes
- Earn certifications
- Search for a topic – take a 15 minute review

Global Search
- In the main navigation
  - Knowledge articles are usually listed at the end of suggested list of content.



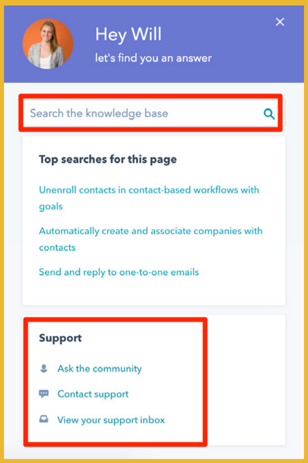
HUBSPOT HELP

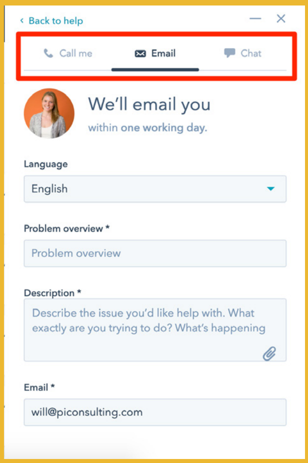
Ways to get help:

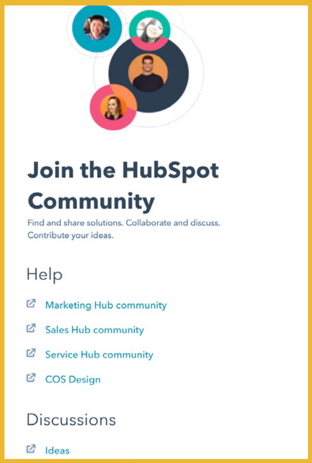
- Search knowledge base
- Help Suggestions
- Ask the HS Community
- Support inbox – maybe someone from your team asked the same question.

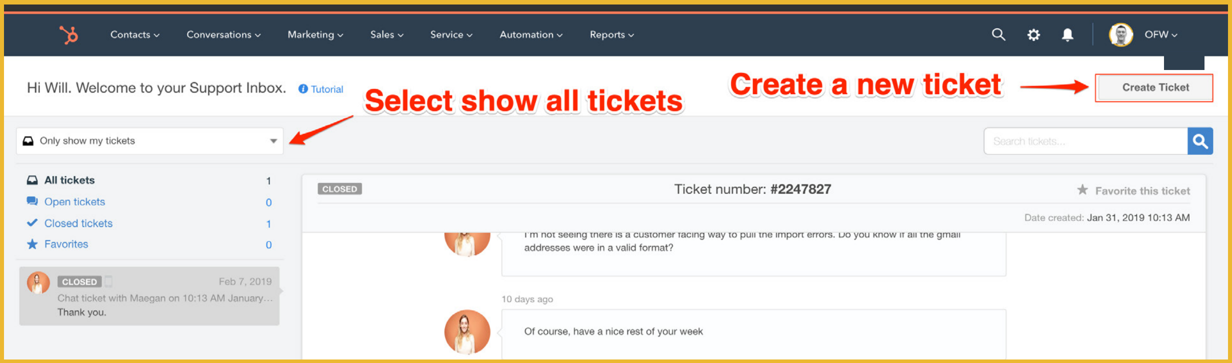
PRO TIP:

Use the **"Call me"** function to get an answer quickly. HubSpot representatives are experts at working through problems and can quickly start a screen share to look at what you're looking at.
"Chat" is the 2nd fastest way to get an answer.









CONNECT YOUR INBOX

To hit the ground running with HubSpot, the first thing to do is to connect your email. This connection will save you time and automate the recording of your emails directly into your HubSpot CRM. There are 2 parts to this: The inbox connection & email extension.

INBOX CONNECTION

Office 365 and Google users, can connect their inbox by simply providing their account credentials. If you don't use either, you'll connect through IMAP.

To help you choose your email connection type, navigate to mxtoolbox.com
- Enter your email domain (this is after the @ symbol in your email)
- Click **MX Lookup**

You will likely be connecting your inbox to HubSpot in one of the following ways:
- Gmail Account
- Office 365 Account
- IMAP
- Exchange Account

We will go over the 2 most popular ways to connect your inbox: Gmail & Office 365.

Connect your Gmail account:
In your HubSpot's account main navigation, click the settings icon
On the left menu, navigate to **Integrations > Email Integrations**
Click **Connect an inbox** > Select **Google / Gmail** > Enter your email > Click **Allow**

Connect your Office 365 account:
In your HubSpot's account main navigation, click the settings icon.
On the left menu, navigate to **Integrations > Email Integrations**
Click **Connect an inbox** > Select **Office 365** > Enter your email > Click **Allow**

For the best experience, the latest version of Chrome is recommended.
Supported Browsers - to update your browser click the name below:
Google Chrome Mozilla Firefox Apple Safari Microsoft Edge

EMAIL EXTENSION

The email extension places your HubSpot CRM directly into your inbox. You'll have access to your HubSpot sales tools from within your inbox.

NOTE: HubSpot does not support Apple Mail.

For best results, it is highly recommended that **Google Chrome** is used.

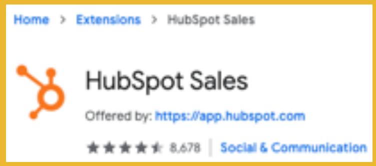
- Instant Chrome notifications for tracked emails
- Access to templates, documents and sequences from Gmail inbox.
- Quickly see activity feed by clicking the extension icon in browser toolbar.

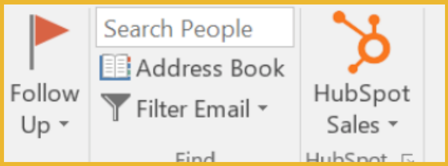
INSTALL CHROME EXTENSION

- Search for the HubSpot Sales extension in the Google Chrome store.
- Click **Add to Chrome**.
- **Log** into your HubSpot Sales account when prompted.

INSTALL OFFICE 365 ADD-IN

- Search for the HubSpot Sales add-in in the Microsoft AppSource.
- Click > **Get it now** (left sidebar) then Click > **Continue**.
- You'll be redirected to your Office 365 account. Click > **Add**.





INSTALL OUTLOOK DESKTOP ADD-IN

- **Download** the HubSpot Sales Outlook desktop add-in.
- Run the HubSpot sales for Outlook installer **setup.exe.**
- Restart Outlook.
- **Log in** with your HubSpot Sales username & password.
- HubSpot Sales should now appear in the top inbox ribbon.

NOTE: HubSpot Sales Outlook Desktop add-in will not work on MAC. Do not install both the 365 add-in AND the desktop add-in this will cause conflict.

CONTACTS IN HUBSPOT

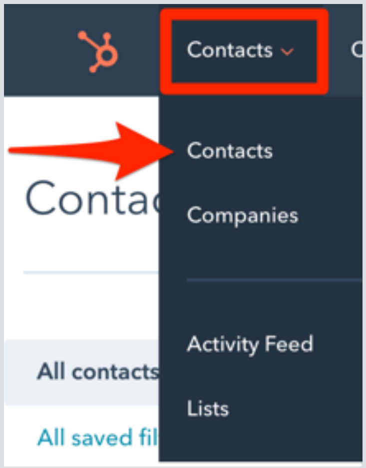
HubSpot contact records are the lifeblood of your business. Everyone that has been in touch with your business can be found here.

This information is divided into 3 buckets:

1. Contacts: The people you speak with.
2. Companies: The place where they work.
3. Deals: The purchases you're working with them on.

TO FIND YOUR CONTACTS:

- In the main navigation, select **Contacts** > then **Contacts** in the drop down menu. This is a list of everyone that has interacted with your business
- In the contacts CRM:
    1. Search for contacts by name
    2. Depending upon your business, manually add contacts who haven't been to your website. Depending upon your business, this could include:
        - Call ins
        - Walk ins
    3. Apply filters to find contacts that meet specific criteria.



FINDING AND FILTERING CONTACTS

Now that your email is connected, a contact record will be created for each person you email.

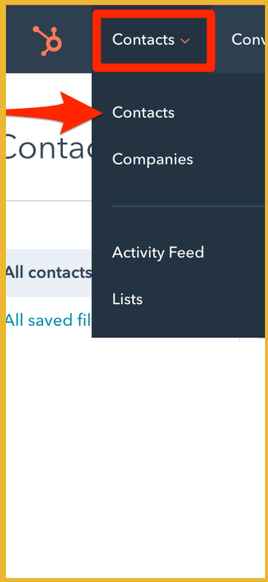
It's important to keep your CRM organized and know how to find the information you need to reach out to the right people at the right time with the right message.

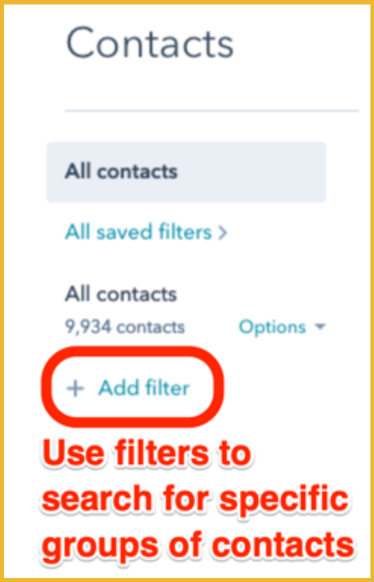
In the main navigation, go to **Contacts > Contacts.**
Click **Add Filters** (left menu).
Since you connected your email inbox, check these two filters:

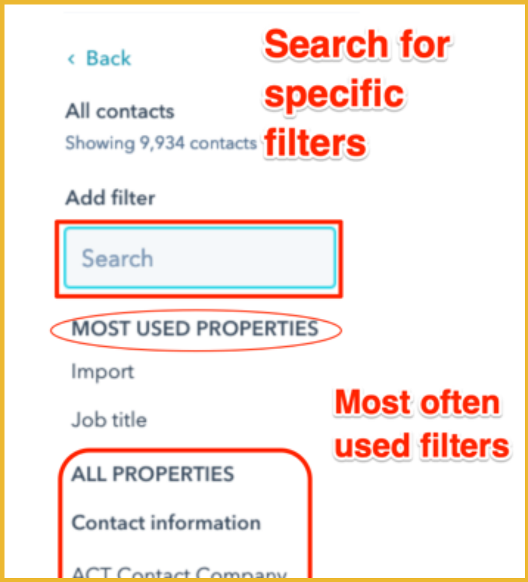
- Recent sales email opened
- Recent sales email replied

As more information populates your CRM, the more useful more filters will become.

ACTION ITEM:
Scroll through the available HubSpot filters. Seeing what is available will help you in the future.



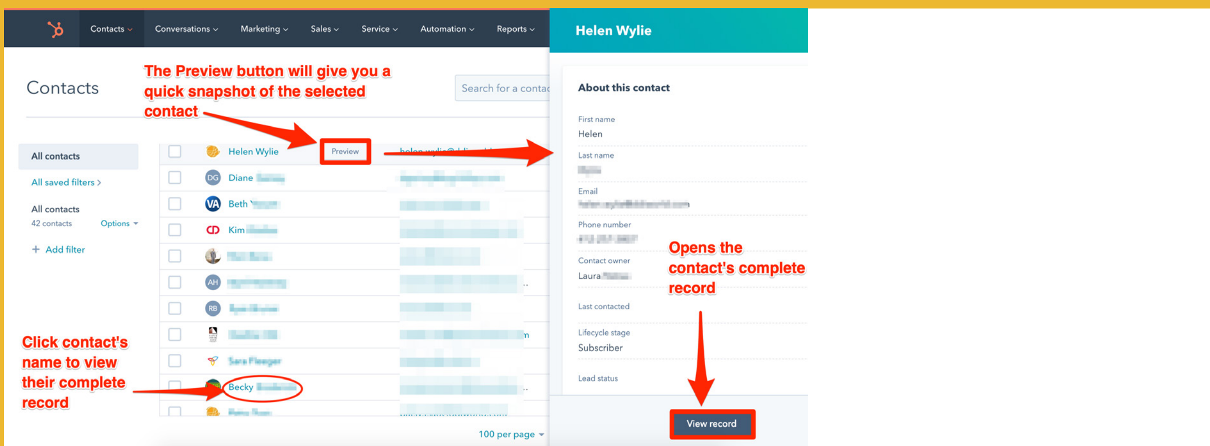




CONTACT RECORD

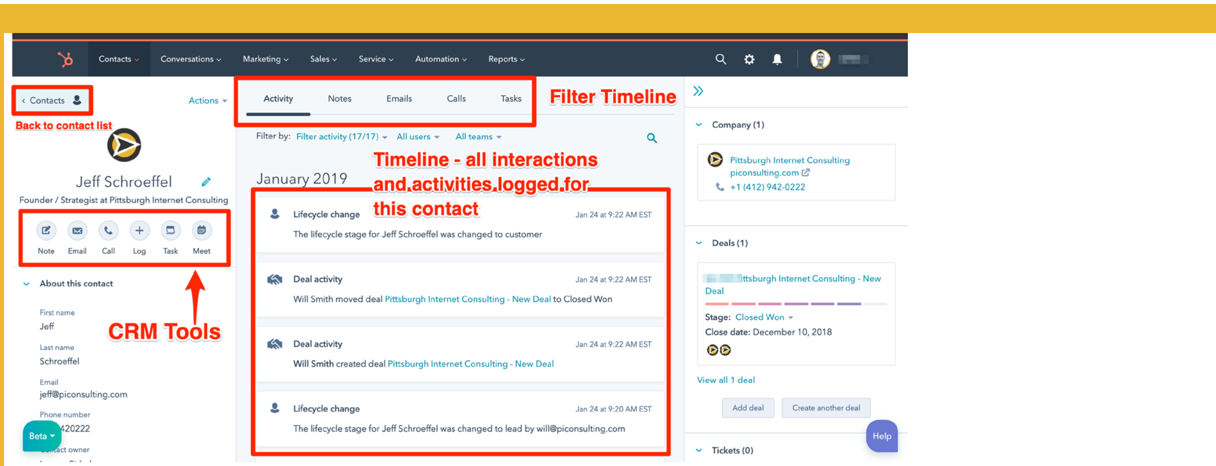
CONTACT RECORD PREVIEW

From the contact list, if you need a quick look at your contact's information, hover over the area to the right of the contact's name and click the preview button that appears.



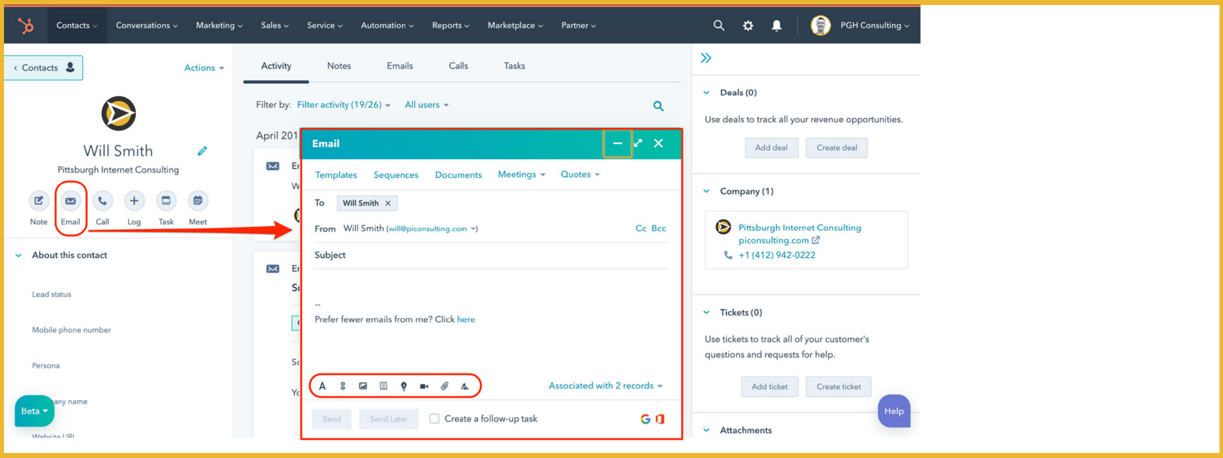
COMPLETE CONTACT RECORD

Left panel: CRM Toolbox (under contact name) and information about the contact.
Middle panel: Timeline.
Right Panel: Company, Deal and Ticket associations.



HUBSPOT TOOLS - EMAIL

- With your connected email you are able to email contacts from within your CRM
- The pop-up email window allows you to view contact information while composing your email – allowing you to provide the best context while communicating
    - Contact Timeline
    - Associated deals, companies
    - Attachments
    - Previously recorded emails.



Available tools:

- Format Text
- Insert Link
- Insert Image
- Insert Snippet
- Insert Knowledge article (Service Hub Required)
- Insert video (Requires PRO)
- Attach file
- Edit Signature.

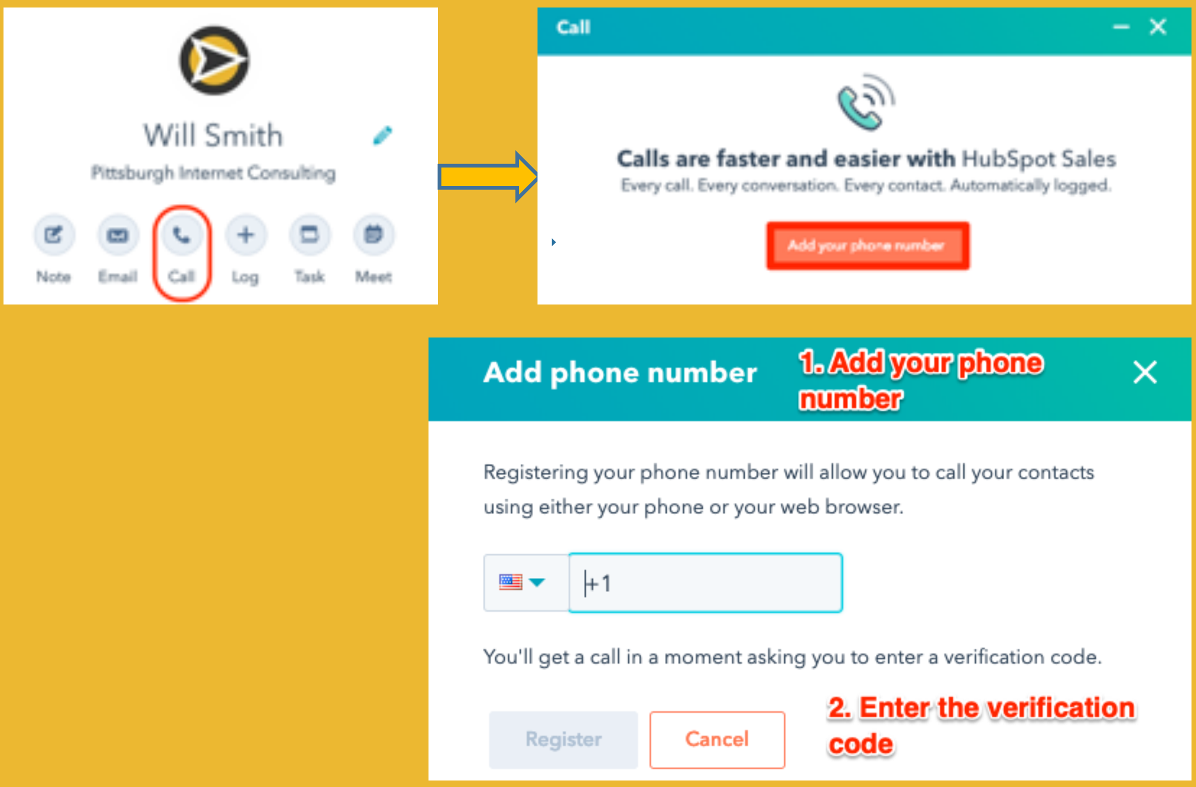
PRO TIP:

- Create follow up tasks before sending email
- Schedule emails for best possible delivery time.

HUBSPOT TOOLS – CALLS

Set up the Call Tool

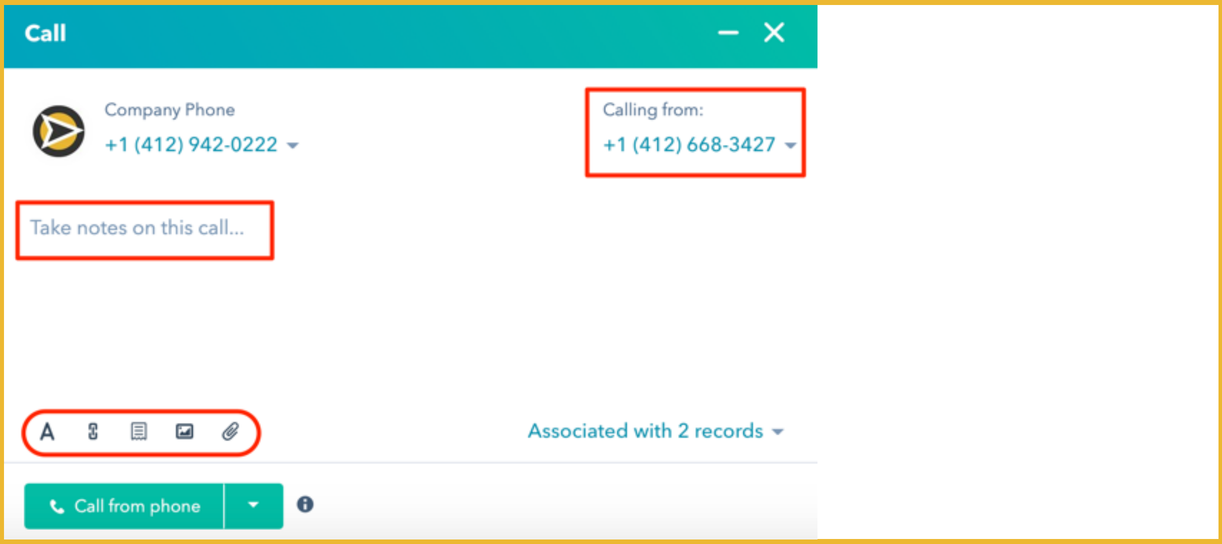
1. Click the “Call Tool” on any contact
2. Click Add your phone number
3. Enter your direct line phone number – extensions can also be included
4. Your phone will ring – pick it up and enter the verification code when prompted.



HUBSPOT TOOLS – CALLS

Calling contacts with call tool

1. Click the “Call Tool” on any contact
2. Your phone will ring
3. When you pick it up, you’ll hear the contact’s phone ringing
4. Take notes on the call or minimize the calling window
5. Once the call is complete, be sure to select and record an outcome



PRO TIPS:

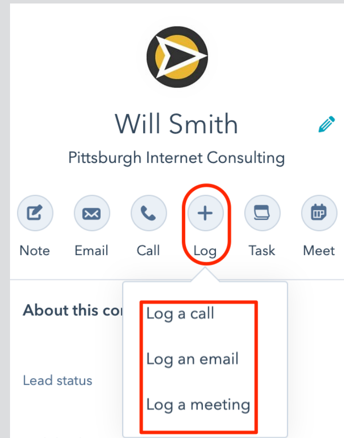
- Keeping the contact record open while calling gives you access to all the information and interactions your contact has had with you and your company
- Taking notes during a call keeps your conversation easily accessible for future reference.

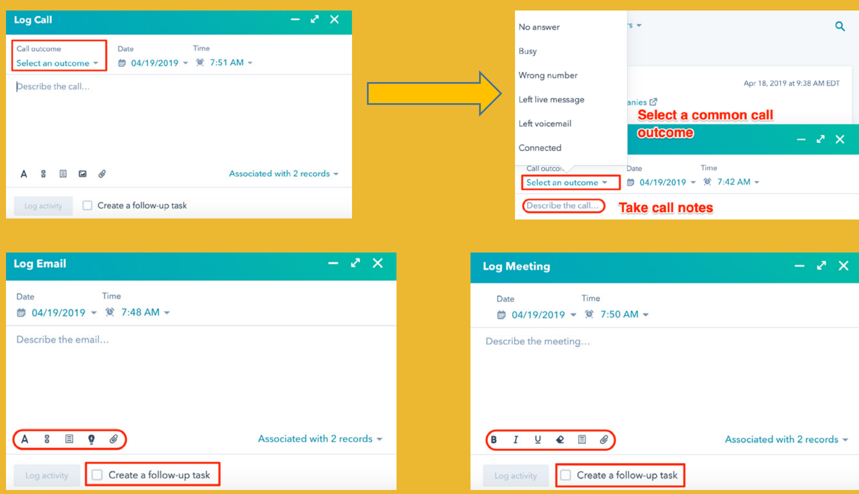
HUBSPOT TOOLS – LOG

The Log tool is the most under utilized tool in HubSpot – for the situations listed below, most rely upon the Notes tool. For better segmentation, use the LOG TOOL.

This tool will allow you to log:

- Incoming Calls
- Emails (emails that haven't been recorded)
- Meetings (good for walk-ins or unscheduled meetings).





HUBSPOT TOOLS – TASKS

When used properly, tasks are a very powerful way to keep your work organized. There are 3 places to create tasks:

- Contact list - Good for assigning tasks for multiple contacts
- Contact record tools
- Task screen - In the main navigation: **Sales > Tasks**.

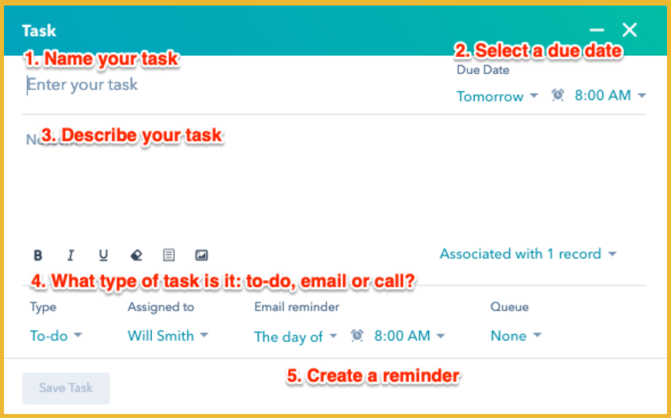
1. CONTACT LIST

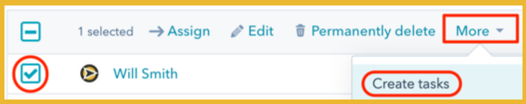
- In the main navigation: **Contacts > Contacts**
- Select contact (or multiple contacts) by selecting the checkbox
- Click **More > Create tasks.**

2. CONTACT RECORD TOOLS

- In the selected contact record: Click the **Task** tool
- In the pop-up window at the bottom of your screen
  1. Name your task
  2. Select a due date
  3. Describe your task
  4. **IMPORTANT**

     Select the type of task:
     - To-do
     - Email
     - Call
  5. Create a reminder (HubSpot will email you).

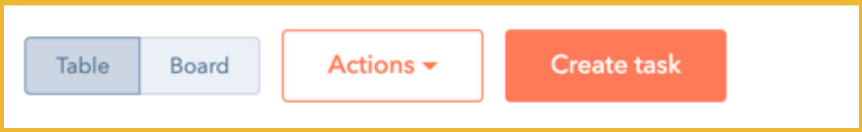


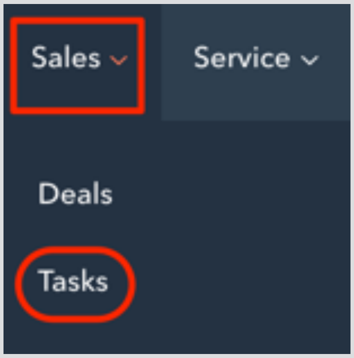


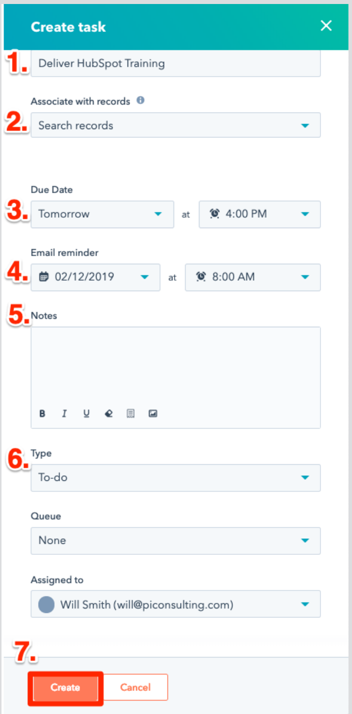
HUBSPOT TOOLS – TASKS

3. TASK SCREEN

All the tasks you have created can be found in the Task List.
In the main navigation: **Sales > Tasks.**
Create a new task by clicking the **Create Task** button (upper right).





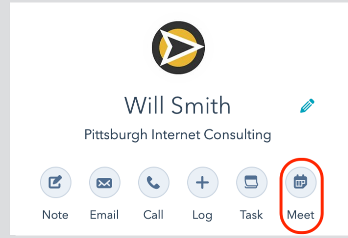


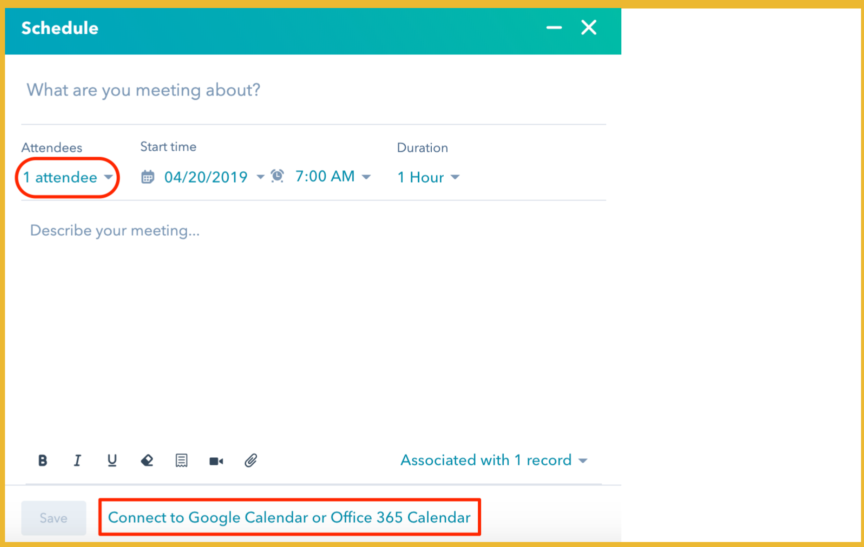
1. Name your task
2. Associate your task
3. Create a due date
4. Create an email reminder time
   - Highly recommended!
5. **IMPORTANT**

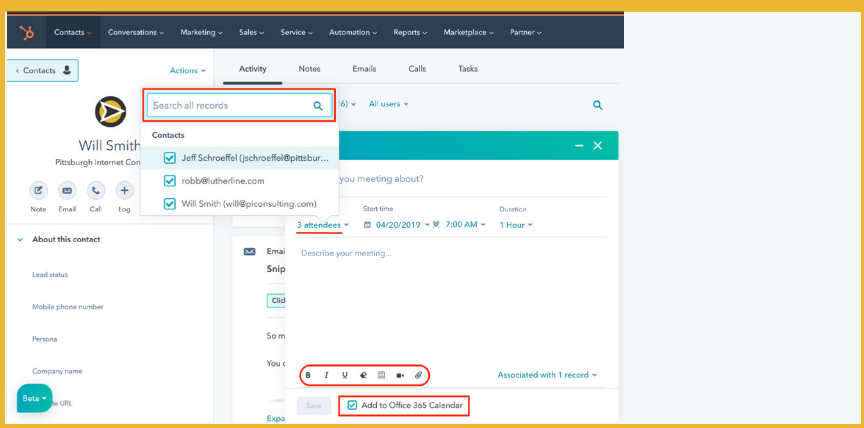
   Select the type of task
   - To-do
   - Email
   - Call
6. Label type of task
7. Click **Create**.

HUBSPOT TOOLS – LOG A MEETING

Log a meeting – click the meetings tool.
Connect your Google or Office 365 calendar here.
Once connected, meetings can be added to your calendar.







Search for contacts to include in the meeting.
Available tools:

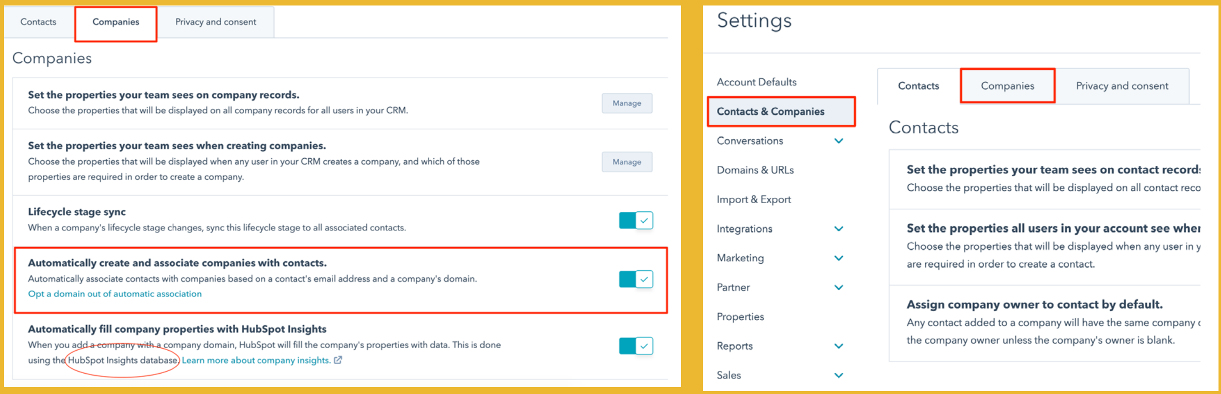
- Format Text
- Insert a snippet
- Video conferencing
- Attach a document

COMPANY ASSOCIATIONS

Contacts with company email addresses can be automatically associated with their respective companies.

To create this global setting:

- Click the **Settings** icon (main navigation, upper right).
- Select **Contacts & Companies** in the left menu.
- Select the 2nd tab labeled **Companies**.
- Toggle the **Automatically create and associate with contacts** switch **ON**.

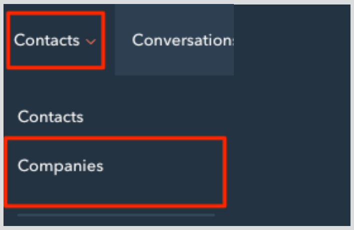


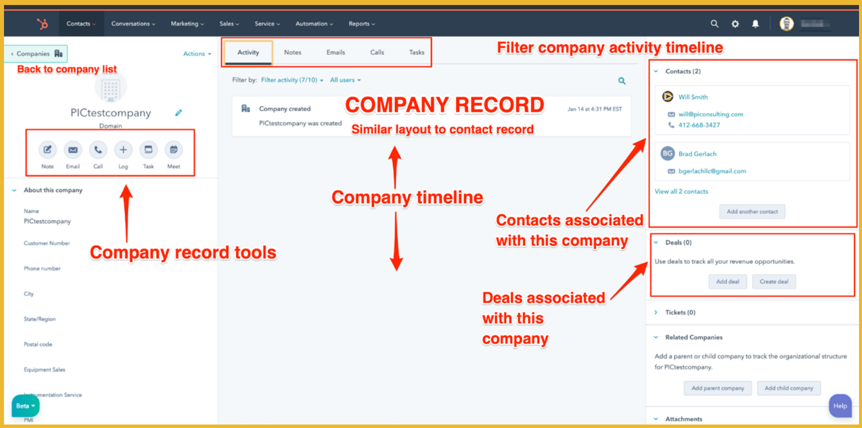
"HubSpot Insights is a database of company information that HubSpot gathers from internal and third-party data. If you add a company with a company domain name, data will be pulled from HubSpot Insights to the company record".

COMPANY RECORDS

HubSpot keeps their design consistent throughout the CRM. Company records are very similar to contact records. Similar to the contact list, company names are previewed and clicked to reach the Company Record.

In the main navigation select **Contacts > Companies** From the company list, hover over the company name and click preview for a quick snapshot of the company record. Select **View record** for the complete company record.

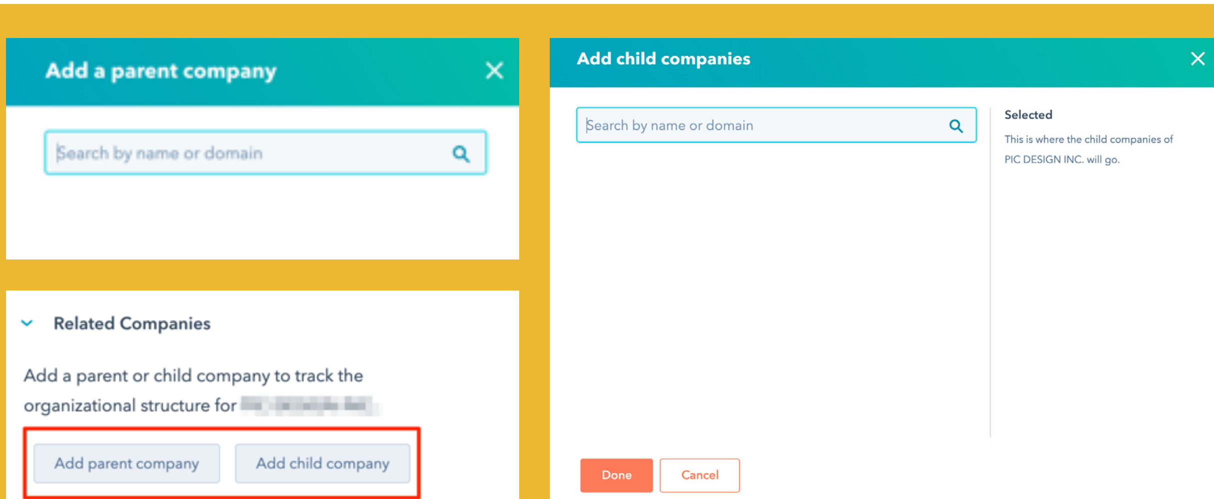




COMPANY RELATIONSHIPS

Contacts & Company Relationship:

- You are selling to companies, however, you interact with contacts at those companies
- It is important to always associate your contacts with a company
- When the email address is a company email address, HubSpot finds and populates the information into the company record. This global setting was created on page 17
- Multiple contacts can be associated with a company
- Parent and Child Companies can easily be created to show the relationship to each other. For example:
  - ABC Company is the parent company, located in Albany, NY
  - One of the satellite offices or branch offices, XYZ Branch is the child company, located in Xenia, OH. This would be the child company
  - Alan Boss is the president of ABC Company and his contact is associated with the parent company
  - Xavier Yoast is the manager of XYZ Branch and his contact is associated with the child company, which is also associated with the parent company ABC Company
- To create Parent and Child Companies:
  - Navigate to the Company Record
  - In the 3rd right panel find the company property Related Companies
  - Select Add parent company or Add child company.

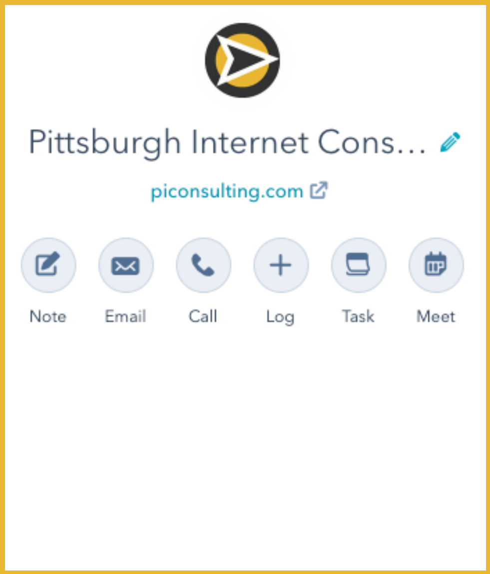


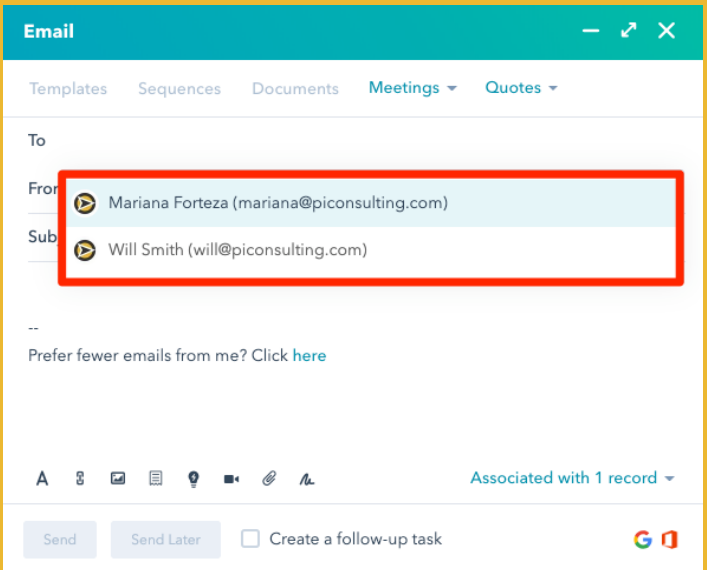
COMPANY TOOLS

In the About section of the company record, all tools that are available with the contact record are also available in the company and deal records:

- Notes: click to add a note
- Email: click to write a one-to-one email
- Call: click to call
- Log +: click manually log an activity
- Task: click to create a task for the record
- Meet: click to set up a meeting.

All HubSpot tools operate in the same way in the company record as they do with the contact record. When emailing a company that is associated with multiple contacts, HubSpot asks to specify which contact or contacts you would like to email within the company.





DEALS

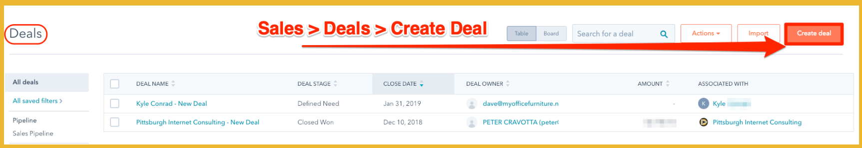
Deals track potential revenue that is associated with a particular contact or company. Depending upon your business and structure, a deal should be created whenever your contact/company takes action that could lead to revenue. At this point, they are no longer a marketing qualified lead that could make a purchase; they are now a possible sale - a sales
qualified lead.

3 places to create a new deal:

- Deal list
- Contact record
- Company record.

DEAL LIST

In the main navigation to go **Sales > Deals.**
Click **Create Deal.**

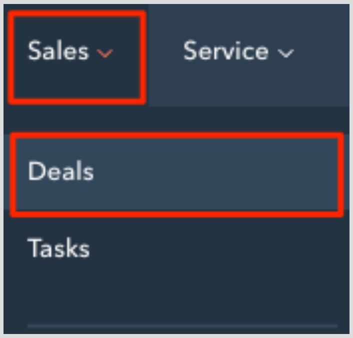


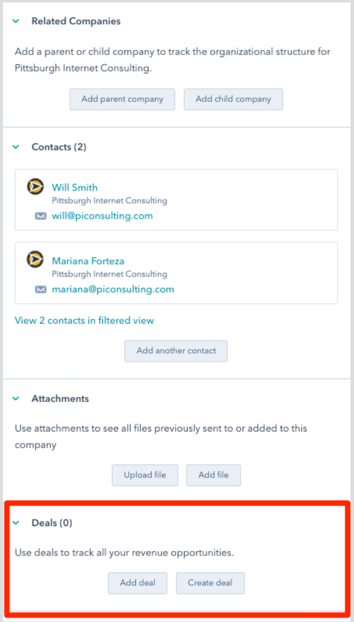
CONTACT RECORD

Create and associate a deal with a contact in the 3rd panel on the right.
Click **Add Deal** or **Create Deal**.

COMPANY RECORD

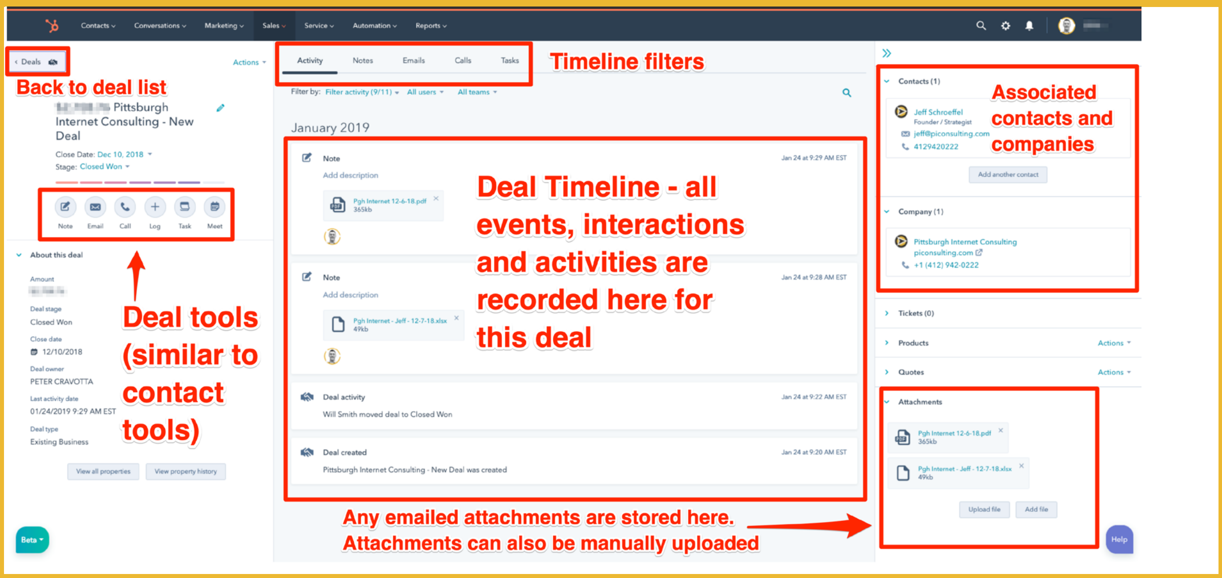
Create and associate a deal with a company in the 3rd panel on the right.
Click **Add Deal** or **Create Deal**.





DEAL RECORDS

The deal record is similar to the Contact Record and Company Record in its layout, function and available tools.



DEAL TIMELINE:

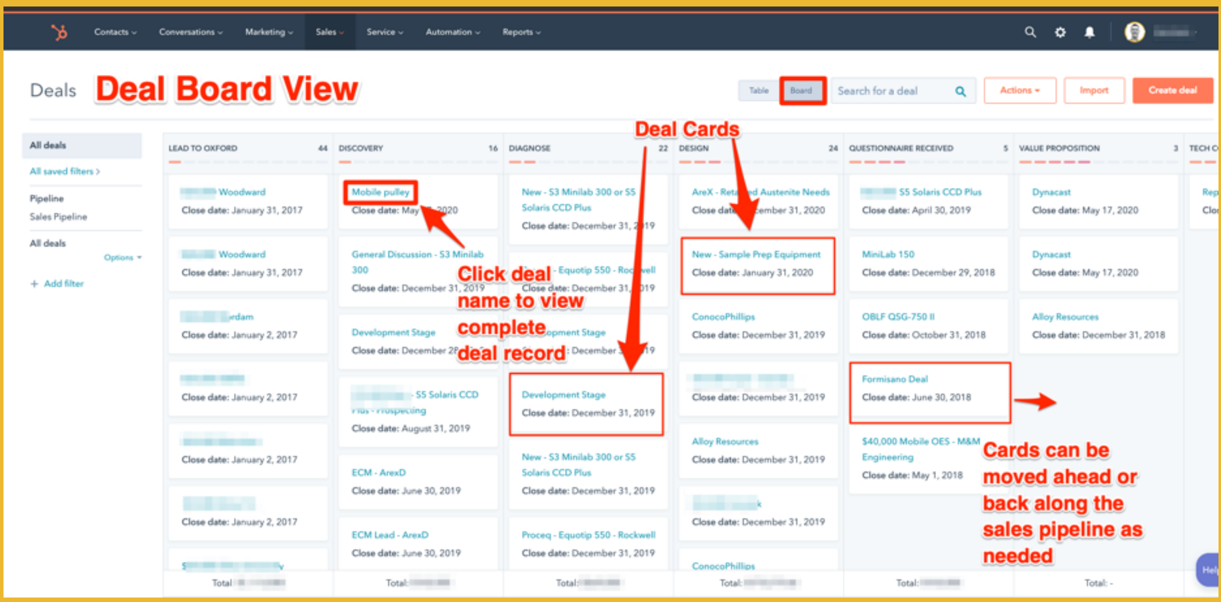
- Similar to the contact and company record timelines, the deal timeline records all activities (with the most recent on top)
- Activities can be filtered
- Search for specific activities.

ASSOCIATED CONTACTS AND COMPANIES:

- Contacts and companies associated with the deal are in the 3rd panel
- Attachments that have been emailed to a contact or company will be stored here
- Attachments can be manually uploaded.

DEALS – BOARD VIEW

In the Board View:
Deals are presented as movable "cards".
The "deal cards" can be moved ahead or back along the pipeline or deal stages as needed.
The pipeline is shown in the columns of the board with the total of predicted revenue at the bottom of each column.
Click on the Deal Name to see the deal record.



The HubSpot default sales pipeline has the following seven deal stages. Each percentage is the probability of the chance of the deal closing.

- Appointment Scheduled (20%)
- Qualified to by (40%)
- Presentation scheduled (60%)
- Decision maker bought-in (80%)
- Contract sent (90%)
- Closed Won (100% Won)
- Closed lost (0% Lost).

SET UP & CUSTOMIZE DEAL PIPELINES & STAGES

Setting up your deal pipeline to be specific for your business will help your team identify opportunities as well as points of friction that may prevent sales from closing.

To edit or create a deal pipeline:
Click the **settings icon** (main navigation, upper right).
In the Settings menu (left side) Click **Sales > Deals**.
Under **Deal Pipelines and Stages** section:

PLEASE NOTE: If you have **Sales Hub Professional or Enterprise**, you are able to create a new (and multiple pipelines.) All other users will need to **Edit** the Default Sales Pipeline. Specific permissions are required to perform some of these actions.

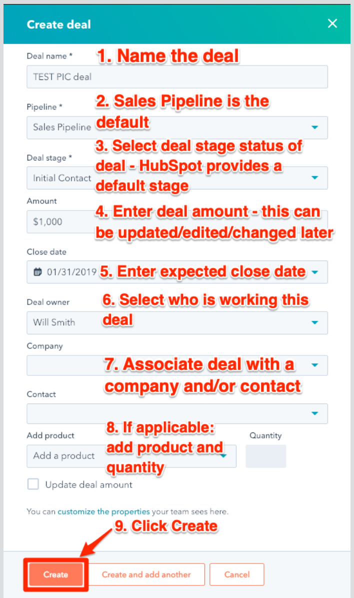
To edit:
1. To change the stage name: click the **Stage name** field
2. To delete stage: click **Delete**
3. To create a new deal stage: click **Add a deal stage**
4. To change the order: **drag** the stage to the new position
5. To change the probability of closing a deal at that stage, click the **Win Probability** arrow and select an option. This number must be below 100.

CREATE A DEAL

Note: This can be customized to fit your business and team needs.

Create a deal:

1. Name the deal: choose a name that is will be obvious to you and your team
2. Select the proper pipeline – "sales pipeline" and its default stages are set by HubSpot. This can be customized to your business
3. What is the status of the deal
4. Enter the deal amount - this can be changed or updated later
5. The closing date can be changed/updated later, if necessary
6. If not you, select who from your team will be working this deal
7. For best data, associate deal with a company and/or contact
8. Add product and/or quantity, if applicable
9. When finished, click **Create**.



DEALS – BEST PRACTICES

As with your contact database (CRM), it is important to not only get as much data as possible, but to make sure this data is updated and stays clean.

The information gathered from deals throughout the sales process, will help improve your sales process over time.

HubSpot Deals Best Practices:

- When creating a deal, always associate to a contact
- Be sure to create the deal in the correct deal pipeline: the Sales Pipeline is the default in HubSpot
- Name the deal in a way that it is easily recognizable to you and to your team
- Include as many details ass possible when creating a deal
- Always fill in the deal amount (this can be changed/edited later)
- Use the deal board to keep deals up to date.

You Can Upgrade To Sales Pro For Incresed Deals Funcionality **LEARN MORE**

FINAL THOUGHTS & TIPS

- For a quick win – connect your email inbox and install the email extension FIRST
- Use HubSpot consistently throughout your day.. Developing new habits, especially new work systems take time, effort and patience
- Experiment & Explore: Click around and try different things
- If you're about to make a significant change, HubSpot will ask you if you're sure you want to do this
- If you get lost or stuck, click the HELP button – bottom right of your screen
- For the quickest answer, have HubSpot call you back. 2nd fastest way to get an answer is starting a chat
- Contacts are the lifeblood of your business – treat them with care
- Even if you are in a B2B you still need to talk to a person to close a deal. That person is your contact in your HubSpot CRM
- Use the "Log" tool to record incoming calls
- When recording interactions – use notes sparingly
- Too many note makes it difficult to find filter and find the data you're looking for – it is the same as having a desk full of Post-It notes
- After recording an activity – develop the habit of creating a follow-up task – asking "What is the next step?"
- Customize the Sales Pipeline to fit your business and processes
- Keep your deals updated – move them along the sales pipeline (deal board)
- The more you work in HubSpot – the more HubSpot will work for you. Good Luck!