



A Guide to Partner Services
with
HubSpot Software



PARTNER SERVICES WITH HUBSPOT SOFTWARE

As a HubSpot Partner you have the opportunity to offer not only marketing services, but also sales and customer experience services. By expanding your services to include sales and customer experience, you can close the loop and turn your clients into full flywheel businesses that grow better. Firms typically have a standard set of inbound services that they offer their clients. As you begin thinking about expanding your services, we've created a guide to the various services you might offer and the products and resources to help deliver these services. Together we can solve for our customers and growth better together.



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Marketing Services

Inbound marketing is about creating valuable experiences that have a positive impact on people and your business. There are four core categories of marketing services that agencies typically offer. These consist of: foundational services, traffic generation services, lead conversion services and lead nurturing services. Below we outline each service offering and the tools and resources that help you deliver them to your clients.

Foundational Marketing Services

Inbound Strategy:

This service is the foundation for all other marketing services. Inbound marketing strategy is a plan of action designed to achieve the goal of attracting, engaging and delighting people to grow a business that provides value and builds trust. This typically includes a one-day on-site strategy session with the goal of creating a clear action plan on how to improve an inbound strategy. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [What is inbound marketing?](#)
- ❑ [Free inbound strategy tools](#)

Buyer Persona and Profile Development

This service is the creation of core buyer personas. Buyer personas are fictional, generalized representations of your ideal customers. Personas help us all - in marketing, sales, product and services - internalize the ideal customer we're trying to attract. (This is typically a one-time service that averages 3-4 hours/profile).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [Make my persona tool](#)



- ❑ [Free buyer persona resources](#)
 - ❑ [Buyer persona templates](#)
-

Content Strategy

Content strategy refers to the management of pretty much any tangible media that you create and own: written, visual, downloadable ... you name it. It is the piece of your marketing plan that continuously demonstrates who you are and the expertise you bring to your industry. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [HubSpot SEO and Content Strategy Tools](#)

HubSpot Resources:

- ❑ [How to position and sell content strategy](#)
-

Technical Implementation

This service is the setup of the HubSpot platform. This consists of adding users, installing tracking codes, connecting domain names, integrating a CRM and more. (This is typically a one-time service that averages 3-4 hours).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [Getting started and setup on Marketing Hub](#)
-

Sales and Marketing Alignment

This service offer is for setting the groundwork that will set your client up for marketing success. Marketing efforts depend on seeing the outcomes of those efforts and the only way is through



sales and marketing alignment. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [How to deliver a sales and marketing alignment meeting](#)
 - ❑ [How we used HubSpot to achieve sales and marketing alignment \[customer story\]](#)
-

Reporting Setup

This service offer is for setting up the default reporting dashboards that you and/or your client will use to analyze marketing efforts. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [Getting started with reports](#)
-

Traffic Generation Services

Blogging

This service is for increasing traffic to your client's website. Blogging is one of the keys to a successful content strategy and helps build thought leadership within an industry, which will help build your client's brand as the go-to subject matter source. (This is a recurring service that averages 3-4 hours/blog post).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CMS](#)
- ❑ [HubSpot CRM](#)



Product Features:

- ❑ [Blogging Tools](#)
- ❑ [SEO Tools](#)

HubSpot Resources:

- ❑ [Getting started with the blogging tool](#)
-

SEO

This service is for increasing inbound traffic to your client's website. SEO focuses on nothing else but expanding a company's visibility in the organic search results. It helps businesses rank more pages higher in SERPs. And in turn, drive more visitors to the site, increasing changes for more conversions. (This is a recurring service that averages 3-4 hours).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [SEO Tools](#)
- ❑ [Blogging Tools](#)

HubSpot Resources:

- ❑ [Content marketing certification course](#)
 - ❑ [Inbound certification course](#)
 - ❑ [How to position and sell content strategy](#)
-

Social Publishing

This service is for creating, scheduling, publishing, and monitoring social posts that build awareness and/or drive conversions from an audience on a social network. (This is a recurring service that averages 1-2 hours/week).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:



- ❑ [Social Media Tools](#)

HubSpot Resources:

- ❑ [Social media certification course](#)
 - ❑ [How to position and sell social media tools](#)
-

Ad Development and Management

This service is for creating, publishing and managing ad campaigns that drive quality traffic and leads for your clients. (This is a recurring service that averages 3-5 hours/week).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Ads Tools](#)

HubSpot Resources:

- ❑ [How to create ads in HubSpot](#)
 - ❑ [Facebook Ads training: How to build great ads and audiences course](#)
-

Video Marketing

This service offering provides your clients with the power of video across marketing to provide actionable, personalized content to leads and customers. Video is one service that can differentiate you and can all be delivered from the HubSpot platform. (This is a recurring service that averages 8 hours).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Video Hosting / HubSpot Video](#)

HubSpot Resources:

- ❑ [How to position and sell HubSpot Video Hosting](#)
- ❑ [HubSpot Video overview deck](#)



- ❑ [HubSpot Video and Vidyard upgrades overview deck](#)
-

Lead Conversion Services

Conversion Path Creation

This service is where you create the process by which an anonymous website visitor becomes a known lead. A conversion path is comprised of a remarkable content offer, call-to-action, landing page, and thank you page. (This is a recurring service that averages 3-4 hours).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Content Strategy](#)
- ❑ [Landing Pages](#)
- ❑ [Calls-to-Action](#)
- ❑ [Forms](#)

HubSpot Resources:

- ❑ [How do conversion paths work?](#)
 - ❑ [How to create a conversion path in HubSpot that generates leads \[customer story\]](#)
-

Social Selling Enablement

This service is all about keeping track of what prospects and customers are saying about your client in social media and engaging with prospects as needed with the end goal of nurturing them into becoming a customer. (This is a recurring service that averages 1-2 hours/week).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Social Tools](#)

HubSpot Resources:



- ❑ [How to position and sell social tools](#)
-

A/B Testing

This service is for optimizing your client's conversion path to ensure that conversion rates stay steady or continually increase. Elements you can test include; CTA copy, CTA graphics, landing page copy, form length, and much more. (This is a recurring service that averages 1 hour/week)

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [A/B Testing](#)

HubSpot Resources:

- ❑ [How to A/B test your page](#)
 - ❑ [How to do A/B testing](#)
-

Lead Nurturing Services

Lead Nurturing and Automation

This service is for nurturing leads through your funnel by providing relevant content and offers along the buyer's journey. (This is a recurring service that averages 1-2 hours configuration).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Workflows](#)
- ❑ [Marketing Automation](#)

HubSpot Resources:

- ❑ [Understanding lead nurturing course](#)
- ❑ [Workflow FAQs](#)
- ❑ [Workflow actions](#)



Email Marketing

This service is for engaging existing contacts through email. (This is a recurring service that averages 1-2 hours).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Starter, Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Email Marketing Tools](#)

HubSpot Resources:

- ❑ [How to create marketing emails in HubSpot](#)
 - ❑ [How to analyze email performance](#)
-

Offer Creation

This service is for creating the offers that will generate quality leads for your clients. You can create content offers for each stage of the buyer's journey to help them progress to becoming a customer. (This is a recurring service that averages 15+ hours).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Starter, Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Landing Pages](#)
- ❑ [Forms](#)
- ❑ [Lead Flows](#)

HubSpot Resources:

- ❑ [Free content creation tools](#)
 - ❑ [How to get started with calls-to-action in HubSpot](#)
-



Personalized Content

This service is for creating a personalized website experience for users who engage with your website and content. Optimize sites to display only relevant information and offers to repeat visitors and customers. (This is a recurring service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Smart Content](#)

HubSpot Resources:

- ❑ [How to use personalization with content](#)
-

Lead Scoring

This service is the construction of a lead scoring system to help your client qualify and assess leads. This is most useful for clients with good lead flow. For smaller clients, coach them on identifying and applying prospect fit criteria through the sales team. (This is typically a one-time service that averages 4-6 hours).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Lead Scoring](#)
- ❑ [Likelihood to Close Contact Property](#)

HubSpot Resources:

- ❑ [How to set up lead score properties](#)
 - ❑ [Understanding HubSpot lead scoring course](#)
-



CRM Integration / Closed Loop Reporting

This service is for aligning the HubSpot CRM (or an integration) to setup and monitor closed loop reporting - ie: how inbound activities are resulting in new customers and how it can be continuously improved. (This is typically a one-time service that varies in time).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Integrations](#)
- ❑ [Reporting](#)

HubSpot Resources:

- ❑ [Closed loop reporting in HubSpot](#)
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Sales Services

Inbound sales is a personalized, helpful, modern sales methodology. Inbound salespeople focus on their prospect's pain points, act as trusted advisors, and adapt their sales process to the buyer journey. There are services you can offer both within inbound sales as well as other sales services that will be supporting the inbound motion and growth of your clients. These consist of: foundational services, CRM implementation services, sales enablement services, and sales coaching services. Below we outline each service offering and the tools and resources that help you deliver them to your clients.

Foundational Sales Services

Sales Audit and Strategy

This service is where you review the sales process and strategy of your client in order to find optimization opportunities. (This is a one-time service averaging 15+ hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)



- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [Sales strategy examples and templates](#)
 - ❑ [Inbound sales certification course](#)
 - ❑ [Defining your sales process in HubSpot course](#)
 - ❑ [Implementing your sales process with HubSpot course](#)
-

HubSpot CRM Setup

This service is where you implement the HubSpot CRM to help manage and analyze customer interactions and data throughout the customer lifecycle. (This is a one-time service averaging 15+ hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [Guide to CRM implementation](#)
 - ❑ [Getting started with HubSpot CRM](#)
-

Install HubSpot Sales Hub

This service is where you get your client setup with HubSpot Sales Hub which will be the platform used to deliver many of the other sales services that we will outline. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [Guide to getting started with Sales Hub](#)
 - ❑ [CRM and sales walkthrough course](#)
-



Sales and Marketing Alignment

This service is where you integrate communications and operations between client sales and marketing teams. This carries over from your marketing services, where you will now close the loop. (This is a one-time service that varies in time).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [How to deliver a sales and marketing alignment meeting](#)
 - ❑ [How we used HubSpot to achieve sales and marketing alignment \[customer story\]](#)
-

Reporting Setup

This service is where you setup dashboards and reports for your client so they can keep track of progress and performance. (This is a one-time service that varies in time).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)
- ❑ [Reports](#)

HubSpot Resources:

- ❑ [How to report on revenue in HubSpot](#)
-

CRM Implementation Services

Custom Fields and View Creation

This service is where you would setup custom fields and views tailored to your client. In HubSpot, properties store information about a contact, company, deal, or ticket. However, you may need additional properties to gather information your clients' business needs. (This is a one-time service averaging 5 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub Free, Starter, Professional and Enterprise](#)



- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [How to create custom fields in HubSpot](#)
-

Deal Stage Setup

This service is where you would set up deal stages for your client so they have the proper process in place to move prospects further along the buyer journey to becoming a customer.

(This is a one-time service averaging 8 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub Free, Starter, Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Deals and Pipeline Management](#)

HubSpot Resources:

- ❑ [How many deal stages do you need? \[blog\]](#)
 - ❑ [How to set up and customize your deal pipelines and stages](#)
-

Data Import and Cleansing

This service is where you would import your client's data to the HubSpot CRM. You'll export all current records from their current system and import into HubSpot with just a few clicks. (This is a one-time service that averages 4-25 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [How to import data into HubSpot CRM](#)
 - ❑ [Importing data into HubSpot academy course](#)
-



Integrations Setup

This service is for agencies that want to use integrations or develop them. If you're not comfortable developing integrations for your client, HubSpot offers a directory with certified agencies who can help you. (This is a one-time service that varies in time).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [HubSpot CRM integrations guide](#)
- ❑ [HubSpot Connect](#)
- ❑ [How to install the HubSpot-Salesforce integration](#)

CRM Ongoing Optimization

This service is where you will continually be optimizing your clients CRM to ensure that records are accurate and updated. (This is a recurring service averaging 5 hours/month).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

Sales Enablement Services

Setup Conversations

This service is where you would setup the Conversations feature within HubSpot. You can use the conversations inbox to manage your team's email inbox and targeted messages all in one place. Connect live chat, bots and team inbox. (This is a one-time service averaging 1 hour).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Conversations](#)



HubSpot Resources:

- ❑ [How to position and sell Conversations](#)
 - ❑ [Guide to getting started with Conversations](#)
-

Setup Calling

This service is where you would setup the Calling feature within HubSpot. Your clients can use this feature to make and record prospecting and sales calls through HubSpot software. (This is a one-time service averaging 1 hour).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Calling Tools](#)

HubSpot Resources:

- ❑ [Guide to using the calling tool in HubSpot](#)
 - ❑ [Technical requirements for the calling tool in HubSpot](#)
-

Setup Workflows and Automation

This service is where you would set up workflows and automation, which relies on triggering relevant and timely actions based on context. (This is a one-time service averaging 4 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub Starter, Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Workflows](#)
- ❑ [Sales Automation](#)

HubSpot Resources:

- ❑ [How to create sequences](#)
- ❑ [How to create templates](#)



Setup Messages Round-Robin (Lead Rotation)

This service is where you would set up messages round-robin (lead rotation) for your client, so that all chat messages get rotated to reps on the sales team. (This is a one-time service averaging 1 hour).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub Starter, Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Workflows](#)

HubSpot Resources:

- ❑ [How to set up lead rotation](#)
-

Reporting Dashboard Setup

This service is where you would set up the reporting dashboards for you client so they can visualize marketing, sales and services initiatives. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Reporting](#)

HubSpot Resources:

- ❑ [Guide to sales reporting](#)
 - ❑ [Default sales dashboard reports](#)
-

Sales and Marketing Funnel Analysis

This service is where you would analyze your client's sales and marketing performance and look for opportunities to optimize each section of the funnel. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:



- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Reporting](#)

HubSpot Resources:

- ❑ [Differences between funnel report types](#)
-

Email Template Creation

This service is where you would create the email templates that your client's sales team would use for various stages of the sales process. This will allow them to spend less time re-creating the same email over and over, saving them time. (This is a recurring service averaging 2 hours/email).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Templates](#)

HubSpot Resources:

- ❑ [How to create and send templates](#)
 - ❑ [Create templates for increased efficiency academy course](#)
-

Sales Document Creation

This service is where you would build a library of helpful sales content for your entire team. Your client will have the ability to share documents right from Gmail or Outlook inboxes and see which content closes deals. (This is a recurring service varying in time).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Documents](#)



HubSpot Resources:

- ❑ [How to upload and share documents](#)
 - ❑ [The power of content in sales enablement academy course](#)
-

Sequence Creation and Optimization

This service is where you would build out email sequences for your client's sales team to use. They will be able to automate follow-up emails, saving them time and personalizing their prospecting at scale. (This is a recurring service averaging 1.5 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub Starter, Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Sequences and Automation](#)

HubSpot Resources:

- ❑ [How to create and edit sequences](#)
-

Build Rep-Specific Landing Pages with Meetings Tool

This service is where you would rep-specific landing pages with the Meetings Tool. This will allow your client's sales team to book meetings faster without annoying back-and-forth emails. (This is a one-time service averaging 1 hour/page).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub Starter, Professional and Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Meetings](#)

HubSpot Resources:

- ❑ [How to set up the meetings tool](#)
-



Create Customer Case Studies

This service is where you would create customer case studies for your client to use at various stages of their sales process to show proven-value. You'll want to create these often and build a library that encompasses the right use-cases, industries and products. (This is a recurring service averaging 10 hours/case study).

HubSpot Resources:

- ❑ [How to write a case study](#)
-

Sales and Marketing Alignment Services

Sales and Marketing Alignment Workshop

This service is where you would hold workshop trainings to align expectations between sales and marketing. (This is a one-time service averaging 6 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [Aligning marketing and sales academy course](#)
 - ❑ [How to deliver a sales and marketing alignment meeting](#)
-

MQL and SQL Definition

This service is where you would define what constitutes as an MQL (marketing qualified lead) versus an SQL (sales qualified lead). This service is critical to sales success, since it's the handoff point between marketing and sales. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Lifecycle Stages](#)

HubSpot Resources:

- ❑ [How to set the lifecycle stage of your contacts](#)



Sales and Marketing Goaling

This service is where you would collaborate with your client to align around SMART goals for sales and marketing that you will eventually track against. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Goals](#)

HubSpot Resources:

- ❑ [How to create goals in HubSpot](#)

SLA Development

This service is where you would align and set service level agreements that sales and marketing will adhere to. Service level agreements align expectations and keep everyone on track. (This is a one-time service averaging 16 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Reporting](#)

HubSpot Resources:

- ❑ [How to create an effective SLA](#)
- ❑ [The ultimate guide to service level agreements](#)



Sales Content Assessment and Optimization

This service is where you would audit the sales content being used by your client. Is the content up to date? What needs to be optimized? What needs to be created? Asking these questions will help you identify the gaps in your sales enablement strategy. (This is a one-time service averaging 5 hours).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub](#)
- ❑ [HubSpot CRM](#)

HubSpot Resources:

- ❑ [The power of sales enablement content academy course](#)
-

Sales Coaching Services

Sales Rep Coaching

This service is where you would be coaching sales reps for your client to make sure that they're able to sell 'the inbound way' and are trained on the tools and resources you enable them with. (This is a recurring service averaging 1 hour/rep/week).

HubSpot Resources:

- ❑ [The ultimate guide to sales coaching](#)
 - ❑ [Sales coaching training for managers academy course](#)
 - ❑ [Sales training techniques and ideas academy course](#)
-

Sales Leadership Training

This service is where you would be training the sales leadership team for your client. You'll want to make sure that they know exactly how to become an efficient leader and believer in your methodology and process. (This is a recurring service averaging 2 hours/week).

HubSpot Resources:

- ❑ [The ultimate guide to sales coaching](#)
- ❑ [Sales coaching training for managers academy course](#)
- ❑ [Sales training techniques and ideas academy course](#)



Create Sales Playbooks

This service is where you would be creating sales playbooks to equip your client's team with. Build sales enablement content for anything your client needs to win a sale. This could include product one-sheets, pricing guides, and competitive battlecards. All playbooks will live within HubSpot and be easily accessible by their sales team. (This is a recurring service varying in time).

HubSpot Products to Deliver Service:

- ❑ [Sales Hub Enterprise](#)
- ❑ [HubSpot CRM](#)

Product Features:

- ❑ [Playbooks](#)

HubSpot Resources:

- ❑ [How to use playbooks](#)

Customer Experience Services

Customer experience is the product of interaction between an organization and a customer over the duration of their relationship. Tie this into the HubSpot methodology, where you're delighting customers in order to turn them into loyal advocates for your clients' business. By solving your customers' problems, you can delight and turn them into a growth engine for clients. These consist of: foundational services, help desk services, knowledge base services, and customer feedback services. Below we outline each service offering and the tools and resources that help you deliver them to your clients.

Foundational Customer Experience Services

Develop a Customer Journey Map

This service is where you help your client get a sense of their customers' motivations, needs and pain points. A customer journey map is a visual representation of the process a customer or prospect goes through to achieve a goal with your company. (This is a one-time service averaging 8 hours).

HubSpot Products to Deliver Service:

- ❑ [Marketing Hub Professional and Enterprise](#)



HubSpot Resources:

- ❑ [How to create an effective customer journey map](#)
 - ❑ [Mapping the customer journey whitepaper](#)
-

Install HubSpot Service Hub

This service is where you help your client get set up on HubSpot Service Hub, which will have the tools their team needs to delight customers and turn them into promoters. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❑ [Service Hub](#)

HubSpot Resources:

- ❑ [Guide to setting up Service Hub](#)
 - ❑ [Guide to getting started with Service Hub academy course](#)
-

Reporting Setup

This service is where you will set up service team reporting. (This is a one-time service varying in time).

HubSpot Products to Deliver Service:

- ❑ [Service Hub](#)

HubSpot Resources:

- ❑ [How to get started with reports](#)
-

Help Desk Services

Add Communication Channels

This service is where you add all relevant communication channels within the Conversations feature in Service Hub. This will help your clients manage, scale and leverage one-to-one communication across their site pages, Facebook, Slack and other messaging channels. (This is a one-time service averaging 3 hours/channel).



HubSpot Products to Deliver Service:

- ❑ [Service Hub](#)

Product Features:

- ❑ [Conversations](#)

HubSpot Resources:

- ❑ [Selecting conversation channels academy course](#)
 - ❑ [Guide to Conversations](#)
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Single Inbox Setup and Training

This service is where you would set up the single inbox feature (Conversations). (This is a one-time service averaging 4 hours).

HubSpot Products to Deliver Service:

- ❑ [Service Hub](#)

Product Features:

- ❑ [Conversations](#)

HubSpot Resources:

- ❑ [Setting up Conversations academy course](#)
 - ❑ [Guide to Conversations](#)
 - ❑ [How to position and sell Conversations](#)
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Ticket System Setup and Training

This service is where you would set up a service ticket system using HubSpot's Ticket and Help Desk features. This will enable your client's to provide an exceptional customer experience. (This is a one-time service averaging 4 hours).

HubSpot Products to Deliver Service:

- ❑ [Service Hub Professional and Enterprise](#)

Product Features:

- ❑ [Tickets and Helpdesk](#)

HubSpot Resources:

- ❑ [Setting up tickets academy course](#)



Live Chat and Chat Bot Setup and Training

This service is where you would set up live chat and chat bots across your client's webpages. You'll want to train them on why they should be incorporating live chat as part of their customer service strategy. (This is a one-time service averaging 4 hours).

HubSpot Products to Deliver Service:

- ❑ [Service Hub](#)

Product Features:

- ❑ [Live Chat](#)
- ❑ [Chatbots](#)

HubSpot Resources:

- ❑ [How to add Live Chat](#)
- ❑ [Guide to bot actions](#)

Knowledge Base Services

Knowledge Base Design and Setup

This service is where you would design and setup a knowledge base on your client's website to help their customers help themselves. This saves their team time and let's them focus on more complex issues. (This is a one-time service averaging 10 hours).

HubSpot Products to Deliver Service:

- ❑ [Service Hub Professional and Enterprise](#)

Product Features:

- ❑ [Knowledge Base](#)

HubSpot Resources:

- ❑ [How to design and setup knowledge base](#)
- ❑ [How to customize knowledge base in HubSpot](#)
- ❑ [How to set up knowledge base in HubSpot academy course](#)



Create and Maintain Self-Service Content

This service is where you would create the self-service content that you would add to your knowledge base. (This is a recurring service averaging 2.5 hours/post).

HubSpot Products to Deliver Service:

- ❑ [Service Hub Professional and Enterprise](#)

Product Features:

- ❑ [Knowledge Base](#)

HubSpot Resources:

- ❑ [How to create knowledge base articles](#)
 - ❑ [Self-service content \[customer story\]](#)
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Customer Feedback Services

Setup Customer Feedback (NPS, CES, 3 Point Surveys)

This service is where you would set up customer feedback surveys that align around your client's goals and the strategy you've outlined for them. (This is a one-time service averaging 10 hours).

HubSpot Products to Deliver Service:

- ❑ [Service Hub Professional](#)

Product Features:

- ❑ [Customer Feedback](#)

HubSpot Resources:

- ❑ [Setting up customer loyalty surveys](#)
 - ❑ [Setting up customer satisfaction surveys](#)
 - ❑ [Setting up customer support surveys](#)
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Analyze and Share Findings

This service is where you would analyze and report on customer survey findings with your client and decide on actionable next steps. (This is a recurring service varying in time).

HubSpot Products to Deliver Service:



- ❑ [Service Hub Starter, Professional and Enterprise](#)

Product Features:

- ❑ [Customer Feedback](#)
- ❑ [Reporting](#)

HubSpot Resources:

- ❑ [How to analyze customer feedback](#)
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Develop Promoter Advocacy Programs

This service is where you would develop customer promoter advocacy programs that can support your marketing initiatives. Once you develop these programs, you'll continue the flywheel motion into marketing where you'll promote these programs to drive net new customers. (This is a recurring service varying in time).

HubSpot Products to Deliver Service:

- ❑ [Service Hub Starter, Professional and Enterprise](#)

Product Features:

- ❑ [Customer Feedback](#)
- ❑ [Email Marketing](#)

HubSpot Resources:

- ❑ [How to create a customer advocacy program](#)
- ❑ [Why your marketing needs more social proof](#)

For help in defining, pricing and packaging your services, reach out to your Channel Account Manager. We have a team dedicated to supporting you as we grow better together.

