**HubSpot**

Getting the most out of your

# Sales Hub Trial

# Welcome to your trial of Sales Hub!

To help you make the most of your time with Sales Hub, we've hand selected a few specific tasks for both sales leaders and end users that will help introduce you to Sales Hub.

You can complete as many or as few of these tasks as you'd like, in any order. So kick the tires, explore, and get to know HubSpot - if you have questions, we're here to help.

## Getting Started

- [A few things to keep in mind about trials](#)

## Recommended Activities for Sales Leaders

- [Importing data into HubSpot](#)
- [Setting up your team](#)
- [Automating the Sales Process (Workflows)](#)
- [Standardizing Your Process (Deal Stages & Playbooks)](#)

## Recommended Activities for Sales Reps

- [Installing the extension & connecting your inbox](#)
- [Previewing the Rep Experience (Contacts, Companies, etc)](#)

# A few things to keep in mind...

**Your trial isn't going anywhere!** Should you choose to move forward after your trial, you'll be able to keep this account and any setup you've already done, so don't worry about losing your work.

**This guide is more of a short tour than a complete resource.** We've selected a few steps that we think you'll find helpful in getting to know HubSpot. You can find a more complete list of setup tasks here. (We'll of course help you with those later on.)

**If you choose not to move forward** with the tools in HubSpot you were trialing, your account will automatically revert back to the original version at the end of your trial. If you aren't already a paying HubSpot customer, your trial will revert to a free HubSpot account.

**We're here to help.** If you have questions about Sales Hub along the way, don't hesitate to reach out to your HubSpot rep, or our support team. You can also find answers in HubSpot's knowledgebase or through our community.

Recommended Activities for

# Sales Leaders

# Importing Data into HubSpot

Most teams come to HubSpot with an initial set of data they want to import, whether it's from an existing CRM system, spreadsheets, homegrown tools, or some other source. There are several ways to get data into HubSpot - one-time migration tools, ongoing integrations, and HubSpot's APIs, amongst others. This task involves importing a CSV file to populate a starting set of your data in HubSpot.

## IMPORTING DATA INTO HUBSPOT VIA CSV

- First, prepare your CSV file for import. Review this rundown of how to set up an import file for HubSpot for instructions on how to set up your spreadsheet.

- HubSpot comes with dozens of standard fields for basic pieces of data like email address, company name, and others. For custom details, you'll want to set up custom properties.

- Once your data is ready to go, you can actually carry out your import.

- After your import is complete, take a minute to familiarize yourself with the data you imported by visiting Contacts, Companies, or Deals.

# Setting Up Your Team in HubSpot

Giving the right members of your team the right access to HubSpot is an important step toward understanding and using HubSpot effectively. During this task, you'll take a few minutes to set up users, organize them into teams, and understand how HubSpot handles details like permissions.

## SETTING UP YOUR TEAM

- First, you'll want to add members of your team who will need access to HubSpot as users. Users can be added manually, synced from Salesforce, or imported via CSV file.

- Once you've set up your users, you'll need to select who you want to have access to the trial features, which you can do from Users & Settings.

- In HubSpot, users can be organized into "Teams" that allow you to control which records in HubSpot individual users have access to. Learn about organizing users into teams here.

- Once your users are in HubSpot, you'll be able to set their permissions which control what they can and can't do and access inside HubSpot. Learn more about permissions.

# Automating the Sales Process with Workflows

Automation can help you simplify your sales process, drive consistency, and save your sales team time. In HubSpot, you'll have the tools you need to build complex custom automation rules, and also easily automate common tasks. During this exercise, you'll get an introduction to a few common scenarios where automation can be helpful.

## SETTING UP SALES AUTOMATION IN HUBSPOT

- One common situation where automation can be helpful is in creating tasks & reminders when deals move from one stage to another. Learn how easy it is to automate tasks on deal stages with HubSpot.

- Workflows, HubSpot's automation tool, enables you to build custom automation flows that suit the needs of your business. Sales teams often use Workflows to rotate leads, send internal notifications when contacts or companies meet specific criteria (e.g., notifying a rep when a lead hits a certain lead score threshold), and carry out other common tasks. Learn more about creating Workflows.

# Standardizing Your Process With Deal Stages & Playbooks

During this step, you'll replicate your sales process by setting up two tools - Deal Stages, and Playbooks. In HubSpot, deal pipelines & stages help you manage your sales process, predict revenue and identify roadblocks in your selling process. With the playbooks tool, you can provide guidance to your sales team on how to carry out every stage of the sales process through interactive content cards displayed in contact, company, deal, and ticket records.

## SETTING UP DEAL STAGES & PLAYBOOKS IN HUBSPOT

- Start by creating the pipelines you'll need in HubSpot (if you need more than one.) Separate pipelines can be helpful when you have multiple sales processes.

- While creating your pipelines, you'll also set up the stages your deals move through, and the probability to close associated with each deal, which aids in forecasting.

- Next, take a swing at creating a playbook in HubSpot to match a specific motion in your sales process. You can start from scratch, or use one of our pre-populated playbook templates as a starting point to edit. Once you've created your first playbook, navigate to any contact, company, or deal record to see where Playbooks appear in HubSpot.

Recommended Activities for

Sales Reps

# Connecting HubSpot to your Inbox

With HubSpot's Chrome extension for Gmail and our Microsoft Office 365 add-in, you can access your sales tools directly in your inbox. Logging emails, accessing templates, seeing details about your contacts & companies, and carrying out other basic tasks doesn't even require you to open your CRM.

## CONNECTING HUBSPOT TO YOUR INBOX

- First, make sure you've been added as a user, and you know your username and password. (If you don't have access yet, someone with admin access will need to add you to HubSpot.)

- Next, install the Chrome extension, Office 365 add-in, or Outlook desktop add-in depending on your needs. Connect your inbox to get access to all features.

- Visit your email and take a few minutes to familiarize yourself with the tools HubSpot has added to your inbox.

# Previewing the Rep Experience in HubSpot

HubSpot follows a similar format to other CRM systems in how it organizes your sales process. Contact records store details on individuals, while company records store details about the organization and group the contacts who work there. Deals allow you to track opportunities, and tasks help you keep track of what you need to do. In this step, you'll explore each of these four objects.

## EXPLORING CONTACTS, COMPANIES, DEALS & TASKS

- Start by visiting Contacts and clicking into any of the contacts in your database. This is a helpful resource that explains what you'll actually see on the contact record.) Note the fields off to the left, the timeline in the center, and the "communicator", which allows you to send emails, place calls, and carry out other tasks up at the top.

- Take a few minutes to also explore Companies, Deals, and Tasks. Note that Deal stages can be customized to fit your team's exact sales process.

- Lastly, take a minute to understand how filters allow you to create custom views into the Contacts, Companies, Deals or Tasks in your database. Add a couple of filters, edit the columns in your view, and save it for future use.