



How Power Users Grow with HubSpot: Tips for
Advanced Marketing & Sales Teams

Advanced HubSpot Usage Workshop

Agenda

- **Supercharging your HubSpot smart content**
 - Extend HubSpot smart content capabilities for anonymous traffic when running large scale PPC campaigns
- **Customized Chatflow Experience**
 - Customizing your prospect/client relationship with advanced Chatflow features & contact identification
- **Leveraging key journey touch points into an advanced sales process & nurturing**
 - Quarterly strategy reports & more custom research as needed
- **Building a solid tech stack with Integrations to extend HubSpot reporting capabilities**
 - Optimize the way clients use HubSpot along with their additional tools



Objective of this session

- Understand the methods available to serve personalize content for anonymous audiences
 - GDPR, new cookie policies and sense of privacy has brought new challenges for retargeting
- Learn how to use your tech & data to up your conversational game
 - Users may know they're interacting with bots but will always appreciate a humanized experience
- Refresh your vision of marketing & sales enablement
 - As the practice of digital marketers gets more complex - how can we ensure the incremental benefits are still perceived by sales?
- Making the most of an "all in one tool in 2019"
 - Optimize the way clients use HubSpot along with their additional tools





Introducing the team

Our mission is to deliver advanced inbound & technical consulting to clients that aim at scaling their digital marketing efforts with HubSpot



Who are we?



Paul Cleenewerck
Inbound Consultant

Customer Centric

► @HubSpot

Former IS team member

Onboarded more than 120 companies
(including more than 50 in Australia)

Notable Clients:

90 Seconds (Saas / on demand platform)

Randstad (Int. Recruitment Agency)

Colliers (Real Estate Sales)

Sports Singapore (Government body)

Inbound Passionate

► Specialties

Growth Marketing

Passionate by advanced content
strategy, technical SEO, digital ads,
in depth- competitor analysis and
automation

Tech & Analytics

Tableau Certified (on-going)

Python for Advanced Analytics and
Machine Learning

Java Script - CSS - HTML

Wide Industry Experience

► Background

Agency

3 years of account management
experience working with large
companies on Influencers
performance driven campaigns

Consulting

Started my career in a Big 4 and
completed 3 years as a Corporate
Finance Advisor.

Who are we?



Sushil Nedyavila

Technical Consultant

Deep Product Familiarity

► **@HubSpot**

Lessons from Support

- Quick to identify expected vs unexpected product behavior
- Troubleshooting experience (4000+ support cases)
- Designated Support → Technical Consultant

Solution-driven

► **Specialties**

Pushing product limits

- Driven to understand business goals and provide various approaches to technical requests
- Educating clients on what is and is not possible
- Ultimate goal is to SFTC by providing as many viable options

API/Customization Junkie

► **Background**

Experience as TC

- Started with 3 clients
- Currently at 13 clients
- Spreading API love to allow clients/developers to think about custom solutions
- Team-based trainings to drive product usage
- Project management

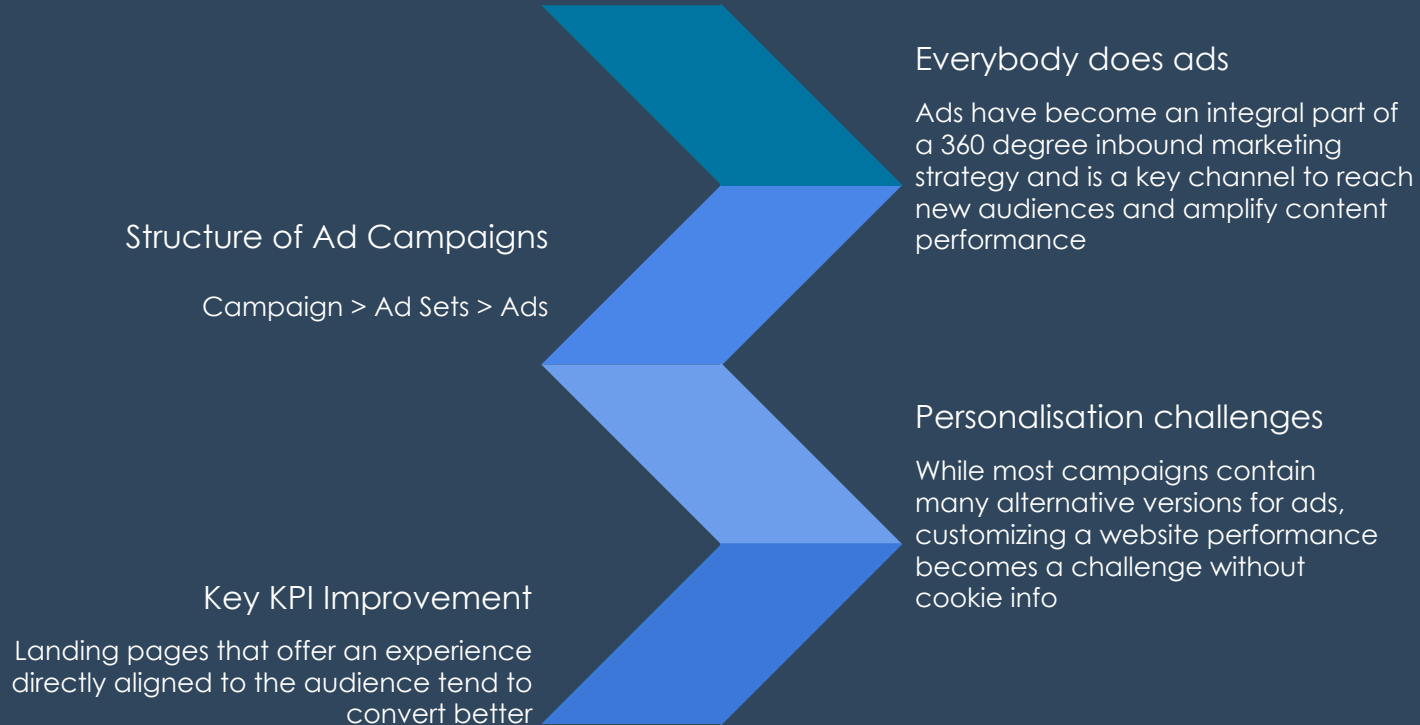


Topic 1: Supercharging Your HubSpot Smart Content

#InboundDrivenAdvertising



Challenges Presented by Digital Ads



Handling Personalisation at Scale

Social media platforms offer the ability to target net new traffic with interest based audiences

- Using multiple ads can be a great way to convey a message differently to the same audience

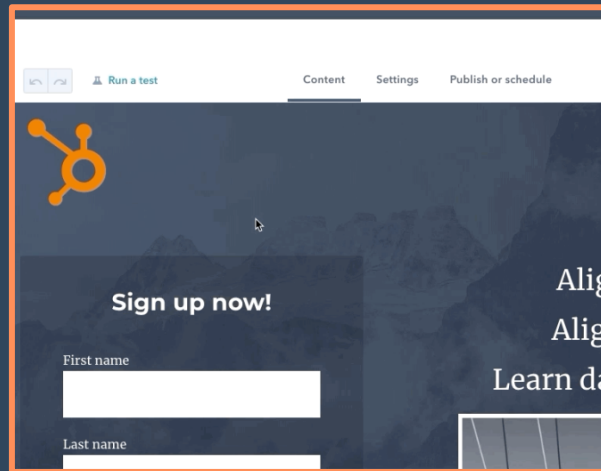
Few problems may arise:

- While it is easy to modify and manage different ads - linking each ad to a different landing page comes at a great challenge
- Too many landing pages = scattered analytics - difficulty to maintain content & content duplicate risks

How can HubSpot solve for this?

HubSpot Native Smart Content Modules:

- Does a great job to cater for existing contact retargeting
- Enables your business to personalize For geo location & devices



How can HubSpot solve for this?

But what if we wanted to personalize landing pages based on the profile of anonymous audiences?

How can HubSpot solve for this?

Our
Solution

Our Solutions

Choosing UTM parameter as a personalization criteria

We've built a smart content module that utilizes this simple HUBL variable to build logic into the landing page & display special content to targeted audiences based on UTM parameters shown in the URL

```
{{ request.query_dict }}
```

Why did we opt for this:?

Most ad campaigns contain UTMs and UTMs (content / ad etc...) are often highly reflective of the type of audiences targeted

How can HubSpot solve for this?

**Let's have a
quick demo!**

How can HubSpot solve for this?

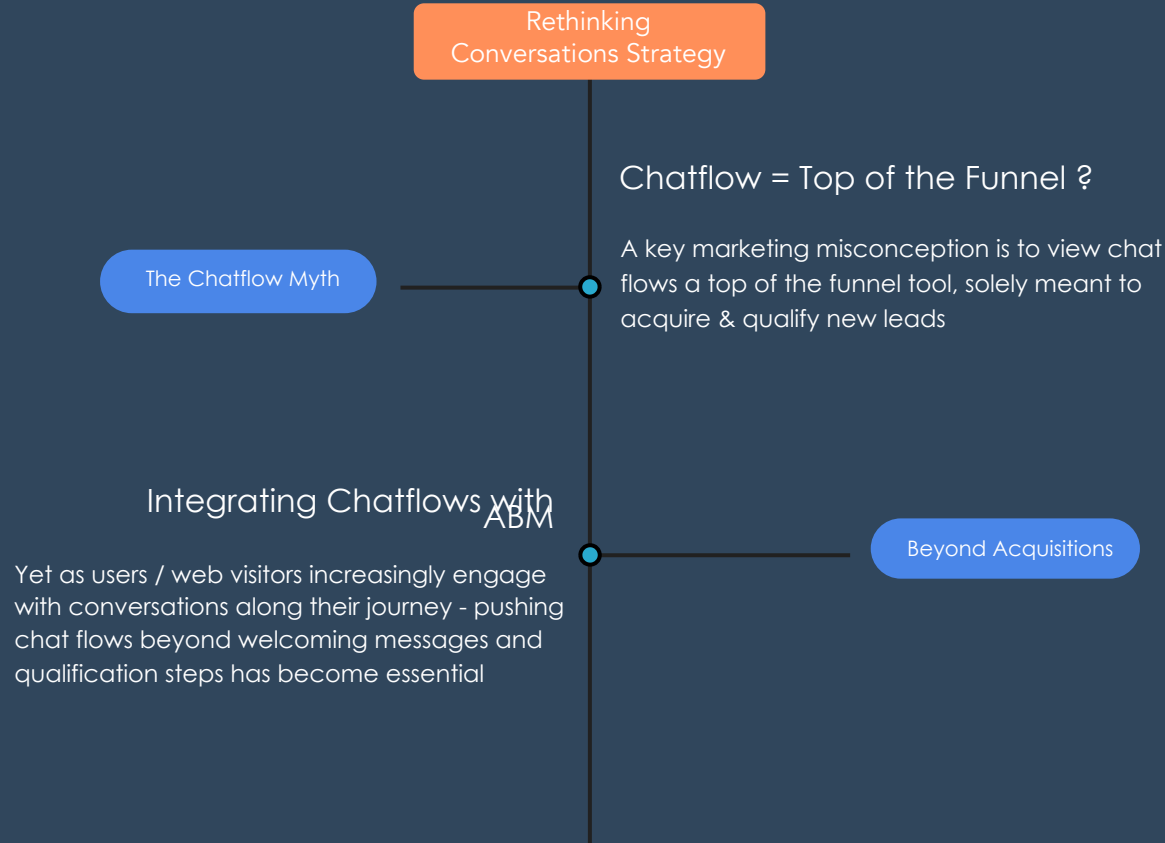
[Click here](#) to get access to the full
documentation to build it in
your own portal



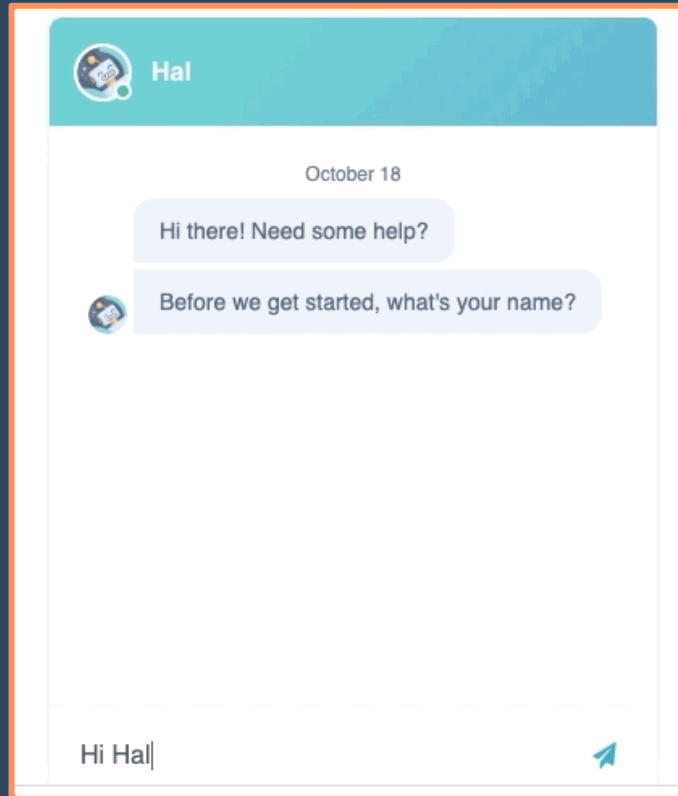
Topic 2: Advanced Chatflow Features & Identification



Customizing your prospect/client relationship with advanced Chatflow features & identification



The (Overly) Common Chatflow Experience



How did we use Chatflow to interact with users?

1

Encouraging highly sought after candidates to apply to upscale positions & get in touch with consultants

2

Help long term job seekers to improve their profile to appear more attractive in their job search

3

Use custom bot actions to query their database and deliver info unique to a candidate

4

Push the right content offers to revive and requalify inactive candidates whenever they would revisit their website

Adapting Chatflows to Your Audience & User Identification

Conversation Fundamentals: Adapt Chat Flows with Custom Audiences

[< Back to chatflows](#)Install Base - Repeat Buyers Chatflow ✎

1 Build
Create new chatflow actions and add if/then logic.

2 Who
Decide who should see this chatflow.

3 When
Decide when to show the chatflow on your site.

4 Options
Set a display name for your chatflow and other options.

Who

Decide who should see this chatflow.

Show this chatflow to:

☐ **Everyone**
Show this chatflow to everyone who visits your web page.

☐ **Anonymous visitors**
Show this chatflow to anyone who visits your site anonymously.

☐ **Tracked contacts**
Only show this chatflow to known contacts who are being tracked by HubSpot.

☒ **Segmented lists**
Only show this chatflow to tracked visitors who meet specific smart list criteria.

08: Repeat Buyers ▼

Hide chatflow from:

Customer x [*] Industry - Government x ▼

Adapting Chatflows to Your Audience & User Identification

Conversation Challenges: How to (always) associate my existings contacts with the right list membership?

Method #1 - Existing Browser Cookies

HubSpot will automatically recognize contacts coming from email clicks or revisiting from the same device & browsers used for their original conversion

Method #2 - Using the HubSpot Identify Snippet

The “identify a visitor” Javascript function requires the email address of a visitor (eg: when submitting a login form) to associate the visitor’s existing HubSpot contact to their new browser/device.

Adapting Chatflows to Your Audience & User Identification

Conversation Challenges: How to (always) associate my existings contacts with the right list membership?

More info on the Identify Javascript Snippet

Sample Code - [Find the full documentation here](#)

Javascript

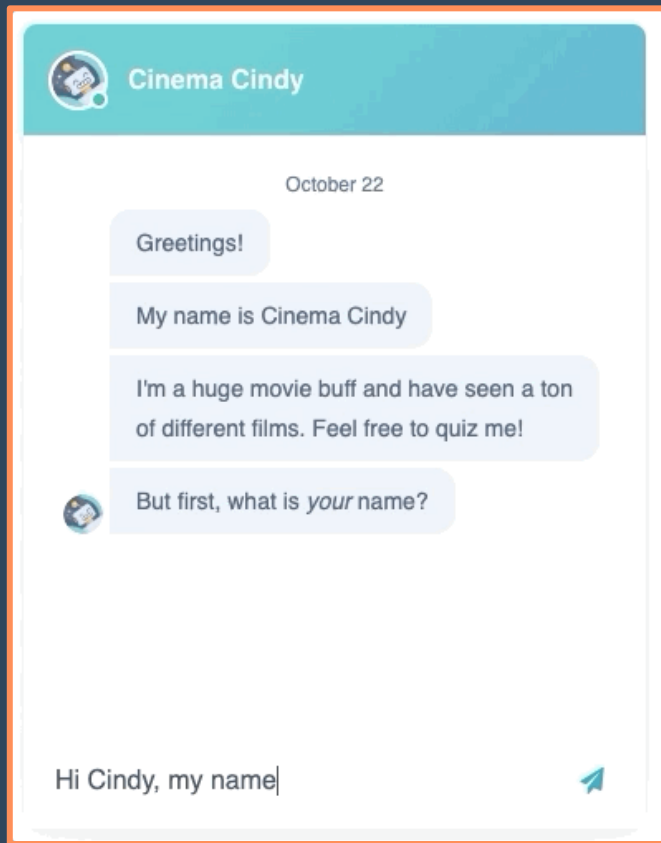
```
0
1  /*
2   This example grabs the value of a
3   query string parameter '?email='
4   and uses that to identify the visitor
5   */
6
7  function getParameterByName(name) {
8      var match = RegExp('[?&]' + name + '=[^&]*').exec(window.location.search);
9      return match && decodeURIComponent(match[1].replace(/\+/g, ' '));
10 }
11
12 var _hsq = window._hsq = window._hsq || [];
13 _hsq.push(["identify",{
14     email: getParameterByName("email")
15 }]);
16
```


Adapting Chatflows to Your Audience & User Identification

Conversation Opportunities:

Querying your HubSpot or external database to serve personalized content to users

IMDb example →





Topic 3: Building an advanced lead prioritisation system in a multi-team environment



Step 1: Create Multiple Sales User Types in HubSpot

Modern companies would typically have a variety of touch point - taking the example of a SaaS business:

- *Users who barely created an account may need some initial guidance and training → HubSpot user = "Success Coach"*
- *Users who started to show engagement and download case studies may need further qualification → HubSpot user = "BDR"*
- *Users who've been appropriately qualified and are now ready for proposals → HubSpot user: "Account Executive (Contact owner)"*

Step 1: Create Multiple Sales User Types in HubSpot

How to create user property types in HubSpot:

Create a new property

Label

Success Coach

Internal name

success_coach

Description

This property will be used to assign a member of my "initial touch" Sales team to my contacts

Optional

Group

HubSpot Sales Team

Field type

HubSpot user

☐ Show in forms

Use in forms, pop-up forms, and bots.

Step 2: Tag your content and marketing events based on the user journey

Methodology for Naming Convention to Tag Marketing Assets & Events:

[Stage of the funnel] - [Resource type] - [Campaign topic]

[*] TOFU Form - Ebook & Podcast - [Automating Inbound Conversations] ✎

✓ Autosaved with unpublished changes ▾

Publish

FormFollow-upOptionsStyle & preview

ShareActions ▾

🔍

First Name *

Last Name *

Company Name *

Email *

Job Title *

Progressive field

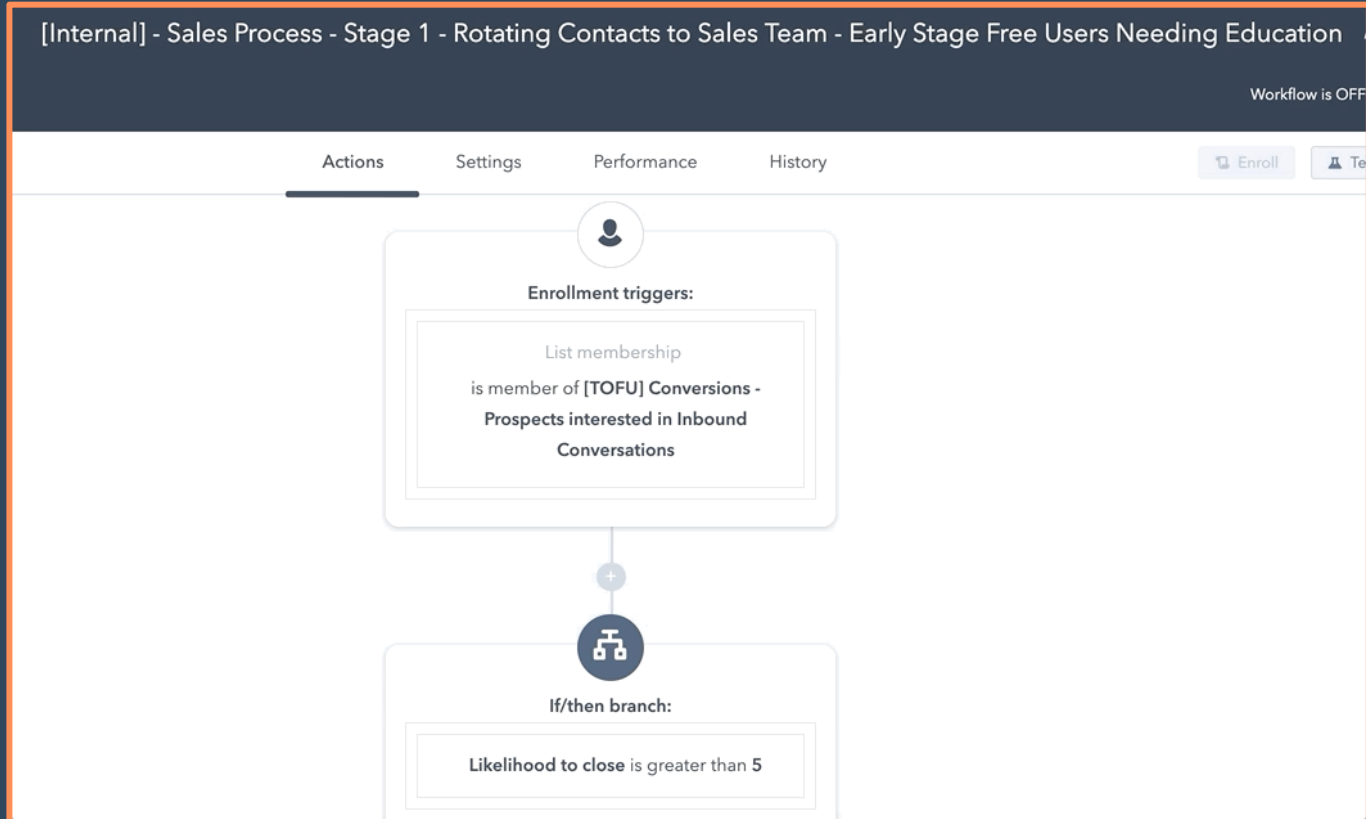
Submit

Step 3: Enroll your contacts into the right list based on their journey

Quick-Tip: Easily gather all assets that contain the same naming convention

The screenshot displays a user interface for managing contact lists. At the top, there is a navigation link '< Back to lists' and the title of the selected list: '[TOFU] Conversions - Prospects interested by Inbound Conversations'. Below the title, it indicates 'Estimation: - contacts'. A dropdown menu labeled 'Active list' is visible. On the right side of the filter rule box, there are 'Clone' and 'Delete' links. The main filter rule is a 'Form submission' condition: 'has filled out [*] TOFU Form - Ebook & Podcast - [Automating Inbound Conversations] on Any page'. Below this rule, there are buttons for 'AND' and 'OR' to add more conditions. The right-hand side of the interface shows a message: 'There aren't any contacts in this list. Build your list to see contacts be shown here.'

Step 4: Associate your contact with the right user type based on their journey



Step 5: Leverage playbook to increase the consistency of lead qualification

Playbook

— X

BDR readiness playbook

Success coaches will use these guidelines to qualify prospects for BDRs.

Are you the decision maker? If not, has the decision maker been alerted to these conversations?

Update deal property (Decision maker alerted)

No

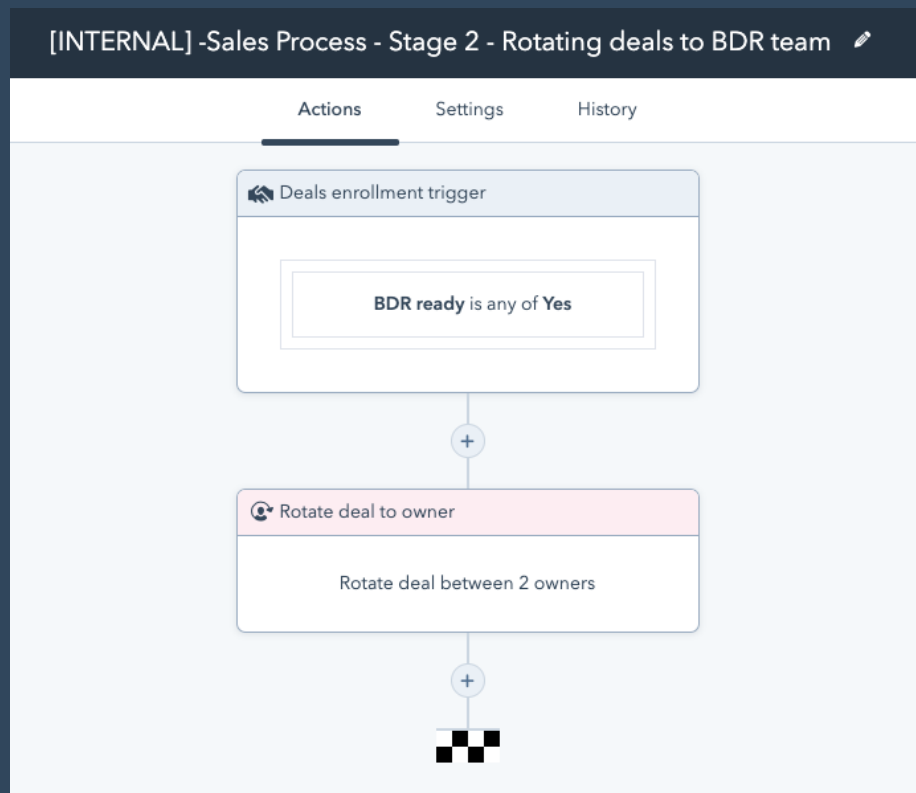
Yes

Notes

Log note

✓ Saved

Step 6: Automatically rotate qualified prospects to other sales team members



Next steps: Repeat the previous automation to all stages of the sales process



Topic 4: Building a solid tech stack to extend HubSpot capabilities



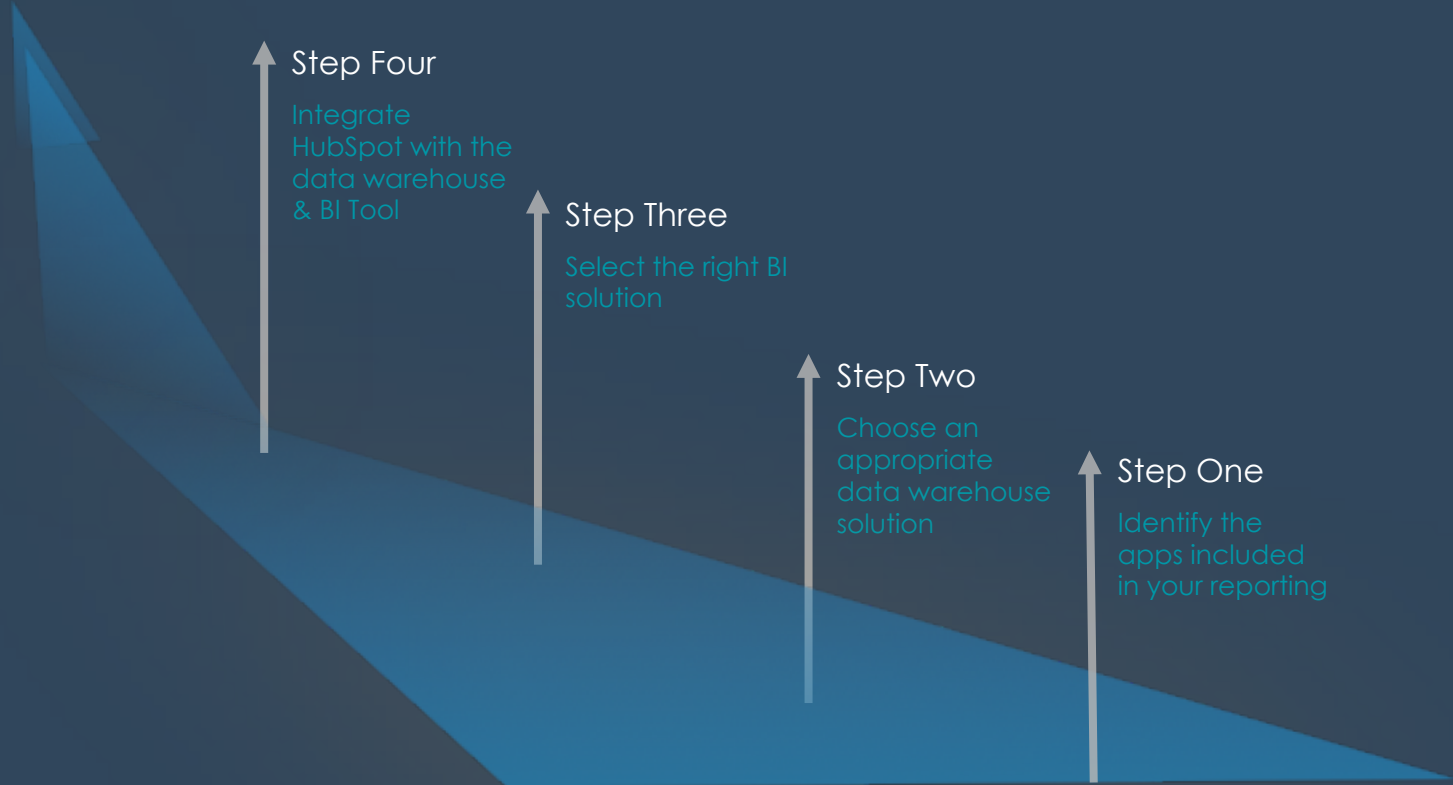
HubSpot as a Platform

In 2019 HubSpot officially evolved as a platform

What are some popular ways of using Integrations as HubSpot add-ons in your tech stack?

- *External Event Management (Eventbrite - LYYTI - Attendease)*
- *Data Cleaning Automation Engine (Insyncle)*
- *Data Warehouse & Advanced BI Reporting Tools*

Stages of Integrating a BI Solution



The ideal BI Reporting Tech Stack

Super Metrics
Google Sheet
Google Data Studio

Low/no cost
online platforms

**Start up &
Small Biz**

Stitch / Adverity
Tableau / Power BI

Higher Cost with
greater degree of
Flexibility

**Mid Cap &
Enterprise**

Loan Types Gauged by Number of Deals - Gender Comparison

Loan Types Gauged by Number of Deals - Gender Comparison

FEMALE

School Expenses

Total Loaned Amount: 52,392,497

Total Number of Deals: 5,074

Av. Deal Amount: 25,178

Home Improvement

Total Loaned Amount: 31,220,921

Total Number of Deals: 3,786

Av. Deal Amount: 24,917

Home Repairs and Improvement

Total Loaned Amount: 63,149,550

Total Number of Deals: 3,509

Av. Deal Amount: 34,809

Business

Total Loaned Amount: 27,652,102

Total Number of Deals: 1,469

Av. Deal Amount: 31,764

Pay Off Debts

Total Loaned Amount: 16,030,840

Total Number of Deals: 1,469

Av. Deal Amount: 25,988

Medical Outpatient Expenses

Total Loaned Amount: 16,232,260

Total Number of Deals: 1,267

Av. Deal Amount: 26,698

Personal Vacation

Total Loaned Amount: 8,631,400

Total Number of Deals: 608

Av. Deal Amount: 27,058

Medical Expenses

Total Loaned Amount: 12,114,626

Total Number of Deals: 1,767

Av. Deal Amount: 21,750

Others

Total Loaned Amount: 15,464,361

Total Number of Deals: 1,395

Av. Deal Amount: 26,663

Vacation

Total Loaned Amount: 4,529,575

Total Number of Deals: 495

Av. Deal Amount: 23,469

Major Purchase

Total Loaned Amount: 5,506,000

Total Number of Deals: 407

Av. Deal Amount: 27,530

Life Events

Total Loaned Amount: 4,915,500

Total Number of Deals: 276

Av. Deal Amount:

Payment of Utilities

Total Loaned Amount: 9,867,400

Total Number of Deals: 460

Av. Deal Amount: 21,731

Purchase of Household Appliances & Furniture

Total Loaned Amount:

Motorbike Purchase

Total Loaned Amount:

Car

MALE

Home Improvement

Total Loaned Amount: 40,744,207

Total Number of Deals: 4,774

Av. Deal Amount: 26,001

Business

Total Loaned Amount: 30,348,250

Total Number of Deals: 2,508

Av. Deal Amount: 31,843

Medical Expenses

Total Loaned Amount: 11,431,005

Total Number of Deals: 1,426

Av. Deal Amount: 22,283

School Expenses

Total Loaned Amount: 45,071,430

Total Number of Deals: 4,586

Av. Deal Amount: 26,780

Pay Off Debts

Total Loaned Amount: 15,852,202

Total Number of Deals: 1,417

Av. Deal Amount: 27,284

Others

Total Loaned Amount: 15,458,409

Total Number of Deals: 1,404

Av. Deal Amount: 25,937

Medical Outpatient Expenses

Total Loaned Amount: 14,380,000

Total Number of Deals: 1,086

Av. Deal Amount: 28,196

Personal Vacation

Total Loaned Amount: 7,465,000

Total Number of Deals: 487

Av. Deal Amount: 26,756

Vacation

Total Loaned Amount: 3,652,530

Total Number of Deals: 428

Av. Deal Amount: 21,871

Home Repairs and Improvement

Total Loaned Amount: 64,075,070

Total Number of Deals: 3,937

Av. Deal Amount: 34,842

Motorbike Purchase

Total Loaned Amount: 8,068,106

Total Number of Deals: 633

Av. Deal Amount: 27,257

Major Purchase

Total Loaned Amount: 7,867,135

Total Number of Deals: 596

Av. Deal Amount: 30,731

Payment of Utilities

Total Loaned Amount: 4,712,350

Total Number of Deals: 320

Purchase of Household Appliances

Life Events

Total Loaned Amount: 4,172,200

Car

Deal Stage

☐ (All)

☐ Closed Lost

☒ Closed Won

☒ Disbursement

☒ Fulfillment

☒ L51

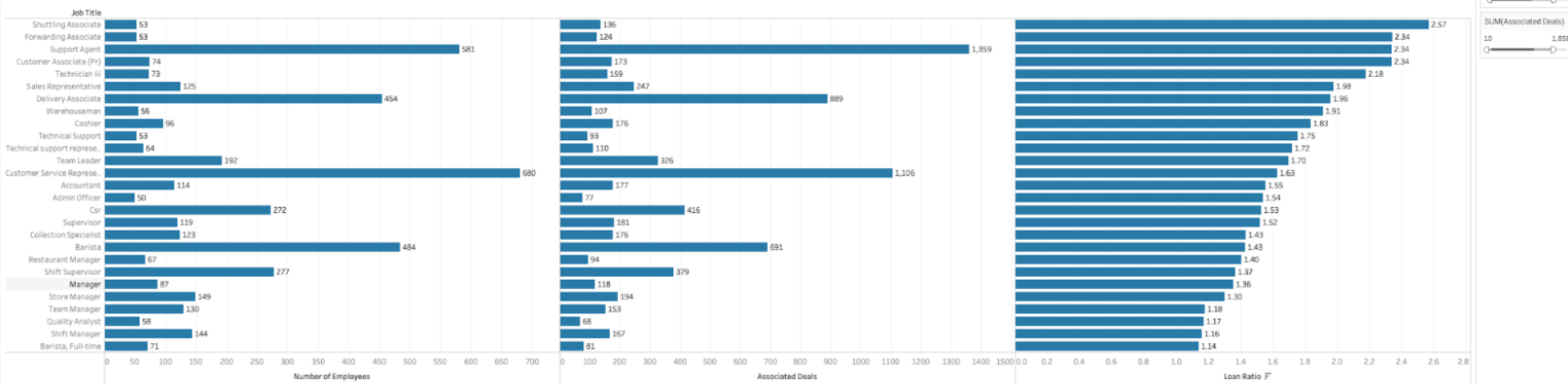
☒ L52

☒ L53

☒ Revive

Examples of BI Reporting with HubSpot Data

Loan Ratio by Job Title - Based on Sample of 12k Employees with clean data - With associated deals
(only employees with a known job title were selected)





Thank you

