How to Demo HubSpot Sales Professional

Transcript and Notes from a HubSpot Sales Engineer

What's the pitch for the new HubSpot Sales Professional? The new tools bring in artificial intelligence and advanced automation to help reps optimize their outreach and get more time back in their day. The biggest benefit? Helping teams increase the volume of high quality leads they're reaching out to while allowing for more personalized outreach with a greater chance of engagement.

Kicking off the call...

We're really excited about the direction of the Sales Professional product. I'm happy to give you a sneak peek of some of the features HubSpot will be bringing to Sales Professional come November, but I want to clarify that the features I'm showing you are currently in beta, so some things may end up changing slightly.

[If this demo is in the context of a buying decision or closing a sale, add: So, we hope you'll buy the product for where it's at today and continue to see value over time. But, you should not decide to buy based on a feature being made available in the future.]

Prioritizing leads...

Start the demo with the contact record. Ask how they are prioritizing leads today. This could be coming from Sales Ops, Marketing and using filtering criteria to find and sort. Introduce Predictive Lead Scoring as a solution to identifying highest quality leads in an automated fashion. Why is it important? To ensure your sales team prioritizes spending time on the most qualified prospects (only on less qualified when they have more time). HubSpot is working behind the scenes to identify these contacts to quantify how likely they are to become a customer. We are surfacing this information for your reps and here are two ways you can use it:

- Sort highest to lowest (organizing leads to prioritize time)
- Introduce automation when they meet a certain lead score so you can follow up in real time (timing factor is crucial) by creating a task.

Make it clear that you can use these tools to make your CRM work **for** your sales team. Tip: You can also use Predictive Lead Score in combination with specific properties like industry or job title to determine fit.

Optimizing Outreach...

Transition to discussing how you would communicate with these prospects after they've been prioritized. Speak to templates, documents, and sequences.

Automating the Sales Process...

Ask them how their internal actions are coordinated today? They are like using saved filters to manually reach out to contacts, and lead owners are also likely assigned manually. HubSpot has always done a good job at organizing and displaying that data but what about automating that process? We have added features to make the CRM pro-actively work for you. From the contact record you can click "Manage workflow memberships" button in the "Workflow memberships" card (you'll need to open it first if it's collapsed). This brings you to the page where you see all the workflows a contact has been enrolled in. You can click on any of the workflows listed to open it and check out how it's built. Discuss some examples to illustrate how they would use automation. (Side note - it's best to create example workflows that show only the triggers and actions supported by Sales Professional):

Transition to Deals for managing pipeline with a focus on Products as a new feature:

- Reduce manual entry of products and amounts and adding up totals, reduce errors, better reporting
- Amount is filled out dynamically
- Anyone who looks at the deal knows what the person bought and for how much

Segway into reporting as a way to track performance in real time and provide insights to make adjustments to reach goals:

- Forecasting for individuals and teams
- Track if revenue targets being met with goals
- Understanding how deals are progressing through the pipeline
- If you need to report on how various segments are operating (Team, Industry, Location, Product, Pipeline) then custom reporting is needed so you can report on those segments individually/separately