

1

Lead Registration

WHY IS IT IMPORTANT?

1. **Owning the Sales Process** – HubSpot's direct sales team will not reach out to partner registered contacts
2. **Your CAM** – CAMs personal success is directly tied to your success. CAMs are comped based on partner registered deals
3. **HubSpot Marketing** – HubSpot can send more relevant marketing messages to partner registered contacts
4. **Partner Tiers** – MRR credit for the tiers program is recognized for registered prospects who purchase HubSpot
5. **Agency Commission** – Receive revenue share on licenses sold based on if the prospect is registered or "tagged" to your agency



Registration Principles

- Register EARLY! Ideally before you even bring up Inbound Marketing/HubSpot
- Register your current clients – these are your lowest hanging fruit
- Register prospects as you have a selling opportunity

Registration Capacity Rules

1. Agencies can have up to **500 contacts** registered at a time*
2. Contacts are **registered for 1 YEAR** and will then expire**

**HubSpot Diamond Tiered Partners are allowed 1,000 registered contacts at a given time*

***Partners can re-register leads at any time*



One-Time Registration Instructions

In the next few slides, you will set-up CRM defaults to make registration easy and repeatable for the future



NOTE:

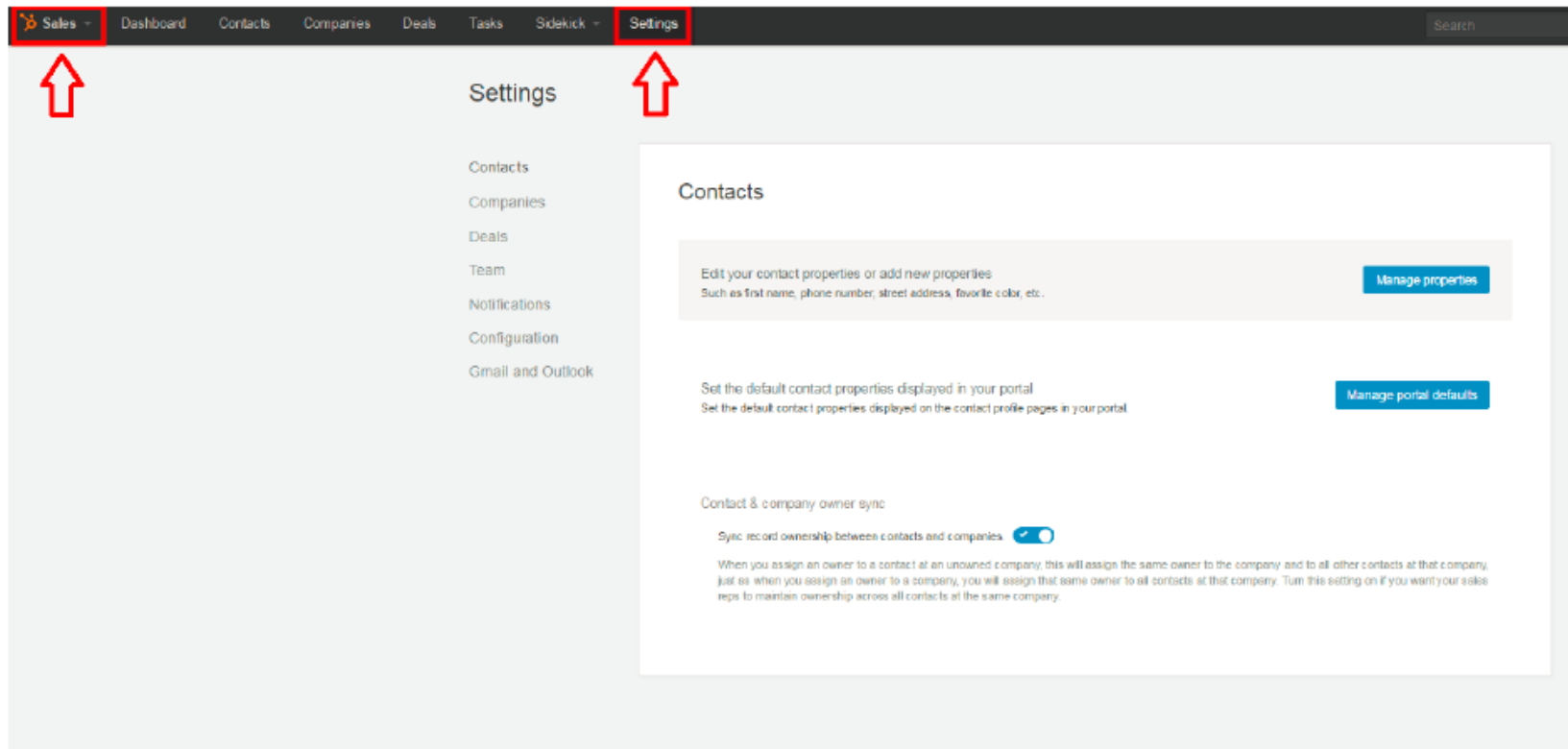
If you do not have the HubSpot CRM, you can do the following and then skip to Step 3.

You may need to first switch to the updated contact record view released Sept. 2015

1. Under the “Contacts” tab, select “Contacts Home” and select any individual
2. Select the gear in the top right corner and then “Manage Properties”

The screenshot shows the HubSpot CRM interface for a contact named Becca Goldring. The top navigation bar includes 'Marketing', 'Dashboard', 'Content', 'Social', 'Contacts', and 'Reports'. The 'Contacts' tab is active. The contact's profile information is shown on the left, including fields for HubID, Company Name, Website URL, First Name, Last Name, Email, Phone Number, and location. A dropdown menu is open over the 'Manage properties' option, which is highlighted with a red box. The right side of the screen shows a timeline of recent communications, including an email sent on 09/10/2015 and another on 09/15/2015.

Step 1: On the SALES tab, select “Settings”



The screenshot shows the top navigation bar of a CRM system. The 'Sales' tab is selected and highlighted with a red box. Below it, the 'Settings' menu item is also highlighted with a red box and a red arrow pointing to it. The main content area displays the 'Settings' page for 'Contacts', with a red arrow pointing to the 'Settings' title. The page includes a sidebar with navigation options: Contacts, Companies, Deals, Team, Notifications, Configuration, and Gmail and Outlook. The main content area has a 'Contacts' section with three main areas: 'Edit your contact properties or add new properties' (with a 'Manage properties' button), 'Set the default contact properties displayed in your portal' (with a 'Manage portal defaults' button), and 'Contact & company owner sync' (with a toggle switch).

Sales - Dashboard Contacts Companies Deals Tasks Sidekick - Settings Search

Settings

Contacts

Companies

Deals

Team

Notifications

Configuration

Gmail and Outlook

Contacts

Edit your contact properties or add new properties
Such as first name, phone number, street address, favorite color, etc. [Manage properties](#)

Set the default contact properties displayed in your portal
Set the default contact properties displayed on the contact profile pages in your portal. [Manage portal defaults](#)

Contact & company owner sync

Sync record ownership between contacts and companies

When you assign an owner to a contact at an unowned company, this will assign the same owner to the company and to all other contacts at that company, just as when you assign an owner to a company, you will assign that same owner to all contacts at that company. Turn this setting on if you want your sales reps to maintain ownership across all contacts at the same company.

Step 2: Select “Manage Portal Defaults”

The screenshot shows a CRM interface with a top navigation bar containing 'Sales', 'Dashboard', 'Contacts', 'Companies', 'Deals', 'Tasks', 'Sidekick', and 'Settings'. A search bar is located in the top right corner. The main content area is titled 'Settings' and features a left-hand sidebar with the following menu items: 'Contacts', 'Companies', 'Deals', 'Team', 'Notifications', 'Configuration', and 'Gmail and Outlook'. The 'Contacts' section is active, displaying a 'Contacts' sub-header. Below this, there are three main configuration areas: 1. 'Edit your contact properties or add new properties' with a 'Manage properties' button. 2. 'Set the default contact properties displayed in your portal' and 'Set the default contact properties displayed on the contact profile pages in your portal', with a 'Manage portal defaults' button highlighted by a red box and a red arrow pointing to it. 3. 'Contact & company owner sync' with a toggle switch for 'Sync record ownership between contacts and companies' which is currently turned on. A descriptive paragraph explains that this setting assigns the same owner to both the contact and the company, and to all other contacts at that company, to maintain ownership across all contacts at the same company.

Sales - Dashboard - Contacts - Companies - Deals - Tasks - Sidekick - Settings Search

Settings

- Contacts
- Companies
- Deals
- Team
- Notifications
- Configuration
- Gmail and Outlook

Contacts

Edit your contact properties or add new properties
Such as first name, phone number, street address, favorite color, etc. [Manage properties](#)

Set the default contact properties displayed in your portal
Set the default contact properties displayed on the contact profile pages in your portal. [Manage portal defaults](#)

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Step 3: Add Default Properties

Type to search a property in the box and it will appear below under “Contact Information” (fig.1). Select the property and it will appear on the right side under “Current Properties” (fig. 2). A property will appear faded on the left side when you have successfully added it to the right side.

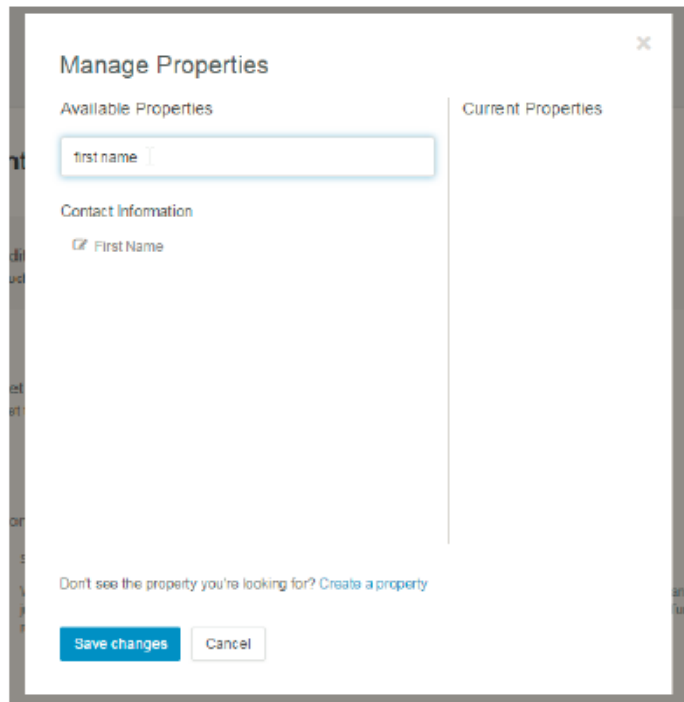


Fig. 1

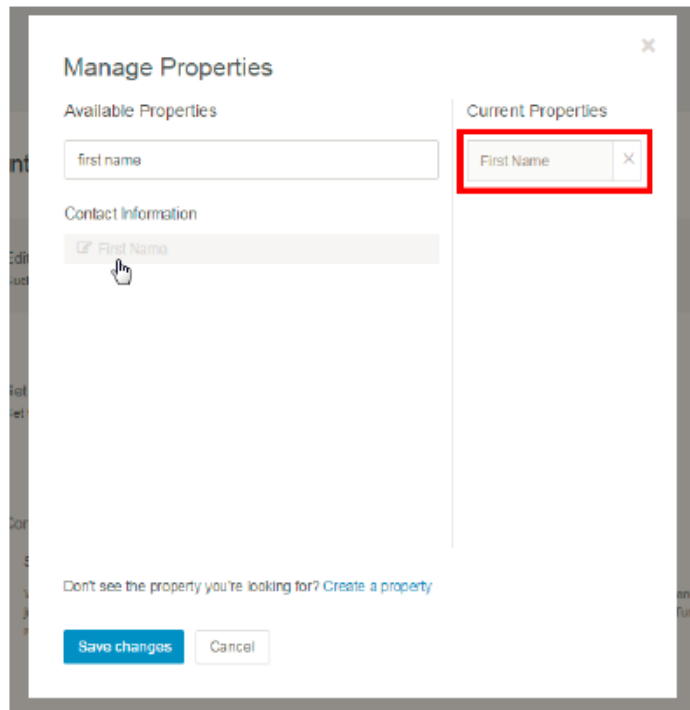
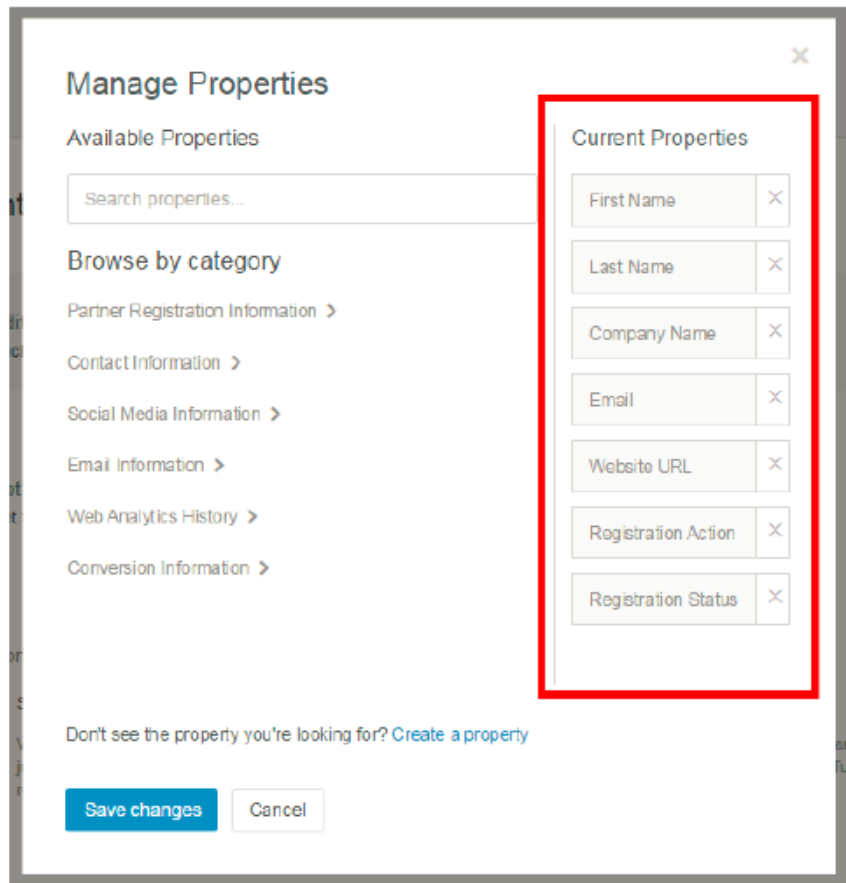


Fig. 2

Step 4: Add Required Registration Properties

Repeat the process from Step 3 to set the required contact registration properties as default properties



The screenshot shows the 'Manage Properties' interface. On the left, there is a sidebar with 'Available Properties' and a search bar. Below that are categories: 'Partner Registration Information', 'Contact Information', 'Social Media Information', 'Email Information', 'Web Analytics History', and 'Conversion Information'. At the bottom of the sidebar are 'Save changes' and 'Cancel' buttons. The main area is titled 'Current Properties' and contains a list of properties: 'First Name', 'Last Name', 'Company Name', 'Email', 'Website URL', 'Registration Action', and 'Registration Status'. Each property has a small 'x' icon to its right. A red rectangular box highlights this entire 'Current Properties' list.

REQUIRED:

- FIRST NAME
- LAST NAME
- COMPANY NAME
- EMAIL
- WEBSITE URL
- REGISTRATION ACTION
- REGISTRATION STATUS



Step 5: Save Changes

Manage Properties ✕

Available Properties

Browse by category

- Partner Registration Information >
- Contact Information >
- Social Media Information >
- Email Information >
- Web Analytics History >
- Conversion Information >

Current Properties

| | |
|---------------------|---|
| First Name | ✕ |
| Last Name | ✕ |
| Company Name | ✕ |
| Email | ✕ |
| Website URL | ✕ |
| Registration Action | ✕ |
| Registration Status | ✕ |

Don't see the property you're looking for? [Create a property](#)

Save changes Cancel



NOTE:

You are welcome and encouraged to create additional default properties to the contact view of your Hubspot CRM; however, these first seven are required.



On-Going Registration Instructions

After setting defaults, you'll only complete steps 6-9
to trigger registration for a contact



Step 6: Under "Contacts", select a name to register

Sales Dashboard **Contacts** Companies Deals Tasks Sidekick Settings Search sales.hubspot.com Hub ID: 152363

All contacts 5,755 contacts • Standard view search all contacts in this view... + Add contact

| | Name | Email | Phone | Lead Status | Create Date |
|--------------------------|----------------------|-------------------------------------|------------------|-------------|-------------|
| <input type="checkbox"/> | Alba Gonzalez Alonso | agonalcalonso@hubspot.com | - | - | 10/09/2015 |
| <input type="checkbox"/> | Nicole Poggen | npog2@georgetown.edu | 443-803-3257 | - | 10/09/2015 |
| <input type="checkbox"/> | Abby Reynolds | areynolds2016@student.hull.edu | +17573532796 | - | 10/09/2015 |
| <input type="checkbox"/> | James Peogram | jpeogram@umass.edu | 506-898-8814 | - | 10/07/2015 |
| <input type="checkbox"/> | Lauren Laigione | llaigione@umass.edu | 6094774121 | - | 10/07/2015 |
| <input type="checkbox"/> | Colin Halvy | colin.halvy@tufts.edu | 201230919 | - | 10/07/2015 |
| <input type="checkbox"/> | Elizabeth Courmoyer | ecourmoyer@aol.com | 7744224924 | - | 10/06/2015 |
| <input type="checkbox"/> | Michael Myers | myers.mich@husky.neu.edu | 9782576549 | - | 10/06/2015 |
| <input type="checkbox"/> | Jenrie Vitdzis | vitdzis.j@husky.neu.edu | 617-360-1545 | - | 10/06/2015 |
| <input type="checkbox"/> | Ellen Weberg | eweberg@gus.pittstate.edu | 9193148541 | - | 10/06/2015 |
| <input type="checkbox"/> | Bao-Guyen Nguyen | brnguyen@mit.edu | (508)4442117 | - | 10/06/2015 |
| <input type="checkbox"/> | Kelsey Torry | ktorry@fiana.providence.edu | 617-540-1542 | - | 10/06/2015 |
| <input type="checkbox"/> | Jeno Kaufman | jkaufm1@syr.edu | 9732247910 | - | 10/05/2015 |
| <input type="checkbox"/> | Andre Washington | andrews.washington@gmail.com | 3144352953 | - | 10/05/2015 |
| <input type="checkbox"/> | Jessica Locca | locca.j@husky.neu.edu | 7326-02105 | - | 10/05/2015 |
| <input type="checkbox"/> | Juliana Fellows | fellows.juliana@gmail.com | 314-58304236 | - | 10/04/2015 |
| <input type="checkbox"/> | Chelsea Bonner | cbonner@u.mail.speiman.edu | 2164817803 | - | 10/04/2015 |
| <input type="checkbox"/> | Chloe Resko | chloe.resko@tufts.edu | 5089819883 | - | 10/04/2015 |
| <input type="checkbox"/> | Christopher Lewitzke | clwitz@gmail.com | +55 33-9123-2929 | - | 10/04/2015 |
| <input type="checkbox"/> | Michael Anderson | manderson@stanford.edu | 7039091442 | - | 10/03/2015 |
| <input type="checkbox"/> | Emily Halpern | emilyhalpern2016@u.northwestern.edu | 8478298936 | - | 10/02/2015 |
| <input type="checkbox"/> | Samantha Levin | slevin3@u.xc.hester.edu | 6175283956 | - | 10/02/2015 |
| <input type="checkbox"/> | Sophia Calkonen | sophiacalkonen@ccn.net | 2087207823 | - | 10/01/2015 |

Create report from view: https://app.hubspot.com/contacts/152363/contacts

View options: Create view, Clone this view, Make this view default, Export all in view

1 2 3 4 5 6 7 8 9 10 11 130

Step 7: Fill Out Contact Registration Information

The screenshot displays a CRM interface for a contact named Rebecca Goldring. On the left, the 'ABOUT REBECCA' section is highlighted with a red box, containing the following details:

- First Name: Rebecca
- Last Name: Goldring
- Email: rgoldring@hubspot.com
- Company Name: Hubspot
- Website URL: www.hubspot.com

Below this section are fields for 'Registration Action' and 'Registration Status', and a 'View all properties' button.

On the right, a toolbar offers actions: 'New note', 'Email', 'Call', '+ Log activity', 'Create task', and 'Schedule'. Below the toolbar is a note-taking area with a text input field and a rich text editor. The timeline below shows two email interactions from October 2015:

- OCTOBER 2015**
- Rebecca Goldring opened a tracked email Re: Invitation: Hubspot + Dragonfly Editorial | PBE Review @ Thu Oct 15, 2015 12pm - 1pm (sam@dragonflyeditorial.com) Today at 4:41 PM UTC-04:00
- Rebecca Goldring was sent a tracked email Re: Invitation: Hubspot + Dragonfly Editorial | PBE Today at 4:39 PM UTC-04:00

Step 8: Select “Request Registration” and **SAVE**

The screenshot displays the HubSpot CRM interface for a contact named Rebecca Goldring. On the left, the contact's profile is shown with fields for First Name (Rebecca), Last Name (Goldring), Email (rgoldring@hubspot.com), Company Name (Hubspot), and Website URL (www.hubspot.com). A red box highlights the 'Registration Action' dropdown menu, which is currently open, showing 'Request Registration' as the selected option. Below the dropdown is a 'View all properties' button. On the right, a timeline of interactions is visible, including two email events from October 15, 2015, at 4:41 PM and 4:39 PM UTC-04:00, both with the subject 'Rebecca Goldring opened a tracked email Re: Invitation: Hubspot + Dragonfly Editorial | PBE Review @ Thu Oct 15, 2015 12pm - 1pm (sam@dragonflyeditorial.com)'. The top navigation bar includes options for 'New note', 'Email', 'Call', 'Log activity', 'Create task', and 'Schedule'.

Rebecca Goldring
Job title

ABOUT REBECCA

First Name Rebecca
Last Name Goldring
Email rgoldring@hubspot.com
Company Name Hubspot
Website URL www.hubspot.com

Registration Action

Registration Status
Request Registration

View all properties

DEALS

New note Email Call + Log activity Create task Schedule

Start typing to leave a note...

Filter timeline...

OCTOBER 2015

Rebecca Goldring opened a tracked email Re: Invitation: Hubspot + Dragonfly Editorial | PBE Review @ Thu Oct 15, 2015 12pm - 1pm (sam@dragonflyeditorial.com) Today at 4:41 PM UTC-04:00

Show interaction

Rebecca Goldring was sent a tracked email Re: Invitation: Hubspot + Dragonfly Editorial | PBE Review @ Thu Oct 15, 2015 12pm - 1pm (sam@dragonflyeditorial.com) Today at 4:39 PM UTC-04:00

Show interaction

WAIT 15-30 SECONDS

When you register a contact, HubSpot will check to see if the contact's company already exists in the HubSpot database or create a new record for the company if it does not.



Step 9: Check Property “Registration Status”

3 Possible Outcomes:

1. **Registered** – **This contact has been successfully tagged to your agency.** Your agency owns the sales process. If the company purchases HubSpot, you will receive new business credit for tiers and a 20% commission on the HubSpot license.

There is one caveat to this situation where you may not receive commission which is described in more detail on the next slide.

2. **Unavailable** – This contact is owned by a HubSpot rep and will not be eligible for registration or the 20% commission.

When a contact comes back as “Unavailable” **let your CAM know immediately.** Your CAM is your HubSpot advocate and can help you explore the potential for a coordinated sales processes.

3. **Invalid Data** – One of the required contact properties is not filled in (First Name, Last Name, Email, Company Name, Website URL) Please return to Step 7.

Step 10: Register Additional Contacts!

- Return to Step 6 and register other contacts in your database

NOTE:

- Because you set up **Default Properties**, when you or anyone else on your team adds a new contact to the CRM manually, you will always be prompted with the required contact registration properties.



Step 11: Setting up workflows for registration (Professional and Enterprise only)

- Who at your agency will handle lead registration?
- Setup 3 workflows:
 - Unavailable
 - Expiring
 - Invalid Data
- Would you like to me to set these up for you in your portal or would you prefer to set them up?



FAQ:

Q: How can I tell if a contact is expired?

A: After 1 year, their “Registration Status” property will change to “Expired”

Q: Can I re-register an expired contact?

A: Yes. Once a contact expires, just complete Step 8 again.

Q: What if I have a prospect who is a good fit for HubSpot, but not a fit for my services?

A: Register this contact and let your CAM know to reach out to run a sales process focused on software rather than services. You can still receive commission on situations like this!

Q: I have a potential/current client who is already a HubSpot customer. Can I get commission on their license if I sign an inbound marketing services retainer with them?

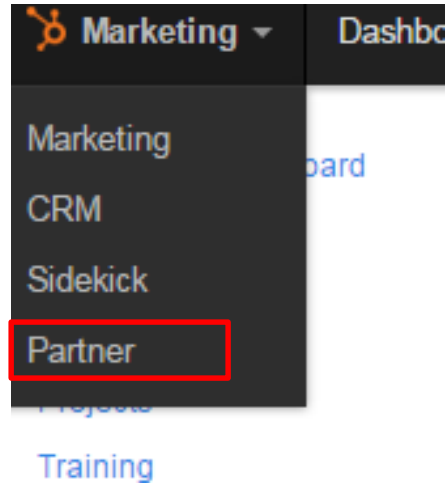
A: No. However, the value of their HubSpot license will count toward your “managed MRR” when assessing your HubSpot Partner Agency Tiers status if you do sign the inbound marketing services retainer.

Q: What is “MRR”?

A: Monthly Recurring Revenue. If a customer pays 12,000/year for their HubSpot license, their MRR is \$1,000.

What is the Partner Dashboard?

- Manage your clients on HubSpot
- Track client success
- View your agency's Tier status



Current Tier Status:

Gold



Grandfathered tier:

Platinum



Median app usage:



Partner certified:



SILVER



GOLD



PLATINUM



DIAMOND



\$4,833 12 month sold MRR

Next update in 17 hours



Based on 4 qualifying clients

\$625

\$1,125

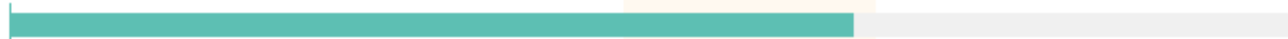
\$3,750

\$10,000



\$14,081 Managed MRR

Next update in 17 hours



Based on 13 qualifying clients

\$2,500

\$4,500

\$15,000

\$40,000

Tiers are calculated by the number of clients you've sold to in the last 12 months plus your managed clients

Total Clients (22)

Unmanaged (9)

Managed (13)

Sold (15)

Sold MRR (4)

Not Sold (7)

How Partner Commissions are Paid

- Commissions are paid quarterly, around 45 days after the close of the quarter

For example, if you sign up a client on a Professional 1k edition (\$800 / mo, \$9,600 for the year)

- The partner commission is 20% or \$160 monthly
- Q1 payout would be around May 15th, and would reflect the months of January, February and March, $\$160 * 3 = \480 total payout for the quarter

Questions? Email Varcommissions@hubspot.com



Next Steps

- Complete partner contract, account information form, and W-9 (or W-8BEN-E)
- Register 2 leads minimum
- Send me an email confirming these are complete prior to your kickoff call