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

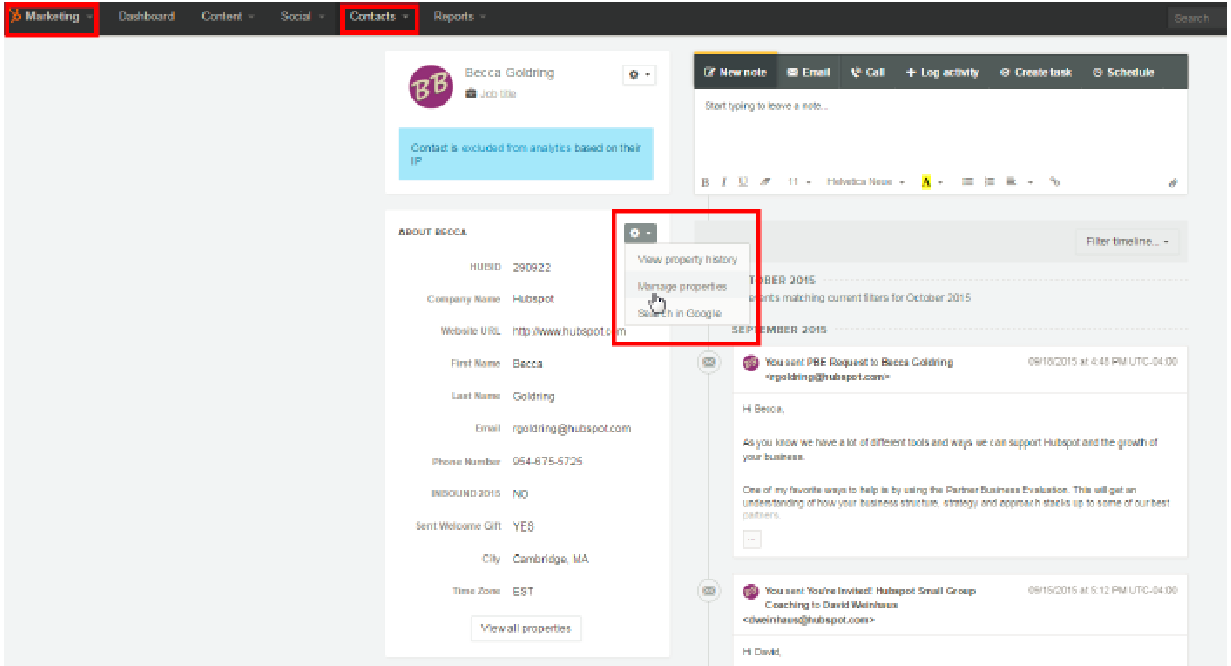
In the next few slides, you will set-up CRM defaults to make registration easy and repeatable for the future

NOTE:

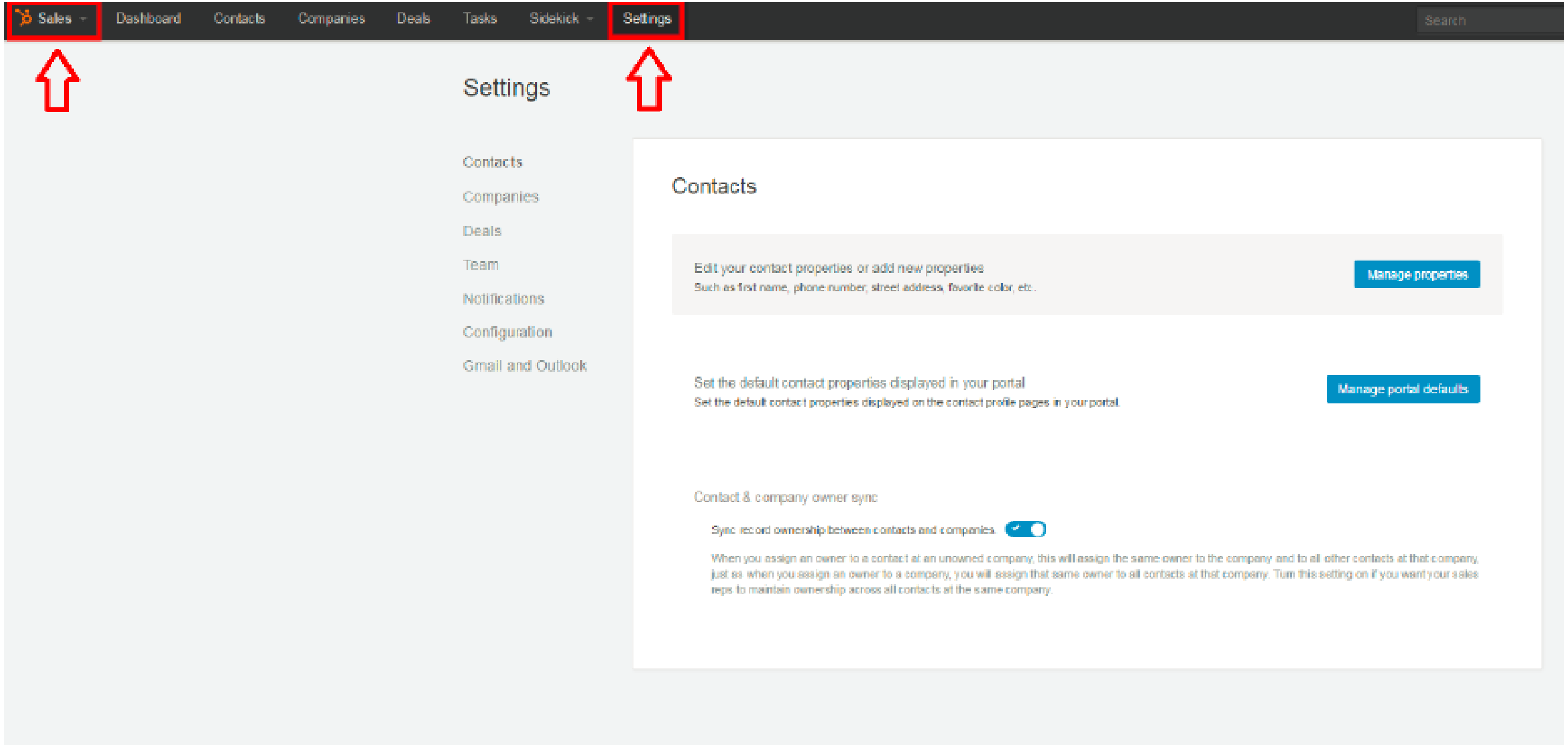
If you do not have the HubSpot CRM, you can do the following and then skip to Step 3.

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

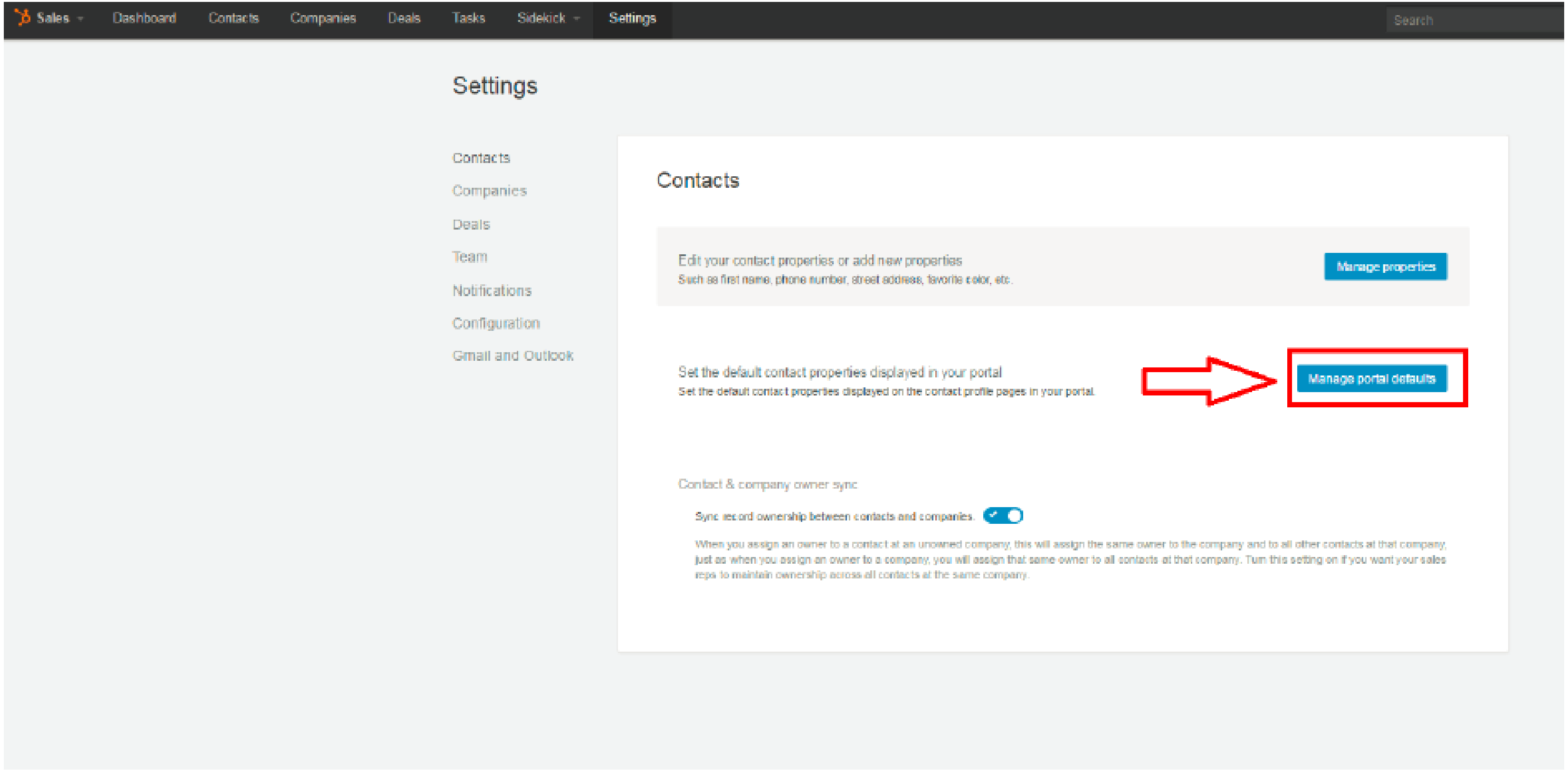
1. Under the “Contacts” tab, select “Contacts Home” and select any individual
2. Select the gear in the top right corner and then “Manage Properties”



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



Step 2: Select “Manage Portal Defaults”



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.

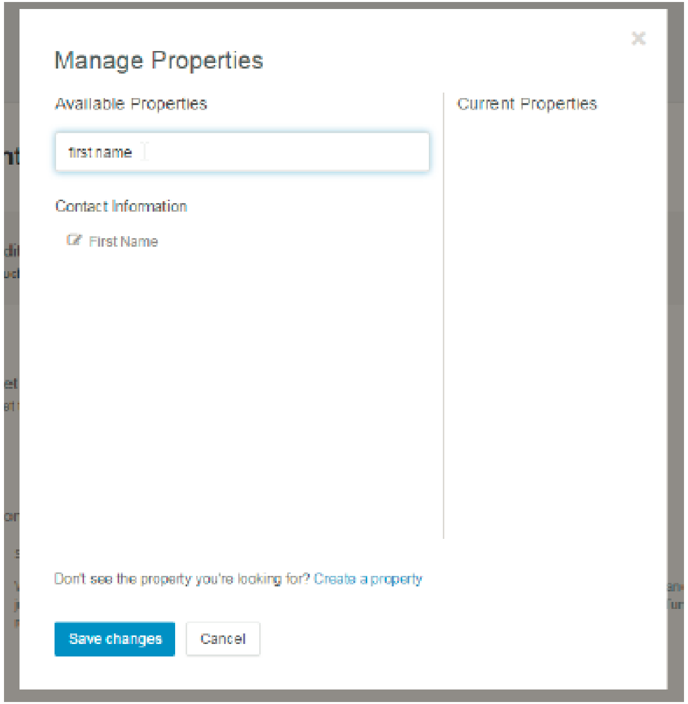


Fig. 1

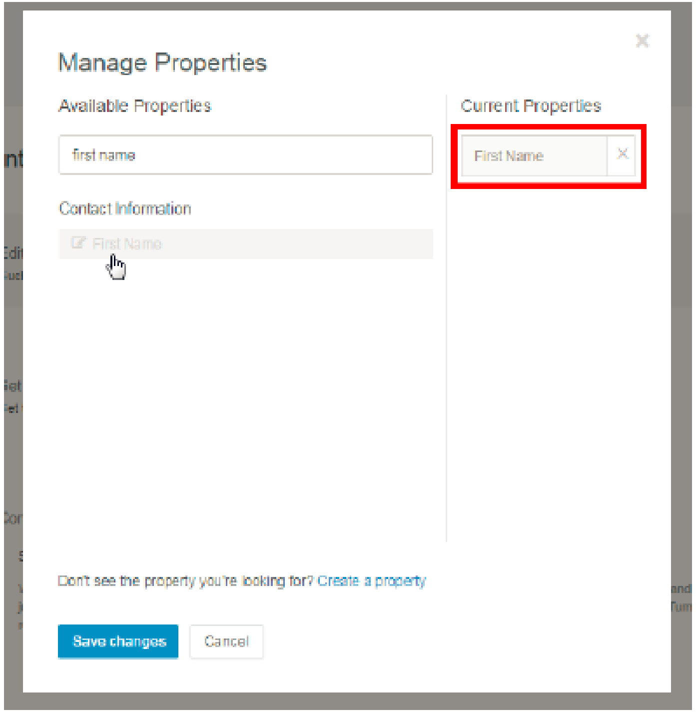
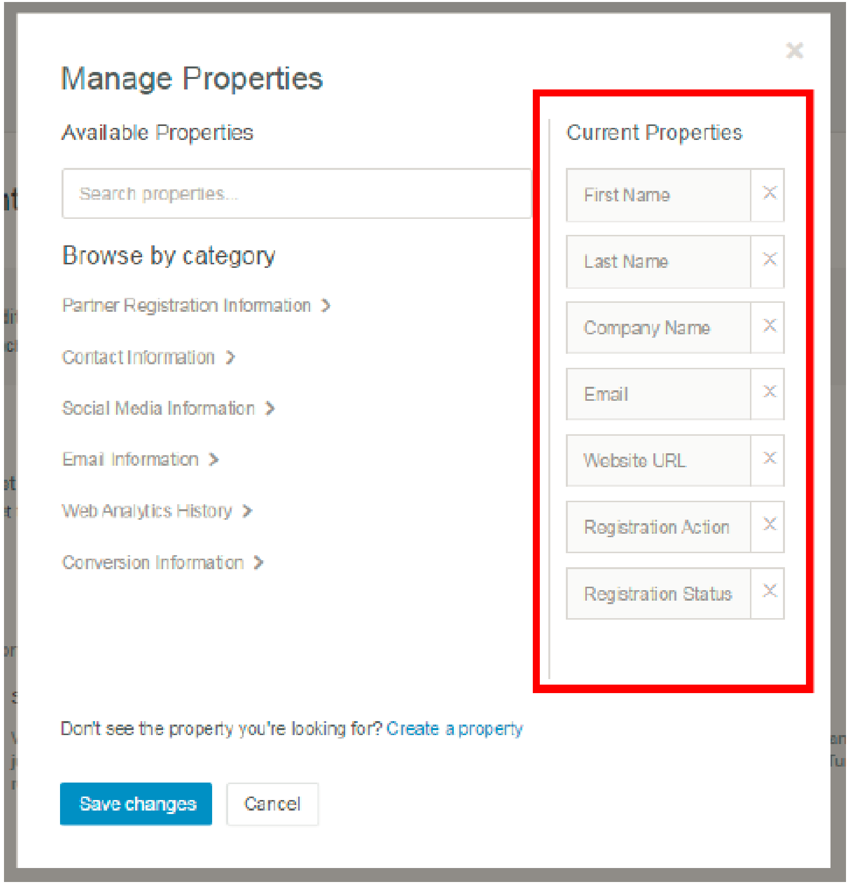


Fig. 2

Step 4: Add Required Registration Properties

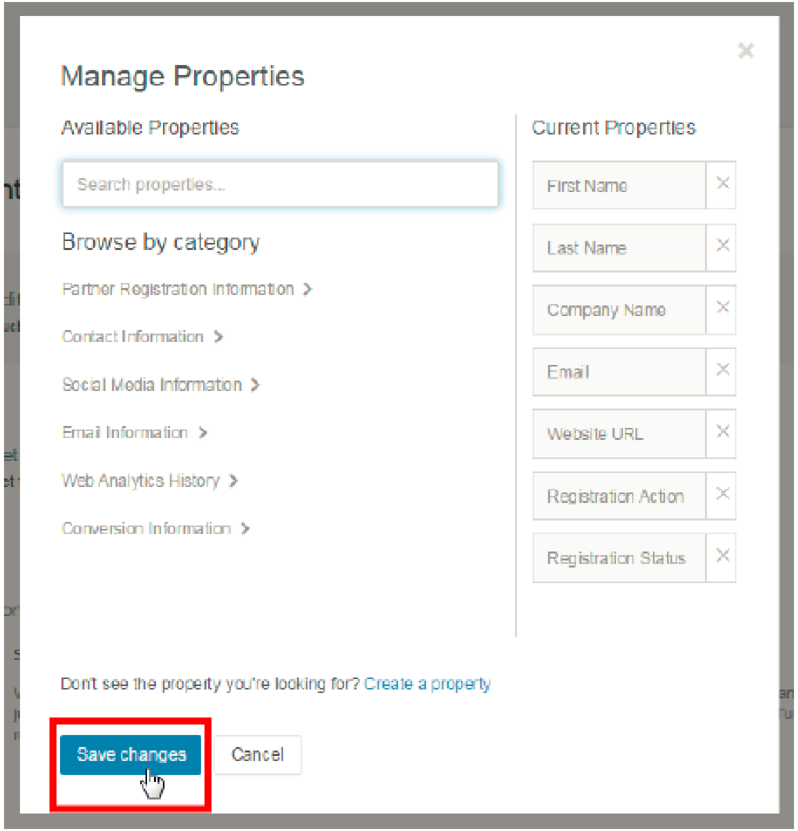


Repeat the process from Step 3 to set the required contact registration properties as default properties

REQUIRED:

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

Step 5: Save Changes



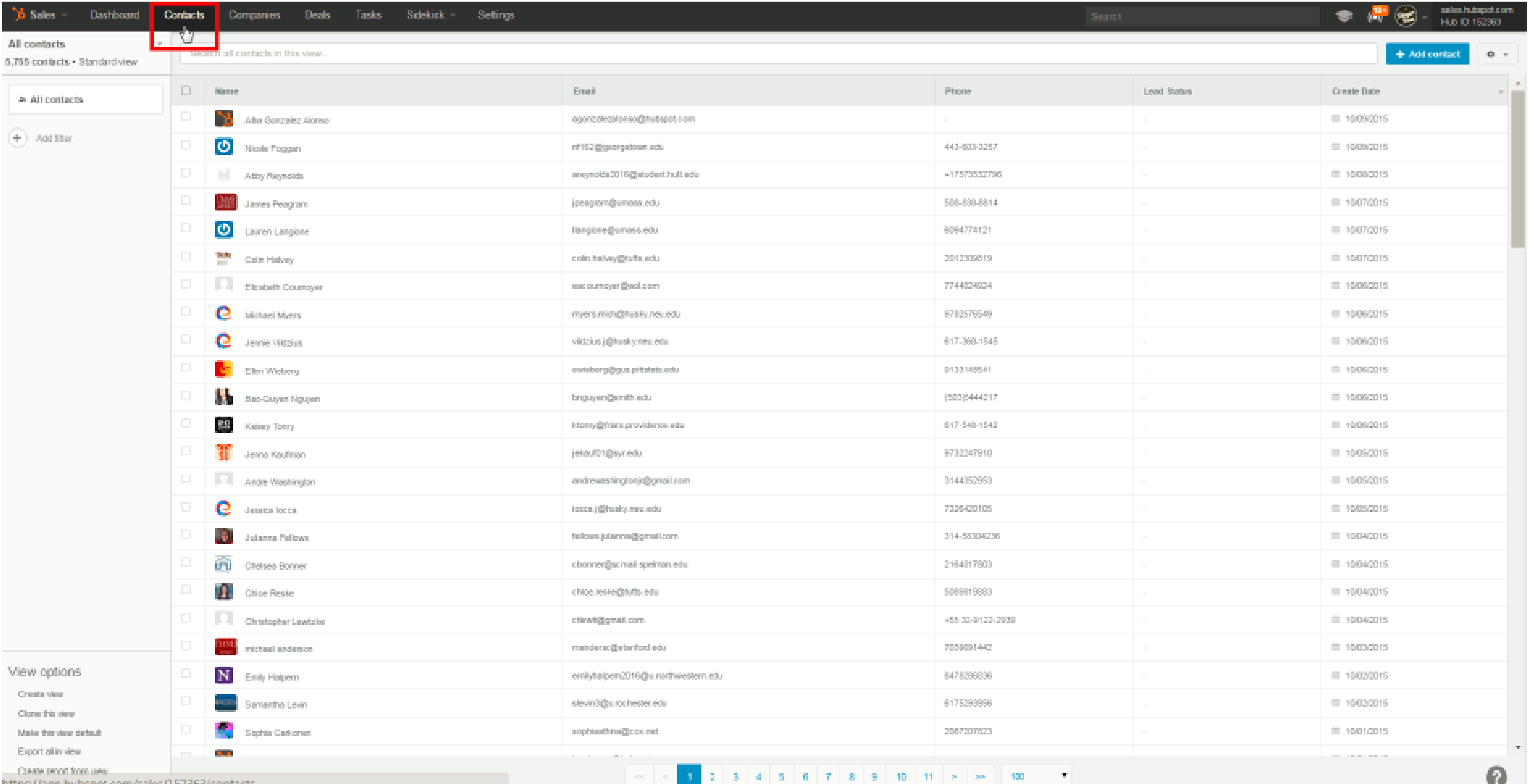
NOTE:

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

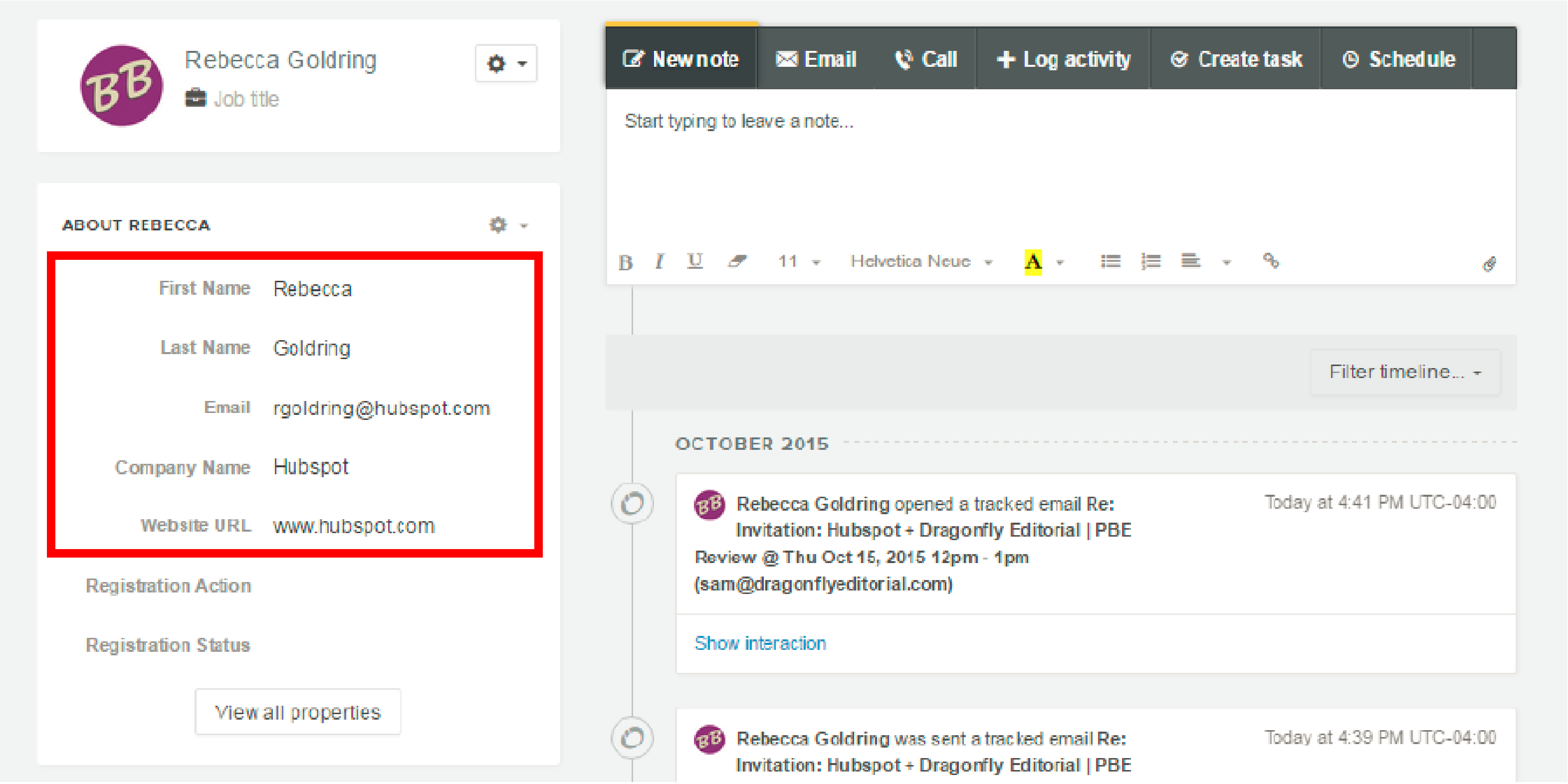
On-Going Registration Instructions

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

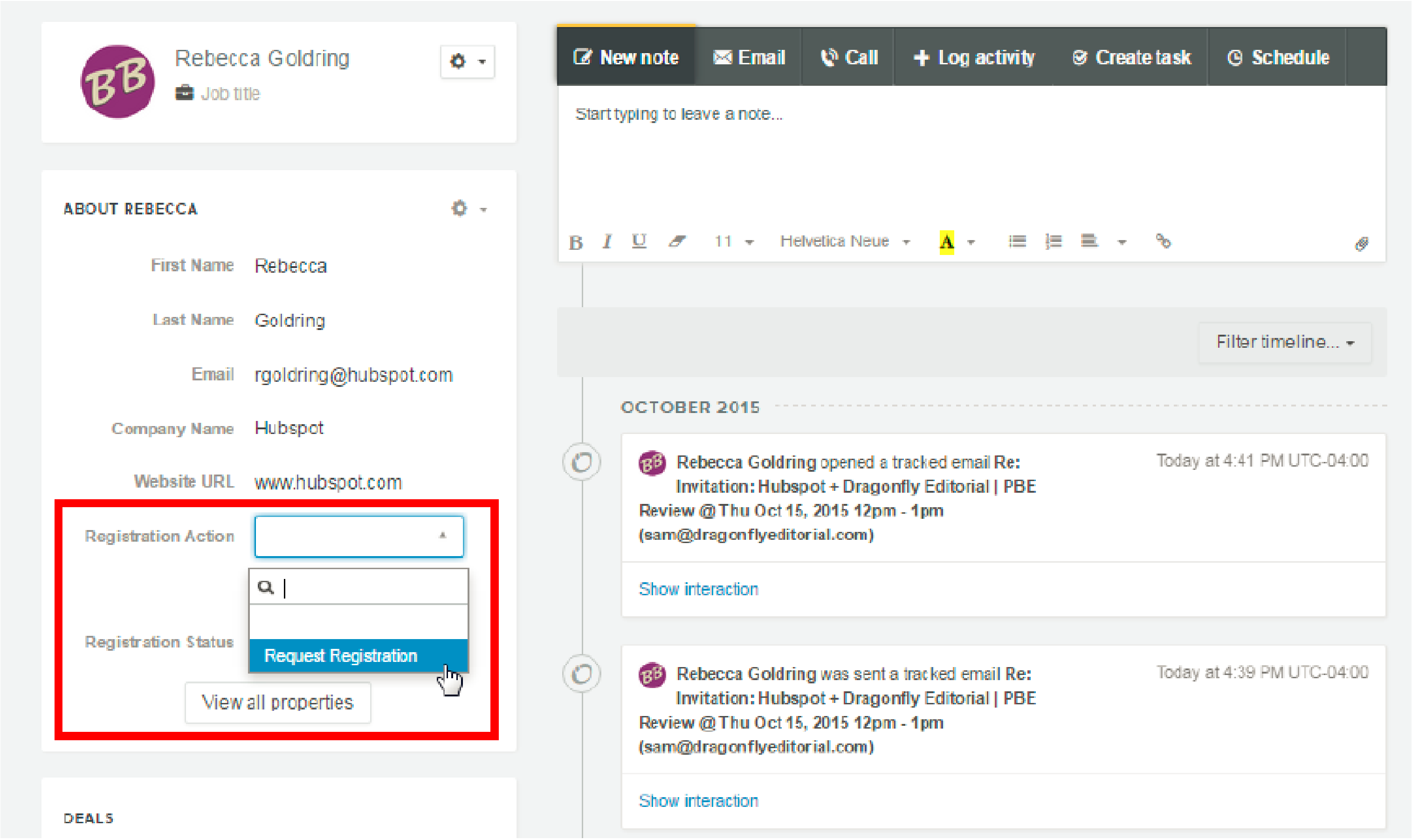
ep 6: Under “Contacts”, select a name to regist



Step 7: Fill Out Contact Registration Information



Step 8: Select "Request Registration" and SAVE



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?

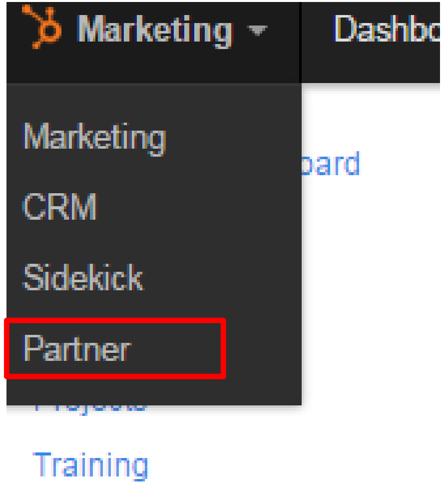
A: No. However, the value of their HubSpot license will count toward your “managed MRR” when assessing your HubSpot Partner Agency Tiers status if you do sign the inbound marketing services retainer.

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



Howdy Partner! Welcome to your new tiers dashboard. In case you missed the webinar where we introduced it, you can check it out here.

Current Tier Status:

Gold

Grandfathered tier:

Platinum

Median app usage: 6+

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