

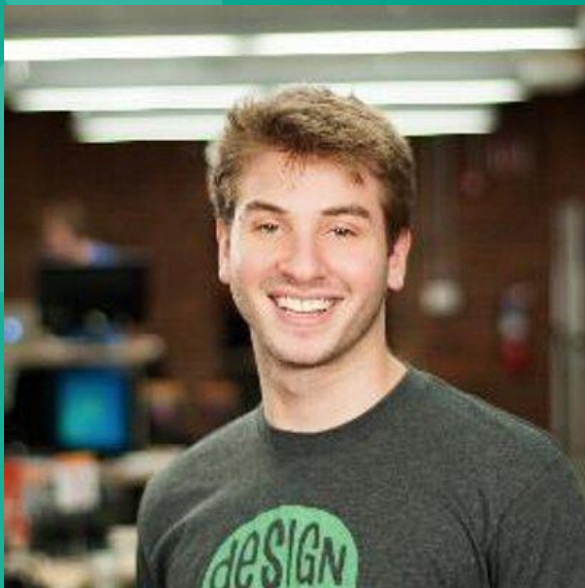
# Turning the Growth Stack into Green Stacks

How to Land Larger Retainers by Offering Sales  
Services

# AGENDA

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1. Why Sell Services for the Sales Hub
2. How to build Sales Hub Services
3. Organize, Optimize and Align in the Product
4. Putting it into Action
5. Q+A



Matt Schnitt

Director of Product,  
Sales Hub @ HubSpot



Jeff Bell

Chief Operating Officer,  
MINDSCAPE

# The MINDSCAPE Story

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MINDS  
SCAPE

TRAFFIC +  
CONVERSIONS

---

**RESULTS**

# The MINDSCAPE Story

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MINDSCAPE



HubSpot  
Academy 



# The MINDSCAPE Story

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MINDSCAPE



#PARTNERDAY18

# The MINDSCAPE Story

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MINDS  
SCAPE

**BABBITT'S**  
**ONLINE**

# The Sales Services Kickstarter



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**4-week sessions starting early June. Partner Application Deadline - May 22nd**

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**Objective:** Help partners define, package, and price Sales Services & sell their next Sales Services deal(s).

For more information & to  
apply:

**<http://bit.ly/sskinfo>**



*A Project Lion Bootcamp  
with David Weinhaus & Dan Tyre*

Please Note: Space is limited and acceptance is not assured



# The MINDSCAPE Story

MIND  
SCAPE

Get ready for more.

Increasing the performance and profitability of your digital marketing.

Prepared for  
Client

## A Growth Agency

Since our inception in 2001, MINDSCAPE has always been an agency **focused on results**. We want to ensure that you are earning a **return on your investment** when you trust us with your business. To that end, we offer both **marketing services** and **sales services** that, when combined, help to create a high-impact **end-to-end experience** for your customers.

MIND  
SCAPE

Where change is the only constant, it's vitally important that sales and marketing **align around your customer**, rather than forcing your customer to be aligned around you. Our **growth-focused** team employs **sales** and **marketing services** to provide you with our brand promise: more **leads**; more **sales**; more **profits**. We look forward to helping you grow!

We outline our recommendations for Butterball Farms, Inc. as well as our overall **sales services** and **marketing services**. We work differently in each area but we're focused on your **growth**. We view ourselves as **integral members** of the Butterball Farms, Inc. team. Our wins are our wins. We **celebrate your victories** and we are motivated to turn your **challenges into opportunities**. The following pages detail out the work we'd like to do for you to help you grow. If you care to read more about our approach to these services, continue on to the Sales Services Approach and the Marketing Services Approach sections.

The services we are recommending in each phase have **check boxes** placed next to them. Services we offer but are not currently recommending have no check boxes. Those services might be recommended at **some point** and are included here for your education of the process and to provide clarity on what we are not recommending.

The background is a solid orange color. There are several abstract circular shapes: a small solid circle on the left, a large solid circle at the bottom left, and a series of concentric circles on the top right.

# Why Sell Services for the Sales Hub

# Misconceptions

What are some of the common misconceptions agencies have about selling Sales Services?

# Common misconceptions about Sales Services

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# Common misconceptions about Sales Services

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## Common misconceptions about Sales Services

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*it's*  
Complicated

# Common misconceptions about Sales Services

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# Common misconceptions about Sales Services

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**WE'RE  
HIRING!**



# Common misconceptions about Sales Services



# Common misconceptions about Sales Services

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# Reality Check

What's the reality of introducing Sales  
Services into your offering mix?

# The reality of Sales Services

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# The reality of Sales Services

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# The reality of Sales Services

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# The reality of Sales Services

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# The reality of Sales Services

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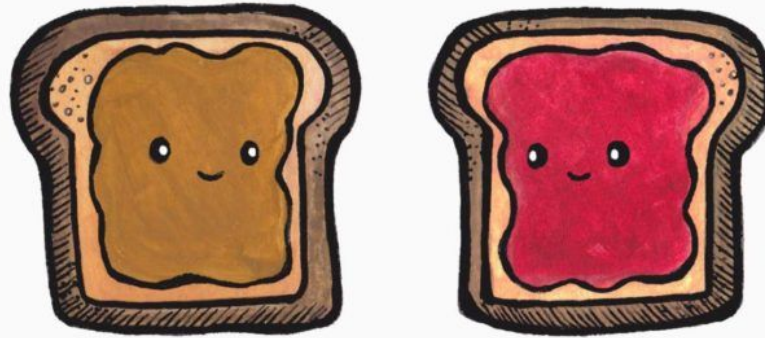
# The reality of Sales Services

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# The reality of Sales Services

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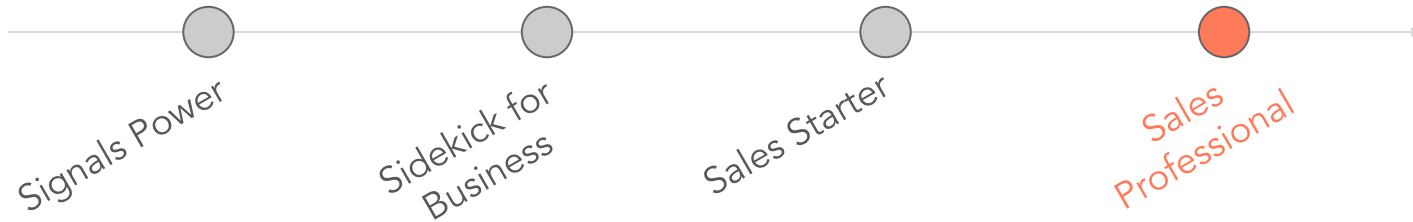
better together

# Leveraging You

The importance of partners to the Sales Hub

# The Importance of Partners to the Sales Hub

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# The Importance of Partners to the Sales Hub

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As the Sales Hub has matured, we've:

- Built for more sophisticated businesses
- Grown the size and scope of the product
- Focused more on the manager
- Invested in cross-selling Sales Hub to Marketing Hub customers

# The Importance of Partners to the Sales Hub

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The product and partners are aligned in a way they've never been before. Now is the time.

# How to build Sales Hub Services

# Use the Sales Hub for your own business

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Be your own best customer with the Sales Hub by implementing it for your own business.

- Chrome Extension
- Connect Inbox
- Create a Contact
- Standard/Custom Views
- Set up Deal Stages
- Set up Meetings tool
- Create templates & sequences
- Prospects tool
- Lead revisit notifications
- Messages



# The Sales Services Kickstarter



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**4-week sessions starting early June. Partner Application Deadline - May 22nd**

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**Objective:** Help partners define, package, and price Sales Services & sell their next Sales Services deal(s).

For more information & to  
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# Blockers

Some of our biggest blockers to getting started

# The Biggest Blocker to Getting Started

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# The Biggest Blocker to Getting Started



**NEED  
IDENTIFICATION**

# Sales Service Structure

The new structure for Sales Services

# The New Structure for Sales Services

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# The New Structure for Sales Services

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# The New Structure for Sales Services

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ALIGN SALES & MARKETING





# The New Structure for Sales Services

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# Assessing Fit

Who's a good fit for Sales Services?

# Who is a good fit for Sales Services

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Your current Marketing Hub clients represent the biggest opportunity for selling Sales Services.

- They have a sales team
- Value selling better and faster
- They have enough leads
- No CRM currently or poor use of current CRM
- No deeply-embedded CRM (ERP/Enterprise system)
- No crazy integrations required
- Values automation and optimization of sales process
- Uses no sales acceleration tools or uses a hodgepodge and is unhappy with the results and effort required to make it all work

# Working it in

How and when to approach the conversation with clients

# Approaching the conversation with Clients

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Now you have all the Services that you offer. And you know your existing Marketing customers are your best opportunity. How do you approach the conversation with clients?

- New prospects in the story/pitch > Growth Agency
- All clients in onboarding > KPI Meeting with Sales Manager
- Existing clients in reporting > High Five

The background is a solid orange color. It features several abstract circular shapes: a large, light-orange circle in the top right corner, a medium-sized solid orange circle in the middle left, and a large, light-orange circle in the bottom left corner. The text is centered in the middle of the image.

Organize, Optimize  
and Align in the  
Product

## Let's use an example company



### Biglytics

- 25 employees, 8 salespeople, 2 marketers, and a small leadership team.
- Has a legacy CRM, the sales team doesn't use it much.
- The marketers and salespeople don't work well together, aren't in the same system.
- Already have a \$5K marketing retainer with you.

# Organize

Moving Biglytics' sales team to HubSpot CRM by making it their system of record.



# Importing CRM data into HubSpot

Sales ▾

Dashboard

Contacts

Companies

Deals

Tasks


Sales Tools ▾


Reports ▾

Settings

Search

Quit Skitch







professionalann...  
Hub ID: 4021199

Imports


Start an import



**How to prepare your spreadsheet**  
Coming to HubSpot from Excel or Google Sheets? The guide below will walk you through how to prepare your files for a successful import.  
[View import guide](#)



**Download a sample spreadsheet**  
Need to see this in action first? Download this small sample file and test the import process so there are no surprises.  
[Download sample spreadsheet](#)



**Have questions?**  
Migrating data should be easy. Read the answers to all your questions about data security, file types, and troubleshooting.  
[View the FAQ](#)

Contact

Company

Deal

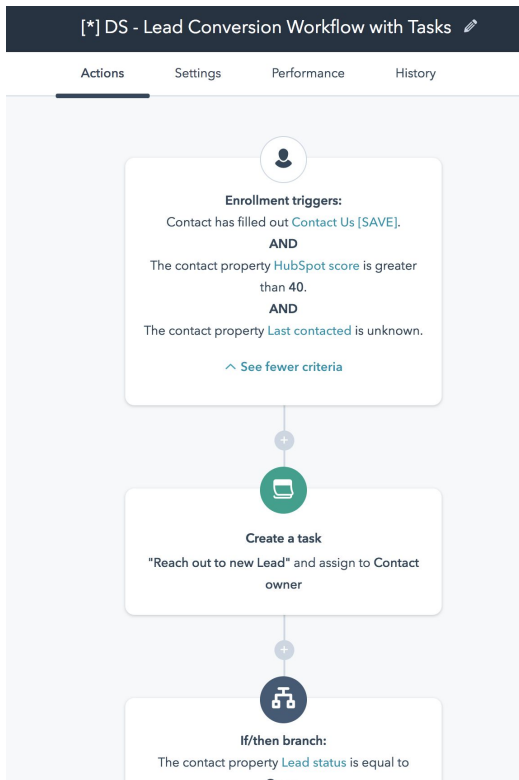
Gmail


This is where your completed imports will live. To import a list, start a new import above.

Help

#PARTNERDAY18

# Prioritizing contact outreach with tasks





**Hi, Matt Schnitt**

Your contact task "Reach out to new Lead" is due today

---

**CONTACT**  
[Scott](#)  
[sjudson@hubspot.com](mailto:sjudson@hubspot.com)

[View contact](#)

Hub ID: 99561069 [sp17-proportal.com](#)  
[Edit email settings](#)  
HubSpot, Inc.  
25 First Street, 2nd Floor  
Cambridge, MA 02141

# Organizing and managing the pipeline

### Update deal stage properties

Salesforce Information

- ☐ Aerostar Commodity
- ☐ App ID - MessageIO
- ☐ Average Budget
- ☐ Booked By
- ☐ Car Type
- ☐ Contract Signed

SELECTED PROPERTIES (2)

MRR	×	<input checked="" type="checkbox"/>
Partner or Direct	×	<input checked="" type="checkbox"/>

Save

Cancel

Preview popup

Remove all properties

# Organizing and managing the pipeline

The screenshot displays the Biglytics CRM interface. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The left sidebar shows a menu with categories like Marketing, Properties, Reports & Analytics, Sales, Branding, Call & meeting types, Calling, Deals (highlighted), Log emails in CRM, Meetings, Product Library, Sequences, Tasks, Service, and Users & Teams. The main content area is titled 'Deal Pipelines and Stages' and contains a table with the following data:

PIPELINE	DEAL STAGES		
Ecommerce Pipeline	6	Edit	Delete
Partner onboarding stage	4	Edit	Delete
Renewal Pipeline	5	Edit	Delete
[*] Sales Pipeline	10	Edit	Delete
EUR Pipeline	2	Edit	Delete
Channel Pipeline	2	Edit	Delete
+ Add another pipeline			

Below the table, there is a section titled 'Monthly Quotas' with the text 'Set monthly quotas for individual sales reps.' and a table with the following data:

HUBSPOT OWNER	QUOTA
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# Organizing and managing the pipeline

The screenshot displays the 'Deal Hygiene' interface. At the top, there's a dark header with a back arrow and 'Back to workflows' on the left, and 'Deal Hygiene' with an edit icon on the right. Below the header, there are three tabs: 'Actions' (selected), 'Settings', and 'Performance'. The main workspace shows a 'Deal enrollment trigger' configuration. It consists of two criteria connected by 'and': 'Deal stage is none of Closed Lost (Sales Pipeline) or Closed Won (Sales Pipeline)' and 'Close date is more than 14 days ago'. A checkmark icon is visible below the criteria. On the right, a teal 'Enrollment triggers' panel is open, showing the same configuration. It has tabs for 'Trigger' and 'Re-enrollment'. The 'Trigger criteria' section includes 'Clone' and 'Delete' links, the criteria text, and 'AND'/'OR' buttons. At the bottom of the panel are 'Save' and 'Cancel' buttons.

Deal Hygiene

Back to workflows

Actions Settings Performance

Deal enrollment trigger

Deal stage is none of Closed Lost (Sales Pipeline) or Closed Won (Sales Pipeline)

and

Close date is more than 14 days ago

Enrollment triggers

Trigger Re-enrollment

Trigger criteria:

Clone Delete

Deal stage is none of Closed Lost (Sales Pipeline) or Closed Won (Sales Pipeline)

and

Close date is more than 14 days ago

AND

OR

Save Cancel

# Biglytics Scenario

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- Biglytics reps are starting to use a new CRM that's deeply integrated with their marketing product.
- Sales processes are more systematized than ever before.
- Pipelines are up to date and accurate.

# Optimize

Enabling Biglytics' sales team to close more deals because they use the Sales Hub.

# Getting more out of the leads you've generated


**BIGLYTICS**[ABOUT](#)[SERVICES](#)[BLOG](#)[RESOURCES](#)[SHOP](#)[CONTACT](#)[LOGIN](#)

## 5 Signs Your Business Needs Big Data Analytics

By: Sally Smiles 9/19/17 10:00 AM

The list post is one of the most popular and readable blog formats on the web. It is composed of -- you guessed it -- a list, and includes short explanatory paragraphs about each item.

Use your introduction as a way to tell the reader how this collection of ideas will help them. Keep it light by including a personal story. If you have any data that you can include relating to your list, include that in your introduction, too.



SEARCH OUR BLOG

Search

BROWSE

BIG DATA (19)

DATA SCIENCE (9)

MARKET ANALYSIS (8)

CASE STUDIES (7)

BIG DATA ANALYTICS (5)

REPORTING (4)

INSIDER (2)

ANALYTICS (2)

PERFORMANCE REVIEW (2)

INDUSTRY (1)

see all

Link to Pillar Page

New Template

Name: 5 Signs Your Business Needs Big Data Analytics

Shared Select a Folder

Subject: 5 Signs Your Business Needs Big Data Analytics

The list post is one of the most popular and readable blog formats on the web. It is composed of -- you guessed it -- a list, and includes short explanatory paragraphs about each item.

Use your introduction as a way to tell the reader how this collection of ideas will help them. Keep it light by including a personal story. If you have any data that you can include relating to your list, include that in your introduction, too.

A

Insert: Snippets Document Token Meeting link

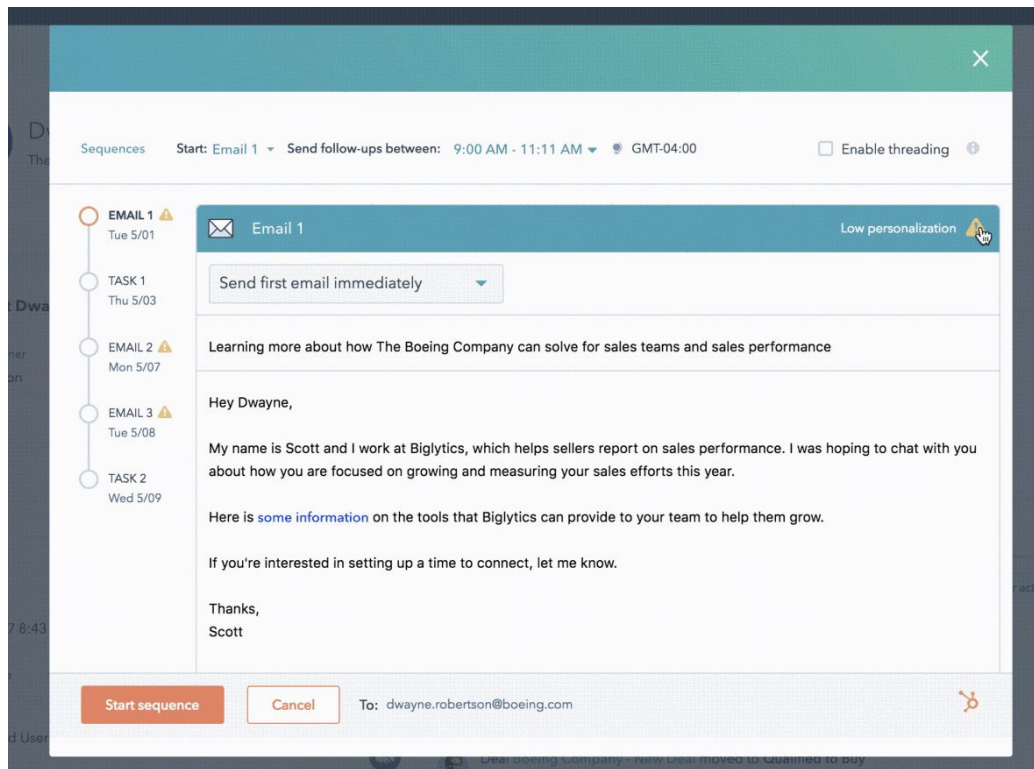
Save template

Cancel

2 Content suggestions



# Getting more out of the leads you've generated



# Getting to Revenue with Quotes

The screenshot displays a CRM interface for a deal named "Dunder Mifflin". The top navigation bar includes links for Sales, Dashboard, Contacts, Companies, Deals, Tasks, Sales Tools, and Settings, along with a search bar and user profile information.

**Deal Overview:**

- Name:** Dunder Mifflin
- Amount:** \$2,400
- Sales Pipeline:** A sequence of stages represented by circles. The first four circles are red with white checkmarks, indicating completed stages. The fifth circle is blue with a white checkmark, indicating the current stage, "Decision Maker Bought-In". The remaining three circles are empty blue circles.
- Close Date:** 02/28/2018

**Products:**

Product	Quantity	Amount
Sales Professional	x1	\$400
Marketing Professional	x1	\$700
One Time Onboarding	x1	\$1,000

Buttons: Edit products, Create quote

**About Dunder Mifflin:**

- Amount:** \$2,400
- Deal stage:** Decision Maker Bought-In
- Close date:** 02/28/2018

**Activity:**

- Activity:** New note, Email, Call, Log activity, Create task, Schedule
- Activity Feed:** April 2018. Filter activity (6/7). Activity items include: "Deal moved from Appointment Scheduled to Decision Maker Bought-In" (Apr 6 at 8:06 AM EDT) and "Dunder Mifflin was created".

**Help** button is visible in the bottom right corner.

# Getting to Revenue with Quotes

The image shows a HubSpot quote page for 'Dunder Mifflin'. The quote is prepared on April 11, 2018, with ID #20180411-104730965, for Michael Scott. A modal window for payment is overlaid, showing a credit card ending in 4242, expiring 05/20, and a total payment amount of US\$1,970.00. The quote details include a one-time onboarding fee of \$1,000.00, a marketing professional subscription of \$700.00/month (discounted from \$800.00), a sales professional subscription of \$220.00/month (discounted from \$400.00 for 45%), and a sales starter subscription of \$50.00/month. The total recurring subtotal is \$970.00/month, and the one-time subtotal is \$1,000.00, leading to a total of \$1,970.00. A 'Purchase' button is at the bottom.

HubSpot

Quote for Dunder Mifflin

Prepared on April 11, 2018 - #20180411-104730965  
For Dunder Mifflin - Michael Scott [Show details](#)

HubSpot  
mschnitt@hubspot.com [Log out](#)

One Time Onboarding \$1,000.00  
30 days with an Inbound Sales Consultant, up to 4 hours of consulting

Marketing Professional \$800.00 / month  
\$100.00 discount \$700.00 / month

Sales Professional \$400.00 / month  
45% discount \$220.00 / month  
For 1 year

Sales Starter \$50.00 / month

Recurring discount \$280.00 / month  
Recurring subtotal \$970.00 / month  
One-time subtotal \$1,000.00  
Total \$1,970.00

[Terms](#) | [Privacy](#)

[Purchase](#)

This price doesn't include any applicable taxes

# Biglytics Scenario

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- Reps are making the most out of the leads you are generating with an array of well-produced, personalized content that get them meetings.
- Reps are more effective at turning meetings into revenue.

# Align

Becoming indispensable to Biglytics by connecting their marketing and sales teams.

# Using product data for marketing automation

The screenshot displays a marketing automation platform interface. The top navigation bar includes links for Sales, Dashboard, Contacts, Companies, Deals, Tasks, Sales Tools, Reports, and Settings. A search bar is located on the right. The main header shows 'Back to workflows' and the current workflow name 'Cross-Sell Nurturing'. Below the header, there are tabs for Alerts, Set goal, Actions, Settings, Performance, and History. The 'Actions' tab is active, showing a workflow diagram. The diagram starts with a person icon, followed by a box labeled 'Enrollment triggers:' containing two conditions: 'The product property Name is equal to Sales Professional.' and 'The product property Amount is greater than 3,000.', connected by an 'AND' operator. Below the triggers box is a red circle with a plus sign and the text 'Add an action'. On the right side, a sidebar titled 'Enrollment triggers' provides configuration options. It includes a 'Trigger workflow:' section with radio buttons for 'Automatically' (selected) and 'Manually'. Below is a 'Trigger criteria:' section with a 'Test criteria' button and a list of criteria, including the one shown in the main workflow. At the bottom of the sidebar are 'Re-enrollment' options, an 'Enroll existing contacts' checkbox, and 'Save' and 'Cancel' buttons.

**Enrollment triggers**

Trigger workflow:  
☒ Automatically ☐ Manually

Trigger criteria: [Test criteria](#)

The product property Name is equal to Sales Professional.

AND

The product property Amount is greater than 3,000.

[See fewer criteria](#)

**Add an action**

**Re-enrollment:**  
Contacts won't be enrolled more than once.  
[Change re-enrollment options](#)

**Enroll existing contacts:**  
☐ Enroll contacts who already meet these criteria.  
[Calculate number of contacts](#)

[Save](#) [Cancel](#)

# Book meetings on behalf of the sales team

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Hi there,

The longer you spend on your own company website, the harder it can be to step back and understand objectively what might be causing people to drop off.

Why not take the guesswork away and use [HubSpot's Website Grader](#).

Simply enter your website url and Website Grader will calculate your company's score (between 1-100), and include personalised recommendations based on lead generation, mobile optimisation, SEO and security .

[Click here to get your website report for your company](#)

If you want to chat through your results and your strategy for 2018, let's set up time to chat-- [book time with me here](#).

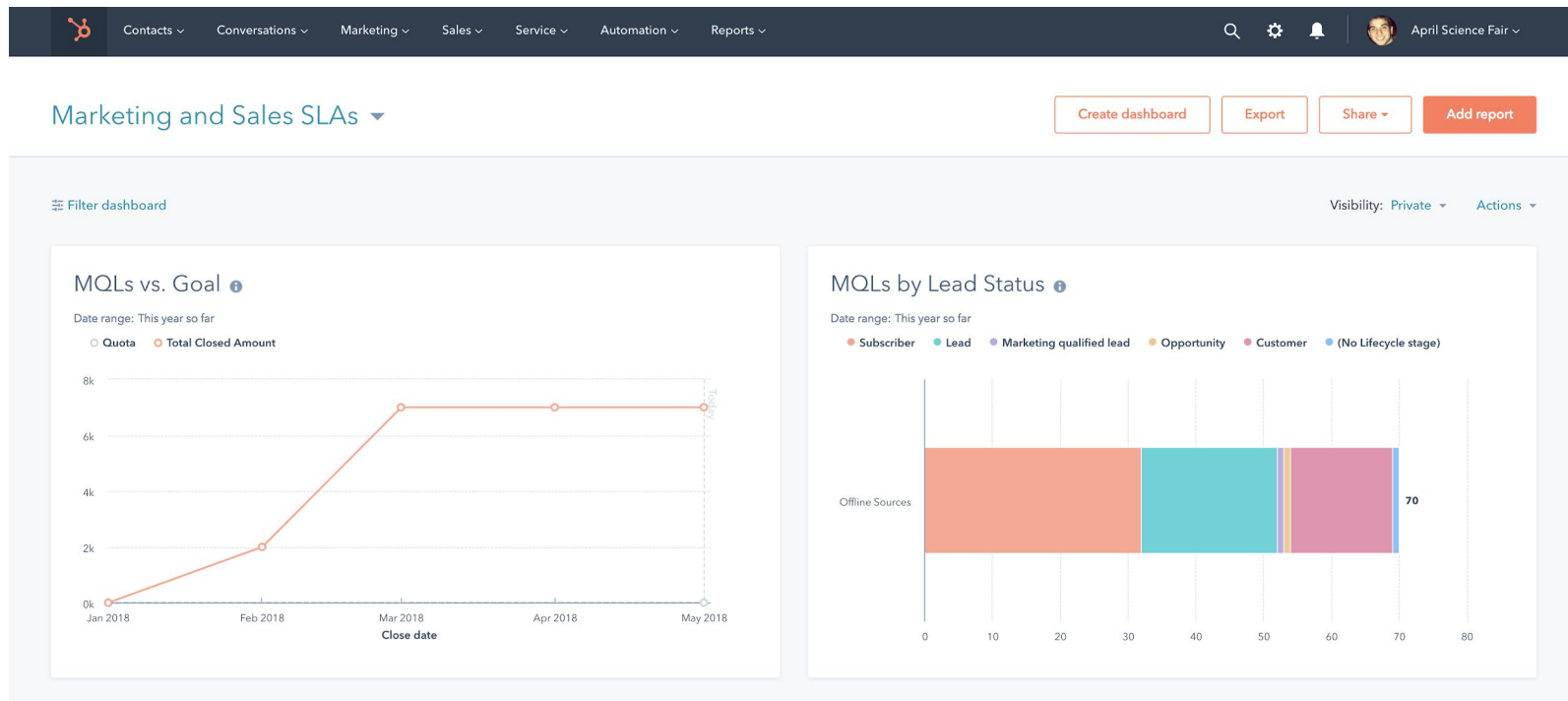
Best,

Sofia Rose (+1 857 829 5060)

Inbound Growth Specialist, HubSpot

-

# Create a transparent SLA between the teams





# Biglytics Scenario

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- Sales and marketing have are in one system, working with the same dataset.
- The two organizations are seamlessly passing leads, meetings and opportunities back and forth.
- Both organizations trust the other more due to increased transparency.

The background is a solid orange color. There are several decorative elements: a small solid orange circle on the left, a large solid orange circle in the bottom left corner, and a series of concentric orange circles in the top right corner.

Putting it into *Action*

# Babbitt's Powersports

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- CRM Implementation
  - Only successful CRM implementation in over 20 years for them
  - Rolled out over 6 weeks
- Pipeline Creation & Management
  - Optional & required fields per stage has reduced errors and double entry for finance
- Templates, Sequences and Workflows for rep efficiency
- Replaced several tools with Marketing Hub & Sales Hub
- Link between eCommerce and in-store customers finally for cross-sell
- Managing over \$4.5MM in deals and an average of 80 deals/mo/rep
- Last retainer increased by 43%.

# Babbitt's Powersports

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"This is so much easier than our old system!" - Rep

"More information is readily available - quickly." - Rep

"I never thought it would be possible to love a CRM but this is pretty impressive." - Rep

"The entire team loves the follow up systems in place - emails and tasks. It makes them a lot more efficient." - Manager

# Takeaways + CTAs

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Takeaway	CTA
The best way to increase your retainer is by selling the Sales Hub	Familiarize yourself with the Sales Hub through <a href="#">Academy courses</a> , <a href="https://bit.ly/GoSalesHub">bit.ly/GoSalesHub</a> and use in your own business.
Organize, Optimize, Align are the three key services you can build today	Think of these as core service offerings you now have and attend the <a href="#">Sales Services Kickstarter bootcamp</a> .
Your existing clients are your best opportunities	Approach your good-fit clients with at least one of these services.

The background is a solid orange color. It features several abstract geometric shapes: a small solid circle on the left, a large solid circle in the bottom left corner, and a series of concentric circles in the top right corner. The text "Q+A" is centered in the middle of the image.

**Q+A**