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Remote Sales & Marketing: A Guide to Moving Your Business Online

Table of Contents

Online Operations	4
Online Marketing	8
Online Sales	14
Working Remotely	19
Get Connected	23
Conclusion	24



The idea of moving your business online and transitioning your employees to remote work can seem daunting at first. With any upheaval of the traditional on-site work experience there is a learning curve and transition period that can be scary to managers. While it is necessary to address these concerns and note their validity, it is also important to acknowledge that online businesses and remote work are here to stay. **The amount of people who work remotely at least once per week has grown by 400% since 2010**, while 99% of people said they'd choose to work remotely, at least part-time, for the rest of their careers.

By creating a remote work policy at your company, you will be communicating to your existing employees that their personal productivity and happiness is a priority of yours, while being able to attract top talent from all corners of the world. When you retain and hire skilled, innovative employees with your comprehensive

remote work policy, you'll be inadvertently building a more diverse and inclusive workforce (with lower overhead).

To be successful in your market, it is critical to know what your customers need. In this increasingly tech-savvy modern workforce, those needs often include an expectation that your product or services are available online. If you are waiting for the day your customers tell you that they want you to move online, you've already lost them. In addition to retaining your existing customers, expanding your visibility by moving online guarantees that you will reach new ones.

By the end of this ebook you will be ready to transition your business, including operations, marketing, and sales online by supporting your teams and online sales force. You'll learn how to translate your current marketing strategy to the digital sphere and train your employees to successfully work remotely all while maintaining what makes your company special.



CHAPTER ONE

Online Operations



The first hurdle to overcome when transitioning your business online is the misconception that managing remote teams requires a vastly different skill set than managing on-site employees. Regardless of office location, the way you lead your teams is fundamentally the same. As your team makes the shift to fully online work, it is critical that you work with them, set the appropriate expectations for how they will be implementing processes and programs moving forward, develop an effective remote communication strategy, and utilize the appropriate software so they can find success as an essential part of your online business.

To best support your team as they move online:



Set the appropriate expectations.

As the leader at your company, it will be your actions that set the standard for how to successfully transition your business online. By setting an attainable, clear standard, your team will be able to set deliberate expectations (**SMART goals**) for the transition process. When expectations are set in advance, ground rules are established from the get-go allowing your team to adhere to lines of accountability. Create collaborative performance and logistical goals and timelines for the transition.



Implement a communication strategy.

When shifting your business and company online, more communication is not necessarily better communication. Implement a communication strategy with your team leaders that includes your expectations for the appropriate cadence of communication. Collaborate with your team to establish this strategy by answering questions such as:

- When should remote employees respond to emails/messages?
- What follow up steps should be taken regarding a lack of response?
- When are unscheduled calls permitted?
- What necessitates a virtual team meeting?

When leading remote teams, it is important that your employees understand their obligation to communicate efficiently.



Utilize the top software.

As your team moves online, their success becomes dependent on the software they utilize. Along with the standard toolset you'll use to quickly communicate with staff like email and [Slack](#), (which has [built-in security for protected documents](#)), you'll need software that helps your team meet virtually, stay organized, and collaborate while out of the office. HR teams need software that makes their personnel-focused tasks easier, while allowing them to manage employee records from anywhere, on any device. Before selecting your team's remote software stack, consider the following:

- Does the user interface offer an intuitive experience, or will there be a strenuous training period?
- Can this software scale as your company grows?
- Is the system designed for your industry and company size?
- Are there available features for managing contractors or freelance employees?
- And the most important question for remote work: Is the system cloud-based?

Test the software that checks all your prerequisites, and choose the one that fits your utility and price.

Some of the top operations team software for 2020 include:

Slack

Slack helps your team communicate with one another, wherever they may be around the globe.

Google Drive

You'll be able to keep all of your documents in one place using Google Drive. Work in documents and spreadsheets, and keep track of your contacts.

Trello

Trello helps get your team organized by allowing online collaboration and project planning to go smoothly and efficiently.

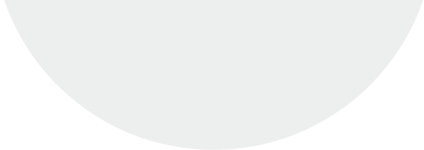
Zoom

Virtual meetings are made easy using Zoom – you can hop on a video call with your teammates and schedule virtual meetings.



CHAPTER TWO

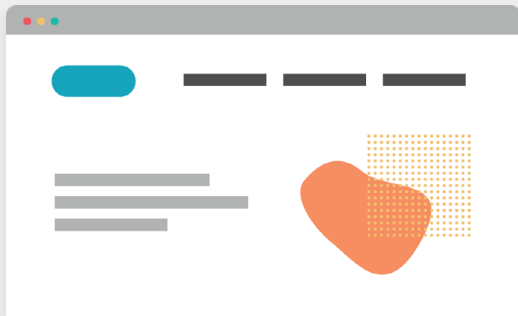
Online Marketing



When moving your business online, the biggest operational change you will face is how you market your business. Although this transition will ultimately impact your long-term online success, it is important to start simple. **SEO ranking** and involved **social media campaigns** are key parts of digital marketing, but they are not the first steps you should be taking. Before you dive right into your first online marketing meeting you need to lay a basic digital foundation for your company, then it's time to integrate your old offline tactics with new online marketing strategies, before transitioning to strictly virtual.

Lay a Digital Foundation

In order to market your company online, you need to have a strong digital presence. Before you post that first blog entry or send out your inaugural tweet be sure to build your website, create social media accounts, and register your business on digital registries.



Build your website.

If you don't have one already, now is the time to **create your business website**. Your business website is required to jumpstart your online marketing presence, and it should be able to support a multitude of activities. As a start, your website should include:

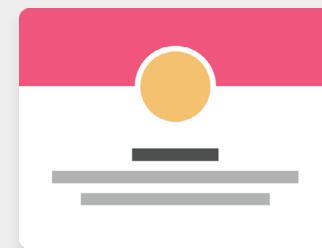
- Your company contact information
- A products and services information page
- An "About Us" page with your personal story and background
- Appealing visuals of you and your products

Use **forms on your website** to collect information about your prospects which will later help you with targeted marketing and communications.



Create social media accounts.

Your **social media strategy** doesn't need to start off with intricate posting patterns and hashtag research, instead you should start by creating social media accounts on all the major platforms that apply to your target audience like Instagram, Pinterest, LinkedIn, Twitter, and Facebook. Use the same handle and logo for consistent branding.



Register your business on digital directories.

Half of creating a thriving online presence is to attract new customers. One essential way to ensure your brand

is in front of the largest audience possible is to get listed on local and national business directories. (Here's a tip, the majority of national directories pull from local ones, so the first step towards a national listing is to get listed locally.) Almost **half (49%) of businesses listed on Google** get over 1,000 searches per month.

Grow your Online Presence

Once you have built your website, created enticing social media accounts, and registered your business on online directories it is time to expand your online footprint.



Blog from your website.

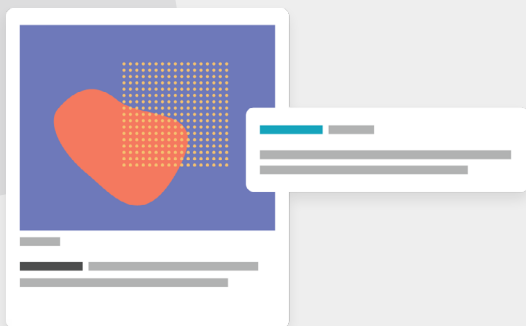
Effective blogging is the backbone of any successful digital marketing strategy. When done correctly and with an eye on SEO, blogging from your website drives traffic,

generates new leads, and grows your customer insight. The blog posts you write should be approachable and attainable. It should be clear that a friendly human is blogging for your company, not a keyword spewing robot. Additionally, your blog posts should offer genuine value to your audience. When a customer trusts your blog to provide valuable information and helpful insight to your industry, they will keep coming back for more. When you are brainstorming blog posts, **start a quick voice or video call from Slack**. Sometimes, a face-to-face or verbal conversation can help get the creativity flowing.



Bonus Tip

Whenever you have a particularly lovely customer experience in real life, share the experience on your blog or through a customer testimonial. Potential customers trust companies who they know others trust as well, don't hesitate to repurpose your customer encounters to attract new clients.



Post to your social media accounts.

The marketing moment your excited fingers have been waiting for, it is time for you to start posting to social media. Before diving right in, pause to create your social media marketing strategy. Social media marketing is a delicate art that consists of creating content to promote your business via unique content that is tailored specifically to the platform on which it is posted. For a full course on social media marketing, check out our [ultimate guide here](#).

Remember, the social media content you post can and should be repurposed as blog posts and vice versa. To repurpose your existing offline marketing strategy as social media marketing you can:

- Promote offline events on your social media accounts. Even if you have advertised an in-person event in your store and utilized email marketing, Tweet about the event and create an event page for it on Facebook to help spread the word.
- Utilize real-time marketing to post live Instagram videos of your events. After the event, create a hashtag for event goers where they can share their pictures and experience for the online world to see.
- Create discounts that are only redeemable through social media activity. Instead of advertising in-store coupons and special offers, allow customers to get a discount if they Tweet a photo of themselves in your store or share their customer experience with a hashtag.



Host a virtual conference.

Virtual conferences, such as panels and promotional events, are an increasingly popular medium that succeed at reaching a large audience. Shifting your current business events to the virtual world not only expands the reach of your audience by growing your awareness, but helps you to build lasting relationships with influencers and other companies with similar audiences by offering avenues for partnerships to form. Additionally, virtual events create a revenue stream from sponsorships. To read more about the step by step process of how to host, and execute a successful virtual conference, here is how HubSpot launched [Inbound Sales Day](#).

Create a webinar.

If hosting a virtual conference seems like too much too soon, start by creating a webinar. Webinars are online events that use live and recorded streaming services to engage your target audience from wherever they are located. Your webinar content should be billed as necessary information that is memorable and leads your viewers directly to your website and product. [Download this free strategy guide to get started.](#)





Integrate live chat software.

In order to waste no time connecting with your website visitors, add a live chat feature to your site so you can convert new leads and provide customer support in real time. The inclusion of live chat software can be the difference between a new customer and a lost opportunity. By integrating a live chat feature you will be able to interact with potential customers when they are the most engaged—right when they click on your website.

With [HubSpot's free live chat software](#) you can easily customize your chat widget to match your brand and create targeted welcome messages for each page of your site. Additionally, every conversation gets automatically stored in your inbox with the customer's timeline, so your digital marketing team can have a clear customer profile from just one conversation.



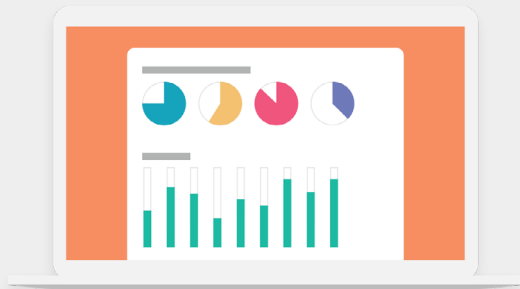
CHAPTER THREE

Online Sales

Your online sales operations focus on everything from lead management to sales strategy, compensation plans to sales automation. And, most essentially, data management and lead generation. To successfully support your sales team as you move your business online, you will need to have it all in one database and choose the correct payment software for your company. You'll also need to arm them with the best messenger, video, and audio software out there. The role of your online sales operation team is to enhance the business impact of your sales team, to accomplish this, your sales operations department must include:

Inside Sales Operations

A successful sales operations department includes a variety of positions, all of which play separate and equally important roles:



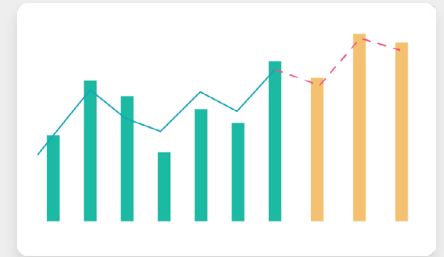
Sales Data Management

In order to determine the effectiveness of your product or services, your sales operations must measure and evaluate their collected sales data. Otherwise, you will not know when to implement a new sales strategy. This data management should keep an eye on the external market and competitor research so you can keep your sales strategy (and hit your sales goals) ahead of the competition. Using a CRM will help your sales team stay organized, keep track of their pipeline, and make sure they have all the necessary sales data and context at their fingertips – [set up the HubSpot CRM for free](#).

Sales Forecasting

In order for sales operations to forecast future sales and develop sales goals they study past data and performance trends across your industry.

When sales forecasting is done correctly, your sales team will be able to spot potential issues with enough foresight to avoid them.



Lead Generation

The process of attracting and then converting strangers and prospects into customers is a many layered cake that fuels the inbound marketing methodology. The beginning steps of successful lead generation are:

- A prospect discovers your company through one of your many marketing channels such as your social media accounts or blog
- That prospect then engages with your call-to-action, which takes them to a new landing page that captures their information in exchange for an offer
- Your offer must have enough perceived value to convince the prospect to provide their personal information, such as an informative ebook, course, or free template
- Once on the landing page, your prospect fills out an information form requesting personal data such as their company email, business size, and industry.
- Congratulations, you've just generated a new lead!

For our complete beginner's guide to Lead Generation, [here is our free guide](#).

Sales Representative Management

A main function of sales operations is to support your internal salespeople. You can do this by providing sales compensation plans and incentives, as well as setting up rewards systems for superior performance. A little healthy competition in the [#Sales Slack channel](#) never hurt anyone... Additionally, you will be creating processes for resolving poor performance and encouraging more efficient sales techniques. This can be achieved by providing leads and training on time management skills. Sales operations influences the organization of your sales team, and is tasked with maximizing its performance.



Technology Management

Sales operations oversees the implementation of all sales team tools and platforms, they often work hand-in-hand with the IT team to make online sales more efficient.

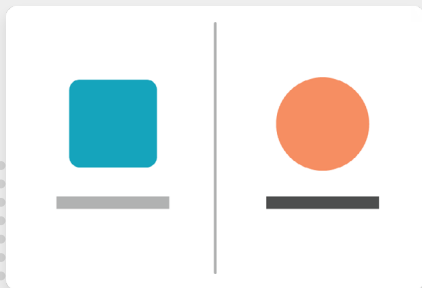
Online Payment

If you're a software or an e-commerce business, you'll want to set up your online payment software. It is critical that your payment software integrates with your other existing software. Your online payment system should do the following:

Provide multiple login options.

For example, when making purchases your customers should always have the option to check out as a "Guest" rather than making them create an account. You should also offer customers the option to log in through one of their social media profiles, this will not only reduce

registration friction but make the login process much faster for all parties involved.



Authenticate the login process.

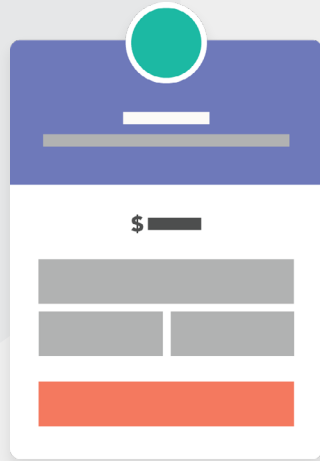
Once customers create an account with you, they want to be ensured that their private information is secure. Always require multiple authentication layers before you store their login information.



Follows the PCI Compliance.

If you're the host of an ecommerce platform it is your responsibility to ensure PCI compliance, regardless of your revenue volume. To find out how to achieve PCI compliance, [click here](#).





Contains an integrated payment processor.

Having an integrated payment solution that processes your customer's information on your own server allows for more flexibility and customization. You don't want online shoppers to be redirected off of your website to a separate pay site, instead your payment processor should integrate directly into your website. For example, [Stripe integrates directly into HubSpot](#).

Is SSL certified.

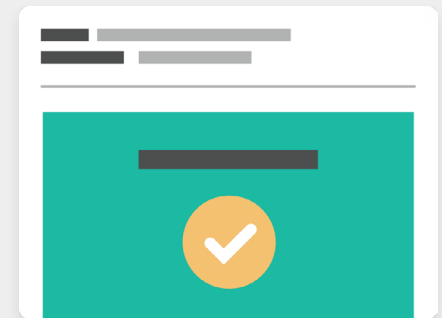
In order to protect your customers' personal and payment information, [your website will need an SSL certificate](#). Without it, your customers will be susceptible to hackers and they will lose their faith in your company.

Has a visible checkout button and optimized checkout page.

This one may seem like a no-brainer, but it is always a good idea to be reminded! Put your checkout button (and all call-to-actions now that I mention it) in a color that stands out against your web pages. The best checkout pages are functional, user-friendly, secure, and well designed.

Send a confirmation email.

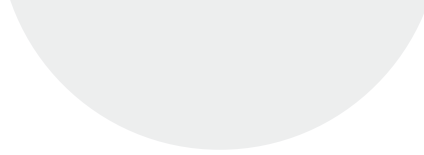
Now that your customer has had a successful ecommerce experience, you want to send them an automated confirmation email that includes their order number, product and payment details, and shipping information. Send this confirmation email from a real email address that the customer can reply to if they have questions regarding their order after the fact. If your customer checked out as a guest, the confirmation email is a great place to offer them the option to sign up for an account.





CHAPTER FOUR

Working Remotely



When transitioning your business online, it is imperative that your staff is trained on the technology they will now be required to use. Don't make the mistake of assuming your employees can learn by themselves at home. In order to set your newly remote employees up for success:

- Provide pre-recorded videos to show your team how to set up their home system
- Set up office hours (try Slack office hours) where your employees can feel comfortable asking their remote work questions
- Make sure your IT team is available during this transition period and is capable of assisting your remote workers
- Install employee feedback software, like [TinyPulse](#), to best utilize the feedback you will surely be receiving from your remote employees

How to Use Slack with your Remote Teams

Now that your employees work remotely, they can't pop their head into one another's office for a quick chat or catch up on their weekend highlights at the water cooler. Just because you aren't meeting face to face means your communication should suffer. With Slack you can message full teams and individuals, provide updates, share files, receive company-wide announcements, and much more.

To get you started implementing Slack at your remote company, [here are a few tips](#):



Create an announcement channel for the whole company

This is your go-to source for company-wide updates. You can create sub-groups like #boston-announcements if you have multiple locations.

Connect all your tools and apps

Slack connects with G Suite, Office 365, Dropbox, Zoom, and others. Check out all the integrations in the [App Directory](#).

Leverage shared channels for internal and external stakeholders

[Shared channels](#) let you connect with your vendors, clients, and partners in the same Slack workspace so you can easily share information, tools and files in a single channel.

Use channels for project management and... everything

- Create channels with key stakeholders for projects. This way, you can share files and collaborate in real-time with everyone who needs to be involved. Use reactions to run polls and get the group's feedback in no time.
- Create team channels for departments and individual teams.
- Create channels for #parents or #gamers, or one for the streamers #netflixpicks.
- Make a channel for a certain role or for a certain region, the possibilities are endless.
- Channels can replace emails, meetings, or daily standups.

Use features like statuses and calls

- Alert your teammates when you're working and when you're wrangling the kids down for a nap by [setting your Slack status](#).
- Call coworkers via video or voice call right from Slack.

If you already have voice or video software, check out [Slack's App Directory](#) to see if you can use them together.

Using the Slack HubSpot Integration

Thanks to the new [Slack HubSpot integration](#), you can add HubSpot tasks, trigger notifications, and use slash commands directly from within Slack. The days of switching back and forth between tools are behind you, now you can work from anywhere with HubSpot and Slack.

● Turn Slack Conversations into HubSpot Tasks

Sales reps can create a task and associate it with a contact, company, or deal in HubSpot—directly within Slack.

● HubSpot CRM Notifications

Receive notifications within Slack when activities happen in your HubSpot CRM. Customize which notifications you want to receive from options such as reminders, mentions, follows, document views, form submissions, and more.

● Save Time Using Slash Commands

You can use slash commands to search for, then share a HubSpot CRM contact. You can also give quick feedback to the HubSpot team about the Slack integration— all without leaving Slack.

CLICK HERE

to connect



and





CHAPTER FIVE

Conclusion



Moving your business online is a concentrated effort that is well worth the time and energy. Taking the essential steps to move to remote-friendly operations will actually help your business grow and thrive, improve communication at your company, and show opportunities for growth that may have been hidden in the day-to-day. You may find that taking these steps will get you closer to your goals than ever before. We can't wait to see what the future holds for you and your new online business.

Mentioned tools and resources for moving your business online:

- [40 Remote Work Statistics to Know in 2020](#)
- [Social Media Marketing: The Ultimate Guide](#)
- [How to Launch a Virtual Conference for Lead Generation and Customer Acquisition: A Step-by-Step Guide](#)
- [Free Webinar Planning Kit](#)
- [Free Live Chat Software](#)
- [Lead Generation: A Beginner's Guide to Generating Business Leads the Inbound Way](#)
- [Online Security & Protection Measures: What All Ecommerce Owners Need to Know About PCI Compliance](#)
- [Use the Stripe integration with quotes in HubSpot](#)
- [A Beginner's Guide to SSL: What It Is & Why It Makes Your Website More Secure](#)
- [Your guide to working remotely in Slack](#)
- [Slack brings the team together, wherever you are](#)
- [How to Manage Remote Employees: A Leadership Guide to Supporting your Distributed Team](#)