



Quick Wins with HubSpot CRM & Sales Free



Bec Collins

Customer Success Manager



A woman with long dark hair, seen from behind, is raising her right hand in a crowd of people. The background is a dense, out-of-focus crowd of people, suggesting a large gathering or event. The lighting is dim, with some highlights on the woman's hair and hand.

Who is already a **HubSpot** user?





Free Email Marketing – Now in the Free HubSpot CRM

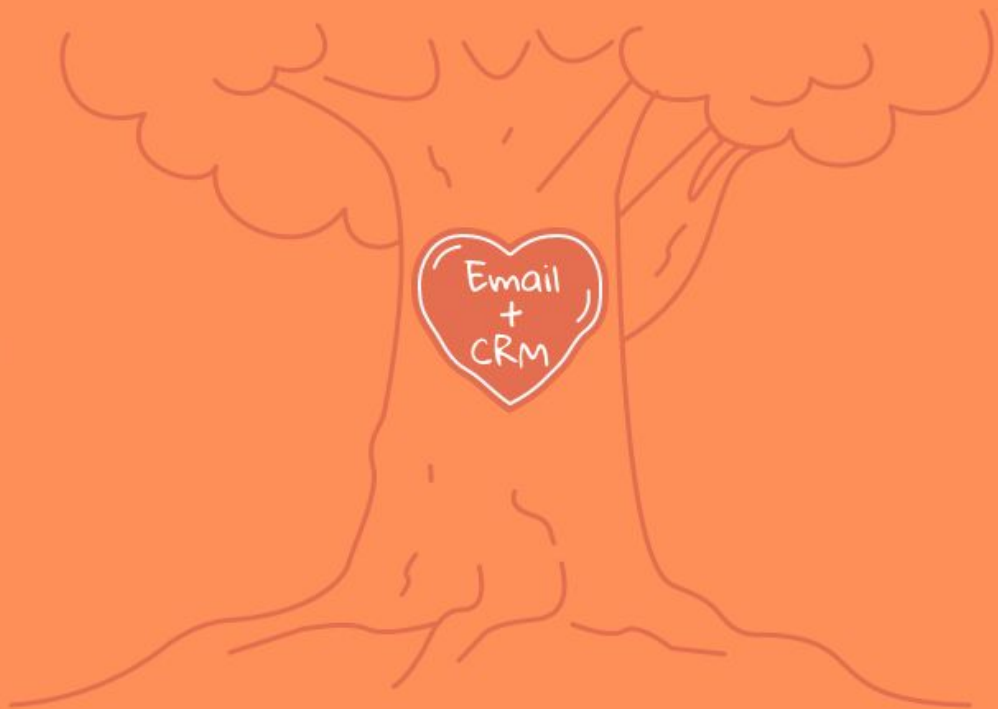
## Email *loves* CRM

And Love Shouldn't Cost a Thing

Send email for free in HubSpot's CRM – not just because it's free, but because it's powerful. Email + CRM. Some things are just better together.

Get free email + CRM

Learn more



# Get Started With HubSpot

Whether you want to increase leads, accelerate sales, organize your contacts, or better serve your customers, HubSpot has a solution to help you grow.



Organize your contacts, get deeper insights on every lead, and monitor deals with ease – all for free.

 Now with free email marketing

[Get free CRM](#)



HubSpot

HubSpot CRM is 100% free. Forever.



Have an account? [Sign in.](#)

## Create your free CRM



Sign up with Google

OR

First name \*

Last name \*

Email address \*

Use your work email address if you're using HubSpot CRM for business.

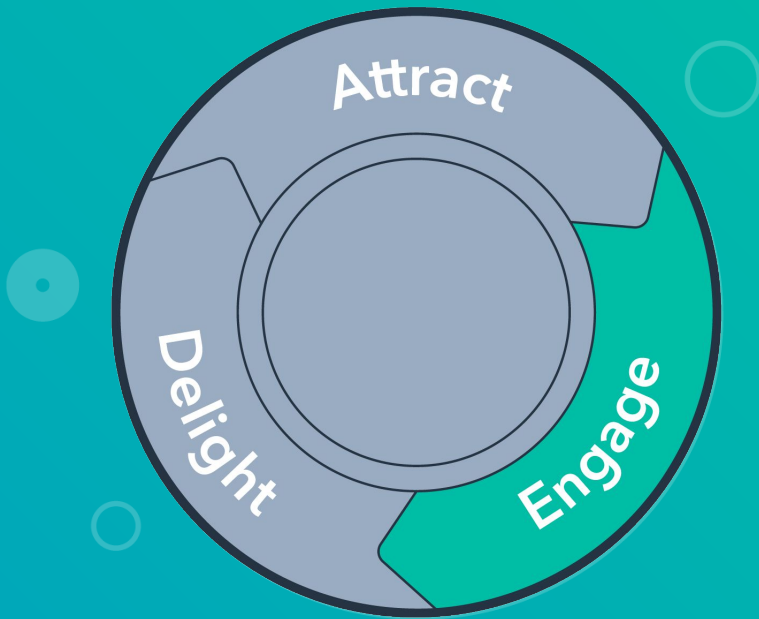
Password \*

[Show Password](#)

Get HubSpot CRM

By creating a HubSpot account, you're agreeing to accept the [HubSpot terms of service.](#)

We're committed to your privacy. HubSpot uses the information you provide to us to contact you about our relevant content, products, and services. You may unsubscribe from these communications at any time. For more information, check out our [Privacy policy.](#)



## Engage

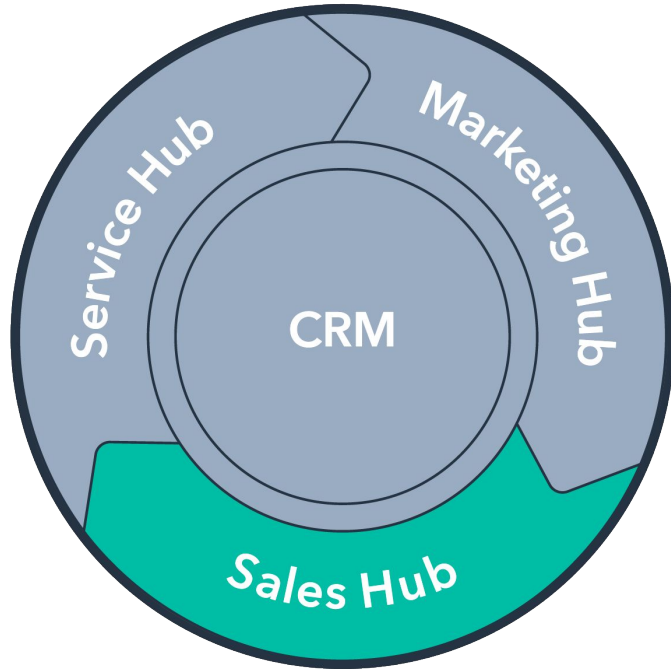
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Open relationships, don't just close deals. Enable buyers to engage with you on their preferred timeline and channels.





# HubSpot Sales Hub



## Sales Tools

Email tracking & notifications

Email templates

Canned snippets

Documents

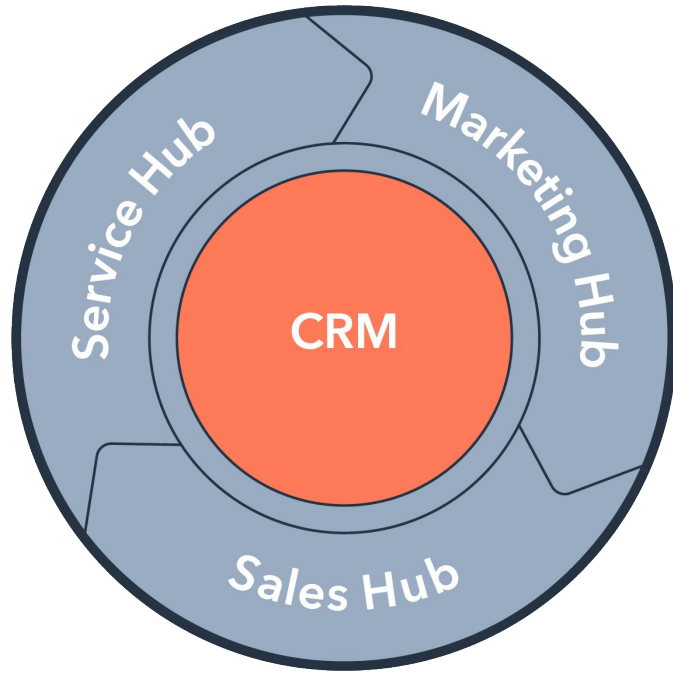
Meeting scheduling

Reporting dashboards





# HubSpot CRM



## CRM Tools

Contact management

Contact website activity

Companies

Deals

Tasks



# Are you optimised to sell?

To effectively engage our prospects we need to:

## Set up your Sales Process



### Deal Pipeline

1. Customise deal stages
2. Set deal stage properties

## Optimise your Sales Productivity



### Individual Productivity

1. Task Queues
2. Filters

## Measure your Sales Performance



### Reporting

1. Funnel report for opp to close
2. Sales productivity report



A row of five Erlenmeyer flasks containing green plant samples, set against a dark background with a white text overlay. The flasks are arranged in a metal rack. The text "Who has a sales process?" is centered over the flasks, with "sales process" in a teal color.

Who has a sales process?

# What is a Sales Pipeline?

A series of stages and tactics that orchestrate the **movement of leads from qualification to close**. Unlike a funnel, which is a theoretical depiction of a buyer's journey, a sales pipeline defines **specific actions at each stage**.

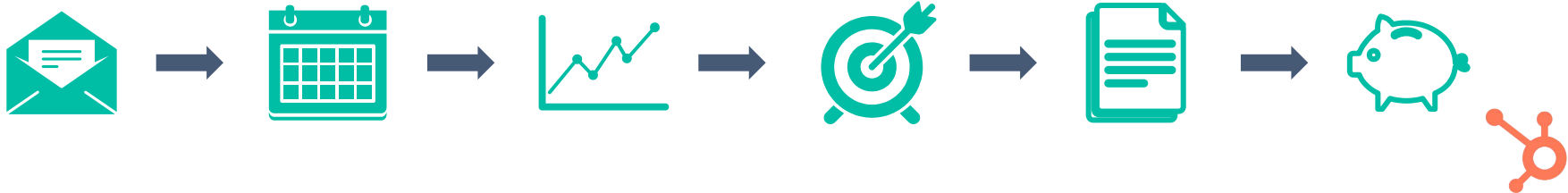


# Deal Management

What specific action needs to be taken for them to progress?

APPOINTMENT SCHEDULED	0	QUALIFIED TO BUY	0	PRESENTATION SCHEDULED	0	DECISION MAKER BOUGHT-IN	0	CONTRACT SENT	0	CLOSED WON	0	CLOSED LOST	0

Factual, Inspectable, Buyer-centric



# Deal Pipeline



- Predict revenue and identify roadblocks in your selling process
- Define and track progression from lead to close
- Centralise deal activity to ensure business continuity
- Collect data to obtain better visibility into productivity
- Prioritise your deals through saved filters



# Deals > Settings > Edit Pipeline

The screenshot shows a CRM interface with a dark navigation bar at the top containing menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. A search icon, a settings gear icon (circled in red), a notification bell, and a user profile icon are also present. The URL 'harpsealandmicropig.com' is visible in the top right.

On the left, the 'Deal Pipelines and Stages' section displays a table with the following data:

PIPELINE	DEAL STAGES		
Sales Pipeline	7	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">+ Add another pipeline</a>			

A large green arrow points from the 'Edit' button in the table to the right-hand side of the image, which shows the 'Sales Pipeline' configuration page. The page has two tabs: 'Configure' (active) and 'Automation'. Below the tabs is a table with the following columns: STAGE NAME, WIN PROBABILITY, and UPDATE STAGE PROPERTIES.

STAGE NAME	WIN PROBABILITY	UPDATE STAGE PROPERTIES
Appointment Scheduled	20%	
Qualified To Buy	40%	
Presentation Scheduled	60%	<a href="#">Delete</a> <a href="#">Edit properties</a>
Decision Maker Bought-In	80%	
Contract Sent	90%	
Closed Won	Won	
Closed Lost	Lost	
<a href="#">+ Add a deal stage</a>		

The 'Presentation Scheduled' stage name in the table is highlighted with a red box. In the bottom right corner, there is a red logo consisting of a stylized 'O' with three lines extending from it.



A close-up photograph of a hand holding a pen, writing on a checklist in a notebook. The checklist has several items with checkboxes, some of which are already marked. The background is slightly blurred, showing more of the notebook and the hand. The overall tone is professional and focused.

Let's optimise your sales productivity.



# Tasks



- Who has more than one to-do list?
- **Effective task management system - individual and team**
- Keep track of your to-do list
- Set follow up reminders for yourself
- Create different task queues to organise your to-do lists
- Streamline your task completion with task queues



# Task Management Styles

How organised would you consider yourself to be?

A schedule is simply a suggestion.



I plan my day down to the hour.

How structured is your follow up process?

Very ad hoc.



Extremely diligent.



# Example Task Queues

Organise by **Activity Type**

**QUEUES**

- Call Queue
- Email Queue
- Text Queue
- Paperwork Queue

**Other**

+ Add a queue

Organise by **Sales Process**

**QUEUES**

- Prospecting
- Current Opps**
- Future Opps (Good Fits)
- General Follow Up
- Misc.

+ Add a queue

Organise by **Touch Points**

**QUEUES**

- Priority Queue**
- Follow Up 1
- Follow Up 2
- Follow Up 3
- Follow Up 4

+ Add a queue

Organise by **Schedule**

**QUEUES**

- 9-10AM | Prospecting Call Queue**
- 10-12PM | Follow Up Existing Deals
- 1-3PM | Follow Up New Deals
- 3-4PM | Pipeline Building

+ Add a queue

A schedule is simply a suggestion.



I plan my day down to the hour.





Let's get into the tool and have a look...



How do we **measure** success?



# Sales Reporting



- Your sales dashboard includes five reports by default, each designed to give you an overview of your sales process.
- Generate reports on your deals, sales funnel, revenue, prospecting, meetings, calling and productivity.
- Make data-driven decisions based on trends identified through the included reports.





# Notable Properties

## Activity

***Last Contacted*** - the last time a call, sales email, or meeting was logged for a contact.

***Last Activity Date*** - the last time a note, call, sales email, meeting, or task was logged for a contact. T

***Next activity date*** the date of the next upcoming activity for a contact.

***Last Meeting Booked*** - the date of the last meeting booked with the contact using the meetings tool.

## Productivity

***Number of Sales Activities*** - the total number of sales activities (notes, calls, emails, meetings, or tasks) logged for a contact.

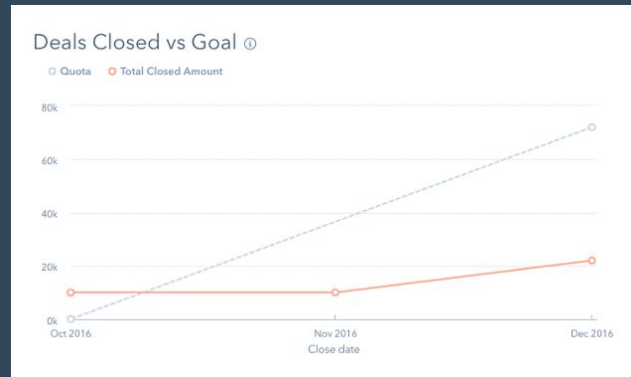
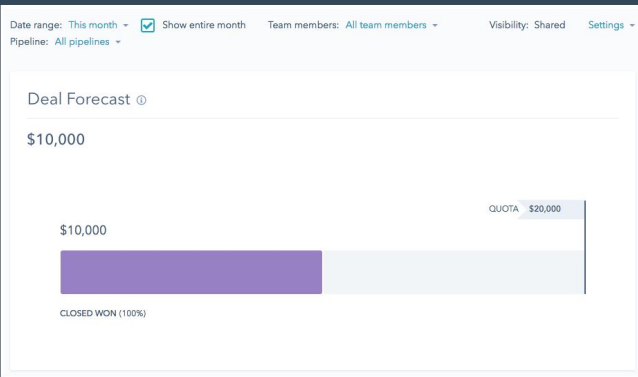
***Number of times contacted*** - the total number of times a contact was sent a sales email or called.

***Recent sales email opened date***: the date of the last time that a contact opened a sales email.

***Recent sales email replied date***: the date of the last time that a contact replied to a sales email sent from your connected G Suite or Outlook 365 email account.



# Default Dashboard



### Recent Activity

- Lauren Pacifico sent an email to Hubspot, Inc. 12/29/2016
- Lauren Pacifico logged a call with Leif Inouye 12/29/2016 demo
- Lauren Pacifico sent an email to Leif Inouye 12/29/2016

### Productivity

Actions

CALL	EMAIL	MEETING
9	26	7
NOTE	TASK	
18	11	

Quick view

### Sales Performance

Date range: This year so far Compared to last year

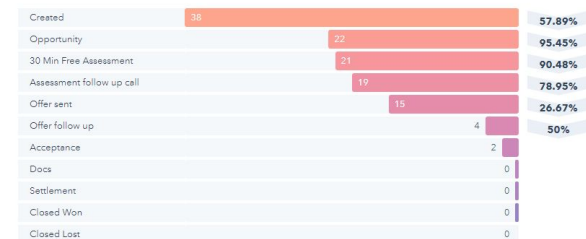
A funnel chart showing the sales process: 4,001 CONTACTS CREATED → 1,130 CONTACTS ASSIGNED → 150 CONTACTS WORKED → 38 NEW DEALS CREATED → 1 DEALS CLOSED WON.

Stage	Count
CONTACTS CREATED	4,001
CONTACTS ASSIGNED	1,130
CONTACTS WORKED	150
NEW DEALS CREATED	38
DEALS CLOSED WON	1

# Customise Your Dashboard

## Deal Stage Funnel

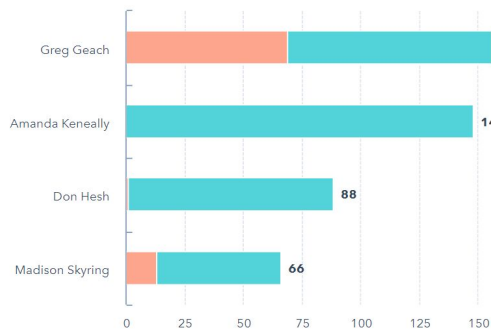
Date range: This year so far



## Leaderboard

Date range: This year so far

Call Email Meeting



## Deal Forecast by Owner

Date range: This year so far

HUBSPOT OWNER	OFFER SENT	DOCS	CLOSED WON
Amanda Keneally	AU\$1,400,000	AU\$320,000	AU\$1,750,000
Don Hesh	AU\$0	–	–
Lee Trego	AU\$0	–	–
<b>Totals</b>	<b>AU\$1,400,000</b>	<b>AU\$320,000</b>	<b>AU\$1,750,000</b>

## Contacts Overview

TOTAL CREATED OVER LAST 24 HOURS AVERAGE CREATED OVER LAST 90 DAYS

3

4

TOTAL CREATED ON BEST DAY FROM L...

TOTAL CONTACTS CREATED

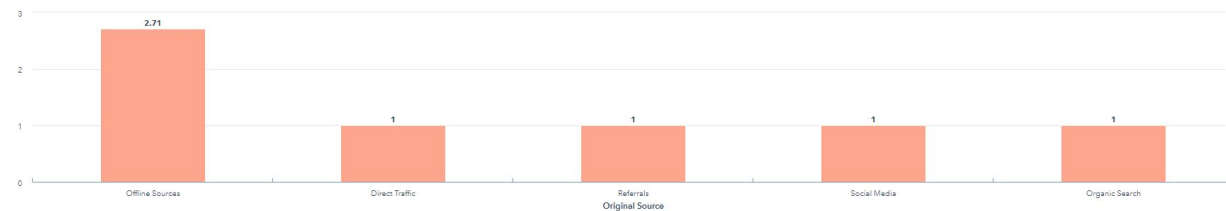
219

4,001

## Average Days to Close

Date range: This year so far

Average Days to close





Questions?



**Thank you**