1ST EDITION

Empowering Marketing and Sales with HubSpot

Take your business to a new level with HubSpot's inbound marketing, SEO, analytics, and sales tools

Images

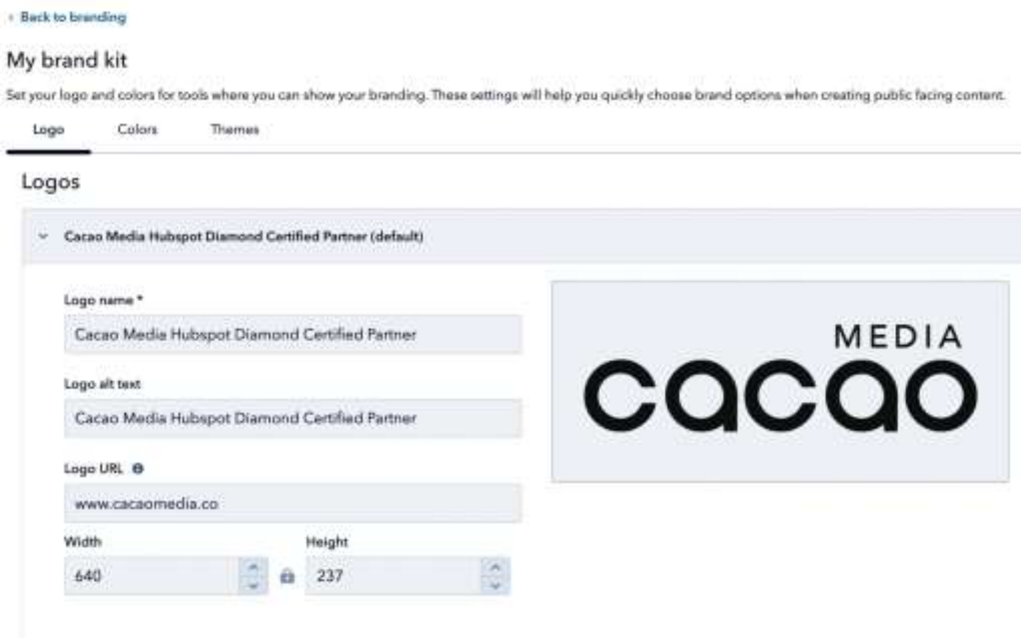


Figure 1.1 – Adding your branding assets to HubSpot

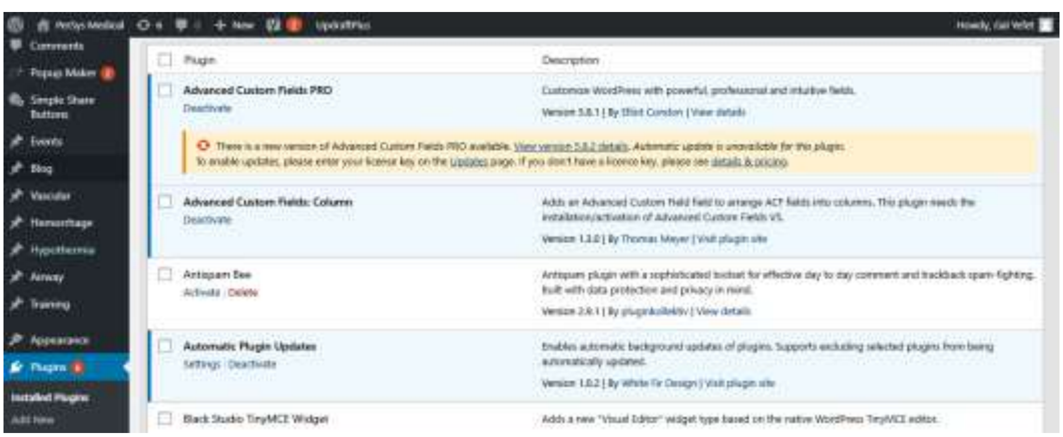


Figure 1.2 – WordPress plugins

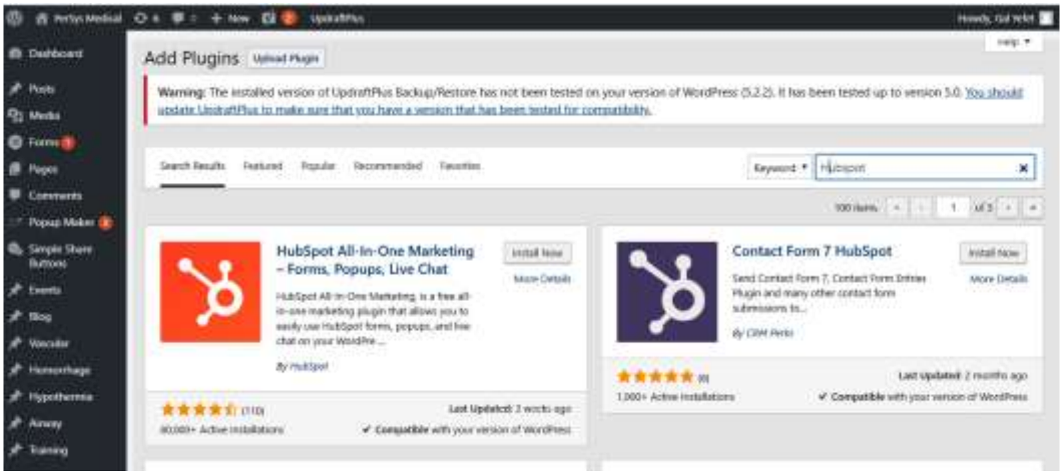


Figure 1.3 – HubSpot plugin

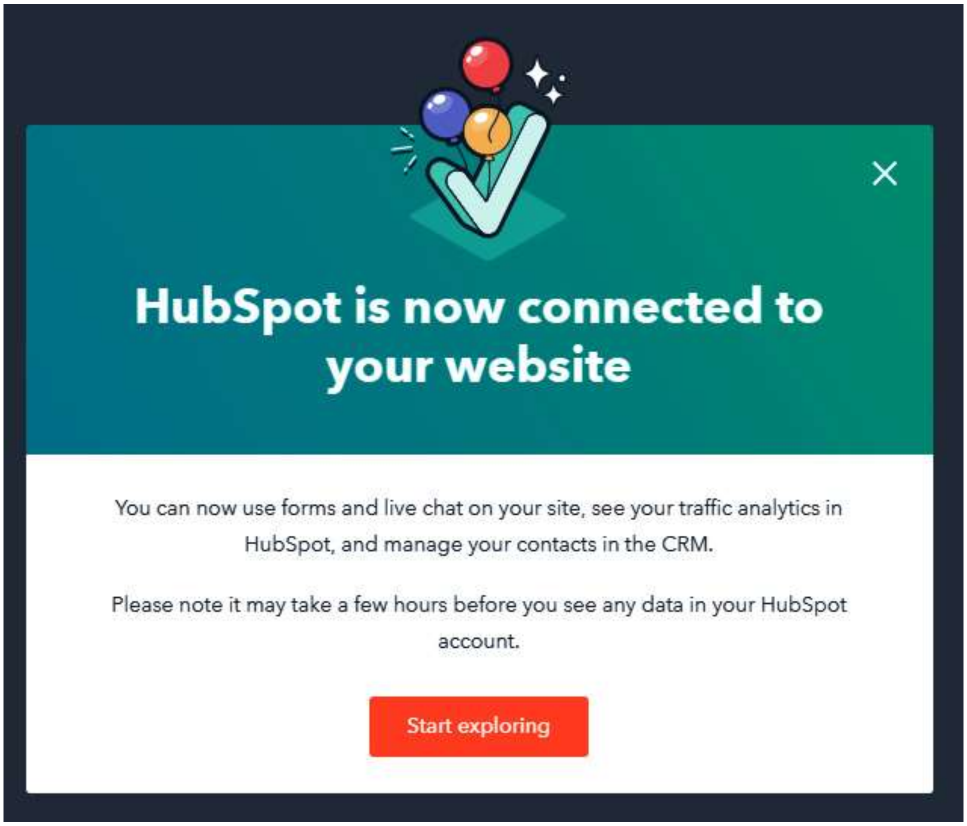


Figure 1.4 – Success screen: your website is now connected to HubSpot

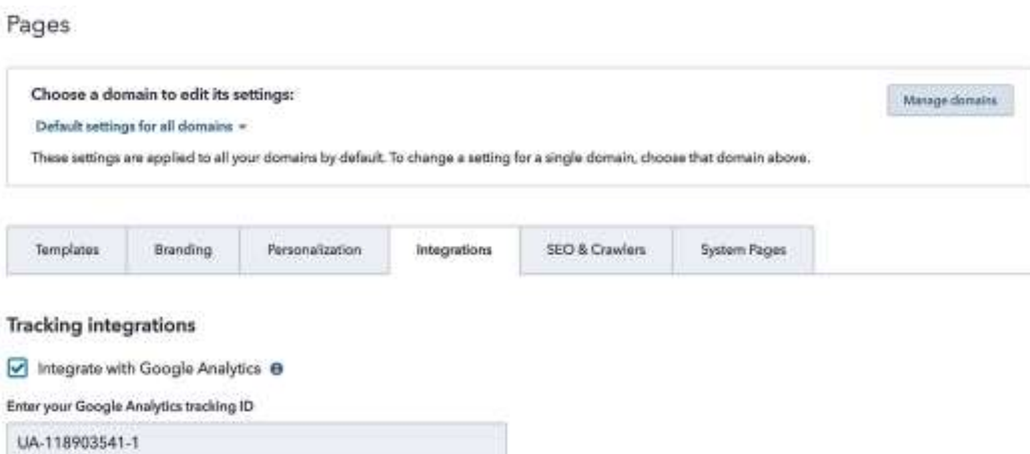


Figure 1.5 – Installing the Google Analytics tracking code

Figure 1.6 – Exclude Traffic screen

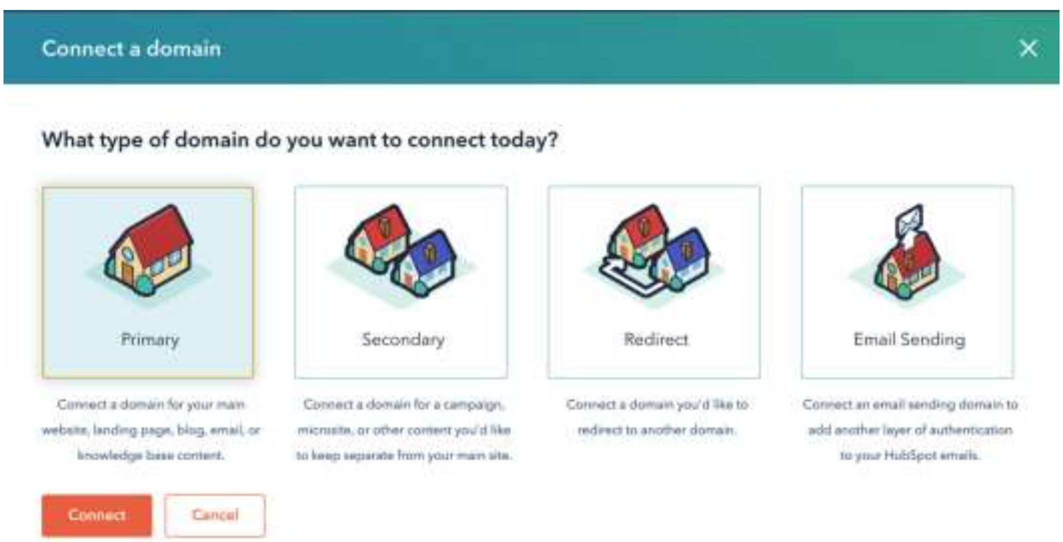


Figure 1.7 – Connect a domain screen

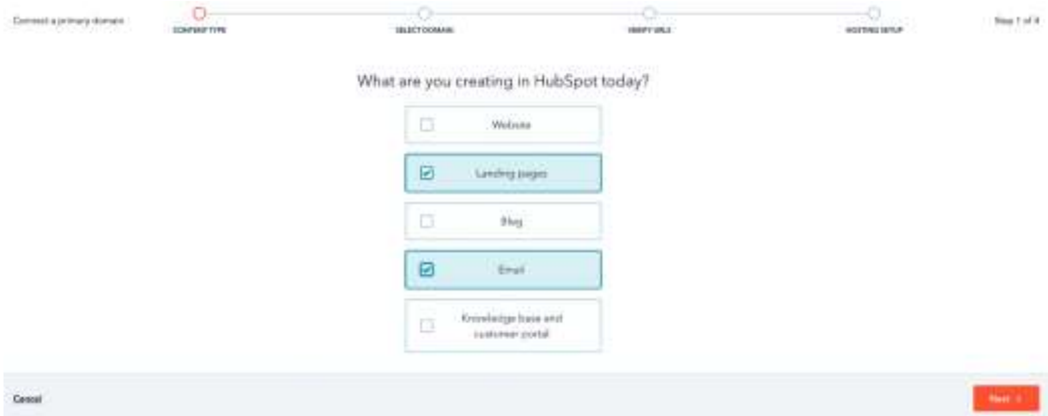


Figure 1.8 – Choosing content type

Figure 1.9 – Entering your root domain

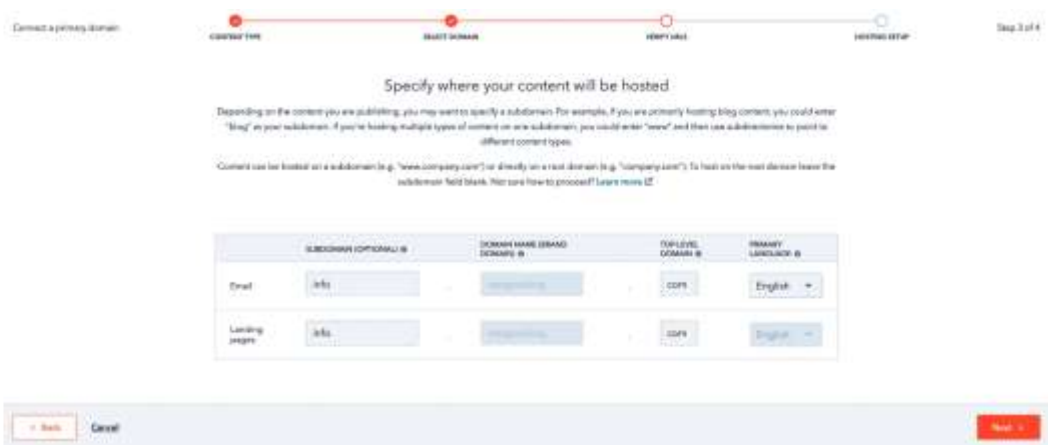


Figure 1.10 – Entering information for your subdomain

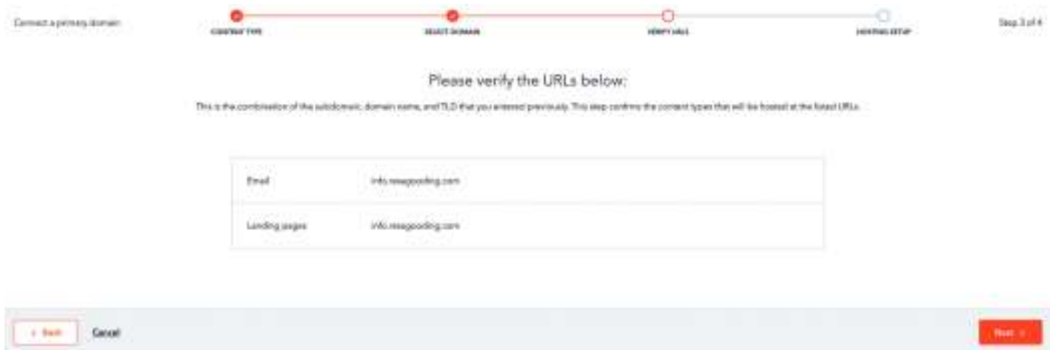


Figure 1.11 – Verifying your URLs

Figure 1.12 – Setting up your host

Figure 1.13 – Confirming access with GoDaddy

Figure 1.14 – Domain connection is successful

Figure 1.15 – Choosing the manual option to connect your domains to HubSpot

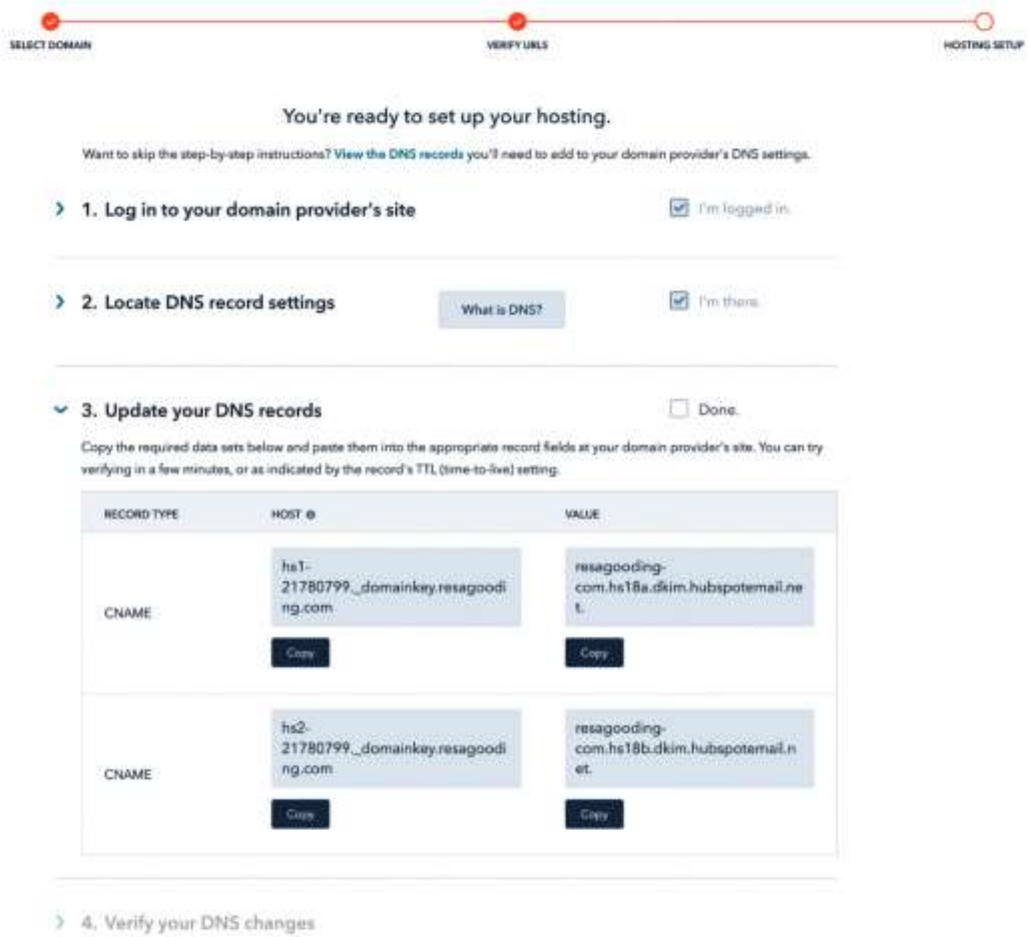


Figure 1.16 – Updating your DNS records

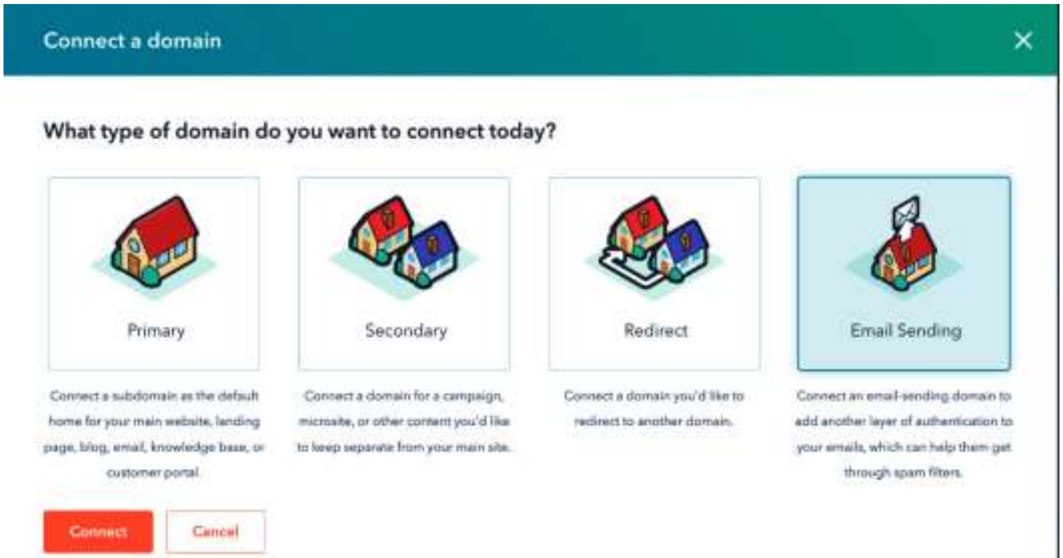


Figure 1.17 – Connecting your email domain

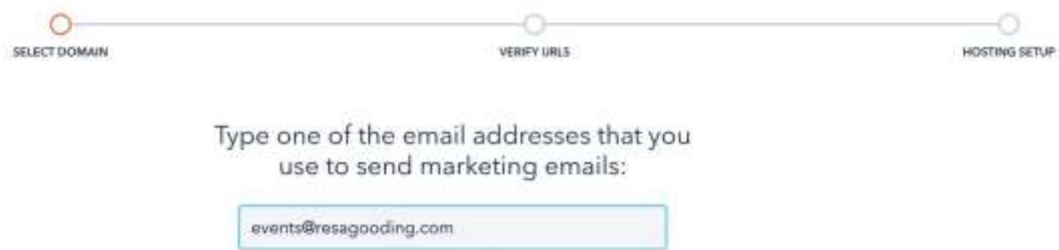


Figure 1.18 – Entering a generic email address in this box

Figure 1.19 – Verifying the email sender

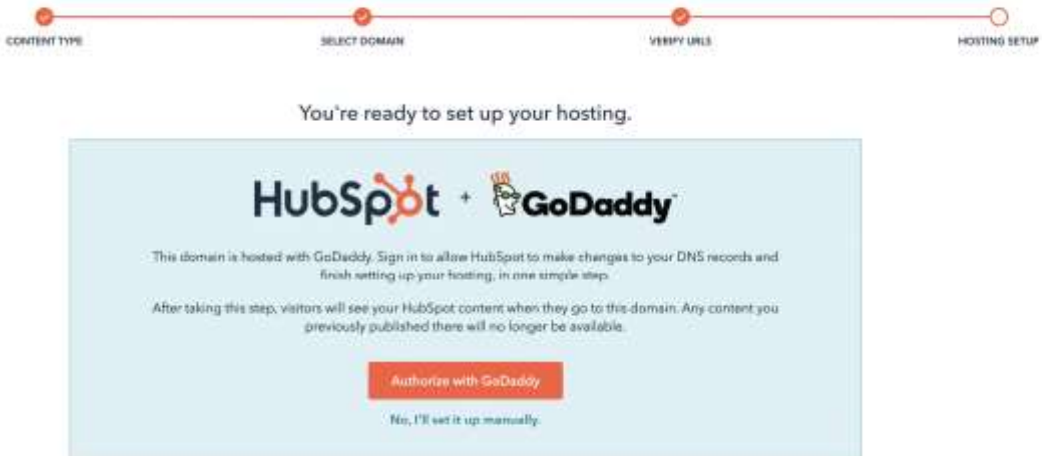


Figure 1.20 – Connecting to your hosting provider

Figure 1.21 – Confirmation that all domains are connected

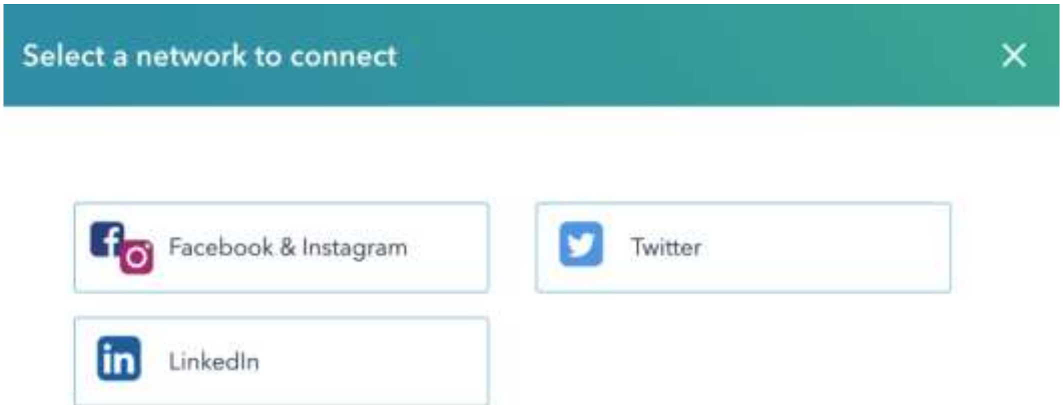


Figure 1.22 – Choosing which social media accounts to connect to HubSpot

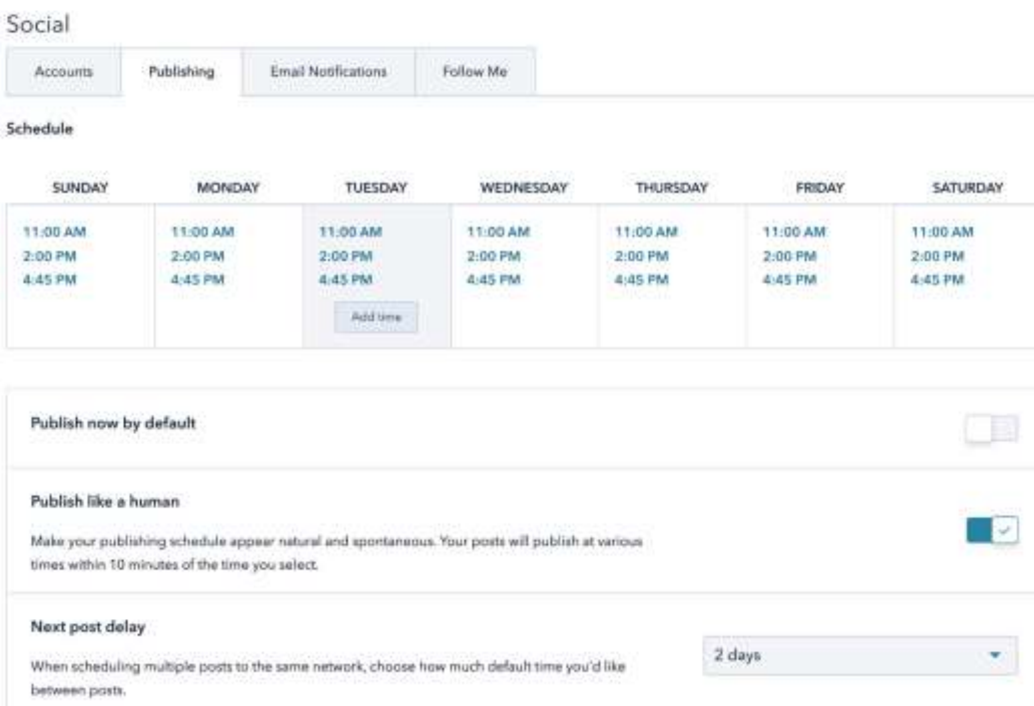


Figure 1.23 – Publishing schedule

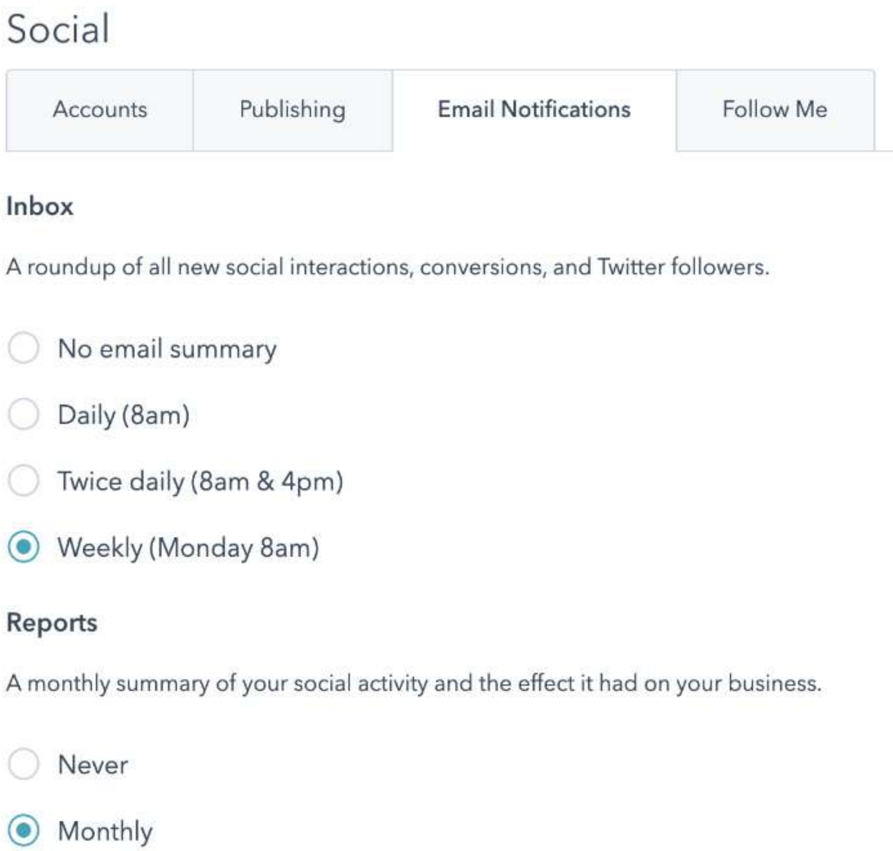


Figure 1.24 – Email Notifications

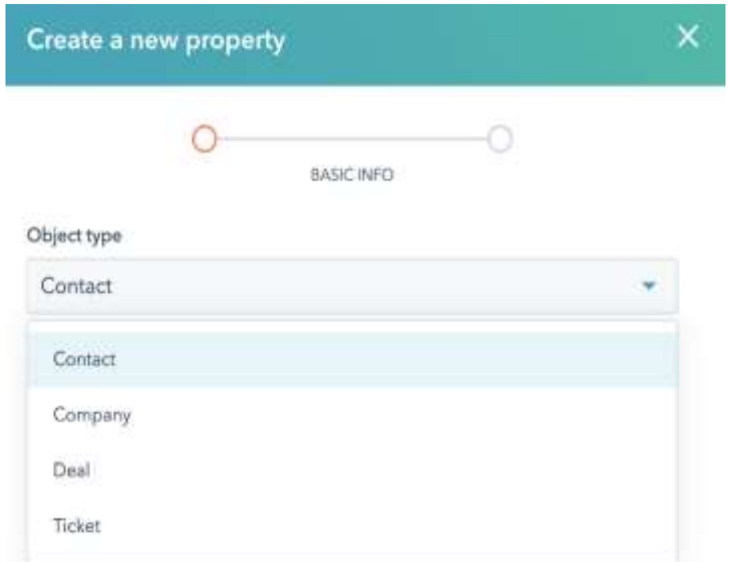


Figure 1.25 – Creating a custom property: choosing an object type

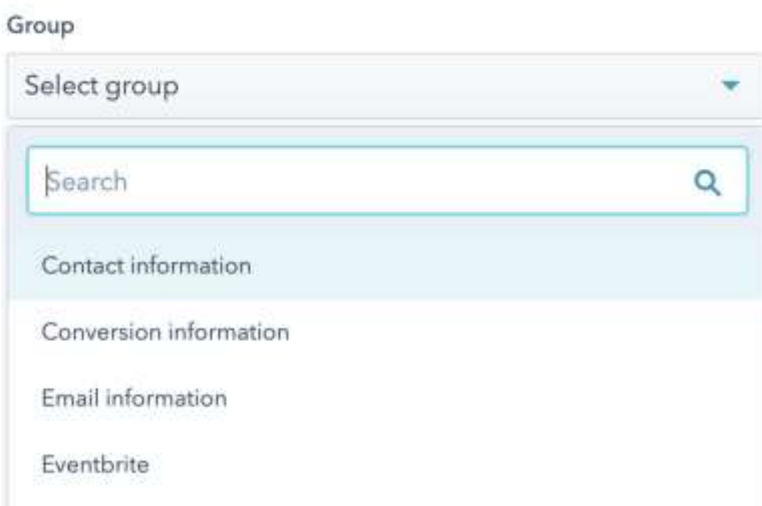


Figure 1.26 – Creating a custom property: selecting a group

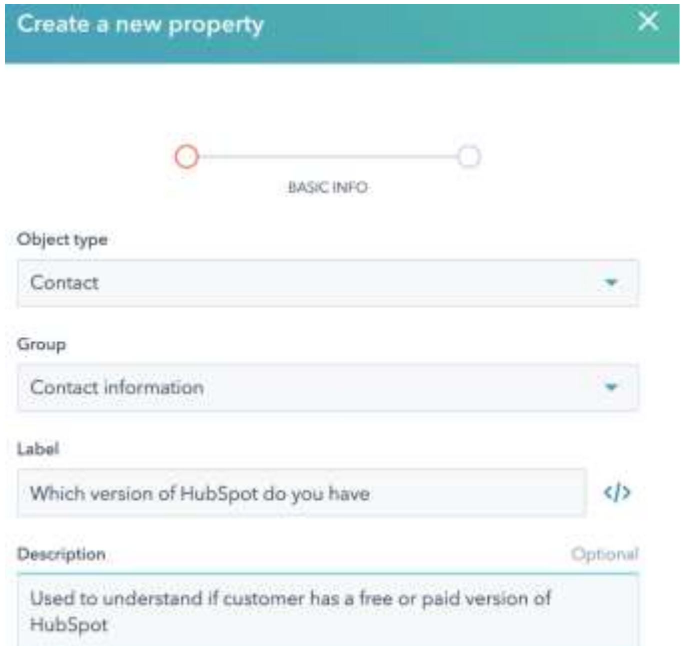


Figure 1.27 – Creating a custom property: choosing a label and description

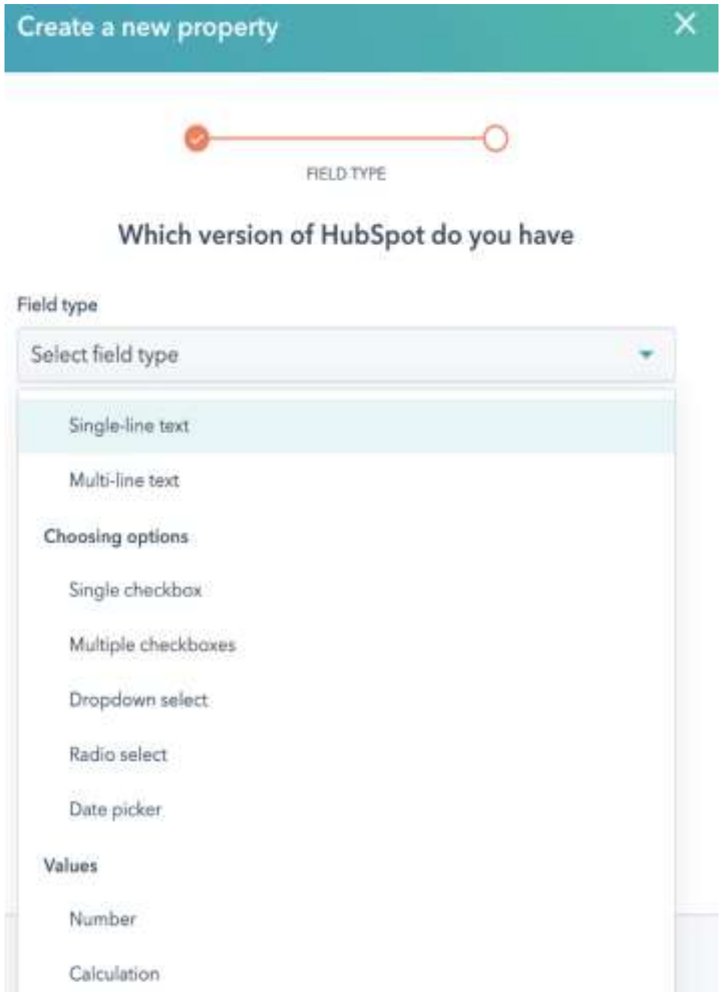


Figure 1.28 – Creating a custom property: selecting a field type

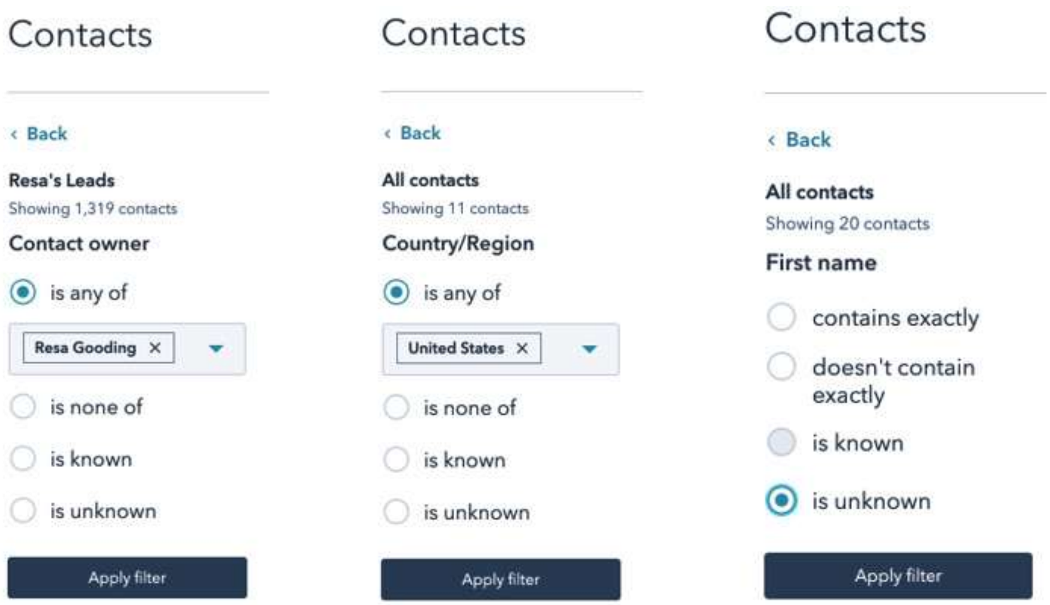


Figure 1.29 – Various filters created in Contacts

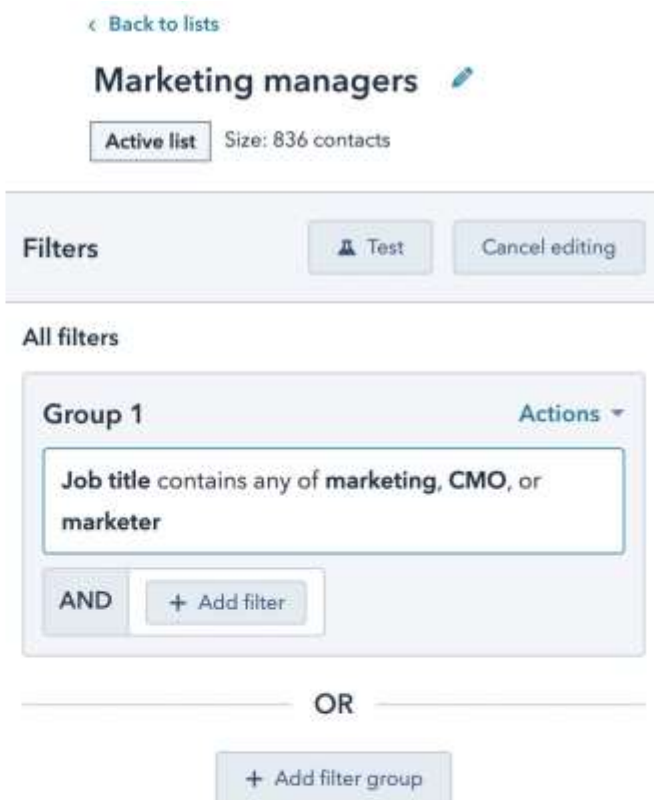


Figure 1.30 – Active list

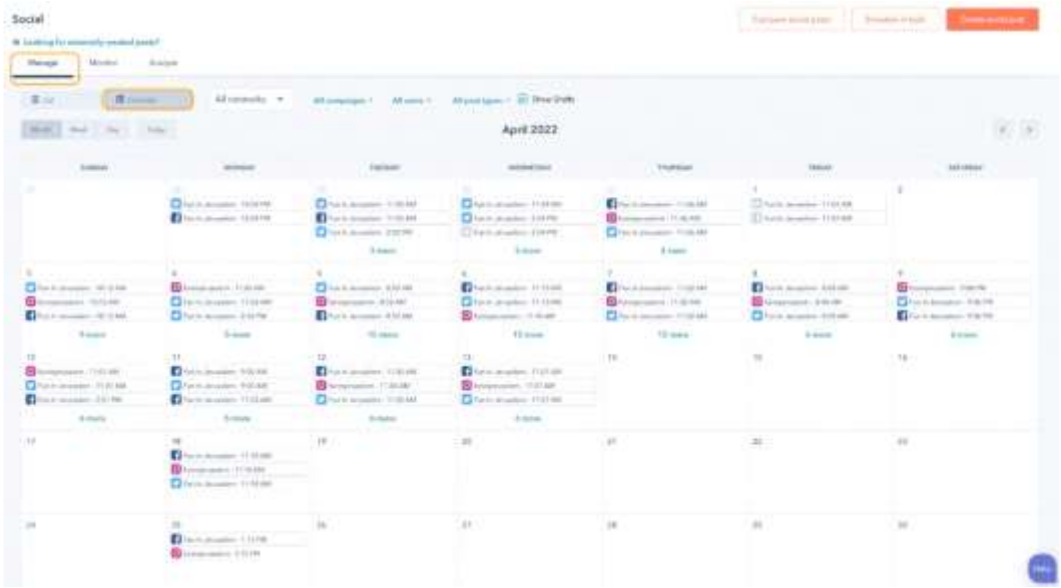


Figure 1.31 – Calendar tool

Figure 1.32 – Campaigns tool

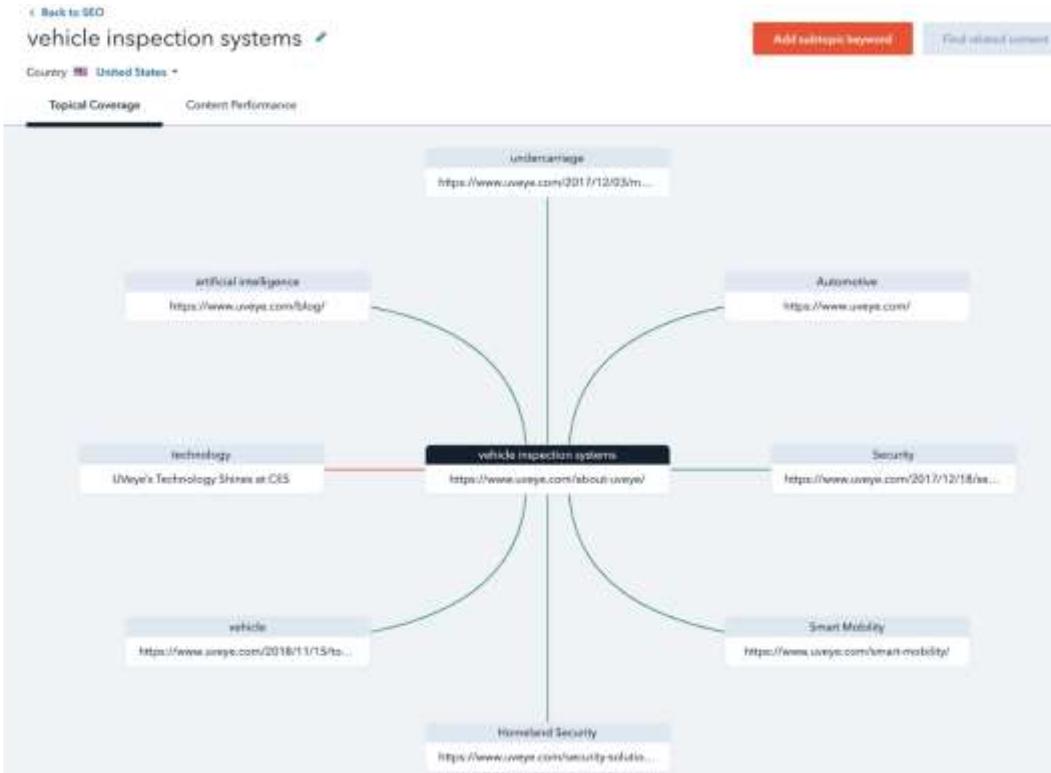


Figure 1.33 – SEO tool

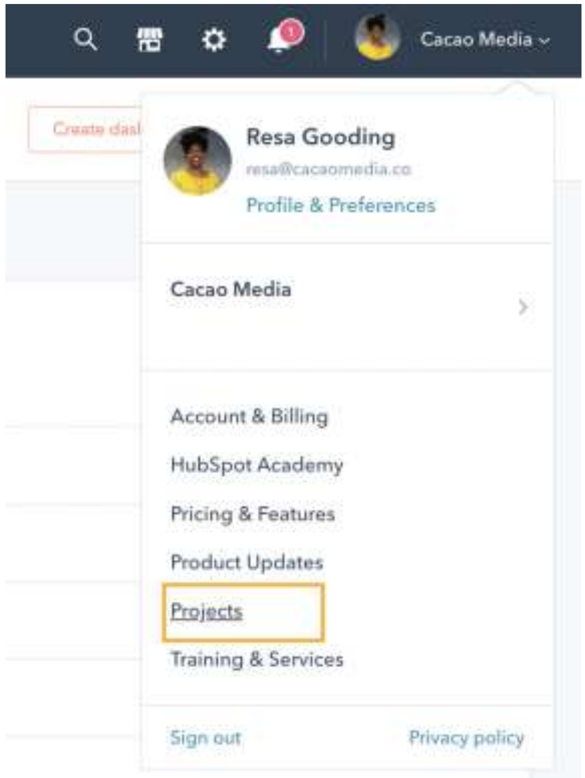


Figure 1.34 – Projects

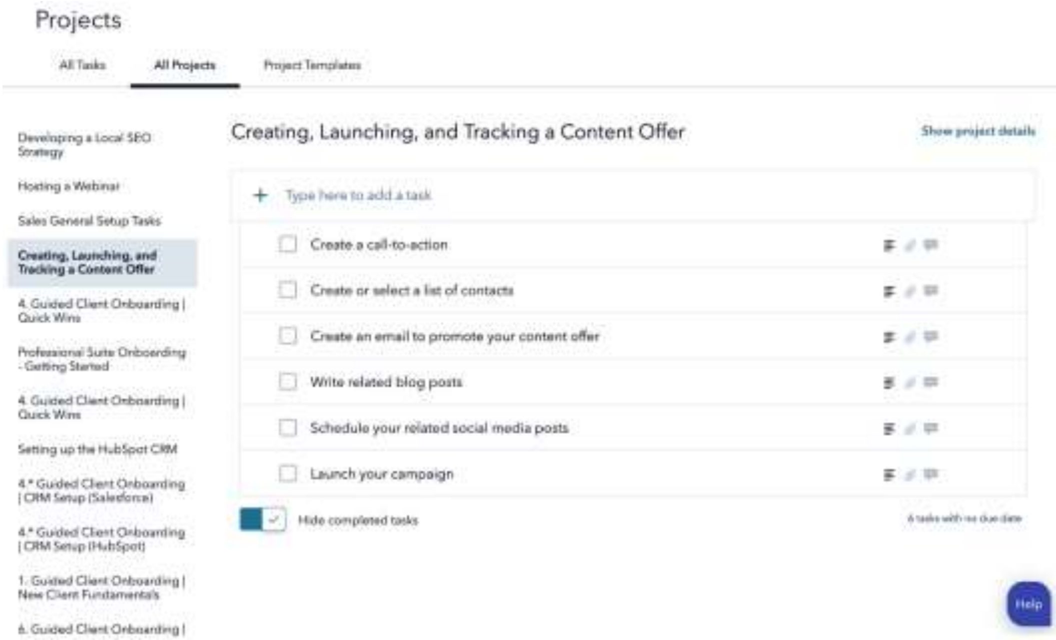


Figure 1.35 – Projects tool

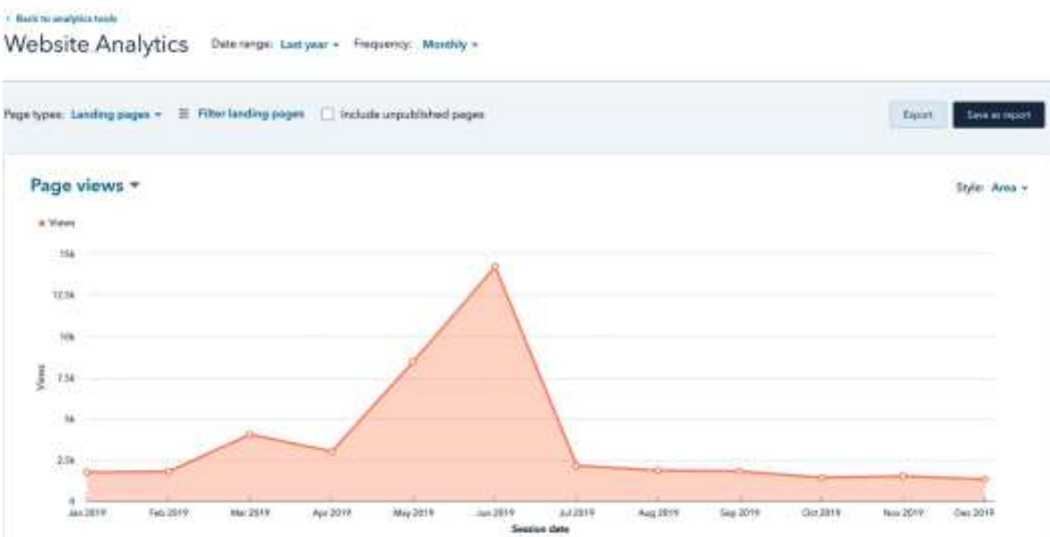


Figure 1.36 – Website Analytics

Figure 1.37 – Traffic Analytics

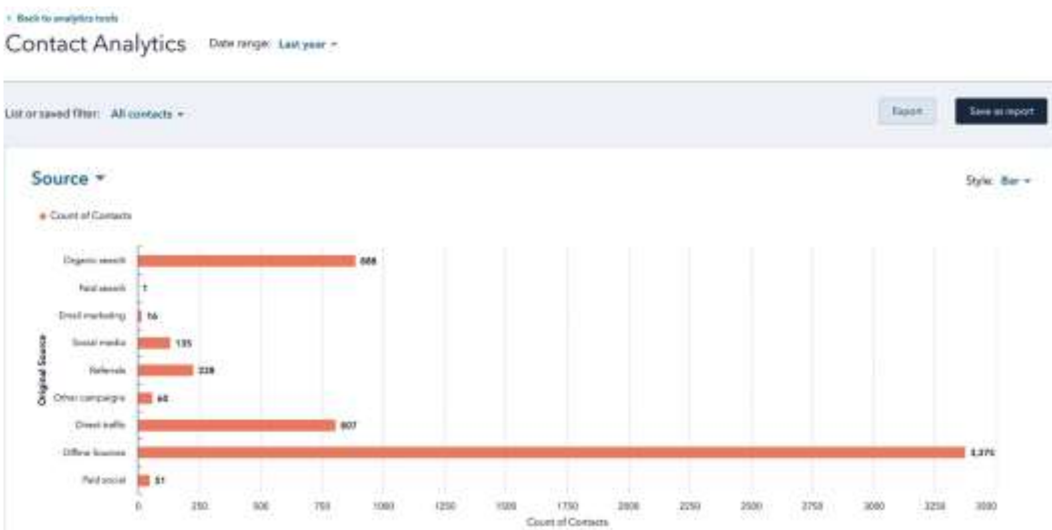


Figure 1.38 – Contact Analytics

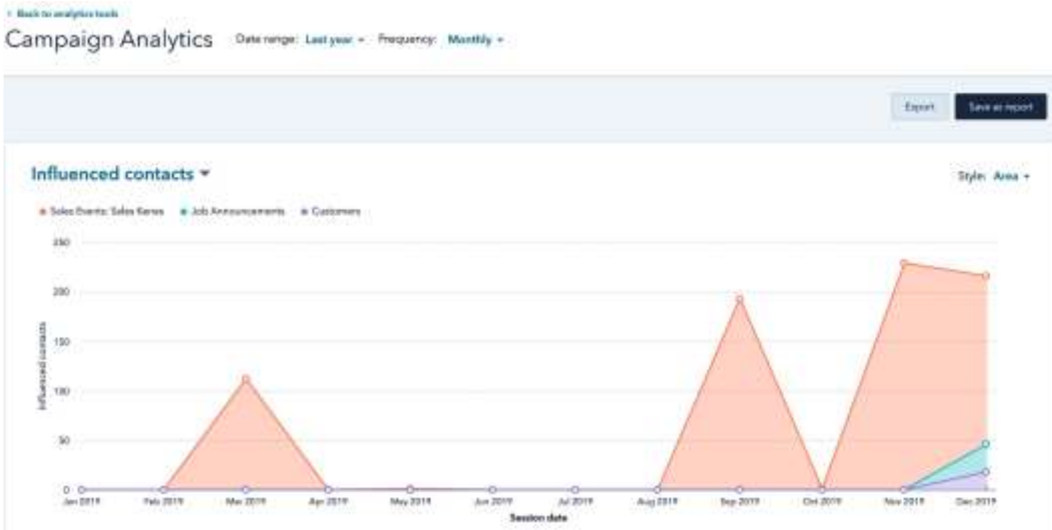


Figure 1.39 – Campaign Analytics

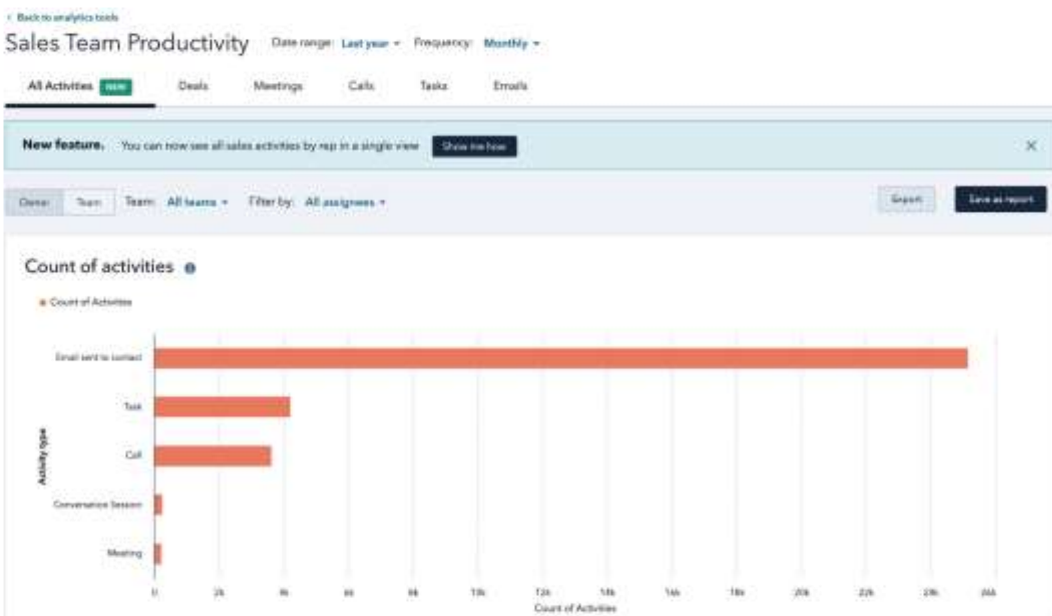


Figure 1.40 – Sales Team Productivity

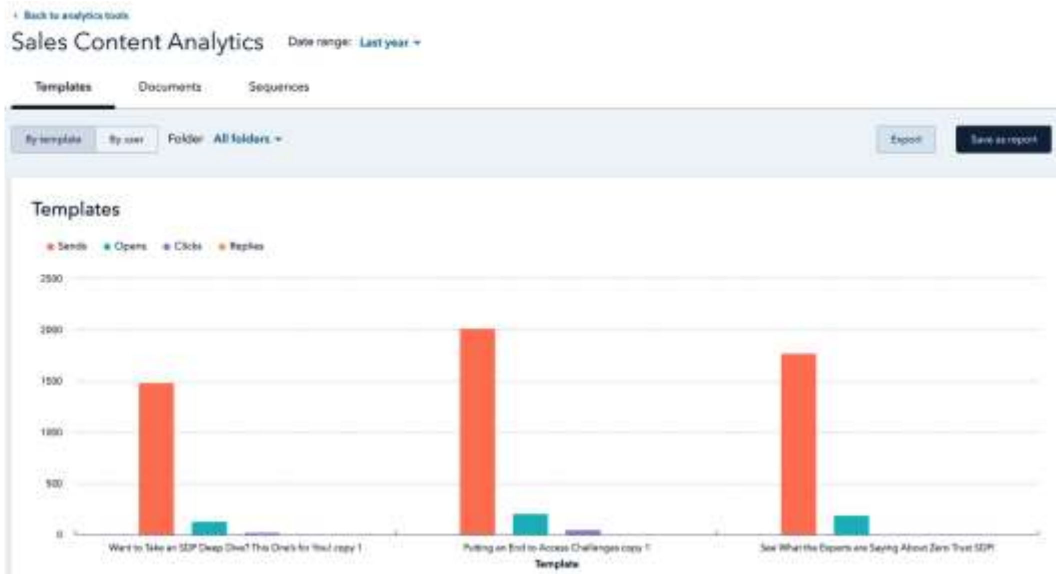


Figure 1.41 – Sales Content Analytics

Questions

To ensure you understand the value of the steps you've just completed, let's practice some common troubleshooting tactics you can implement if faced with any of these issues. Have a go at answering the following questions:

1. Why do you need to create subdomains for your landing pages or blogs if you are hosting these assets in HubSpot?
2. If one of your team members asks why the company needs to use HubSpot analytics if it already has Google Analytics, how would you respond?
3. If you would like to plan an upcoming webinar campaign but are unsure of all the steps you need to do to ensure this campaign is a success, where can you go for a detailed step-by-step guideline?

Further reading

For more information or instructions on any of the items covered in this chapter, do check out these resources:

- HubSpot's *Knowledge Base*: https://help.hubspot.com/
- Contact HubSpot Support: https://help.hubspot.com/

Chapter 2

Images

Figure 2.1 – Top website pages. Source: Google Analytics

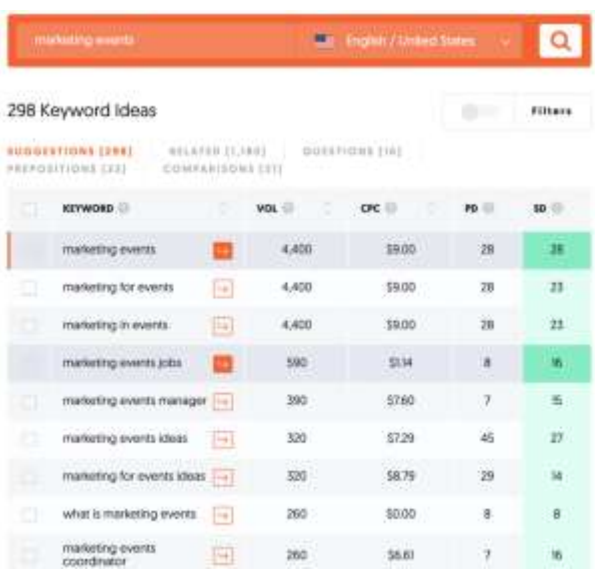


Figure 2.2 – Top SEO keywords for Inbound.com. Source: Ubersuggest

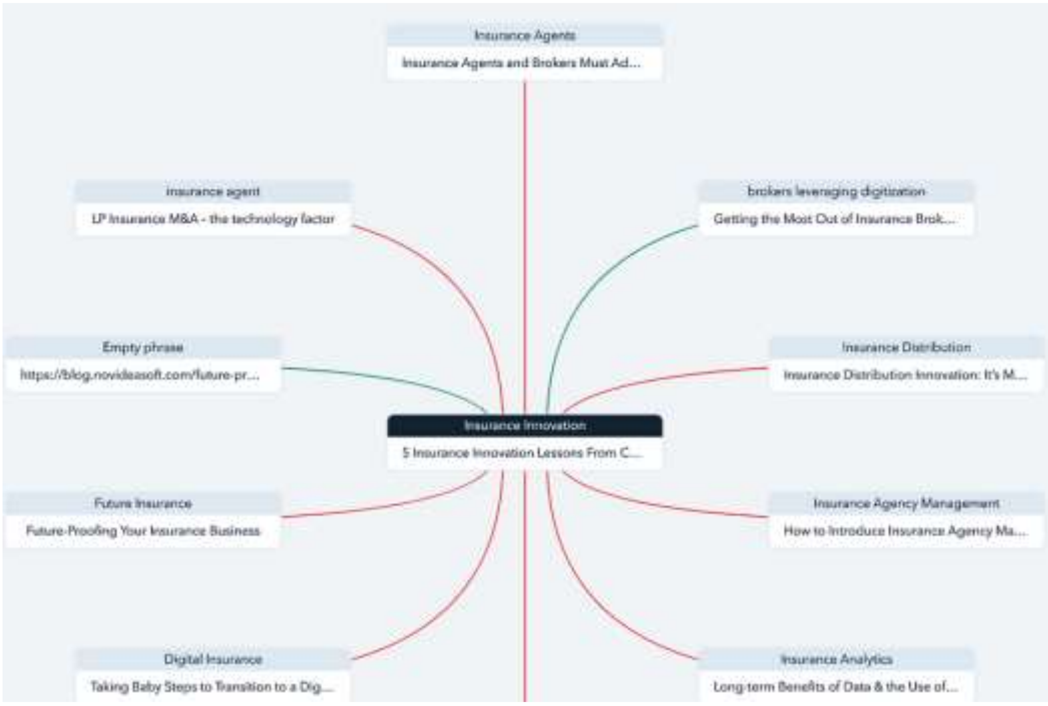


Figure 2.3 – HubSpot SEO tool

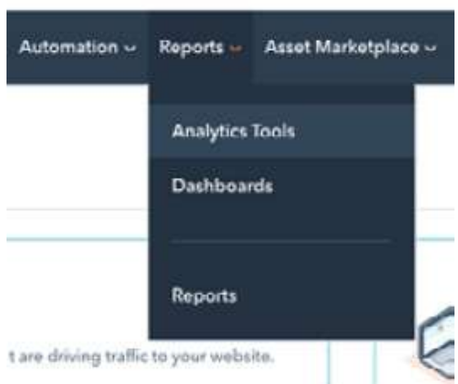


Figure 2.4 – Analytics Tools in Reports

Figure 2.5 – Accessing Tracking URL Builder

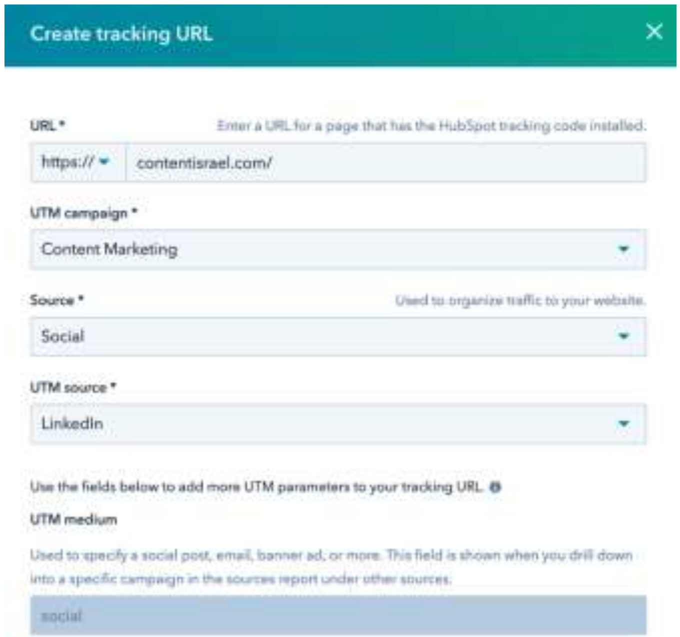


Figure 2.6 – HubSpot's Tracking URL Builder

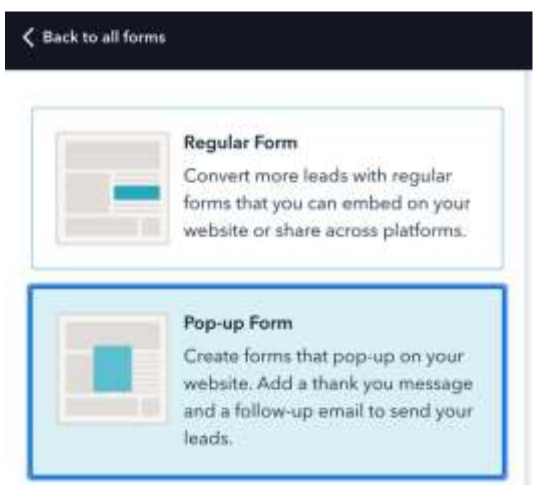


Figure 2.7 – Choosing the type of form in order to create an exit popup

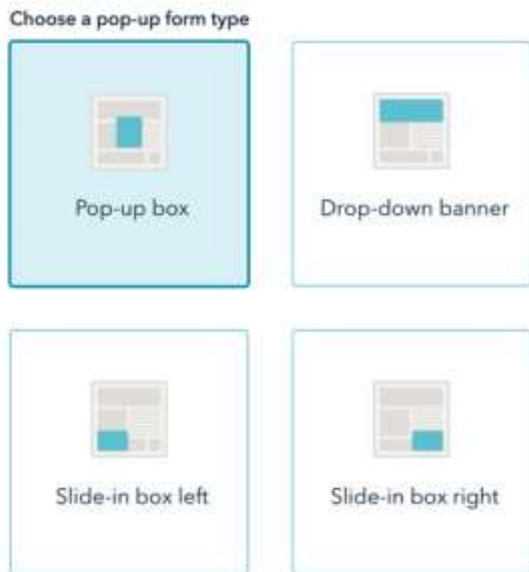


Figure 2.8 – Choosing a pop-up form type

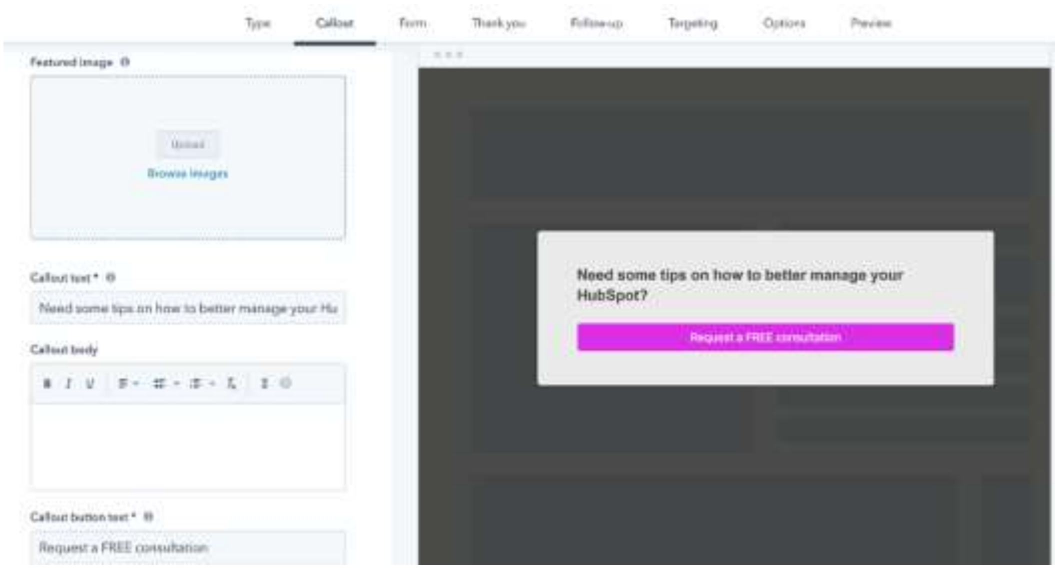


Figure 2.9 – Completing the CTA

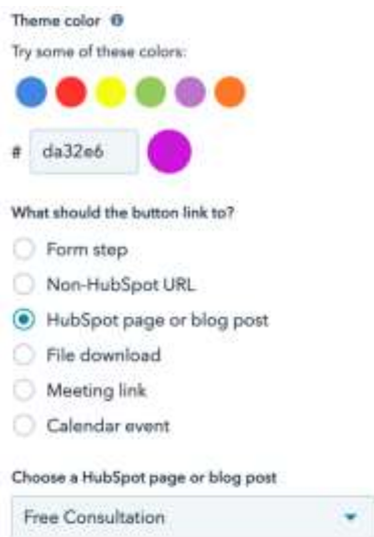


Figure 2.10 – Customizing the CTA and choosing the next action

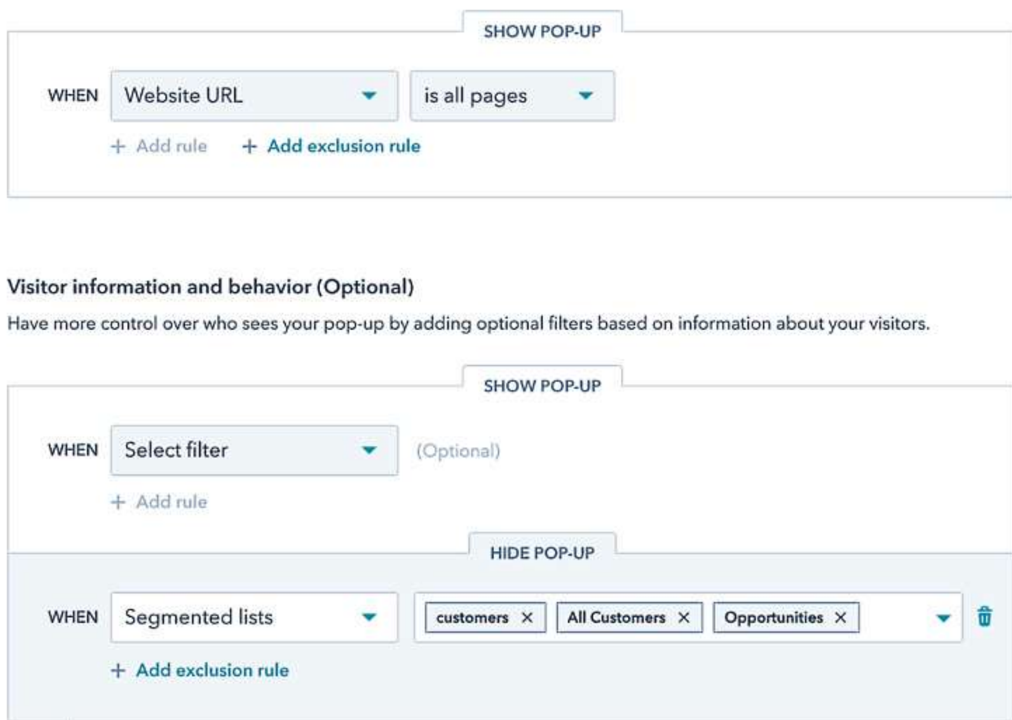


Figure 2.11 – Choosing the pages and to whom the popup should appear

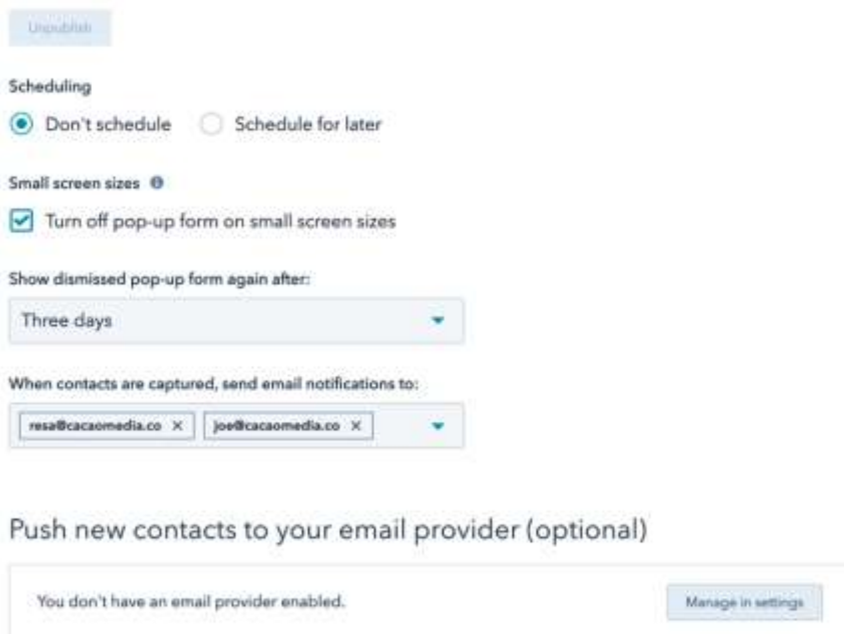


Figure 2.12 – Deciding whether to show the popup on small screens

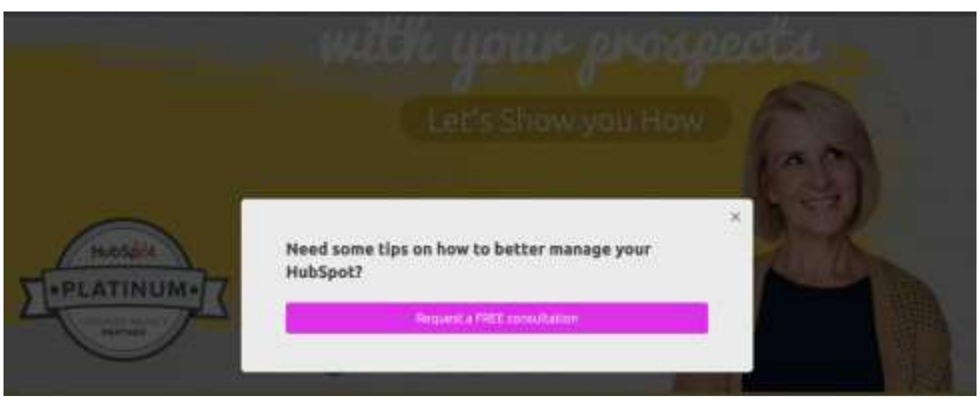


Figure 2.13 – Setting the popup as live on your website

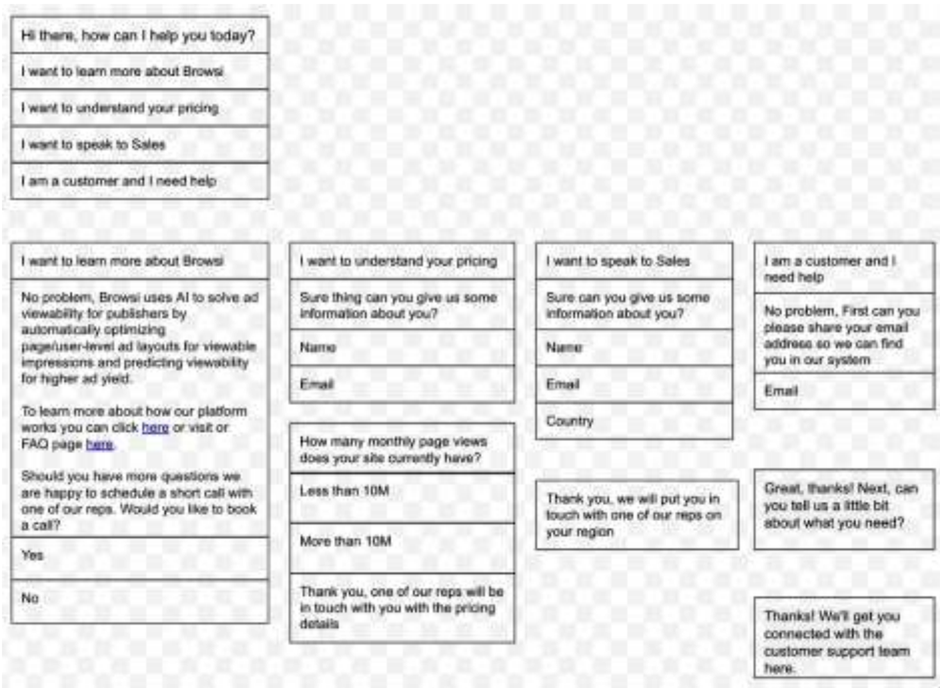


Figure 2.14 – Chatbot map

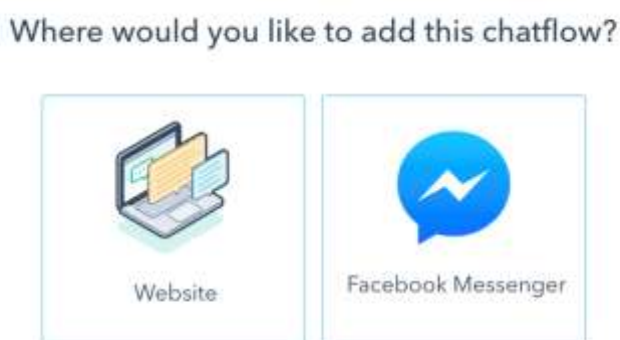


Figure 2.15 – Choosing a website

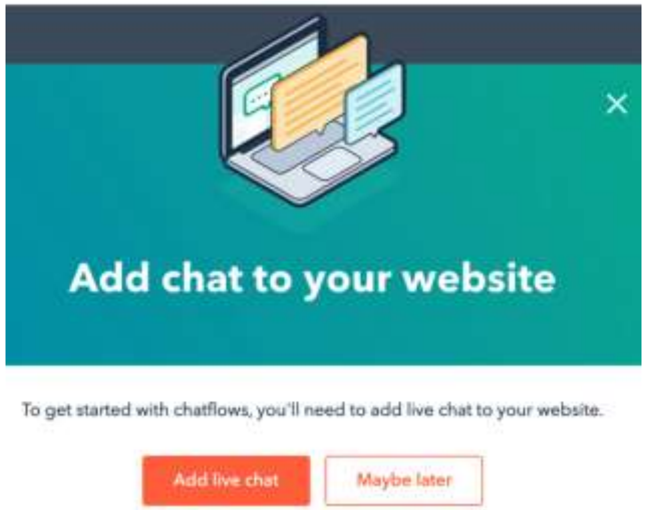


Figure 2.16 – Creating a live chat

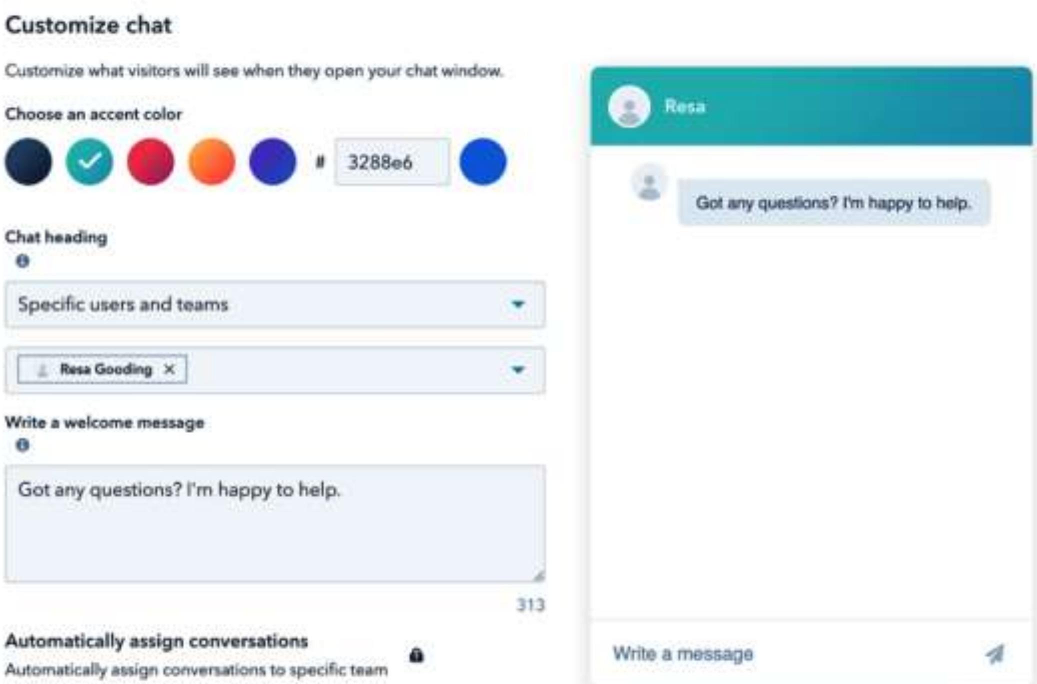


Figure 2.17 – Selecting the user and writing a custom message

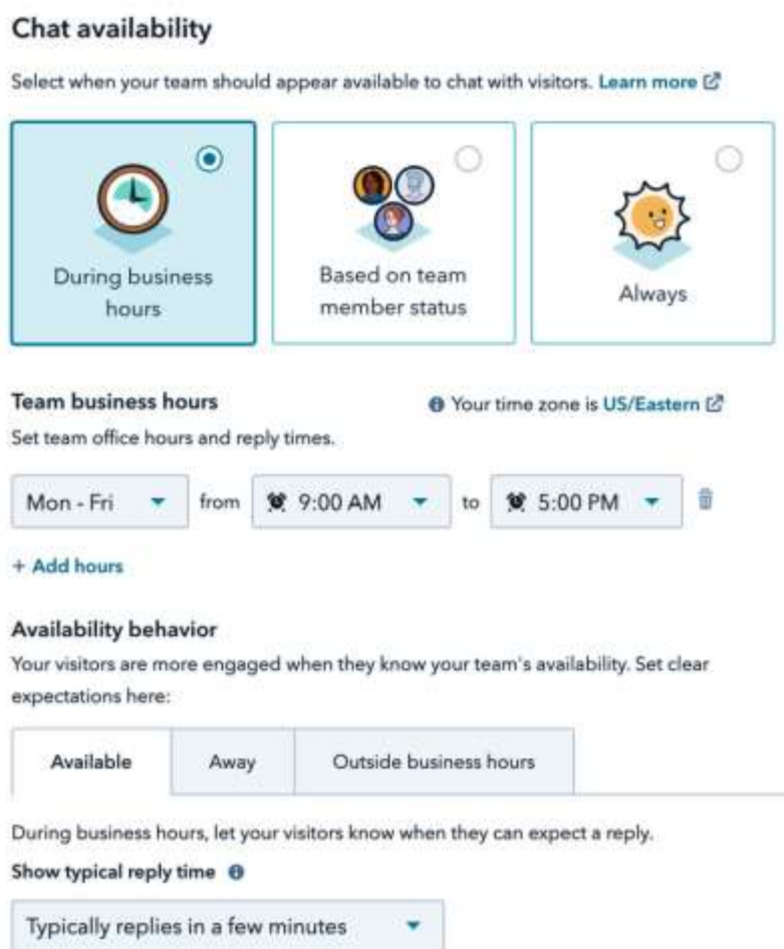


Figure 2.18 – Choosing availability

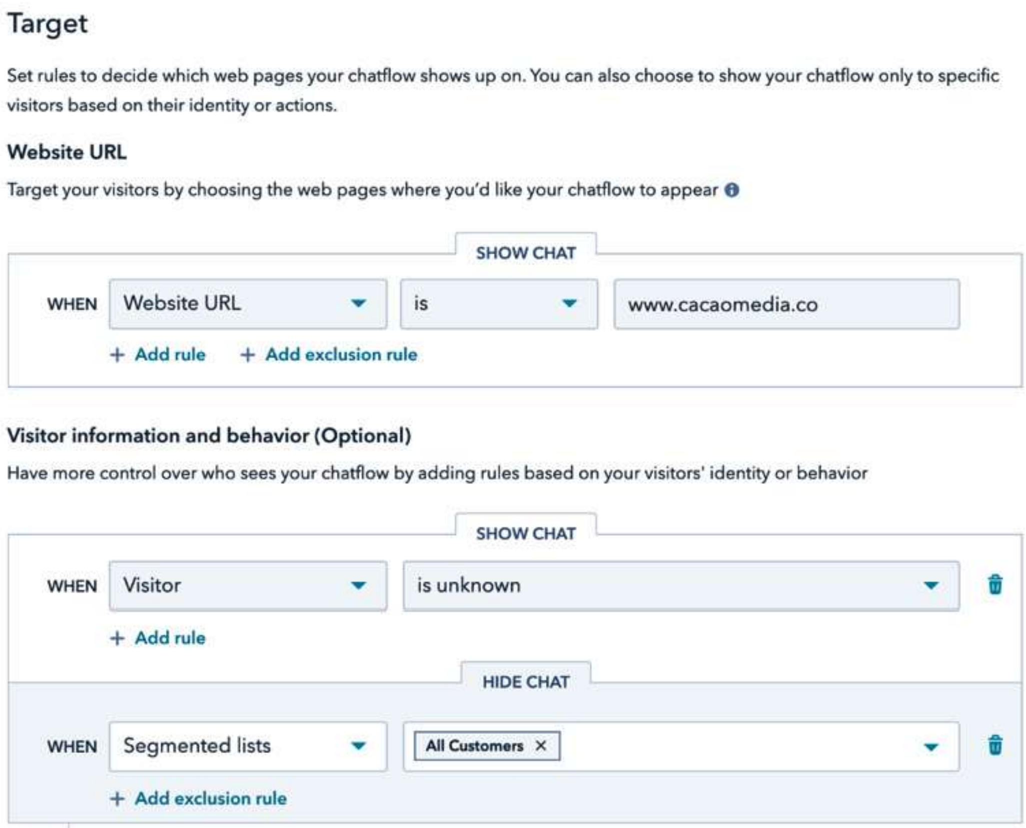


Figure 2.19 – Choosing which pages and to whom the live chat should be shown

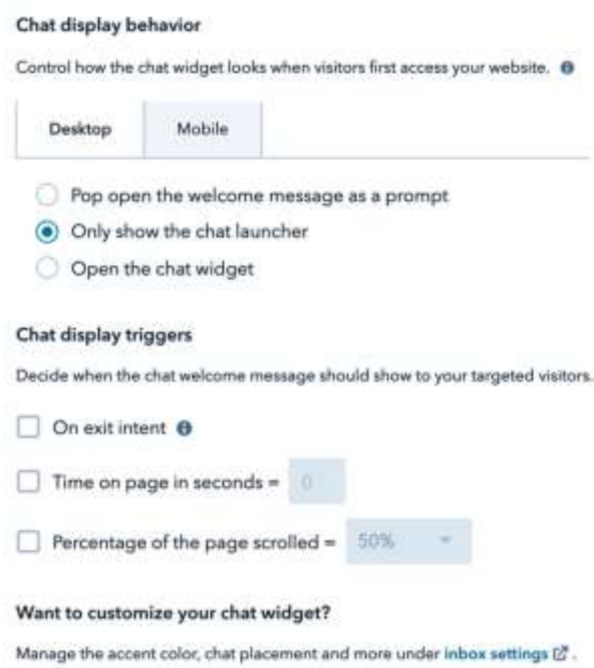


Figure 2.20 – Choosing whether to show the live chat on small screens

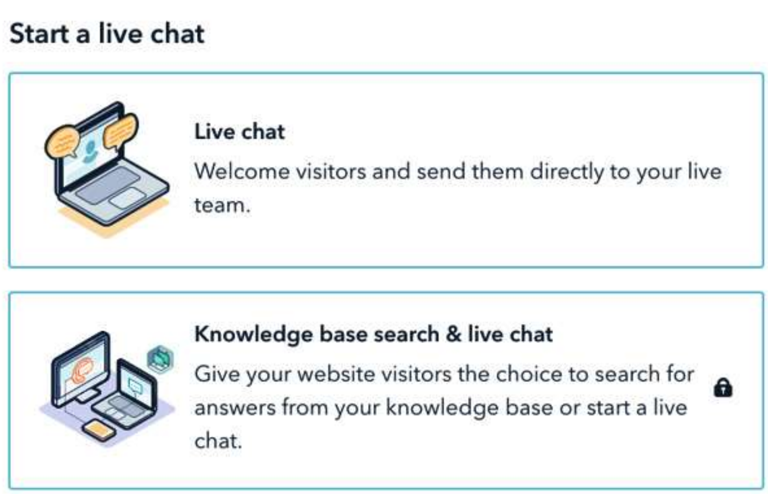


Figure 2.21 – Setting the chat as "live"

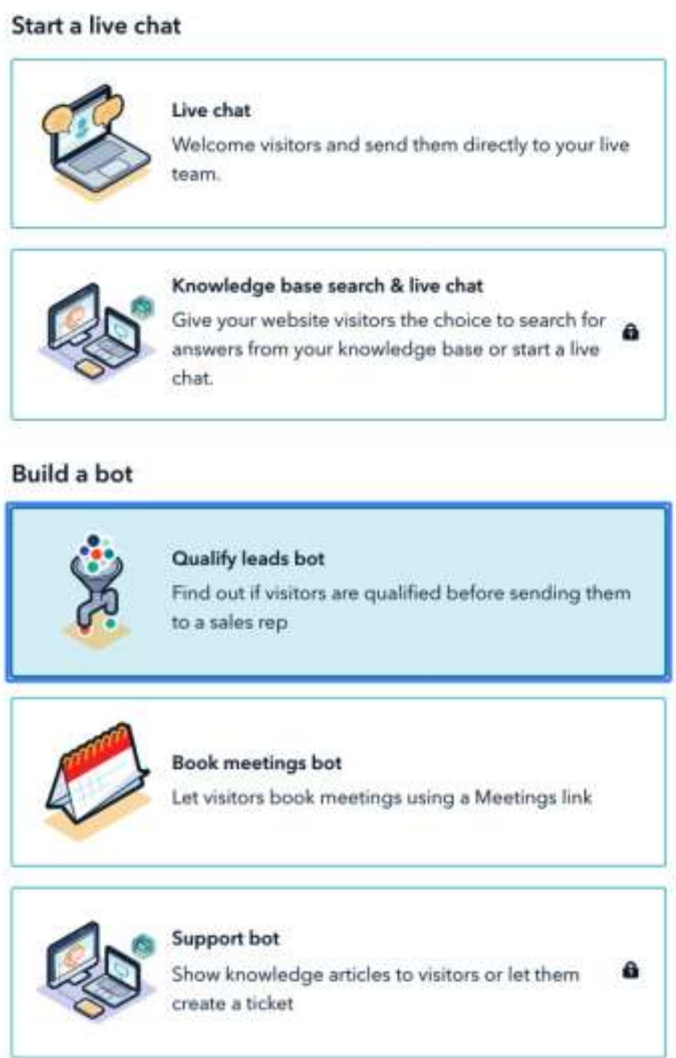


Figure 2.22 – Choosing Qualify leads bot

Figure 2.23 – Building out the chatbot

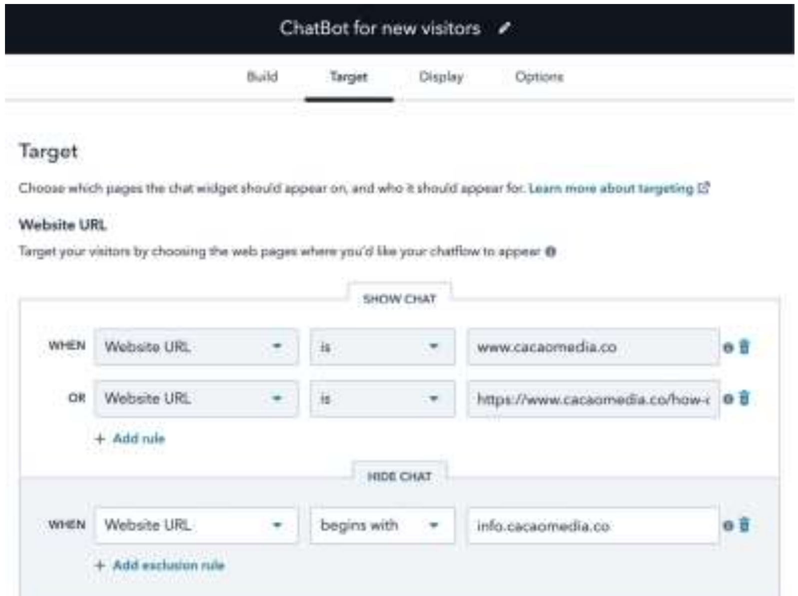


Figure 2.24 – Choosing which pages and to whom the chatbot should be shown

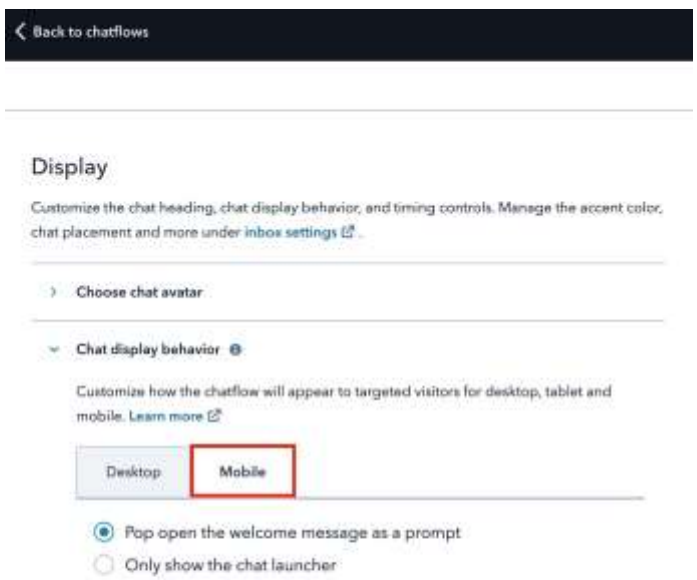


Figure 2.25 – Deciding whether to show the chat on small screens and when

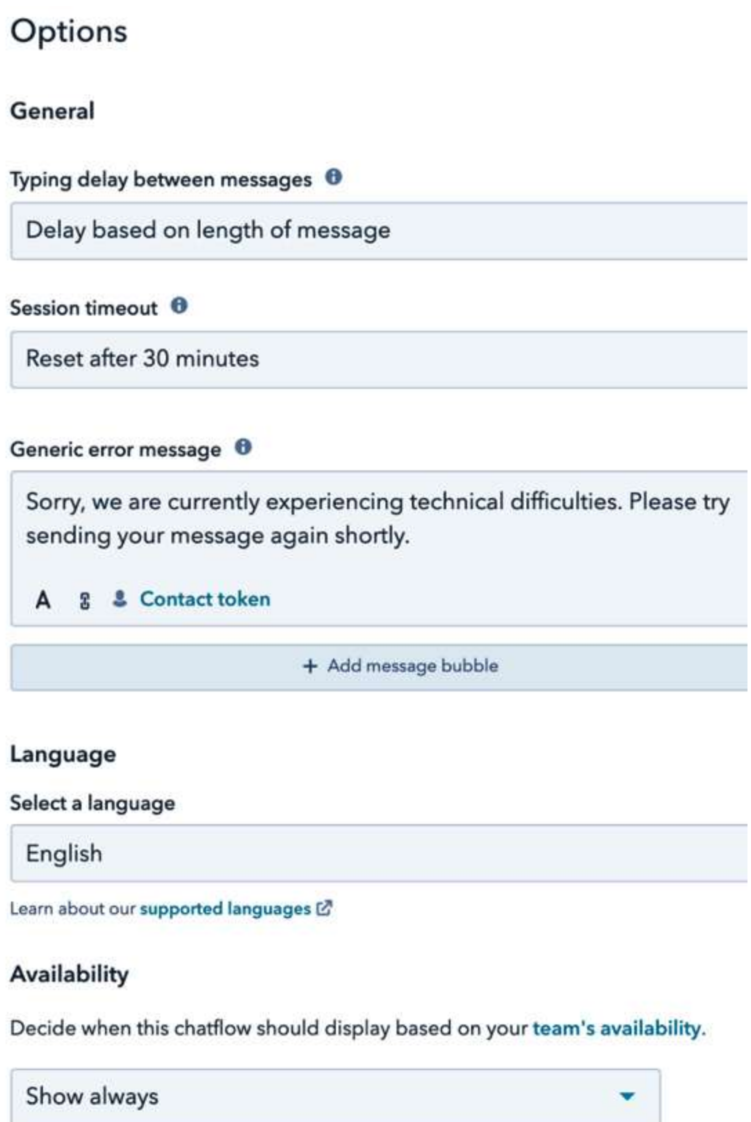


Figure 2.26 – Choosing when the chatbot will end if there is no response

Figure 2.27 – Setting your chatbot as live and testing it

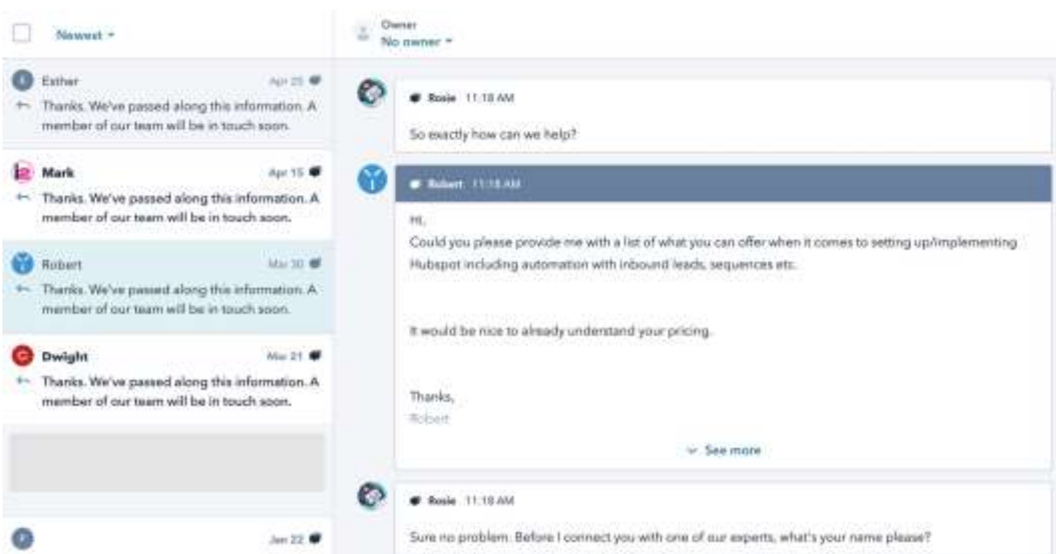


Figure 2.28 – Chatbot conversations in your HubSpot inbox

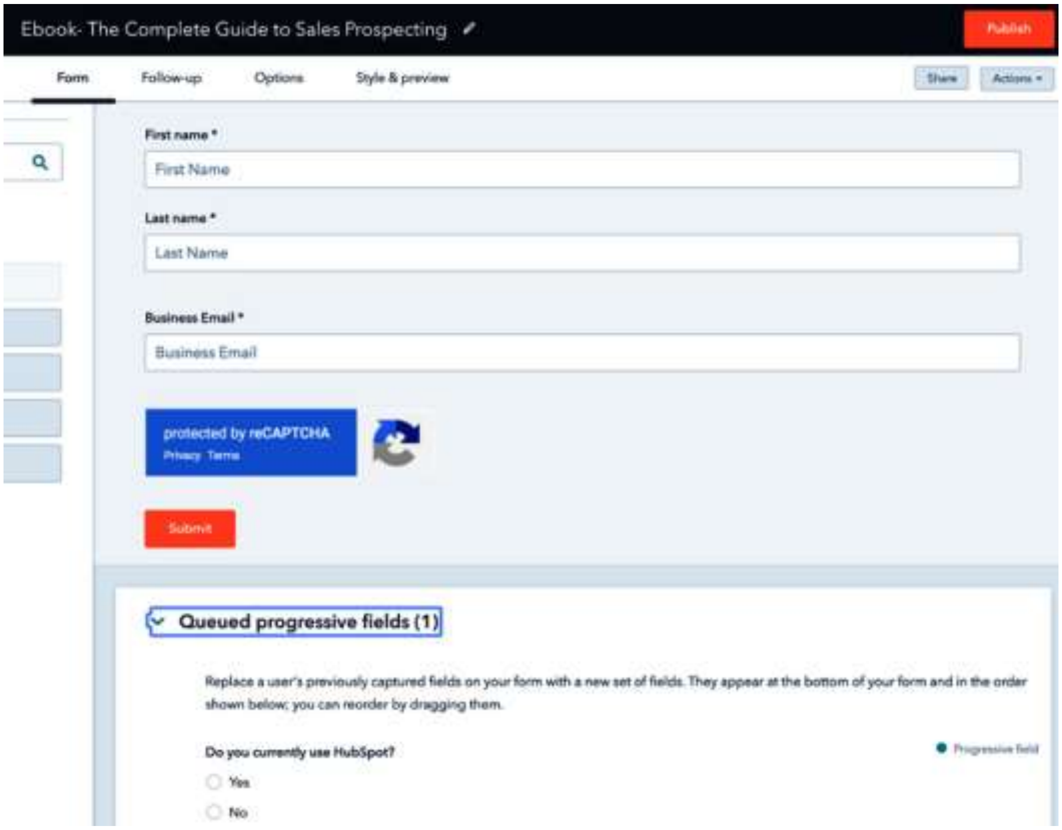


Figure 2.29 – Progressive fields in HubSpot

Questions

To ensure you understand the value of the steps you've just completed, have a go at answering the following questions:

1. What is one tactic you can use to generate more traffic in less than 30 days?
2. How can you convert your contact us page to a more appealing form that visitors want to fill out?
3. How can you capture more information about your contacts over time without asking a bunch of questions all at once?

Further reading

- HubSpot marketing blog: https://blog.hubspot.com/marketing
- HubSpot Academy: https://academy.hubspot.com/
- Projects tool (this is located within your individual portal)

Chapter 3

Images

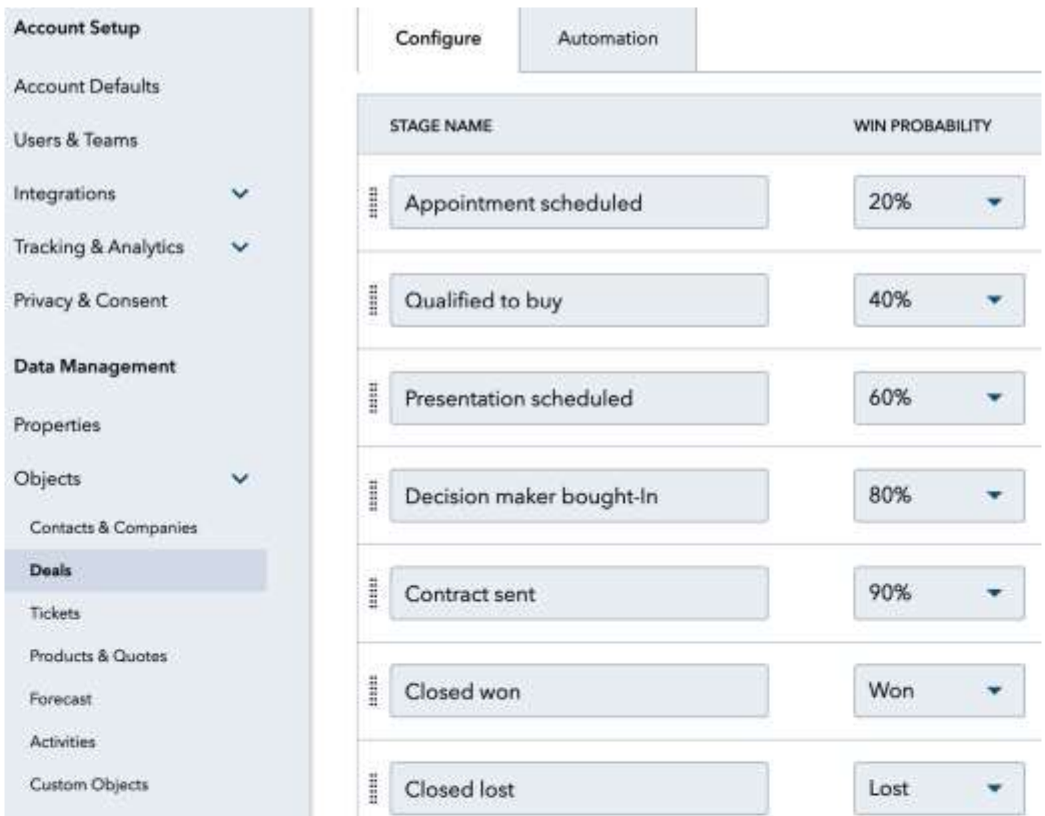


Figure 3.1 – Updating Deals stages

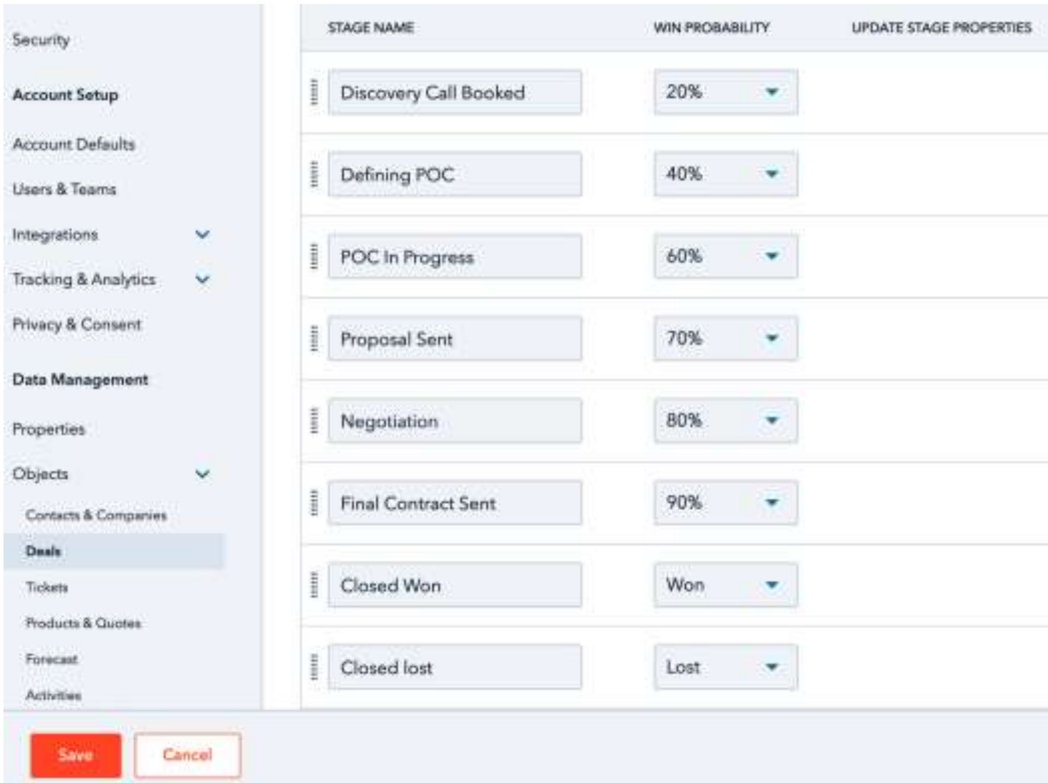


Figure 3.2 – Updating Deals stages and probabilities

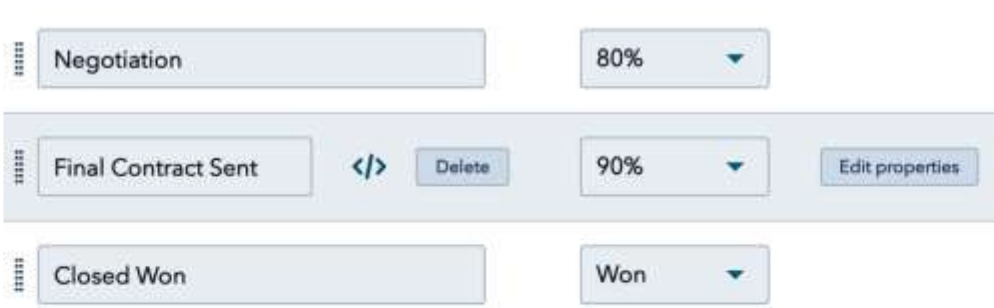


Figure 3.3 – Edit properties in deal stages

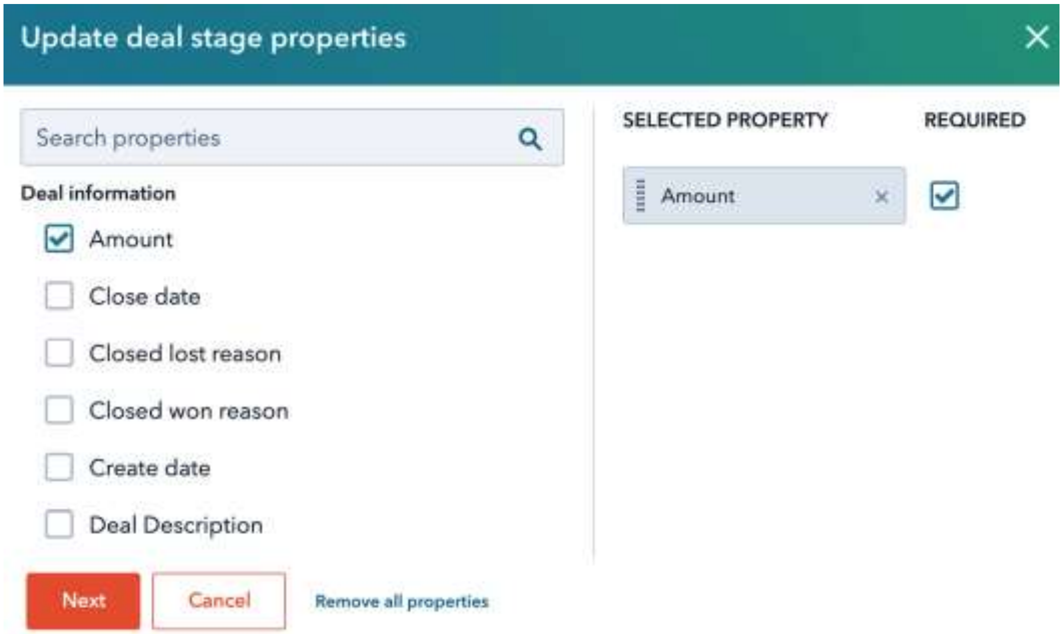


Figure 3.4 – Setting mandatory fields for your deal stages

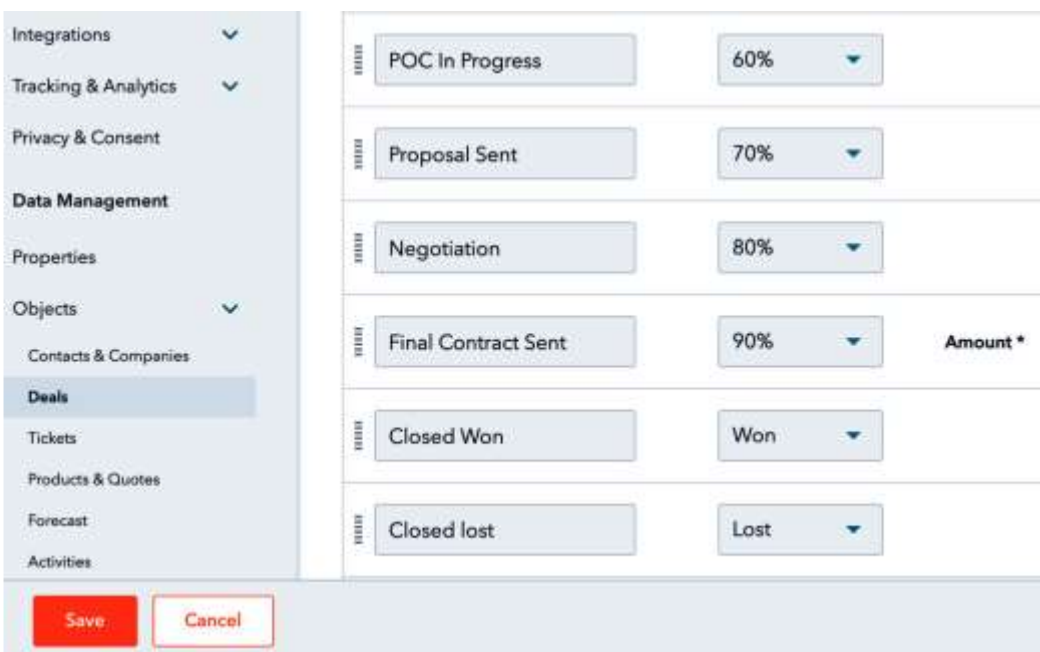


Figure 3.5 – Saving your settings

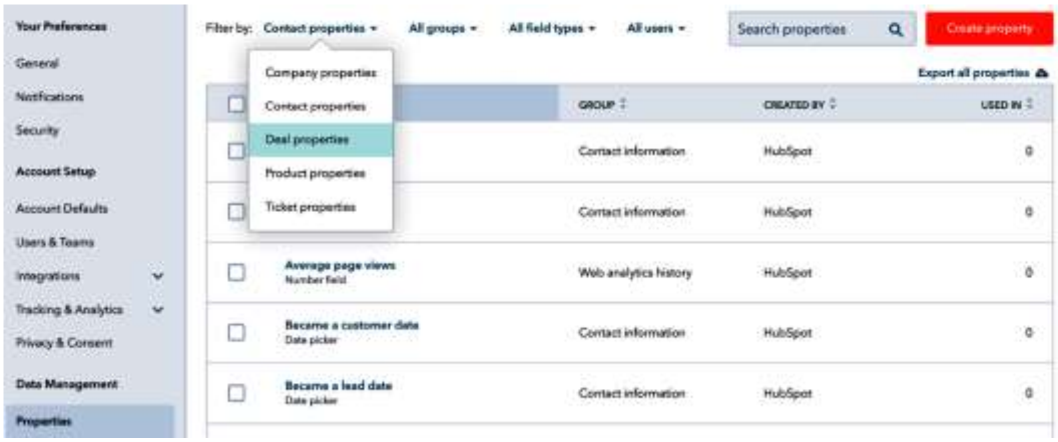


Figure 3.6 – Going to Deal properties

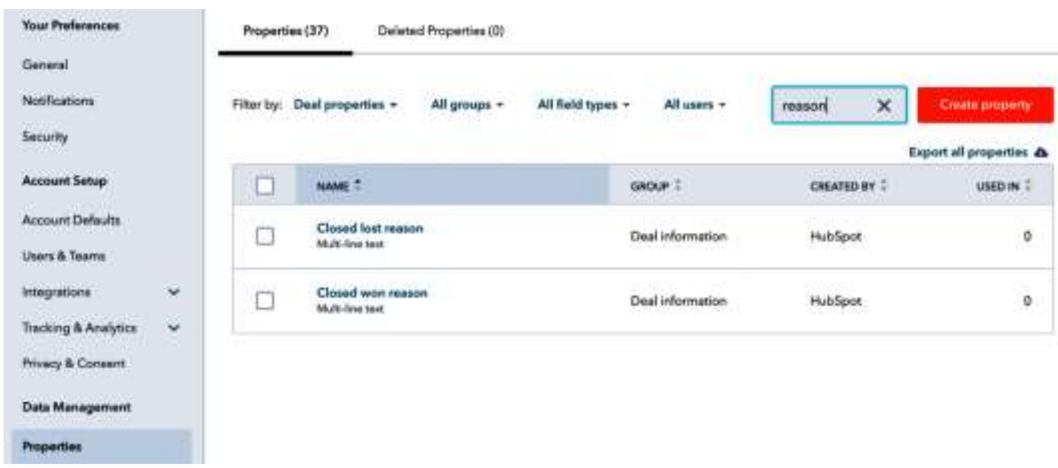


Figure 3.7 – Finding the Closed lost reason property

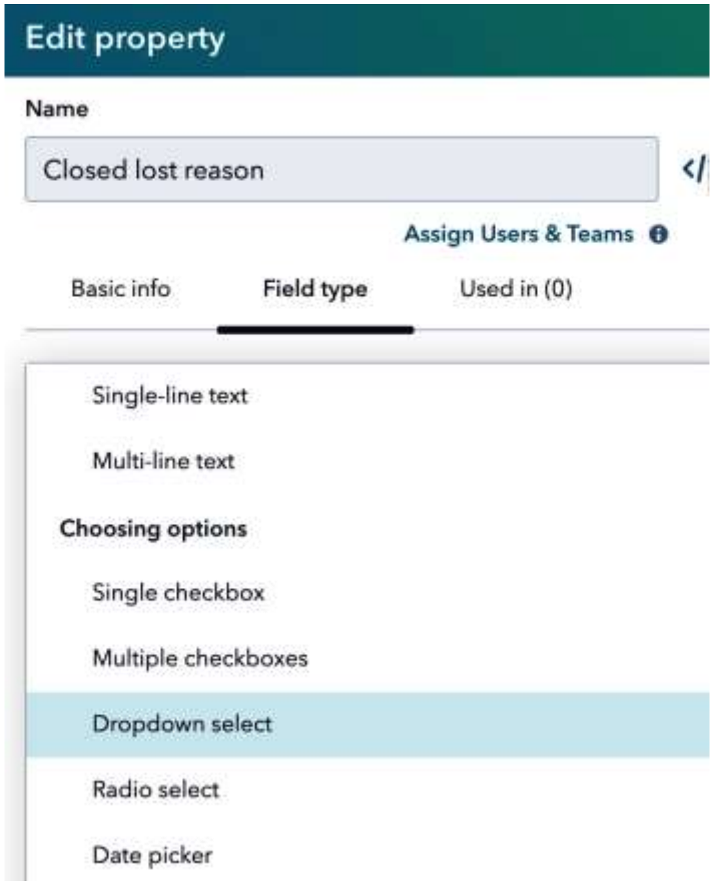


Figure 3.8 – Changing the field type to Dropdown select

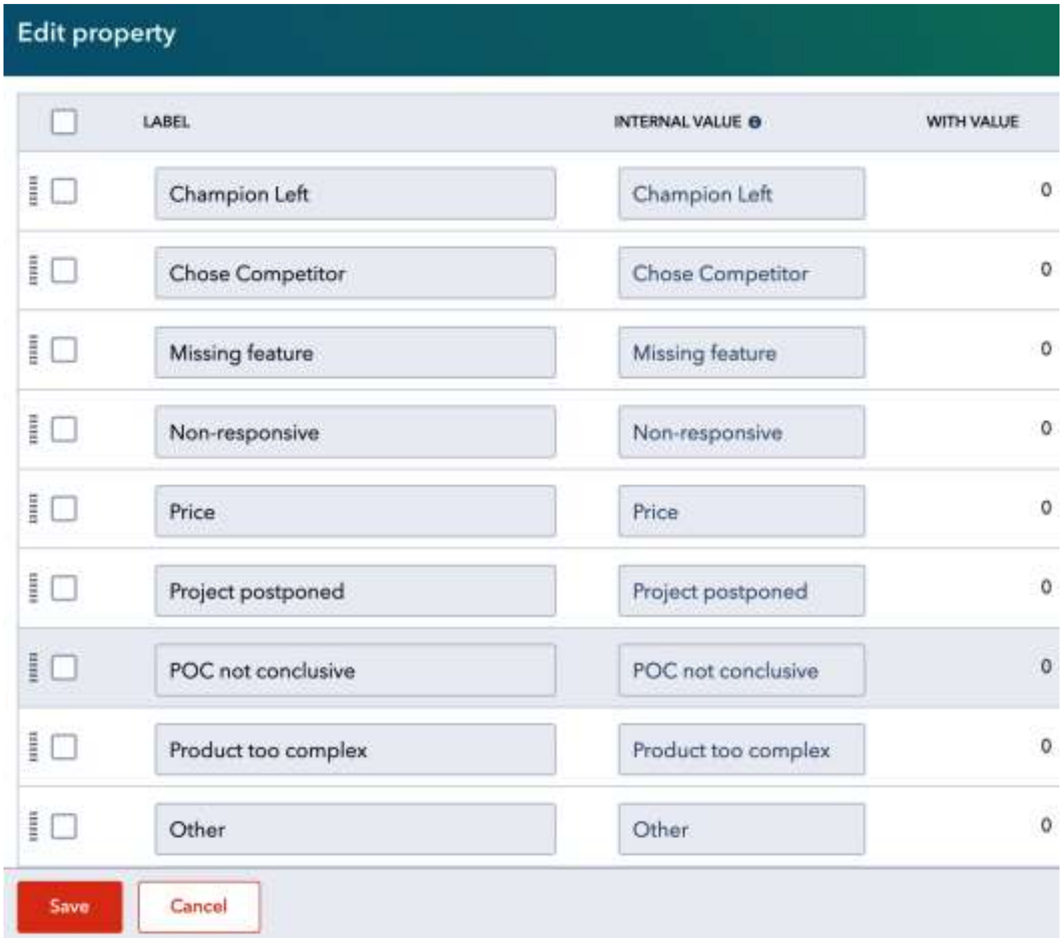


Figure 3.9 – Adding the reasons for losing a deal

Figure 3.10 – Adding the Closed lost reasons to the Closed lost deal stage

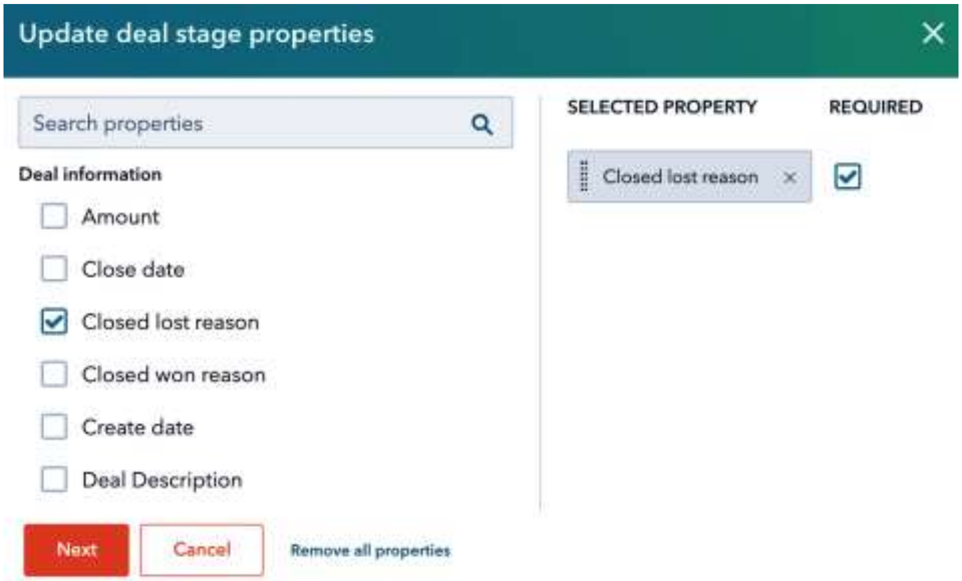


Figure 3.11 – Making the Closed lost reason feature mandatory

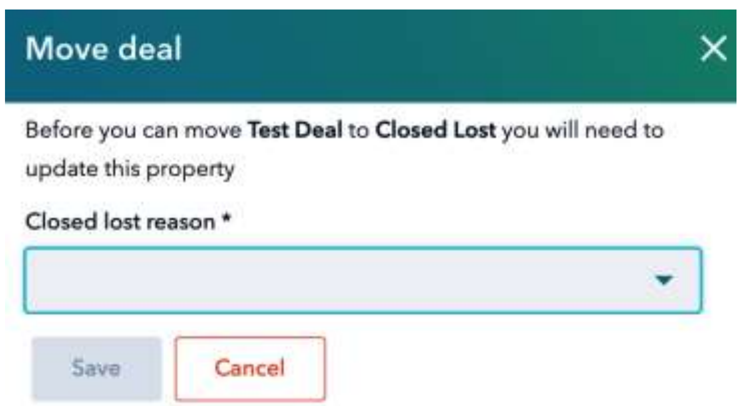


Figure 3.12 – Notification pop-up box for choosing the Closed lost reason

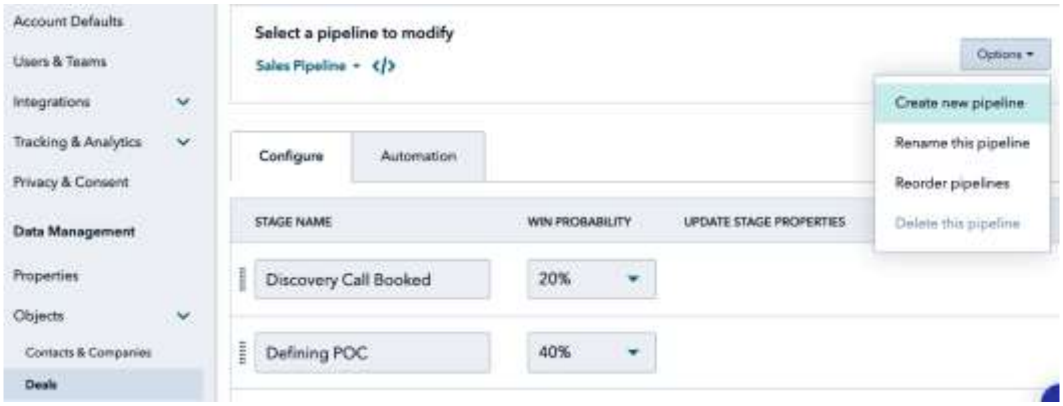


Figure 3.13 – Creating a second pipeline

Figure 3.14 – Naming your pipeline

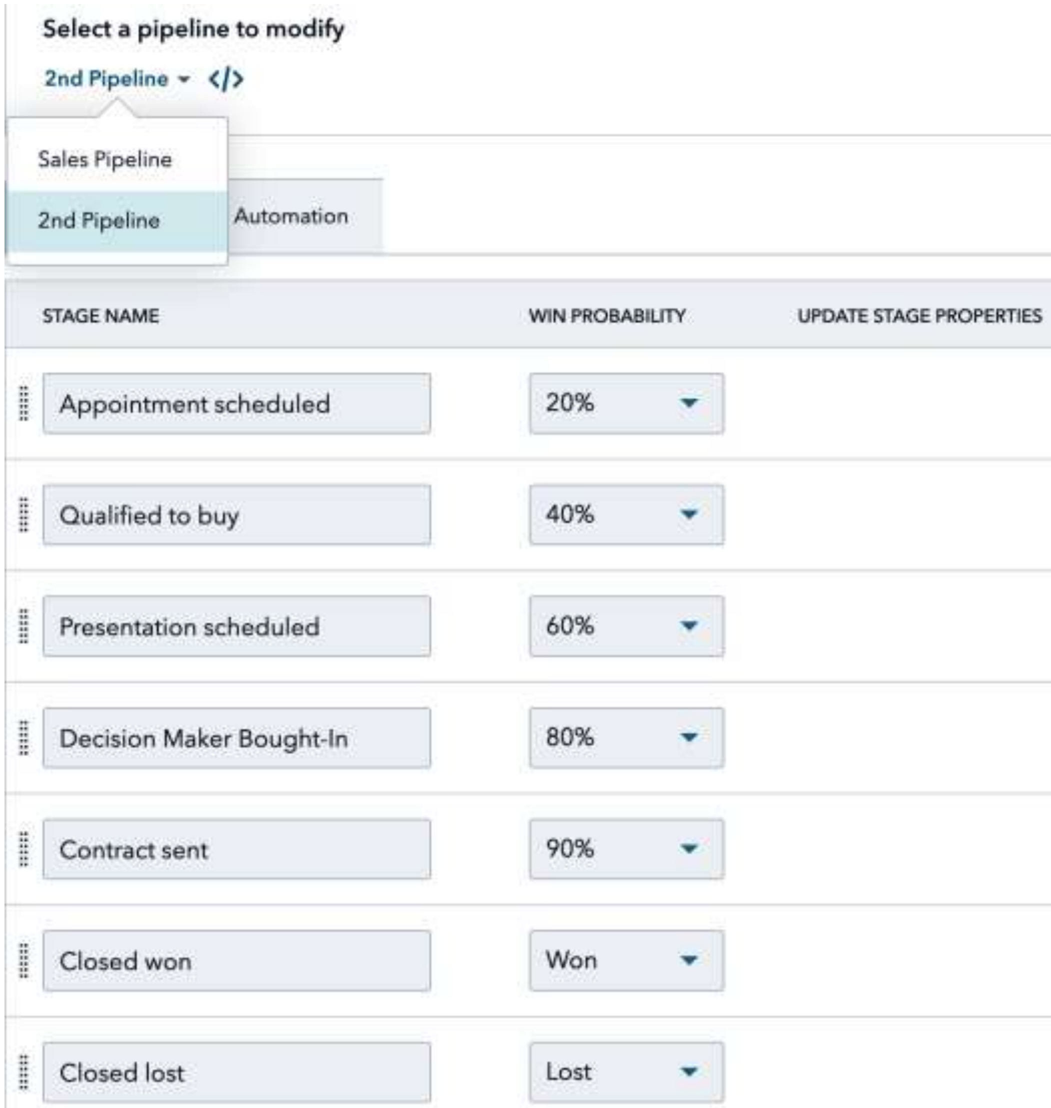


Figure 3.15 – Customizing the stages in the second pipeline

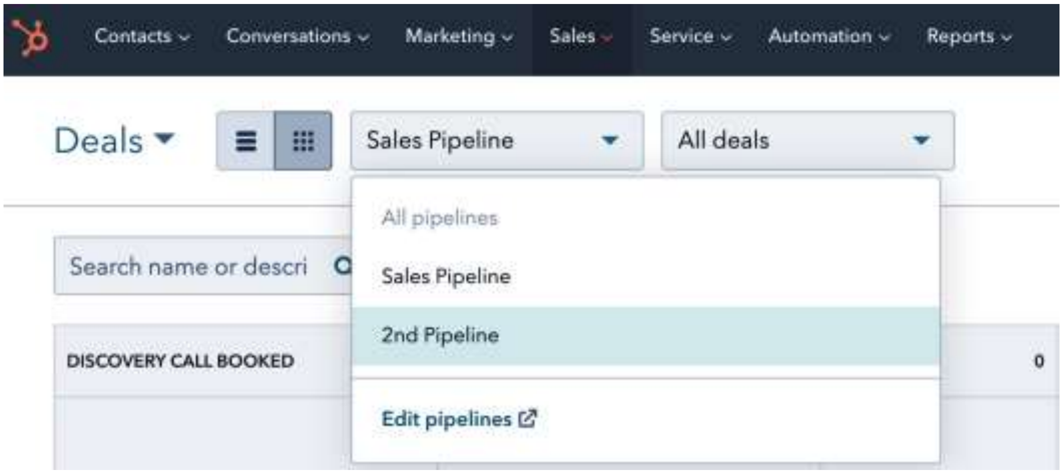


Figure 3.16 – Creating deals in your new pipeline

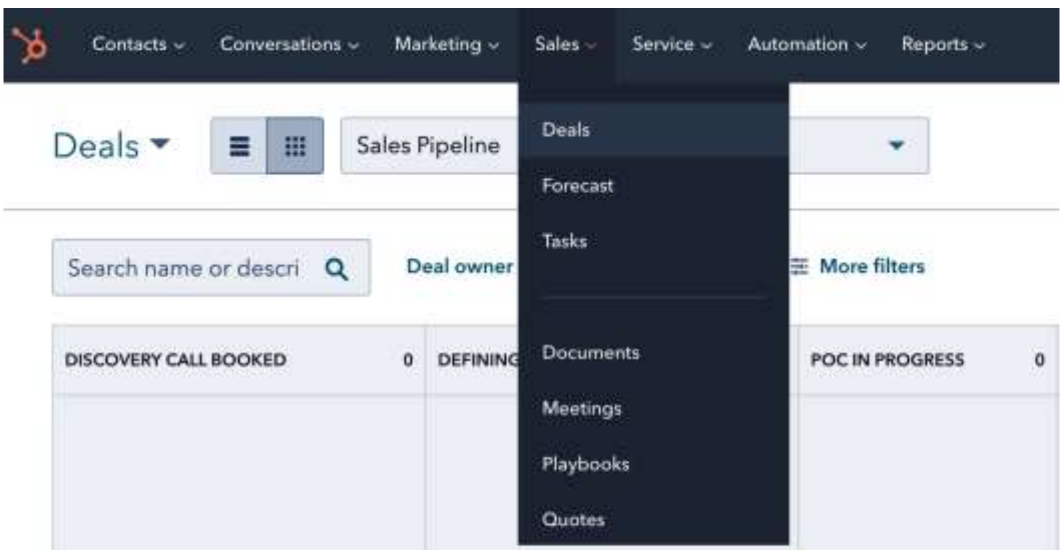


Figure 3.17 – Navigating to Deals

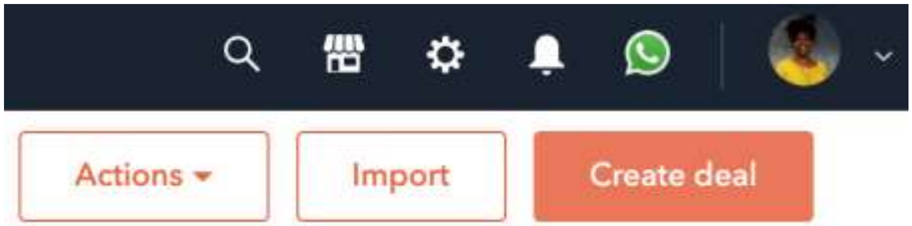


Figure 3.18 – Creating a deal

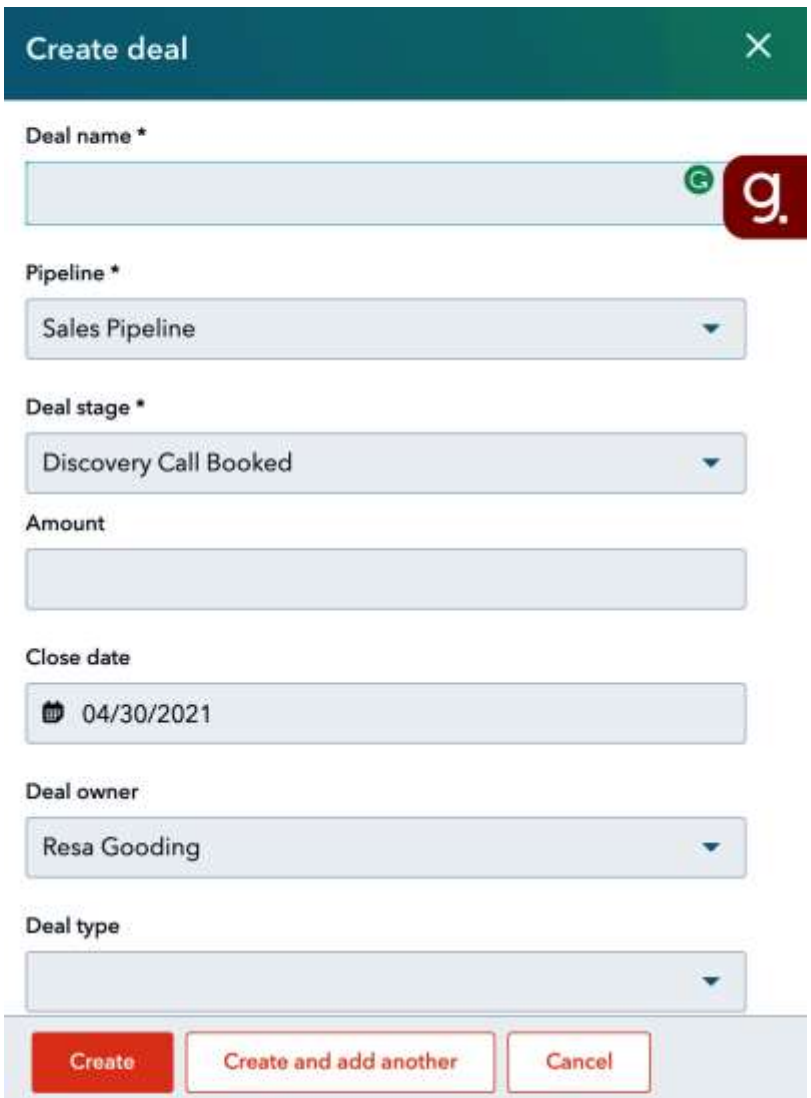


Figure 3.19 – Enter the relevant information as it relates to the respective deal

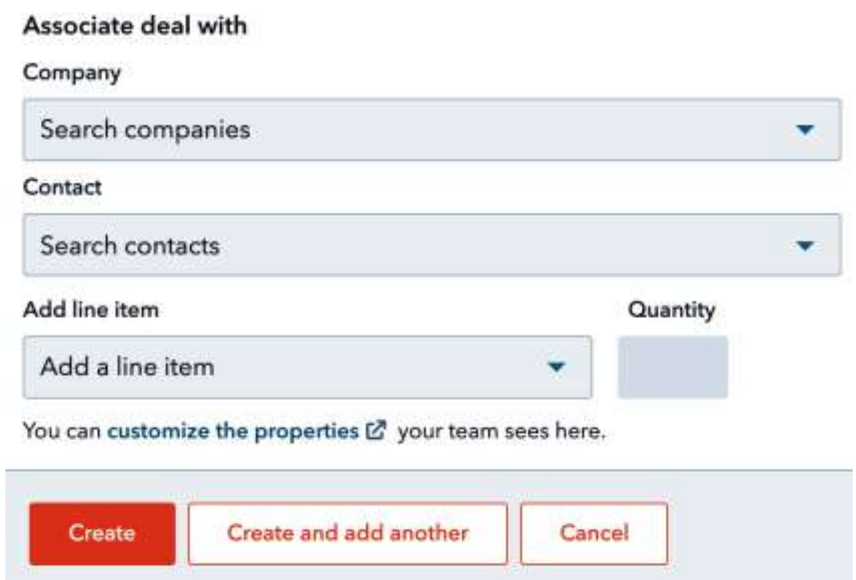


Figure 3.20 – Associate contacts and companies to the deal

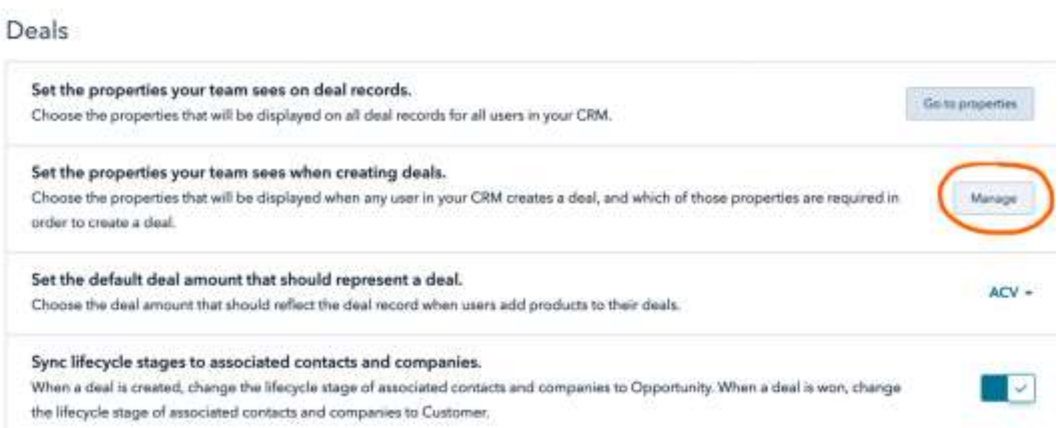


Figure 3.21 – Set the properties your team sees when creating deals

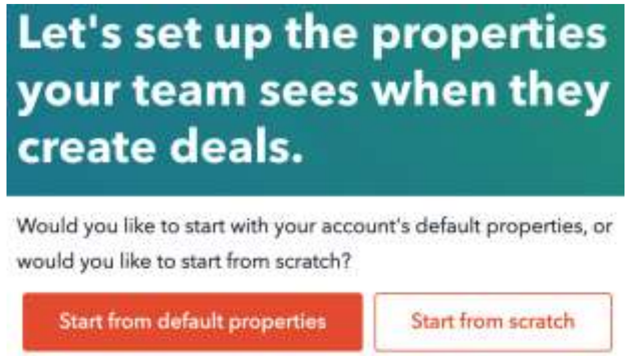


Figure 3.22 – Choosing whether to set these properties from scratch or apply the default properties

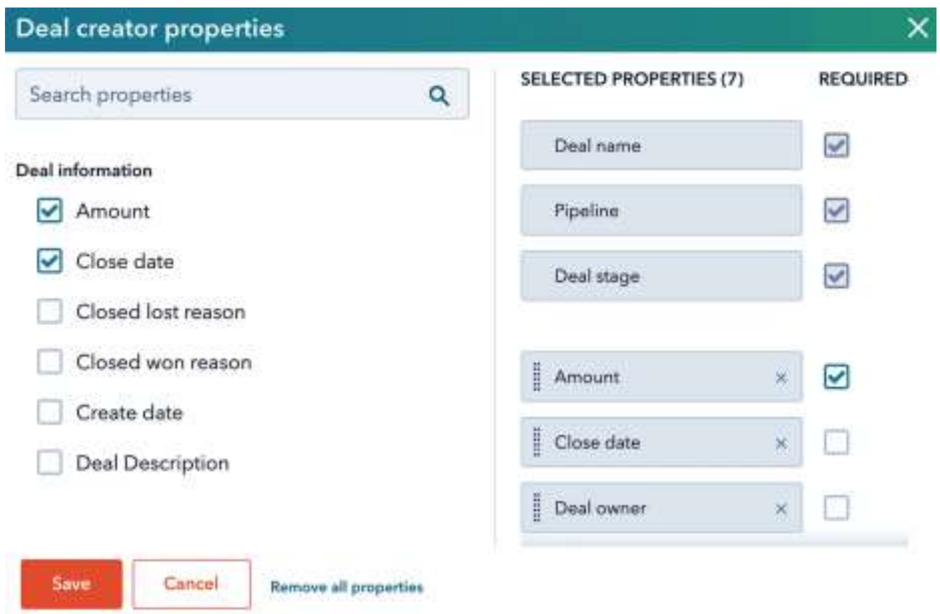


Figure 3.23 – Choosing which fields should be seen when creating a deal record

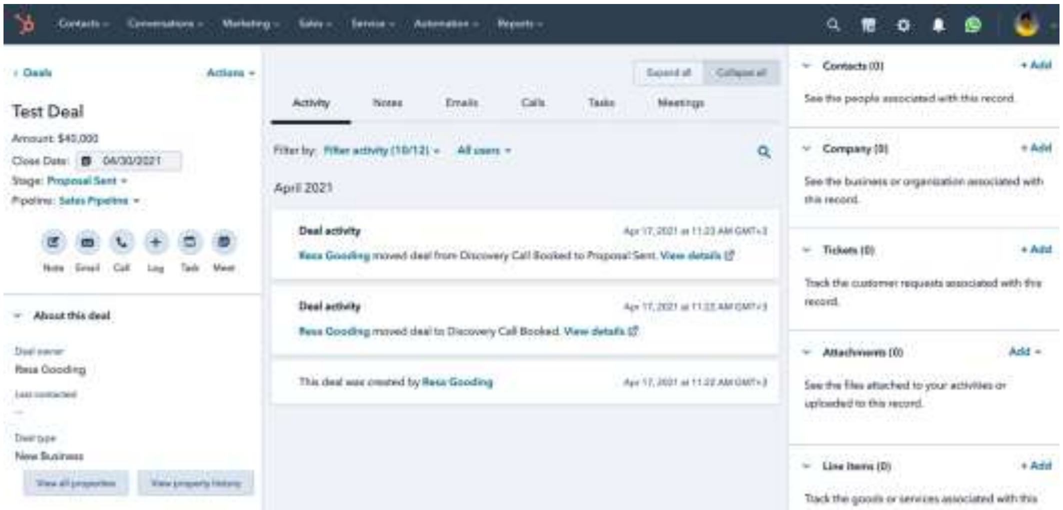


Figure 3.24 – Contact record

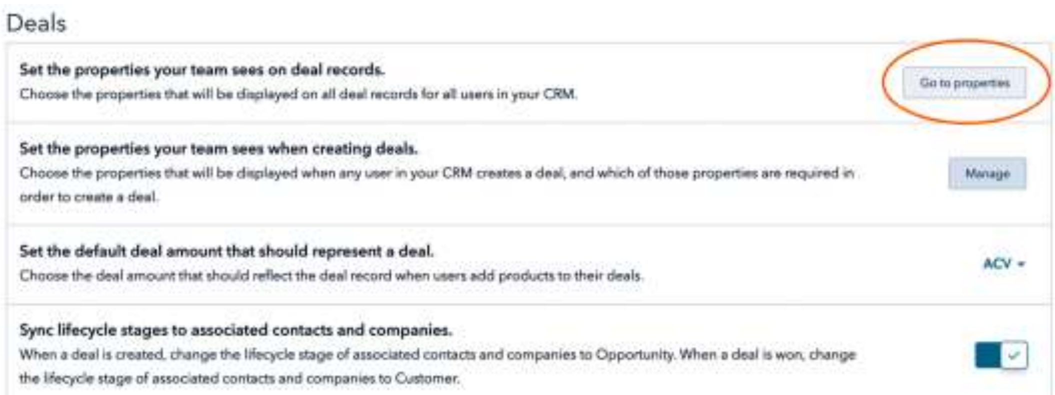


Figure 3.25 – Setting the properties your team sees on deal records

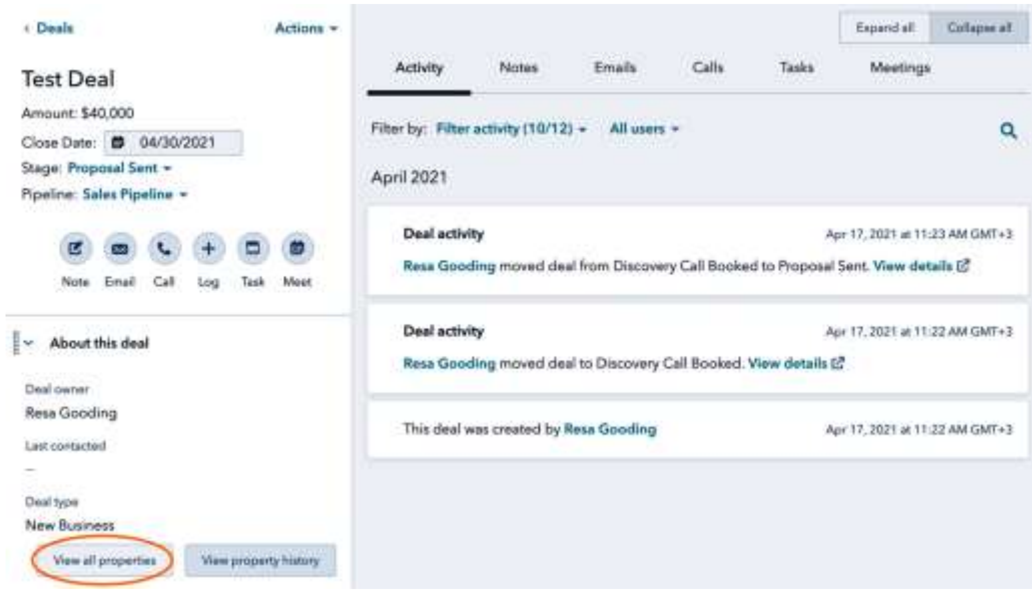


Figure 3.26 – View all properties

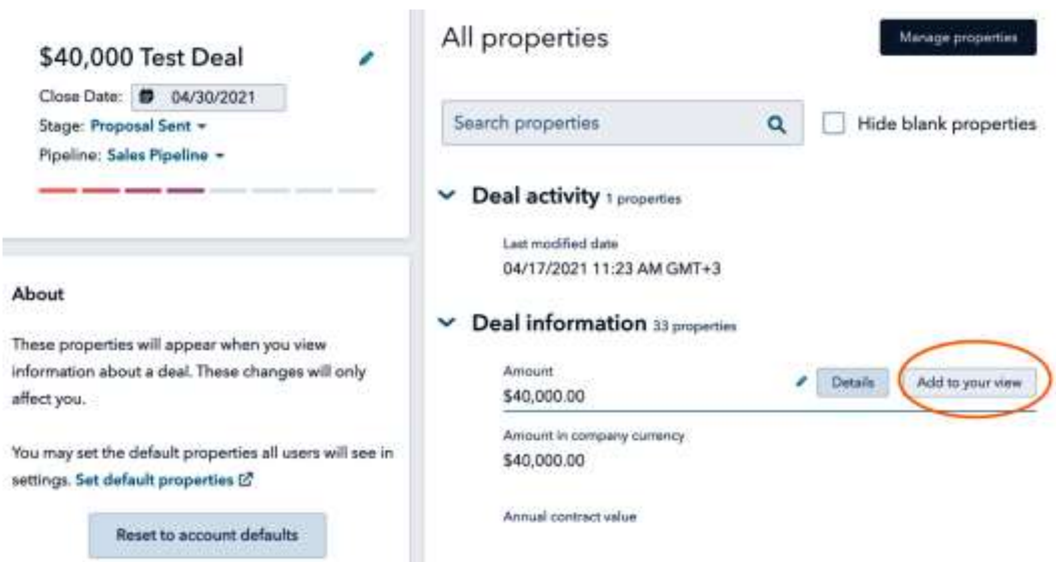


Figure 3.27 – Adding the respective property to your view

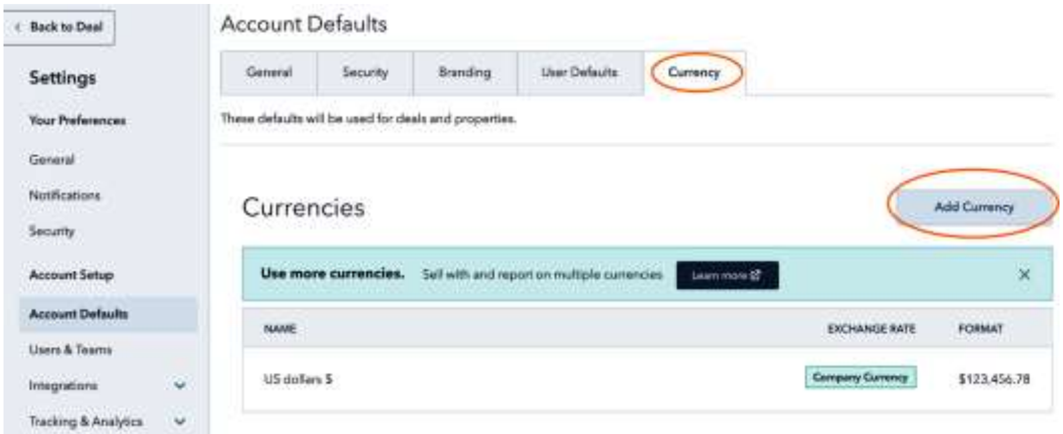


Figure 3.28 – Adding another currency

Figure 3.29 – Selecting a currency

Figure 3.30 – Inserting the exchange rate for the selected currency

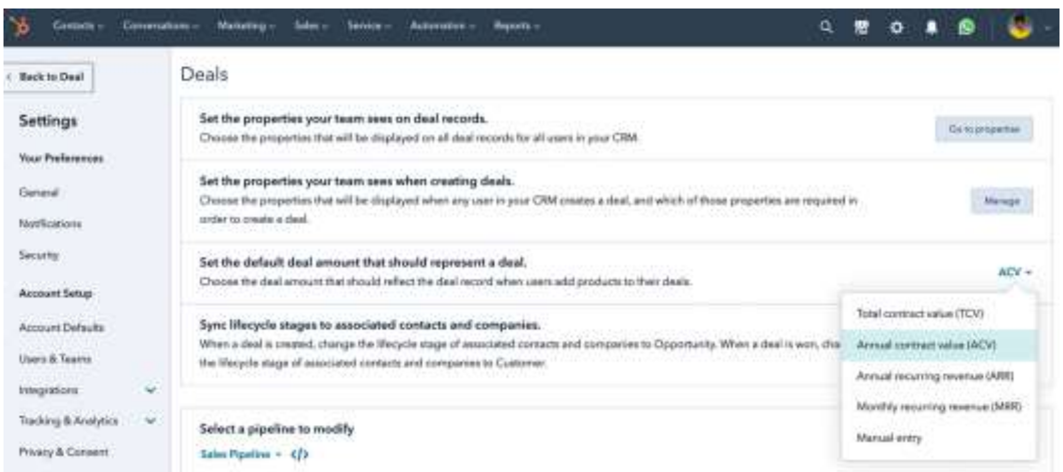


Figure 3.31 – Set the default deal amount that should represent a deal

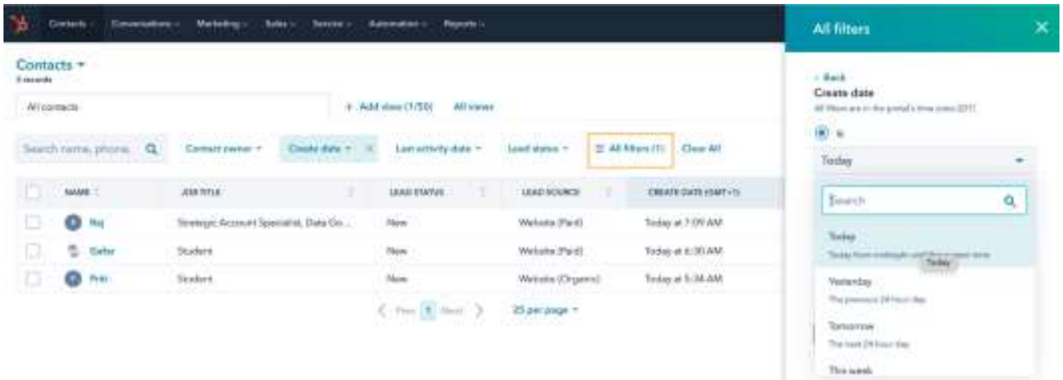


Figure 3.32 – Creating views using filters in Contacts

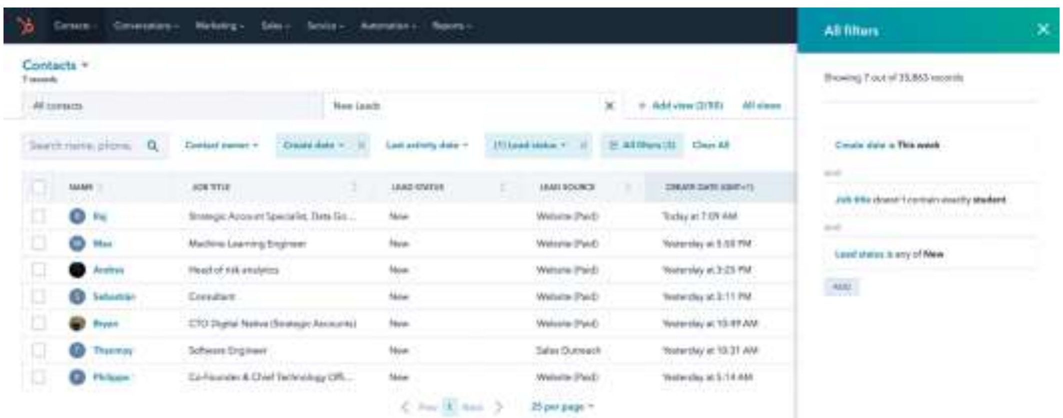


Figure 3.33 – Adding more filters to see relevant contacts

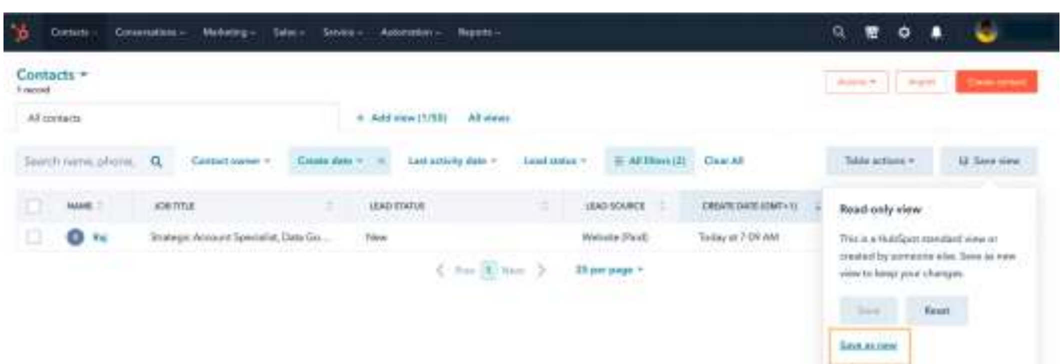


Figure 3.34 – Saving the view of chosen contacts

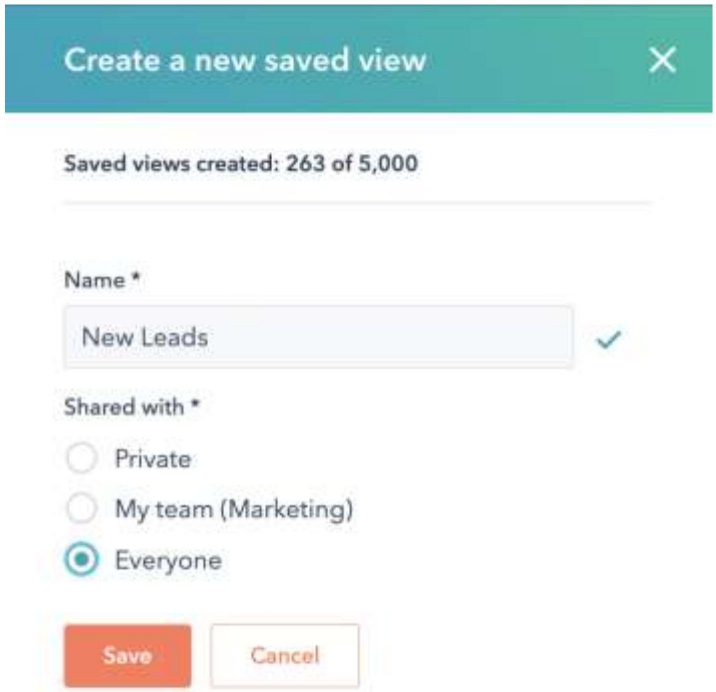


Figure 3.35 – Saving the view for everyone to have visibility of these lists of contacts

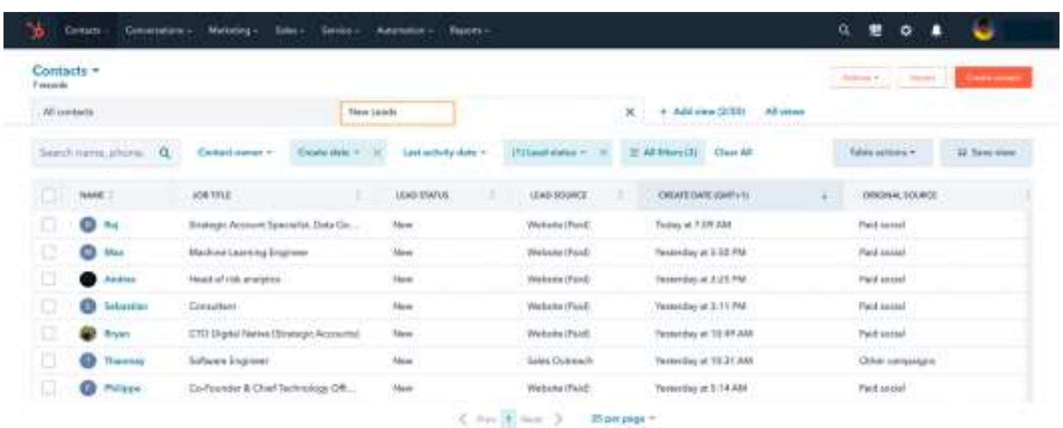


Figure 3.36 – New Leads view

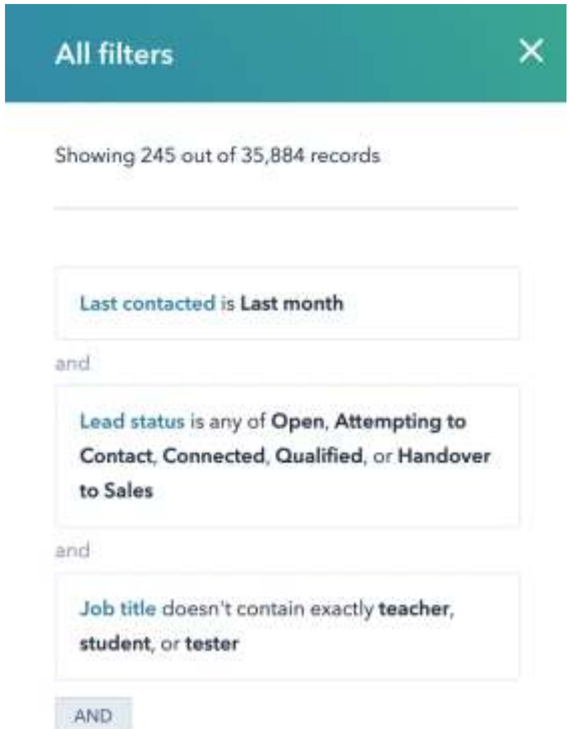


Figure 3.37 – Filters for creating a view of contacts that should be followed up

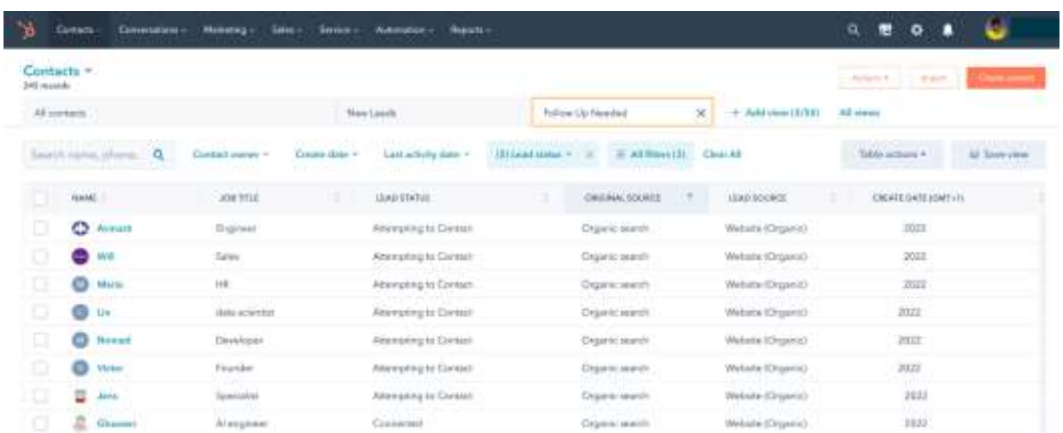


Figure 3.38 – View of contacts that the sales rep should follow up with

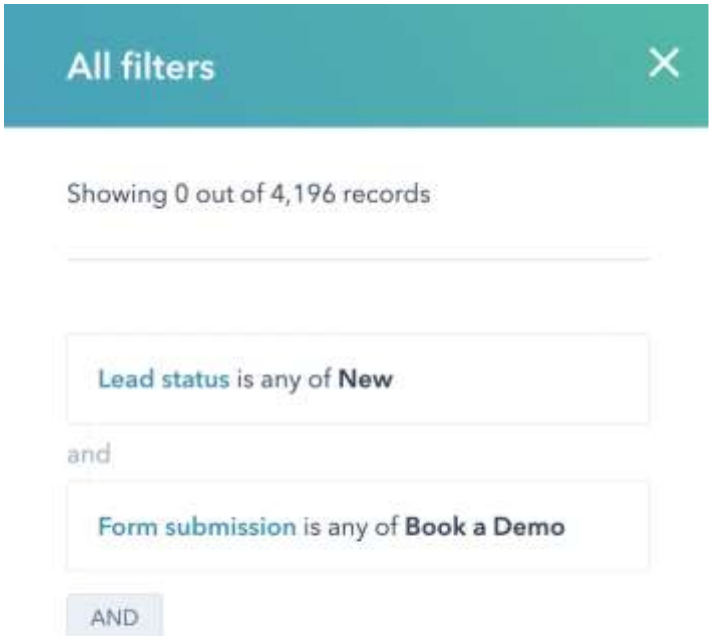


Figure 3.39 – Filter for creating a view of VIP leads

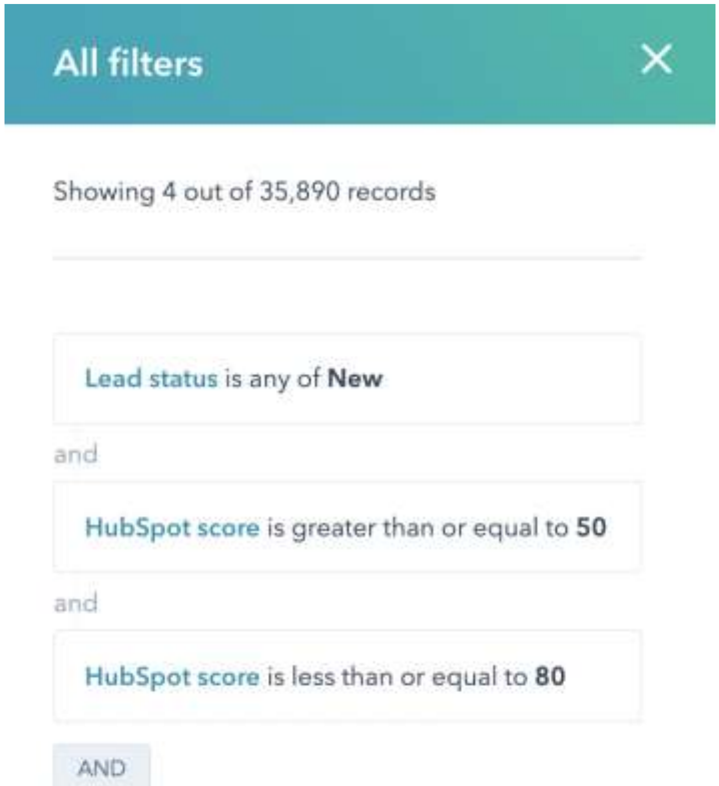


Figure 3.40 – Filters for setting up views for contacts that are not such a high priority

Questions

Let's now see whether the concepts in this chapter have resonated with you:

1. What are two conditions you should consider when setting up the sales pipeline?
2. When should you open a second pipeline?
3. What are two actions you should consider automating in your pipeline?

Further reading

- How to document your sales process: http://www.marketingmo.com/strategic-planning/how-to-document-your-sales-process/
- How to design your sales process in HubSpot: https://blog.hubspot.com/customers/how-to-design-your-sales-process-in-hubspot-crm
- HubSpot Academy Lesson – Set Up Your HubSpot CRM for Growth: https://academy.hubspot.com/courses/set-up-your-hubspot-crm-for-growth?library=true&_ga=2.36803296.1117529161.1633694052-1936490580.1584861075

Chapter 4

Images

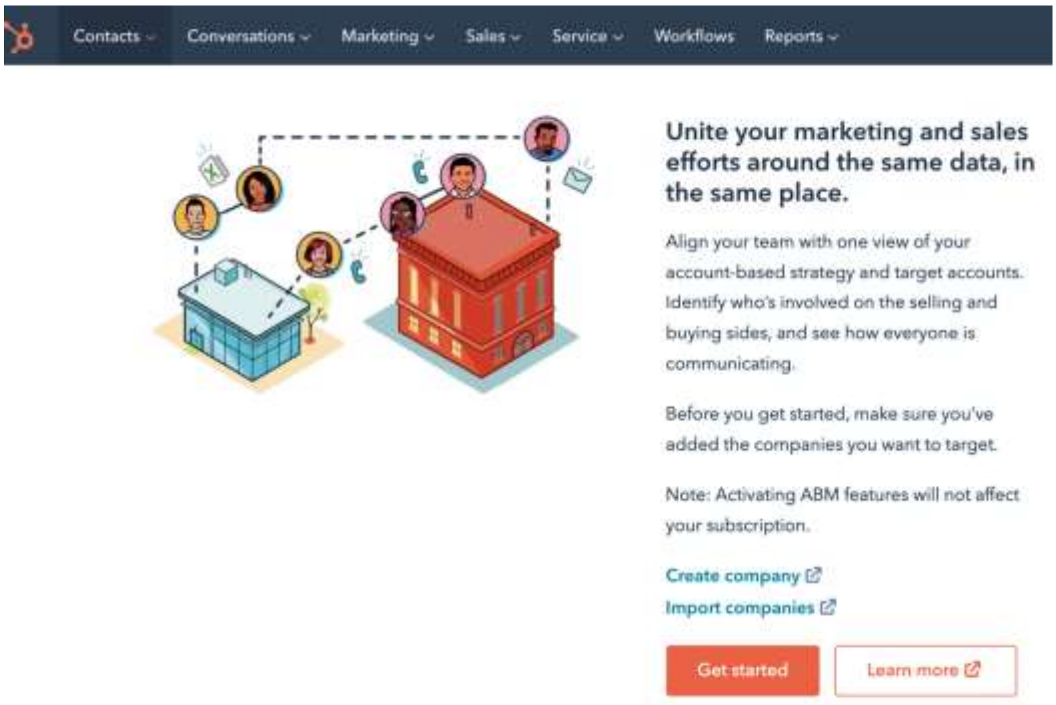


Figure 4.1 – Navigation bar to the prospects tool

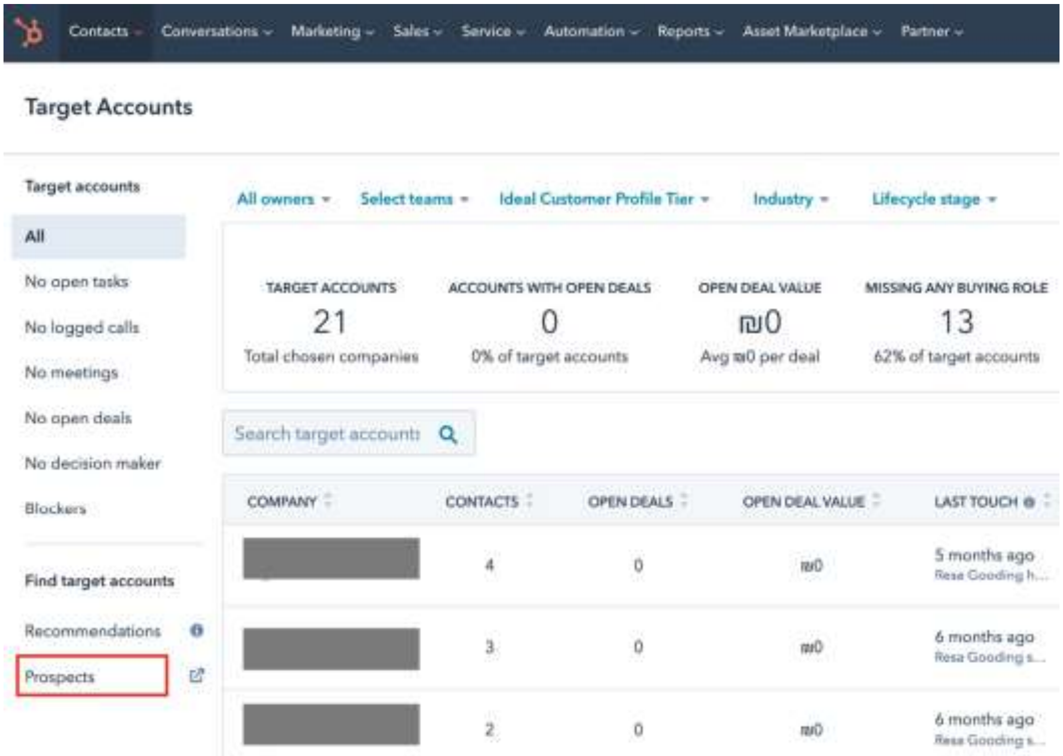


Figure 4.2 – Navigation bar to the prospects tool

Figure 4.3 – Prospects tool

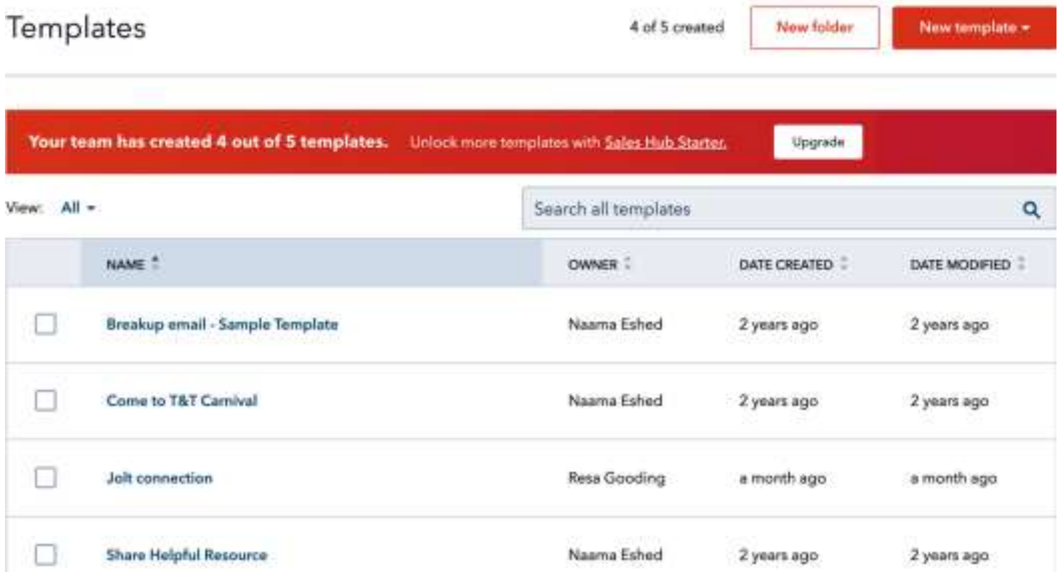


Figure 4.4 – Templates in HubSpot

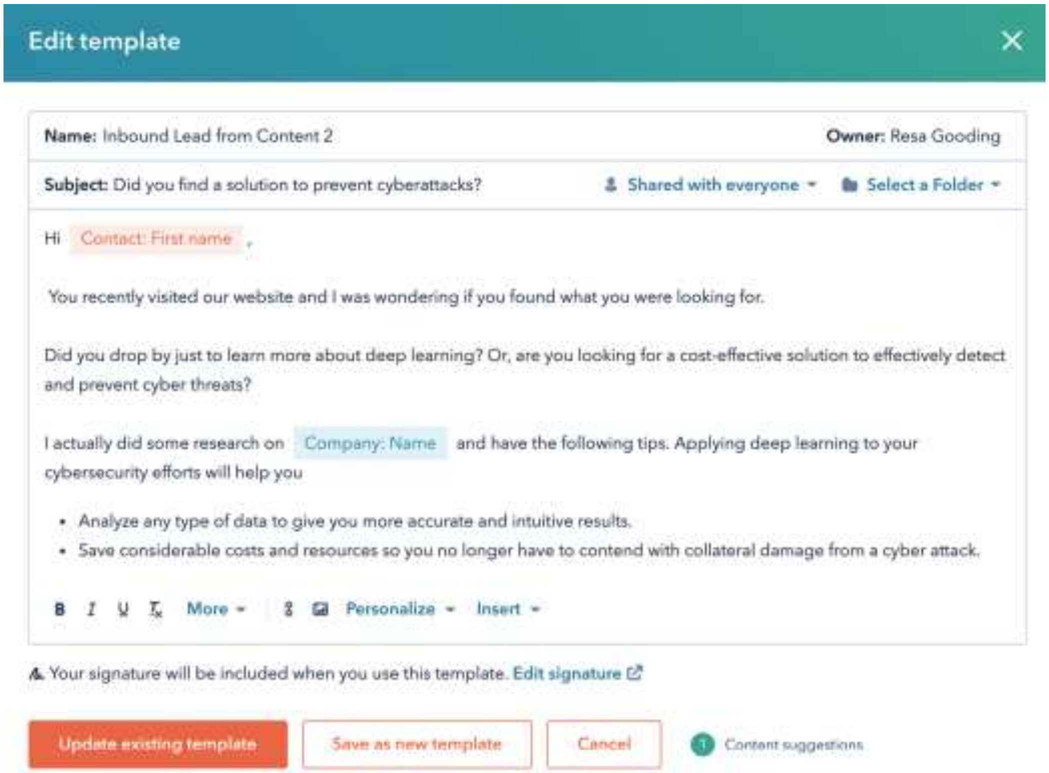


Figure 4.5 – Template sample

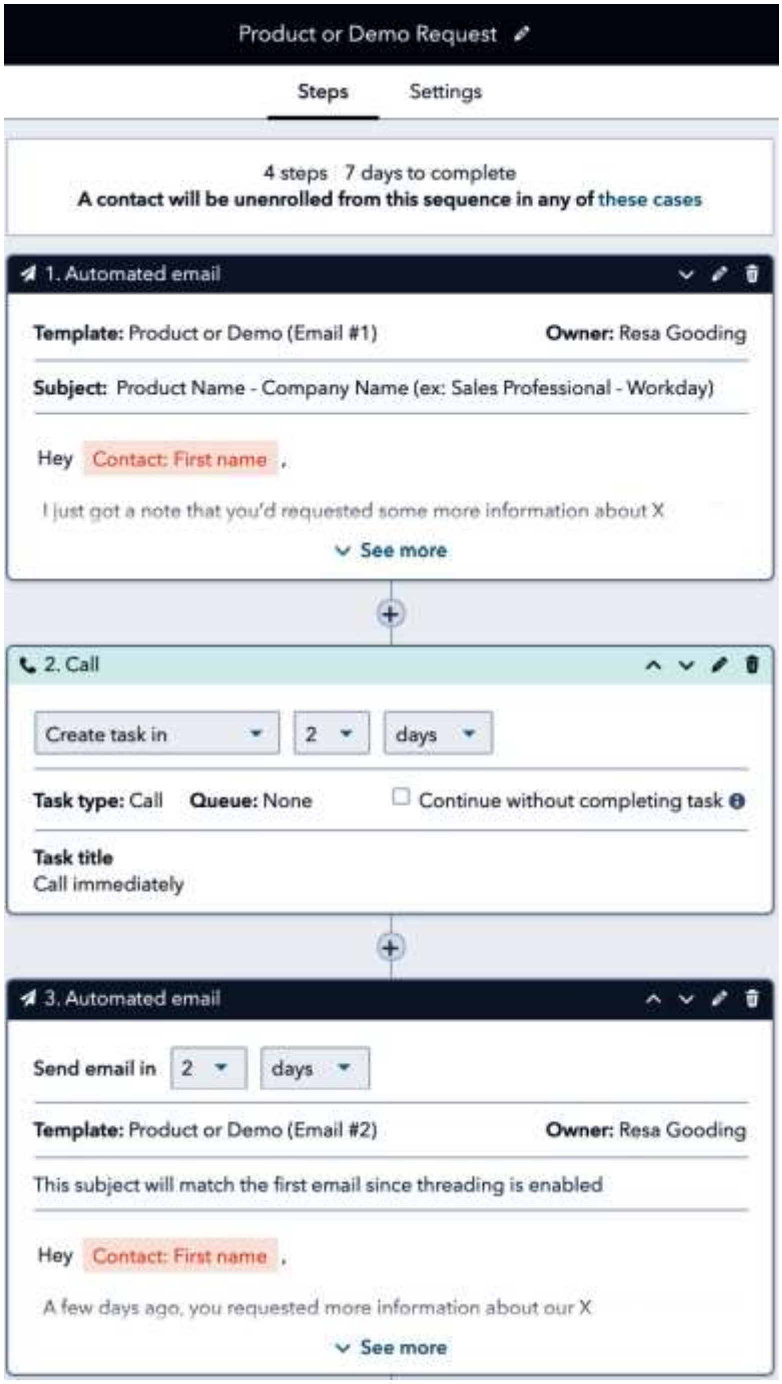

Product or Demo Request
Steps
Settings
4 steps 7 days to complete
A contact will be unenrolled from this sequence in any of these cases
1. Automated email
Template: Product or Demo (Email #1)
Owner: Resa Gooding
Subject: Product Name - Company Name (ex: Sales Professional - Workday)
Hey Contact: First name ,
I just got a note that you'd requested some more information about X
See more
2. Call
Create task in
2
days
Task type: Call
Queue: None
Continue without completing task
Task title
Call immediately
3. Automated email
Send email in
2
days
Template: Product or Demo (Email #2)
Owner: Resa Gooding
This subject will match the first email since threading is enabled
Hey Contact: First name ,
A few days ago, you requested more information about our X
See more

Figure 4.6 – Sequences tool

Figure 4.7 – Analytics of a sequence

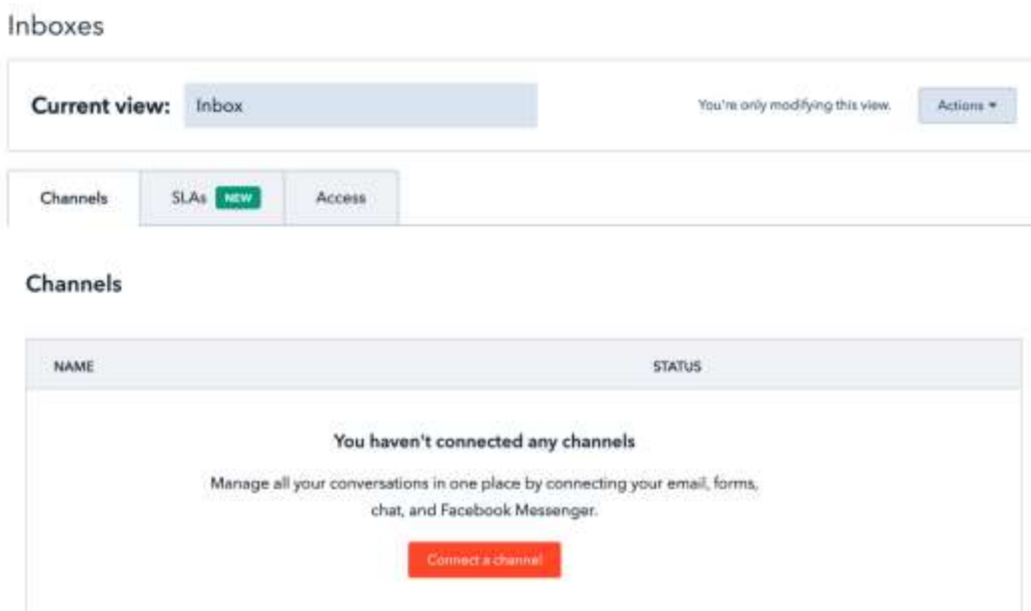


Figure 4.8 – Connecting a shared inbox

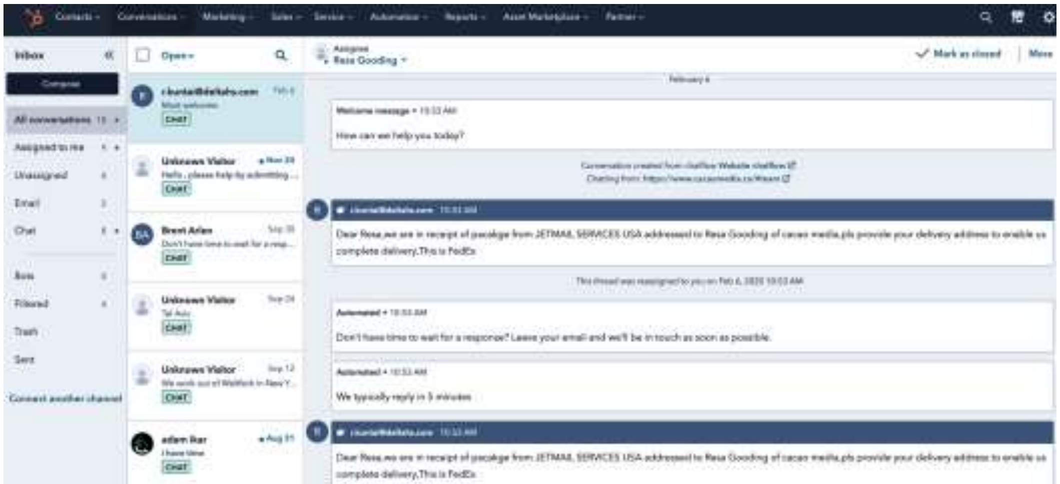


Figure 4.9 – Conversations inbox

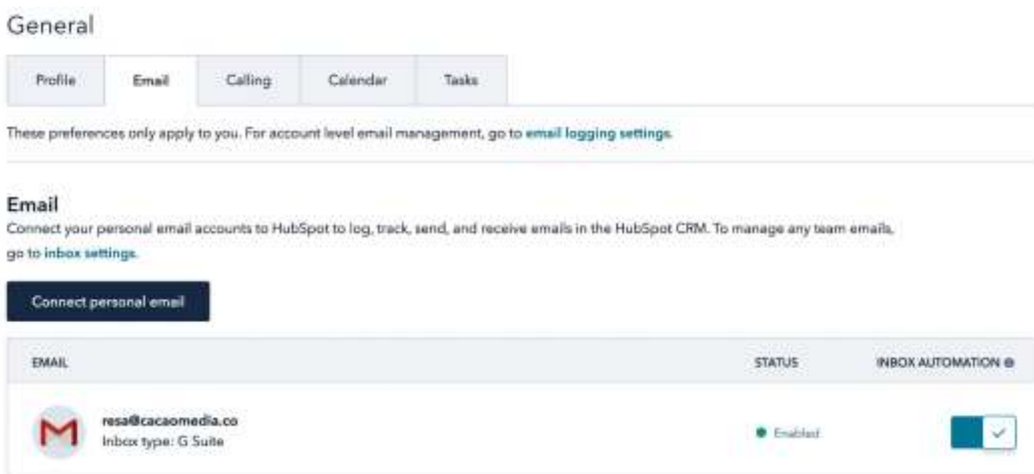


Figure 4.10 – Difference between shared inbox and personal inbox

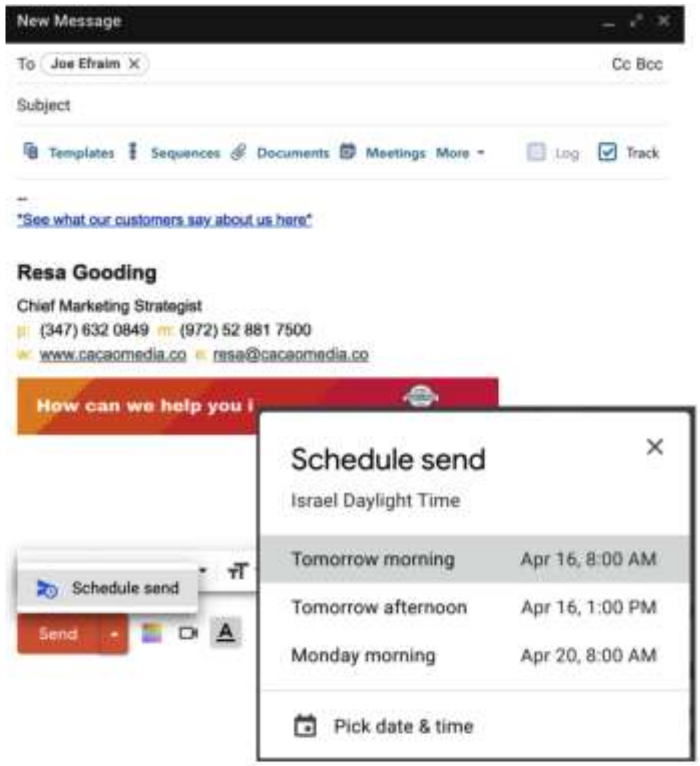


Figure 4.11 – Email scheduling feature

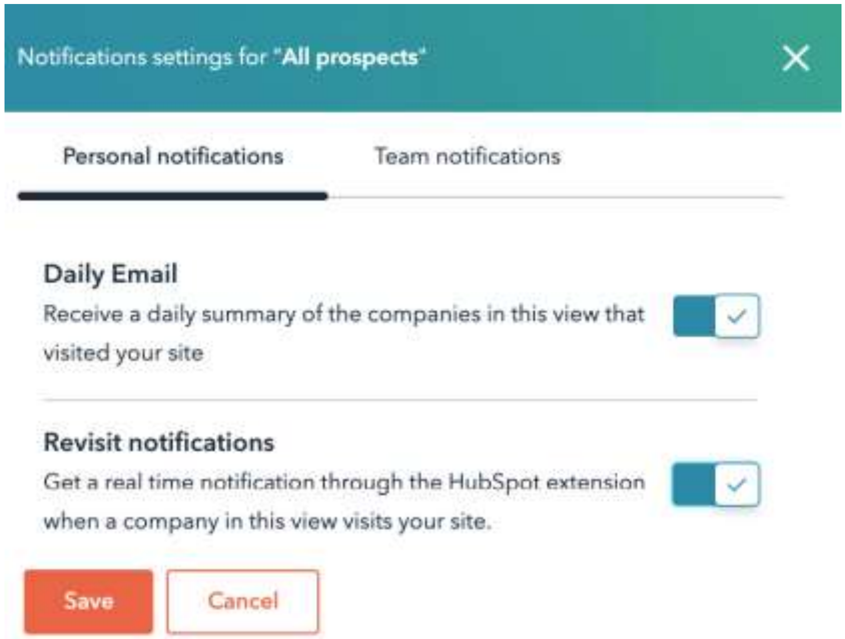


Figure 4.12 – Notifications tool

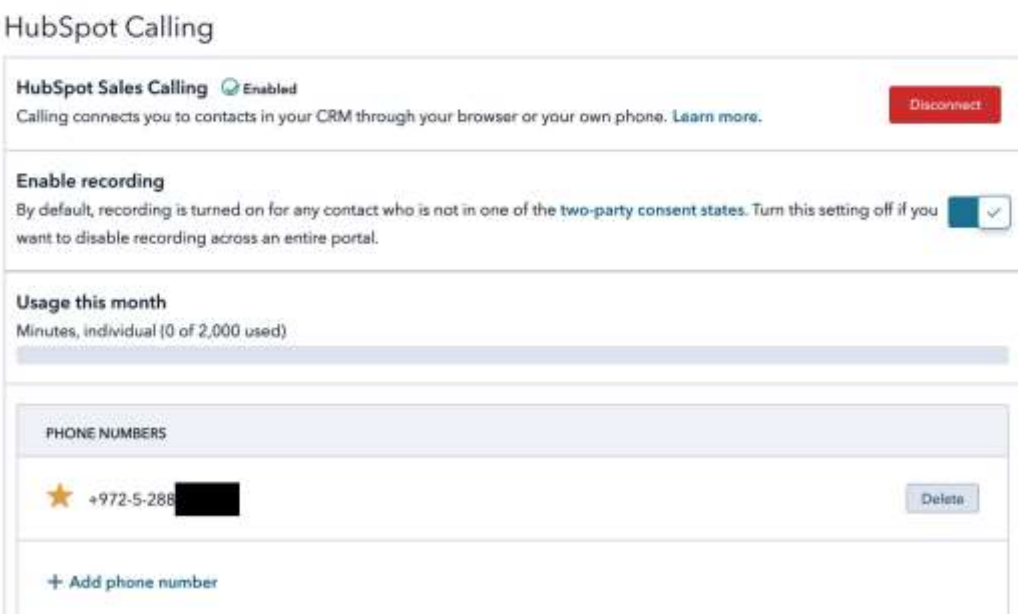


Figure 4.13 – Calling tool

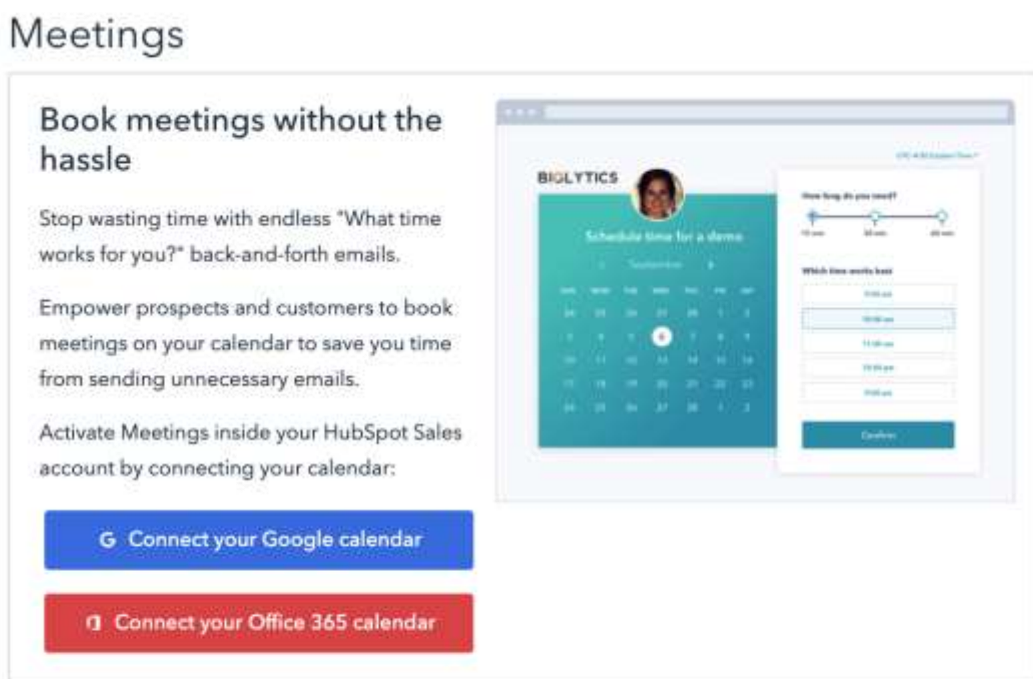


Figure 4.14 – Connecting your calendar to HubSpot

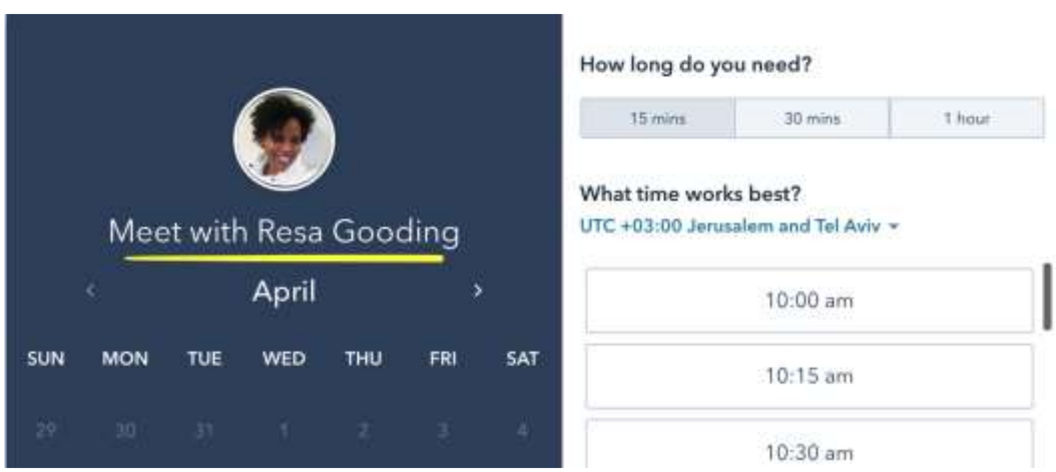


Figure 4.15 – The headline feature in the meetings tool

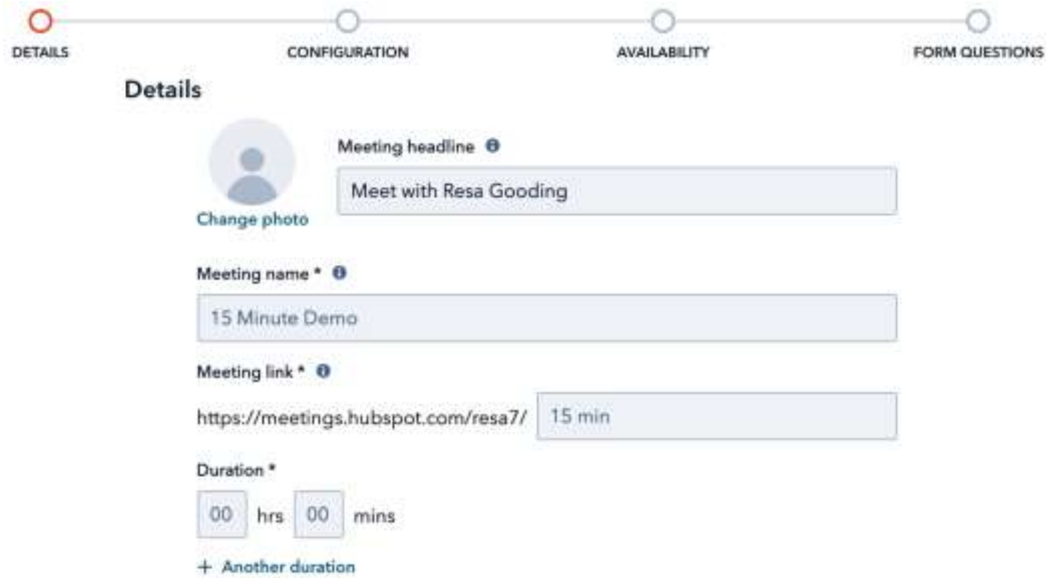


Figure 4.16 – Adding your details to the meetings tool

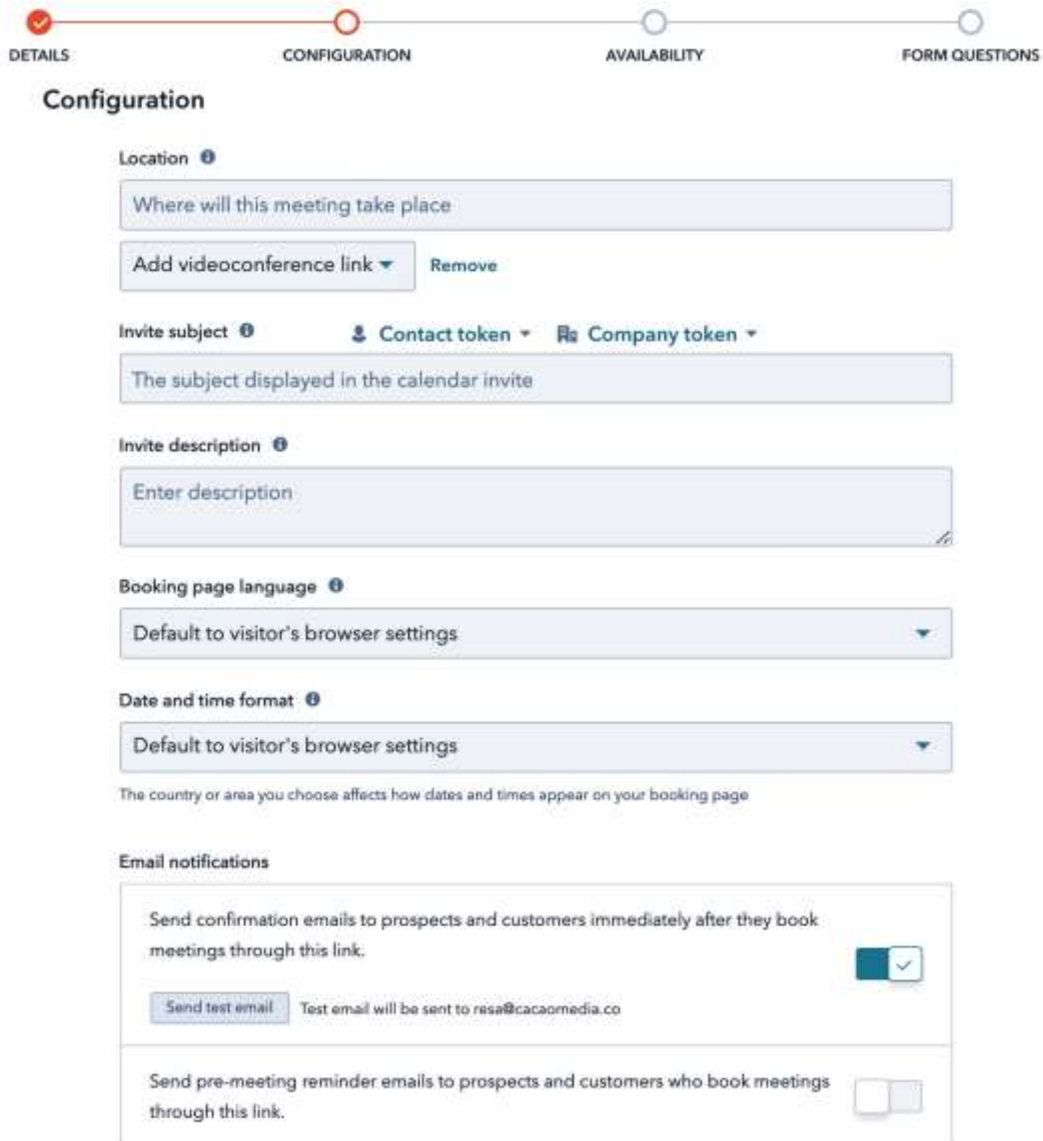


Figure 4.17 – Configuring the meetings tool

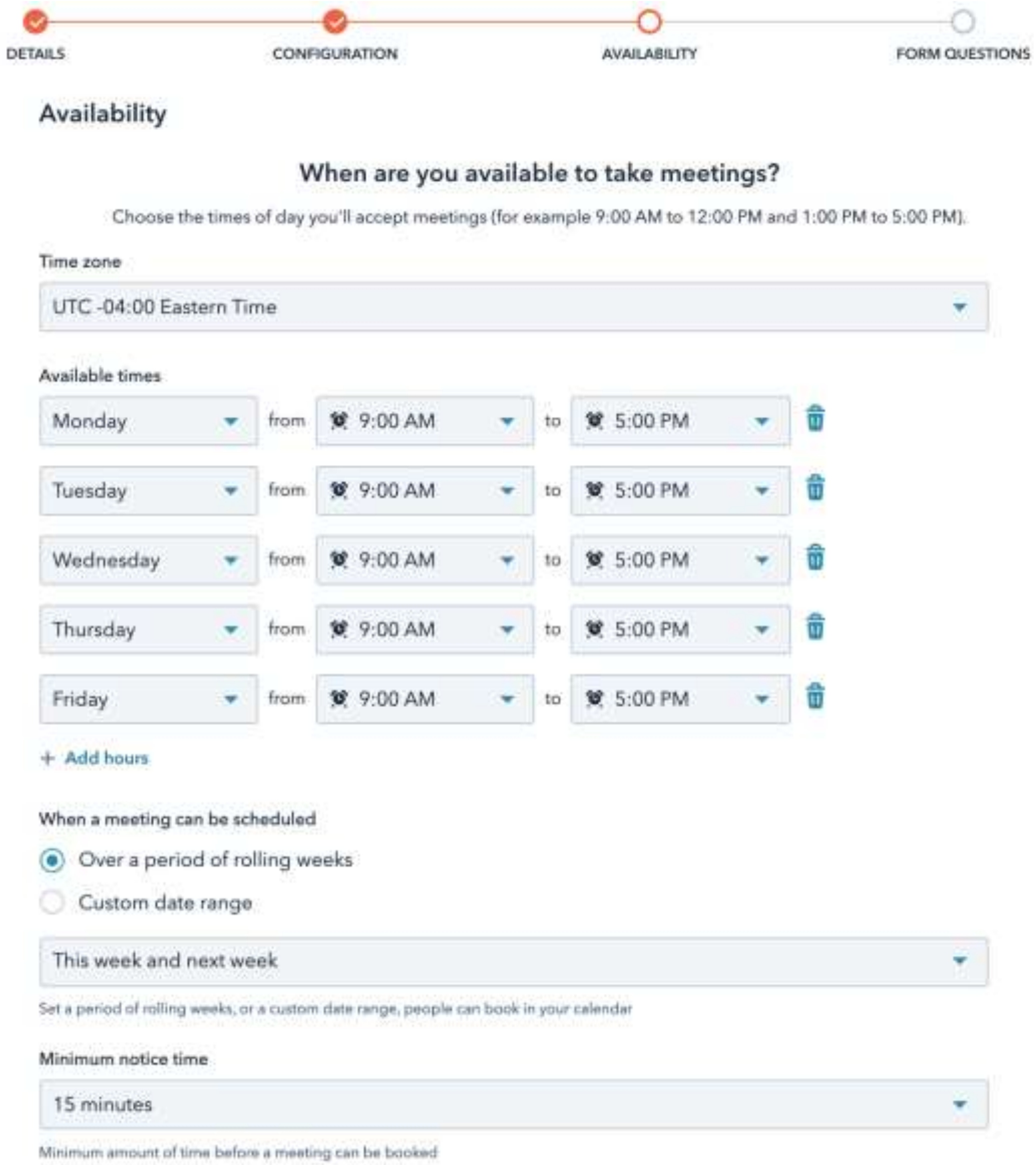


Figure 4.18 – Choosing your availability in the meetings tool

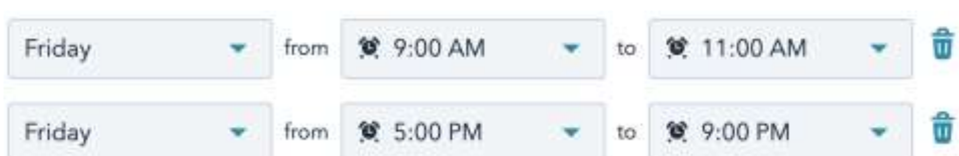


Figure 4.19 – Selecting multiple time ranges on the same day

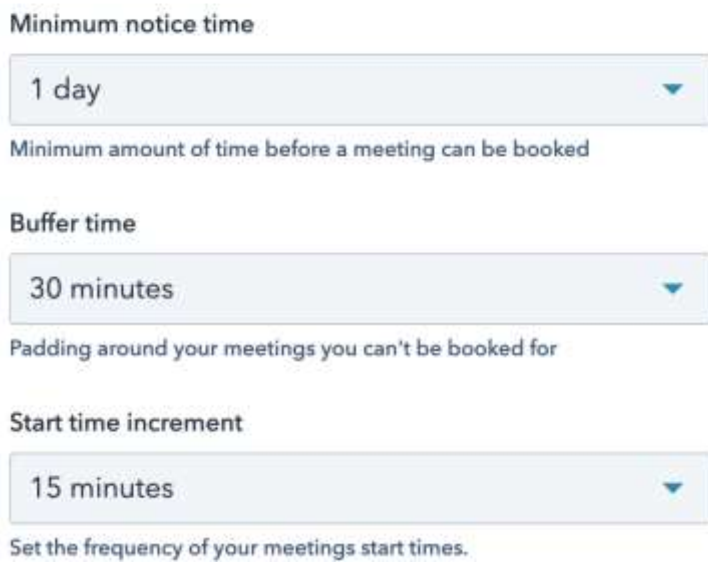


Figure 4.20 – Setting minimum time, buffer time, and start time increment on the meetings tool

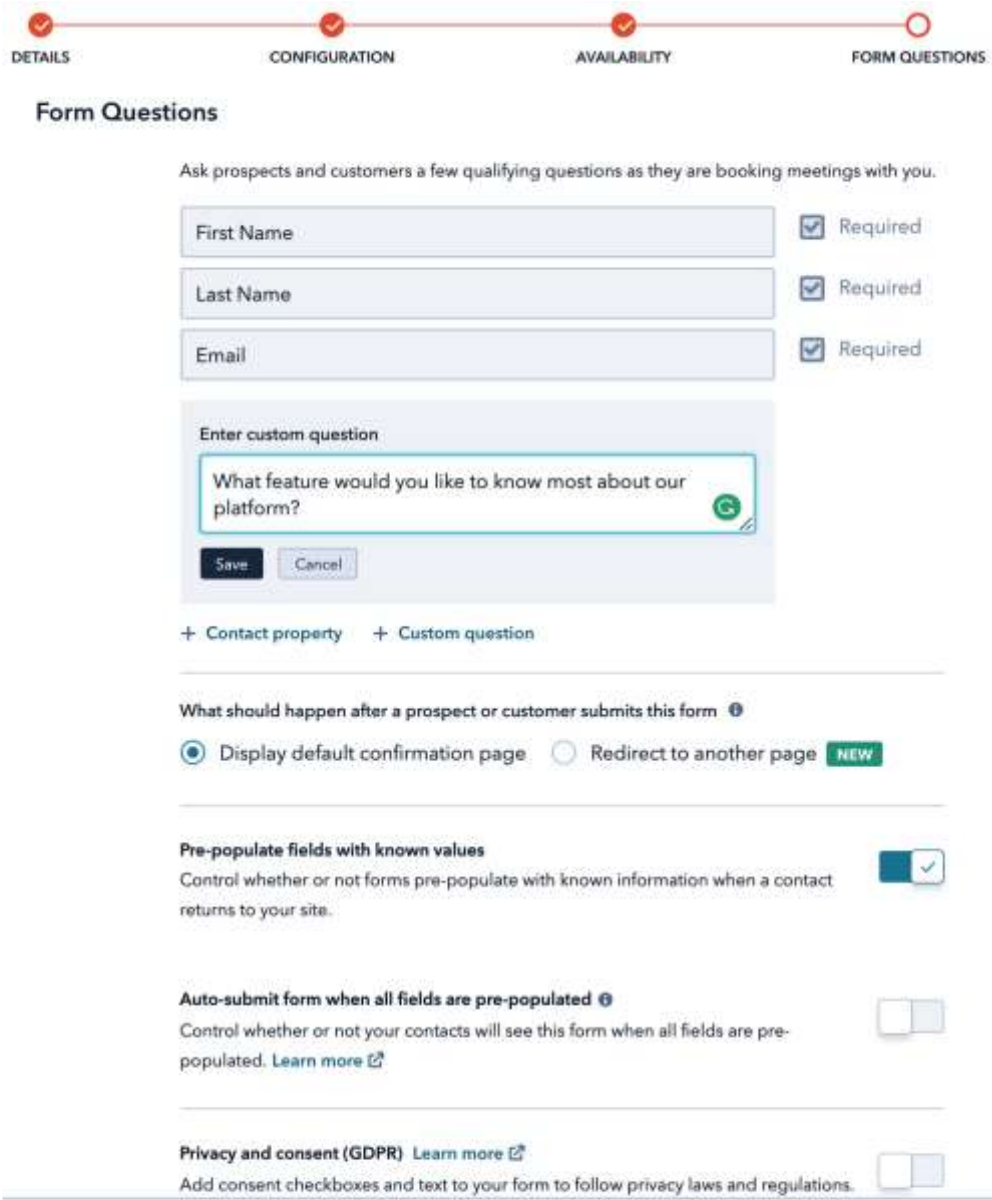


Figure 4.21 – Adding questions to your meeting link

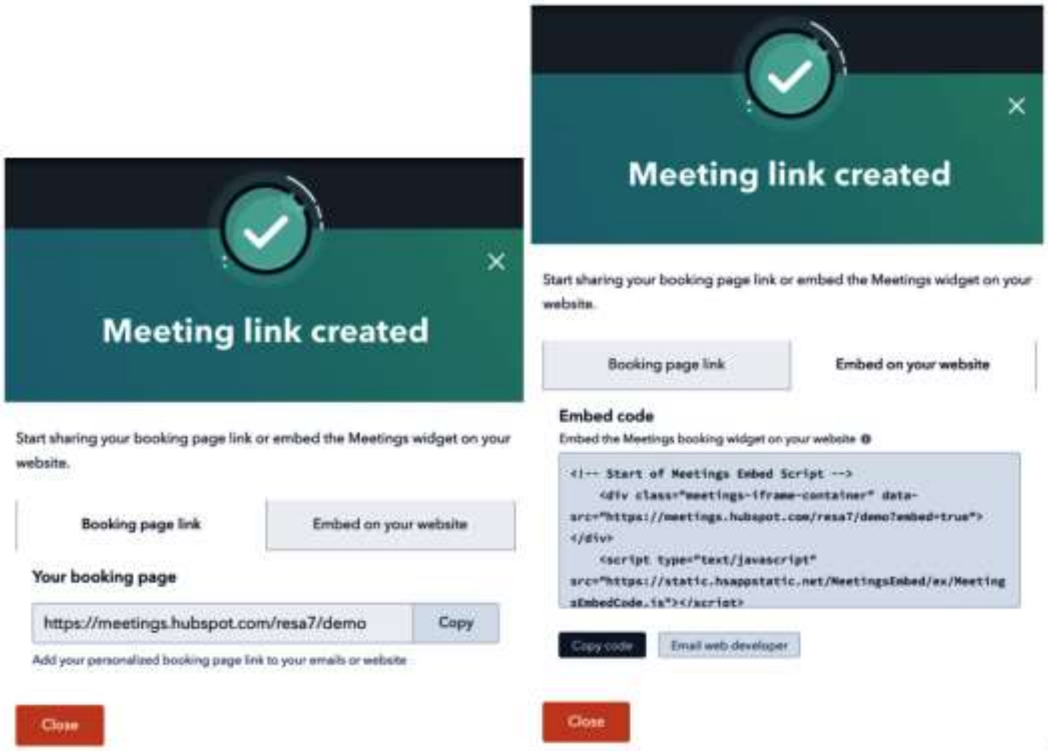


Figure 4.22 – Meeting link

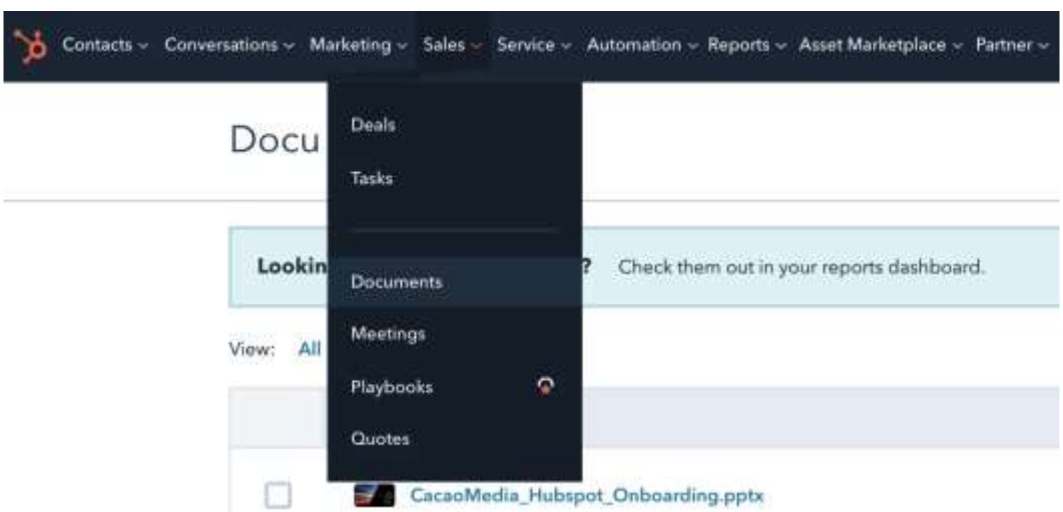


Figure 4.23 – Navigation bar to the documents feature

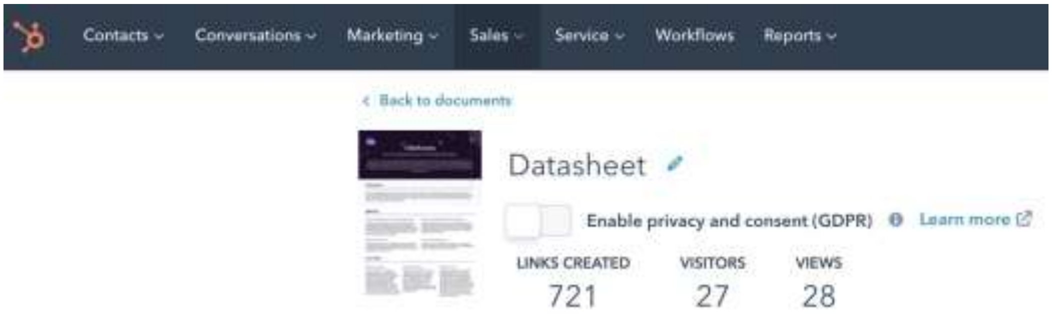


Figure 4.24 – Analytics from documents

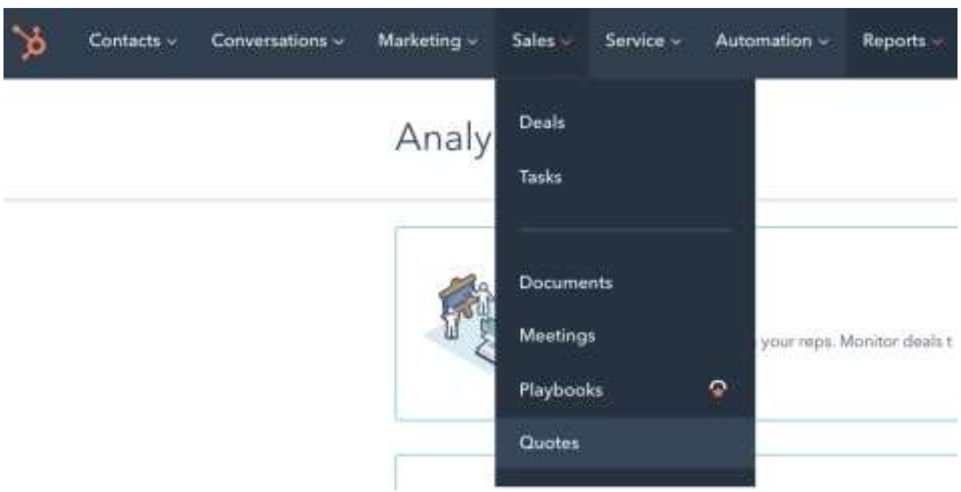


Figure 4.25 – Navigation bar to the quotes tool

Figure 4.26 – Quote details

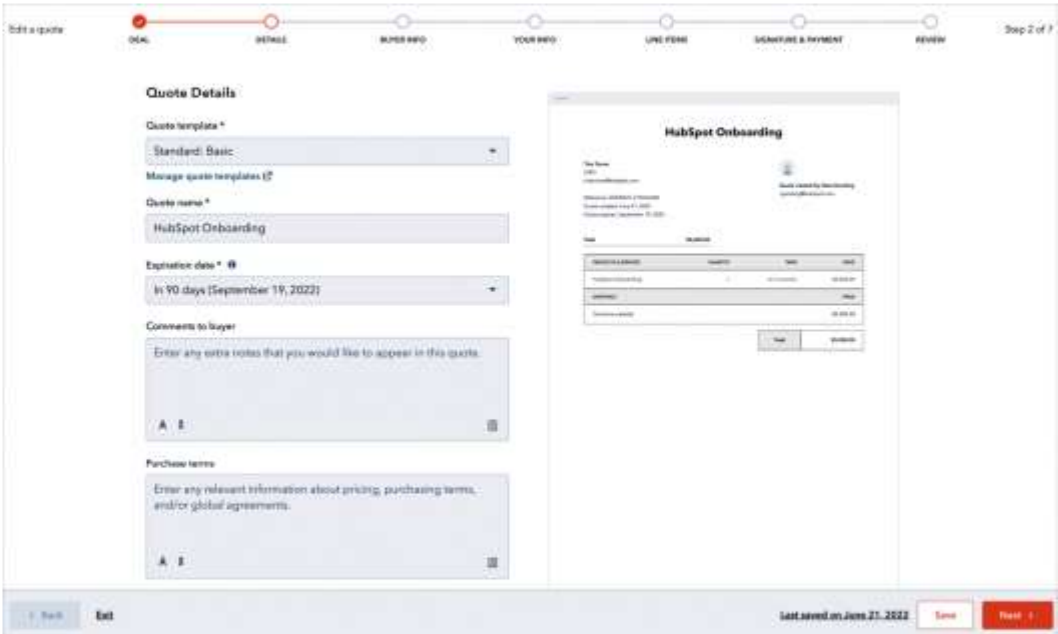


Figure 4.27 – Quote details – template, name, and expiration date

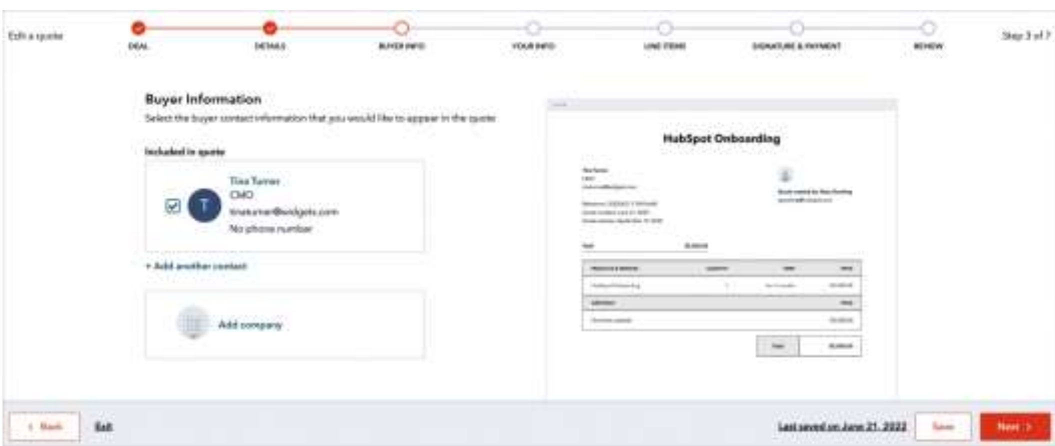


Figure 4.28 – Buyer's information

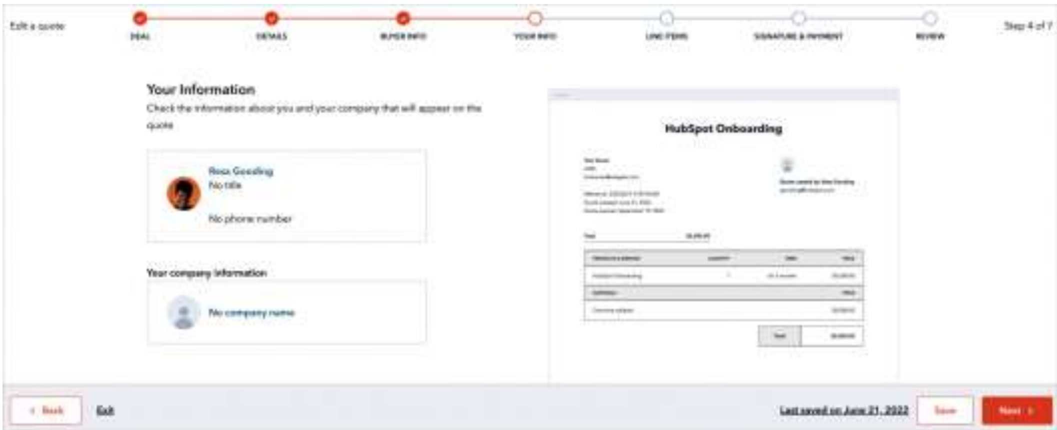


Figure 4.29 – Seller's information

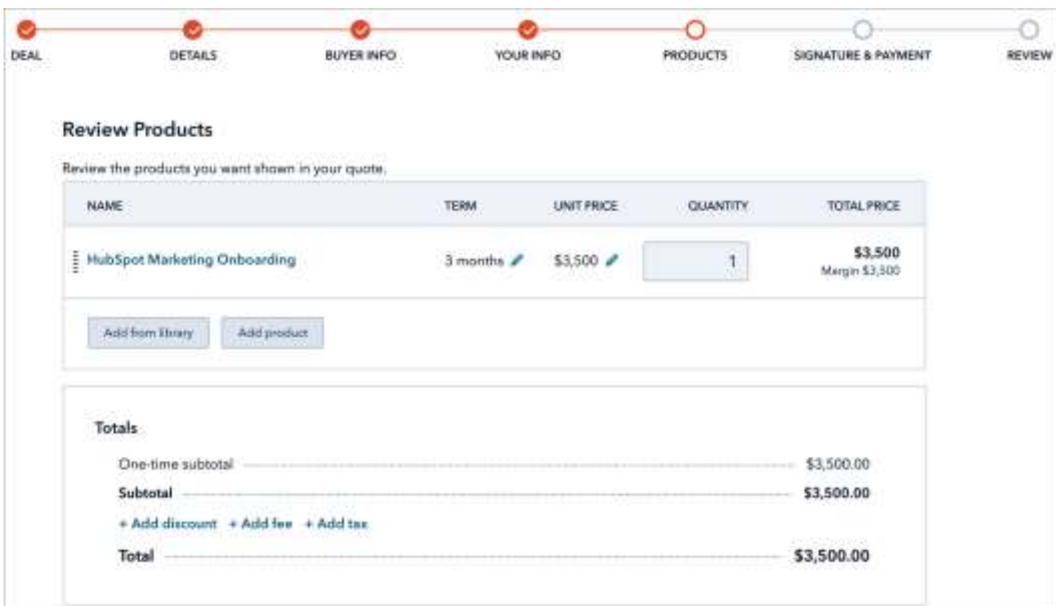


Figure 4.30 – Review products

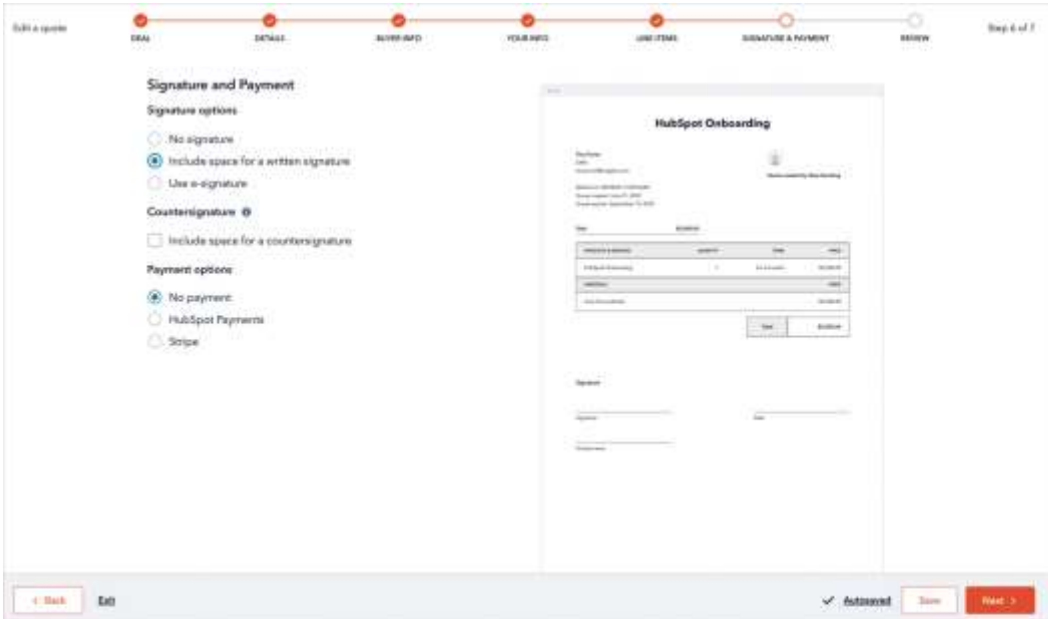


Figure 4.31 – Signature and Payment with space for signature

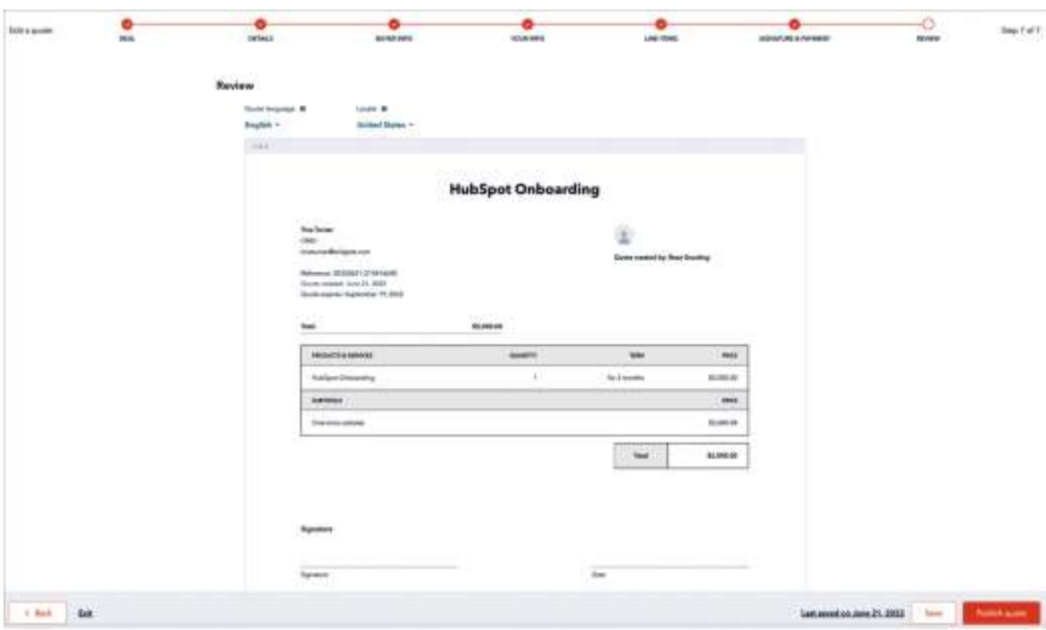


Figure 4.32 – Final review of the quote

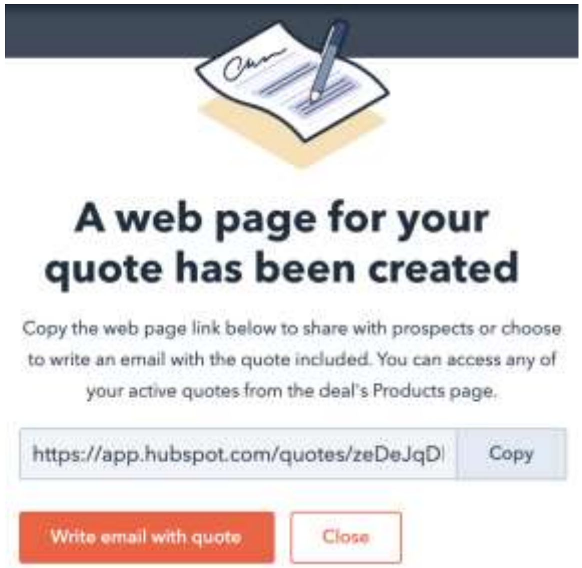


Figure 4.33 – Link for the quote

Questions

For most businesses, it is imperative to help their sales teams focus more on selling instead of dealing with administrative tasks. So, let's make sure you understand the value of implementing some of these free tools right away:

1. Which sales tool helps a sales team member to send personalized yet automated responses – sequences or workflows?
2. Does HubSpot have a meeting calendar tool that allows prospects to see your availability and book a mutually convenient time?
3. What is the benefit of using the documents tool to send a contract instead of just sending it as a regular email attachment?

Further reading

To learn more about HubSpot's sales tools and some creative ways businesses are empowering their sales teams, do check out the following resources:

- HubSpot sales blog: https://blog.hubspot.com/sales

- HubSpot case studies: https://www.hubspot.com/case-studies-directory?product=crm

Chapter 5

Images

Figure 5.1 – Alt text for images

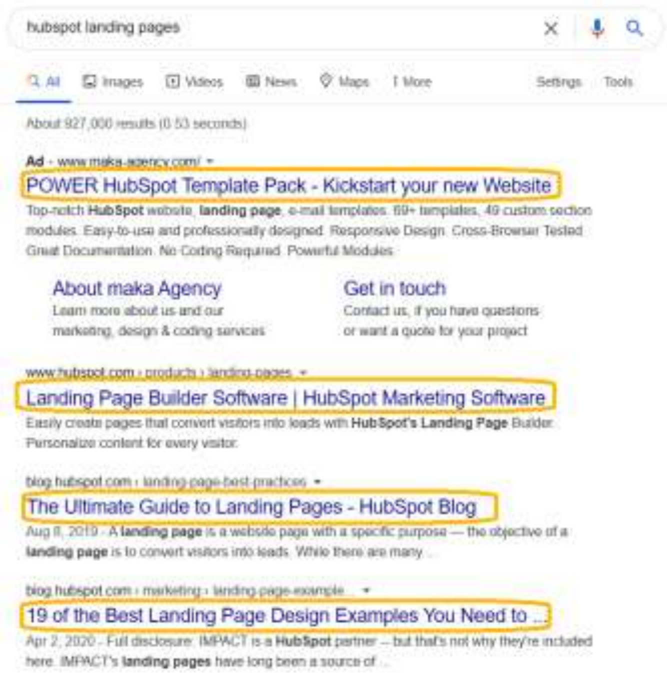


Figure 5.2 – Title tags in Google search engine

Figure 5.3 – Meta description text placed in the setting of your blog or website pages

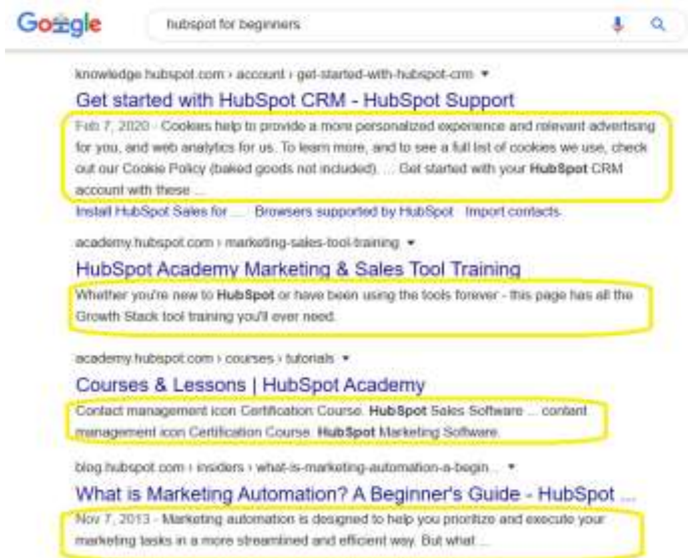


Figure 5.4 – Meta descriptions in Google search engine

Figure 5.5 – Fully optimized SEO page

MOBILE FRIENDLINESS

The page has a properly configured viewport meta tag

Without a properly configured viewport, your mobile visitors may have to pinch and zoom to read the page content.

TITLE

Page has a title

Titles appear in search results, and help search engines know what your page is about.

Title and domain name are unique

Repeating the domain name in your title makes this content look less trustworthy to search engines and visitors.

Title is 70 characters or less

A title that's less than 70 characters is less likely to get cut off in search results. Your page title is 33 characters.

CRAWLING AND INDEXING

Search engines can display the page in search results

If you indicate you don't want search engines to index a page, it won't appear in search results.

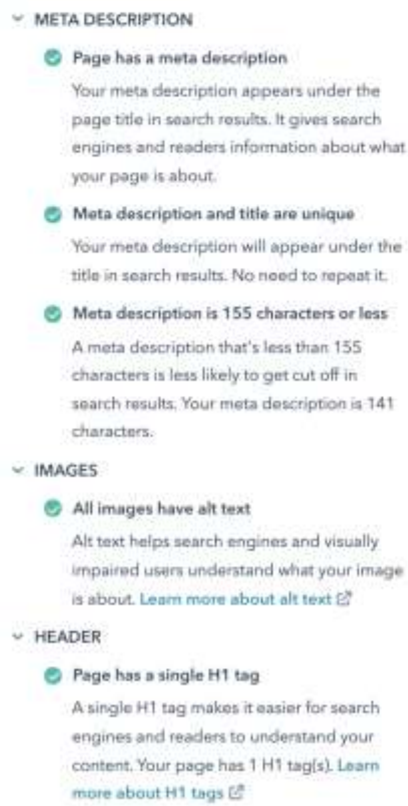


Figure 5.6 – Elements of a fully optimized SEO page

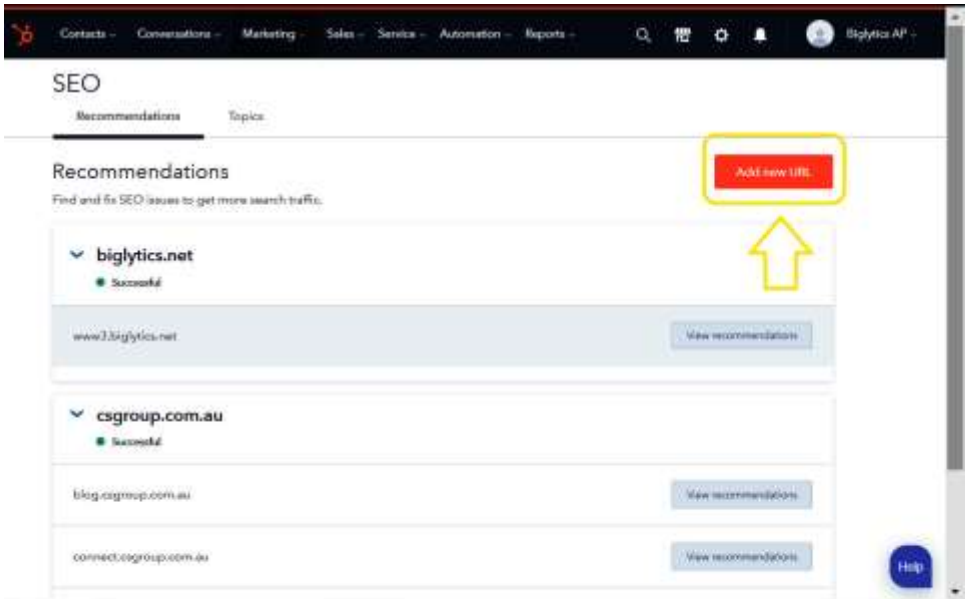


Figure 5.7 – Add your website to HubSpot's SEO tool

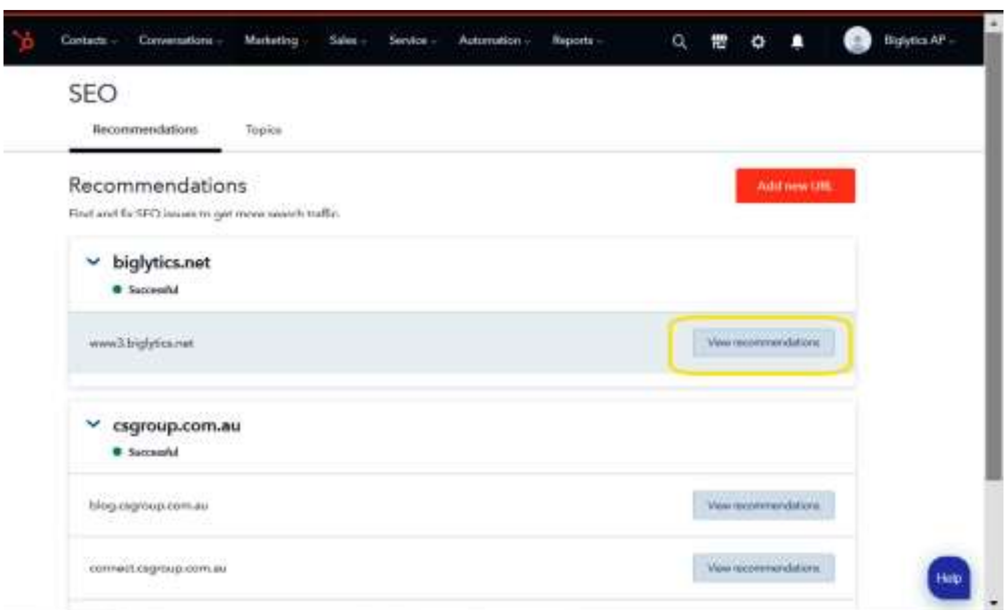


Figure 5.8 – Accessing the SEO recommendations from HubSpot

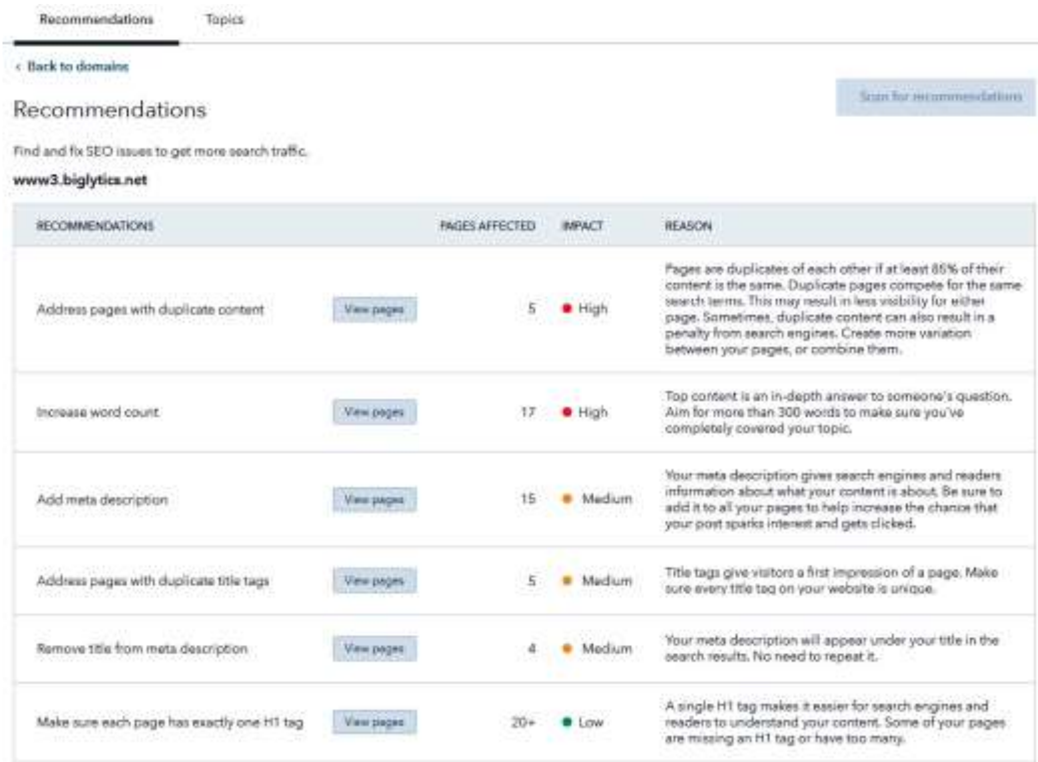


Figure 5.9 – Viewing the SEO recommendations

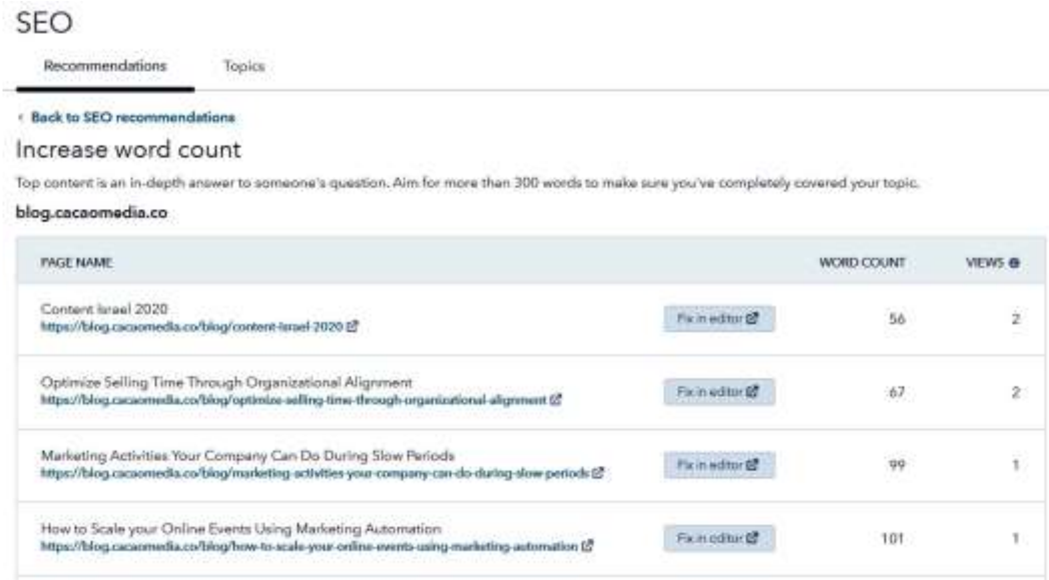


Figure 5.10 – Fixing the SEO recommendations

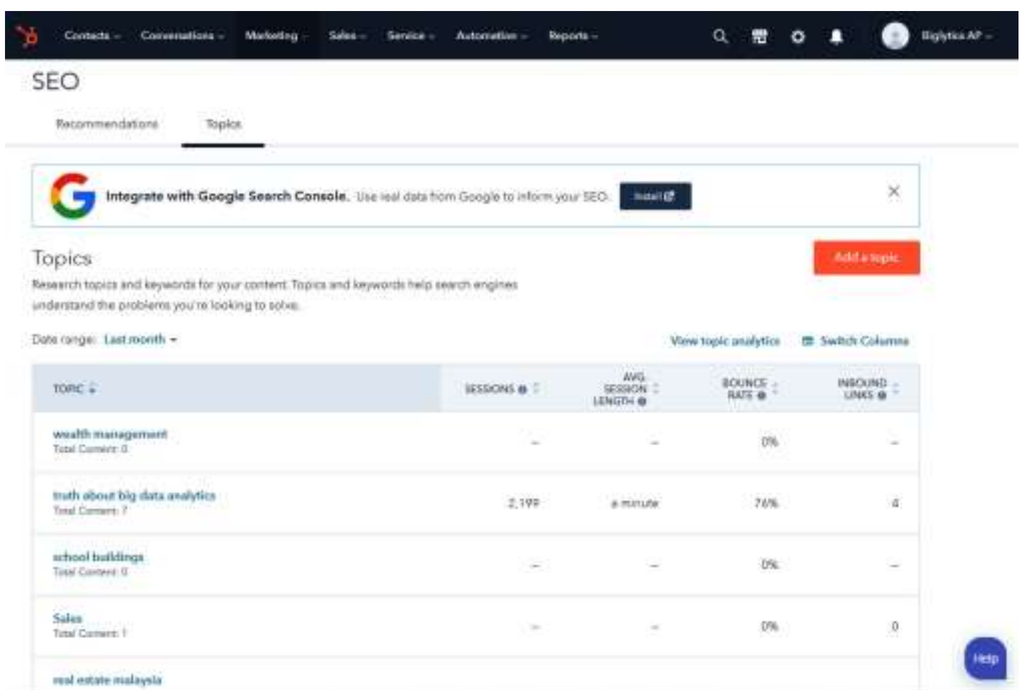


Figure 5.11 – Defining your topics in HubSpot

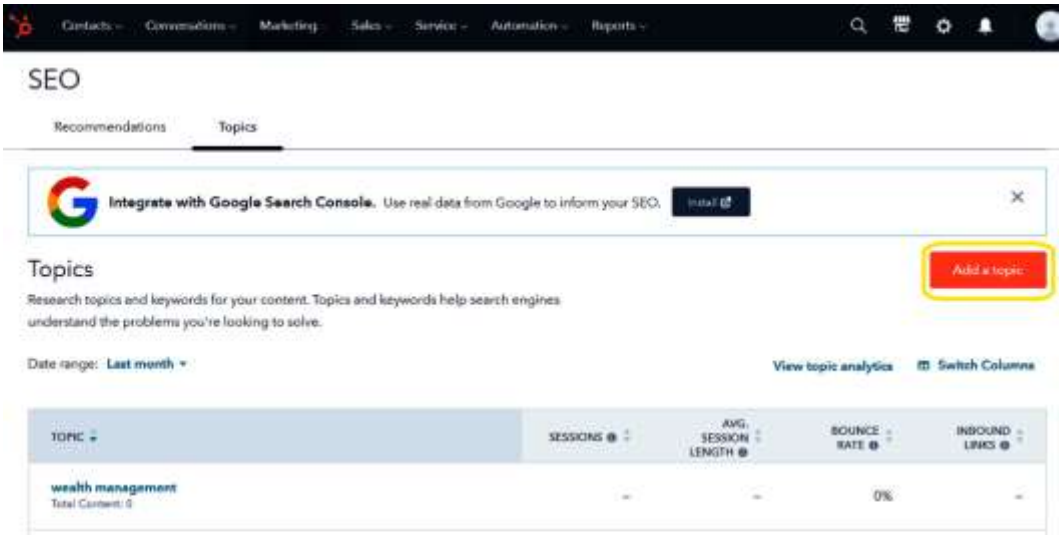


Figure 5.12 – How to add a topic to your HubSpot SEO tool

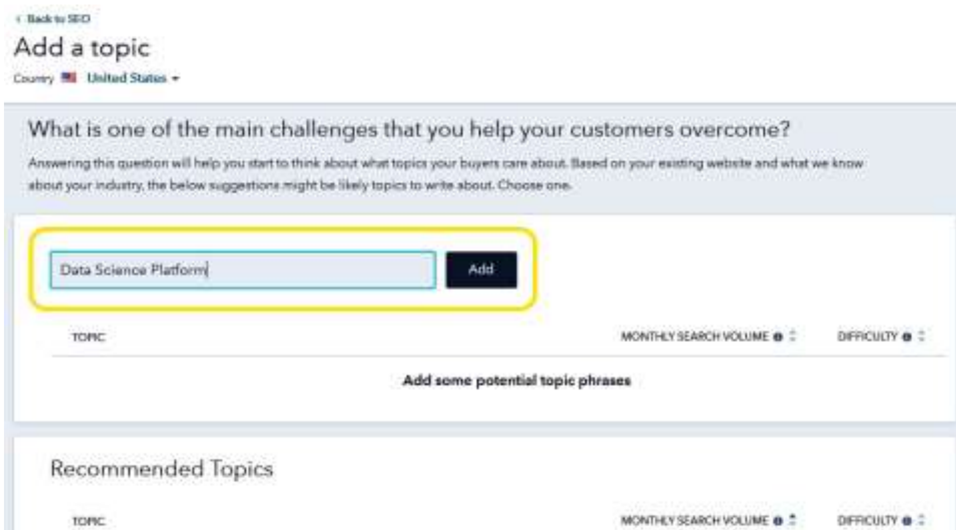


Figure 5.13 – Adding the topic to the HubSpot SEO tool

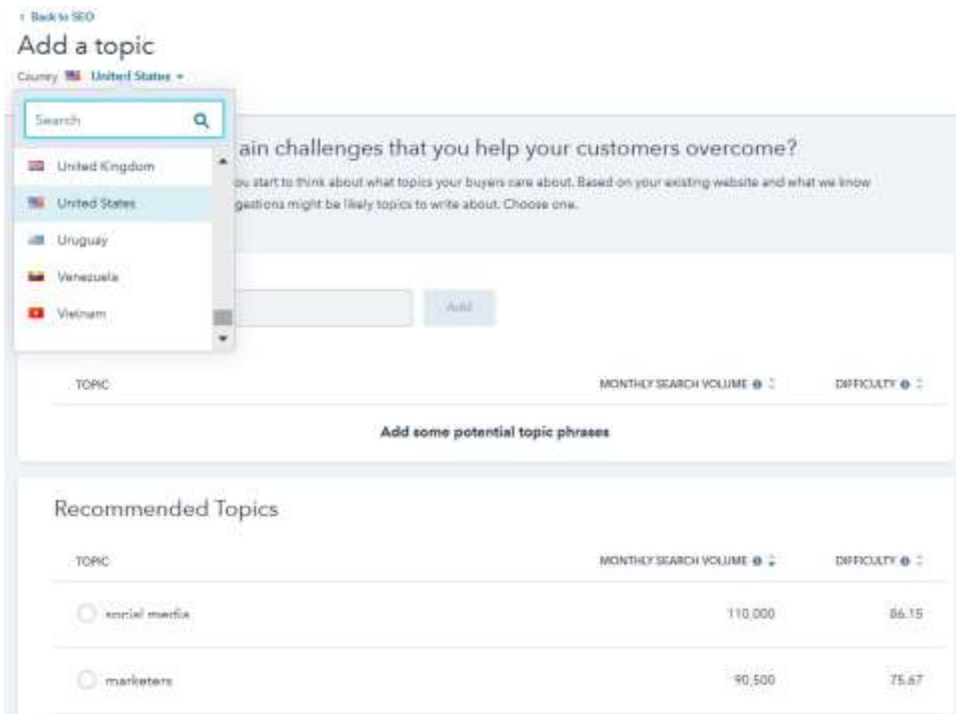


Figure 5.14 – Adding countries to your SEO search

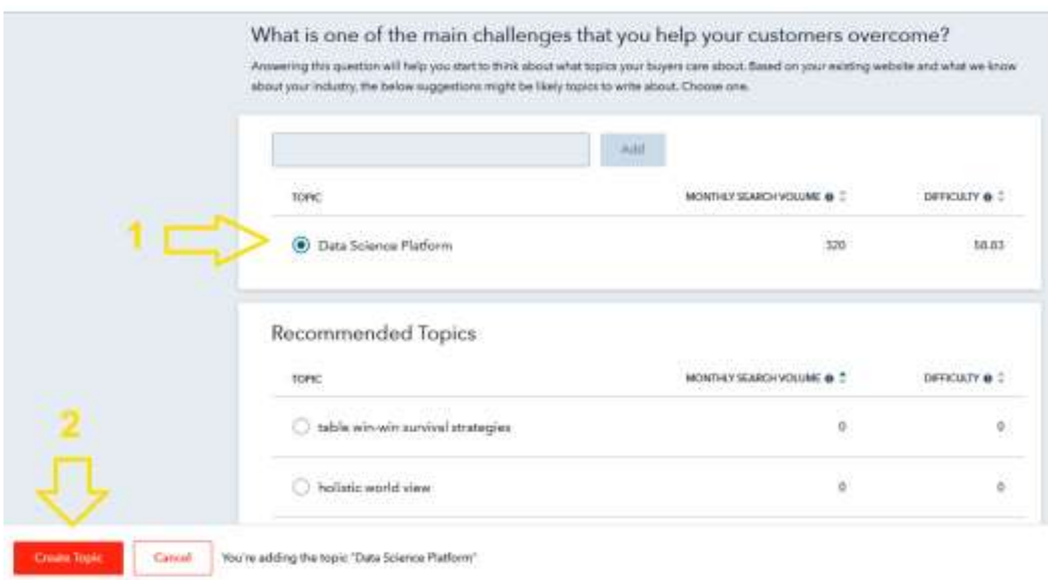


Figure 5.15 – Saving your subtopics/keywords to HubSpot's SEO tool

Figure 5.16 – Pillar page in HubSpot

Figure 5.17 – Example of a submenu of a pillar page. Source: HubSpot

Figure 5.18 – Defining your subtopics in HubSpot

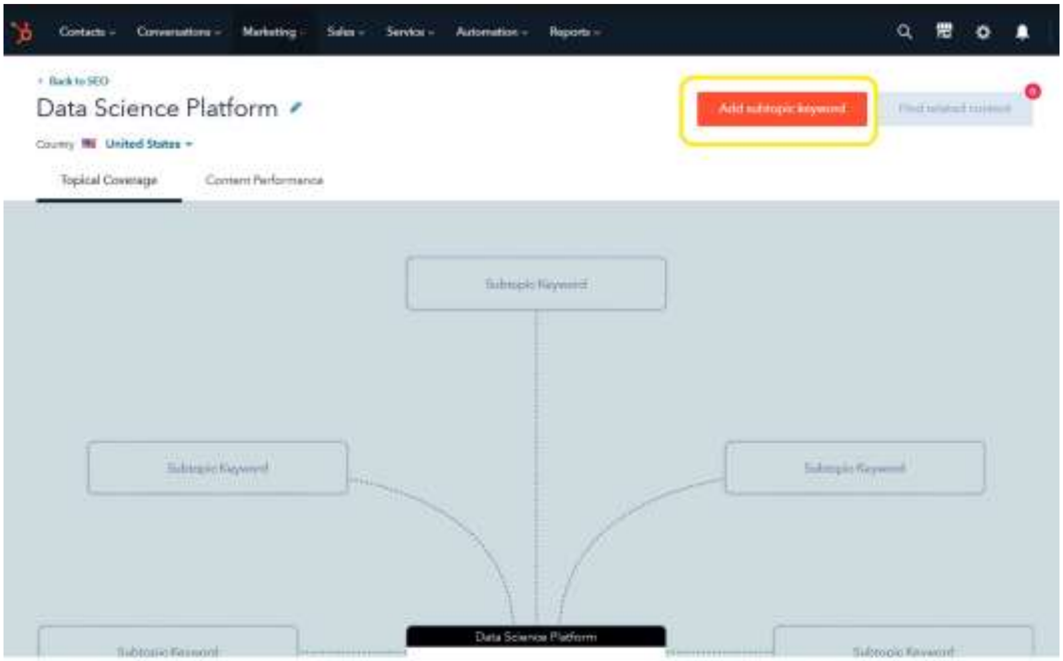


Figure 5.19 – Researching your subtopic keyword

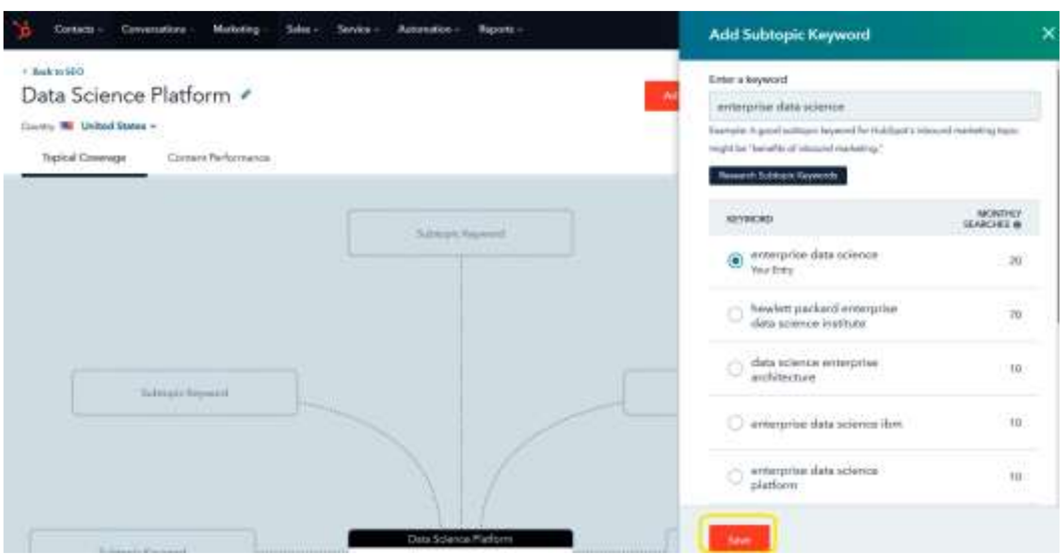


Figure 5.20 – Understanding the relevance of your subtopic/keywords

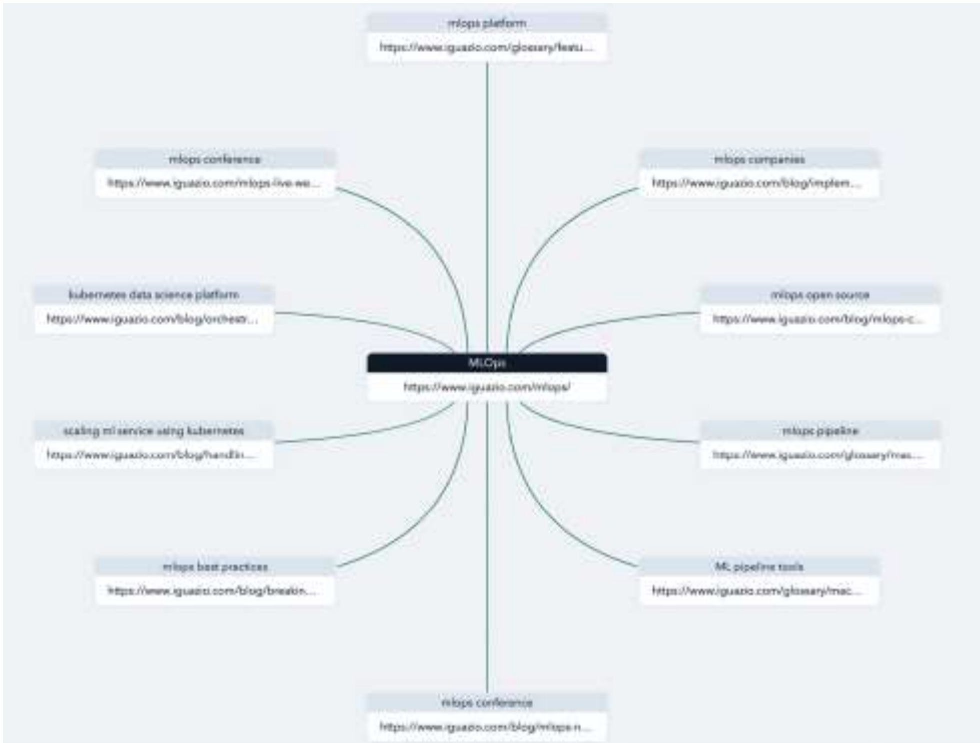


Figure 5.21 – A topic cluster built in HubSpot

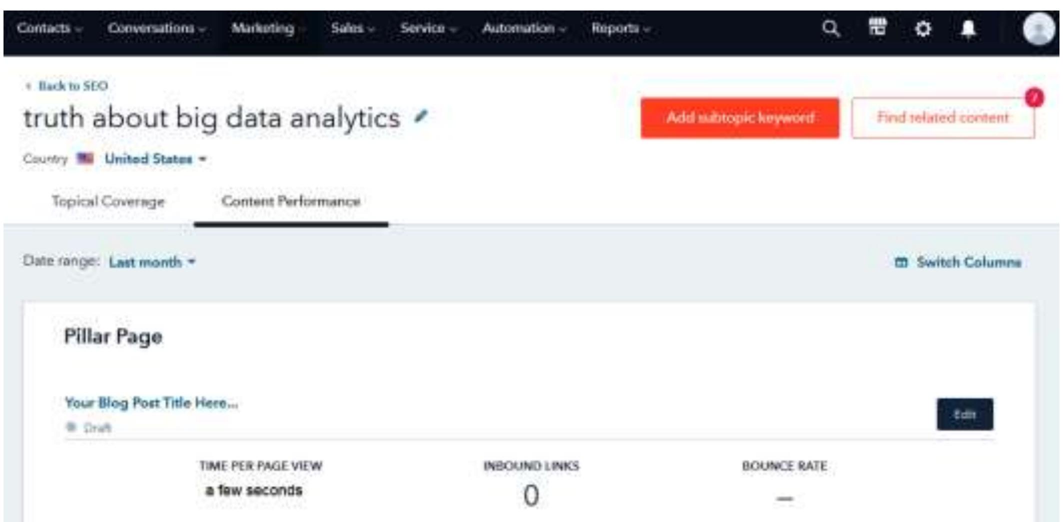


Figure 5.22 – Analyzing the pillar page's overall performance

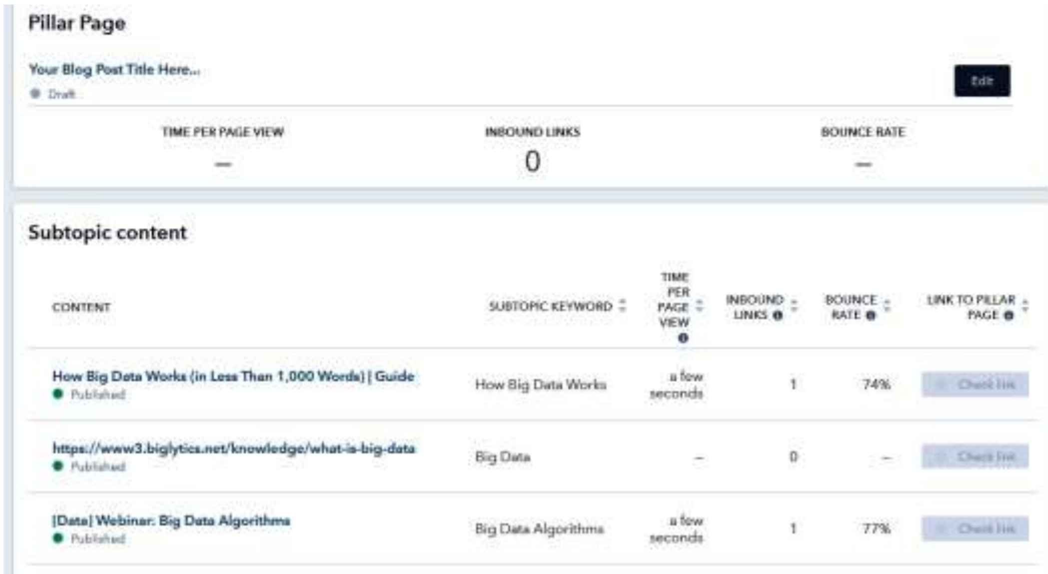


Figure 5.23 – Understanding the results of the subtopic keywords

Figure 5.24 – Checking whether the subtopics are linked to the pillar page

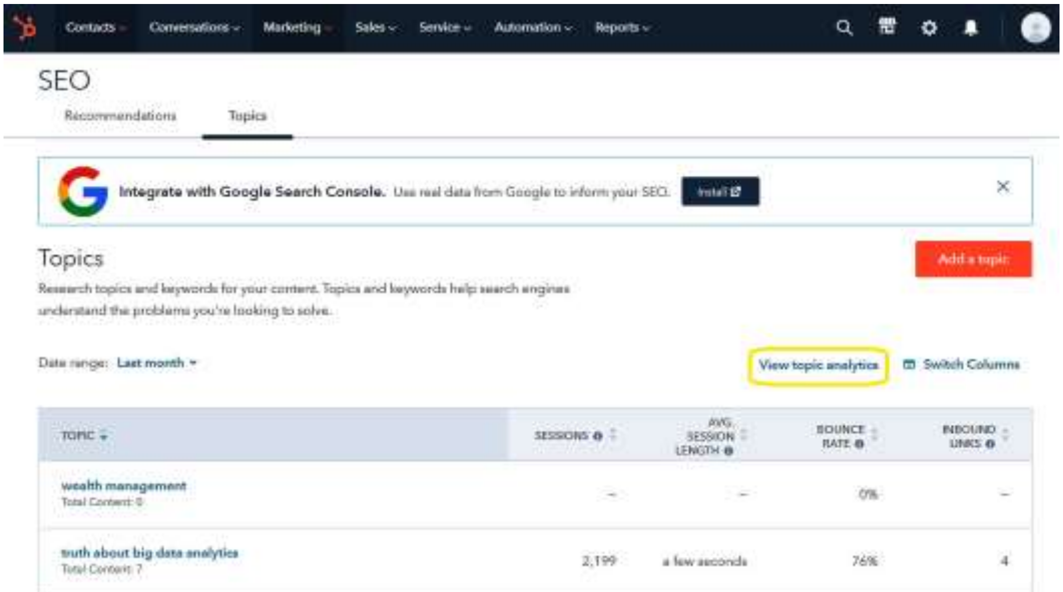


Figure 5.25 – Accessing the top analytics in HubSpot

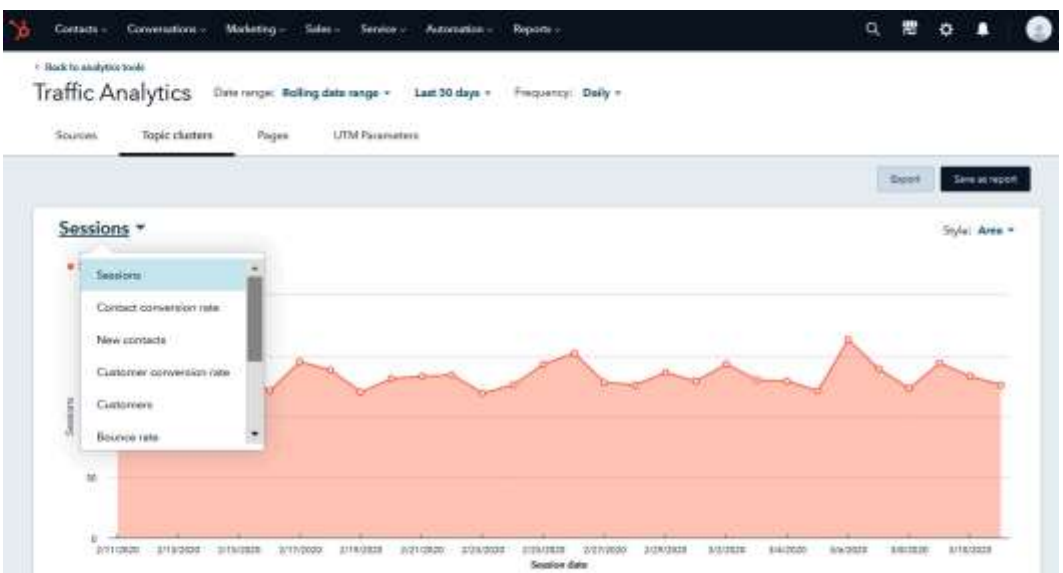


Figure 5.26 – Graph showing the analytics of the subtopics

All topic clusters >

Edit columns

	TOPIC CLUSTER	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
☐	truth about big data analytics	2,269	0.44%	10	0%	0	77.13%	1 second
☐	inbound marketing	1,519	0.07%	1	0%	0	75.58%	1 second
☐	big data analytics	241	0%	0	0%	0	74.27%	1 second
	Total	**4,029**	**0.27%**	**11**	**0%**	**0**	**76.37%**	**1 second**

Figure 5.27 – Topic cluster analytics

All topic clusters >

Edit columns

	TOPIC CLUSTER	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
☐	truth about big data analytics	2,269	0.44%	10	0%	0	77.13%	1 second
☐	inbound marketing	1,519	0.07%	1	0%	0	75.58%	1 second
☐	big data analytics	241	0%	0	0%	0	74.27%	1 second
	Total	**4,029**	**0.27%**	**11**	**0%**	**0**	**76.37%**	**1 second**

Figure 5.28 – Adding more information to your reports

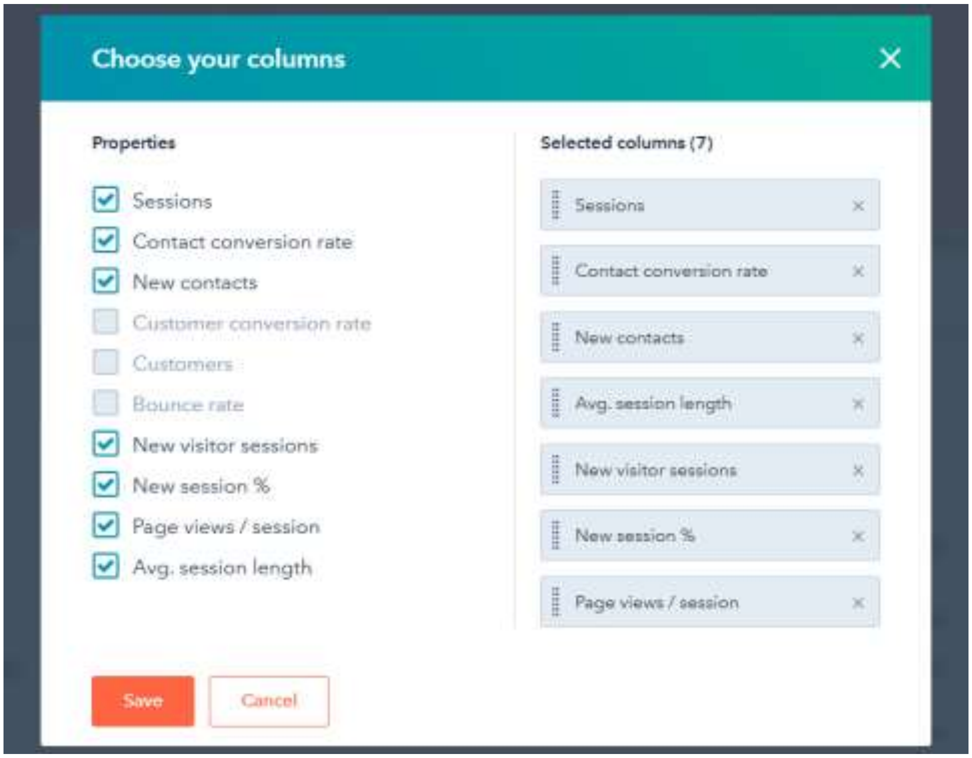


Figure 5.29 – Selecting the columns you wish to add to your report

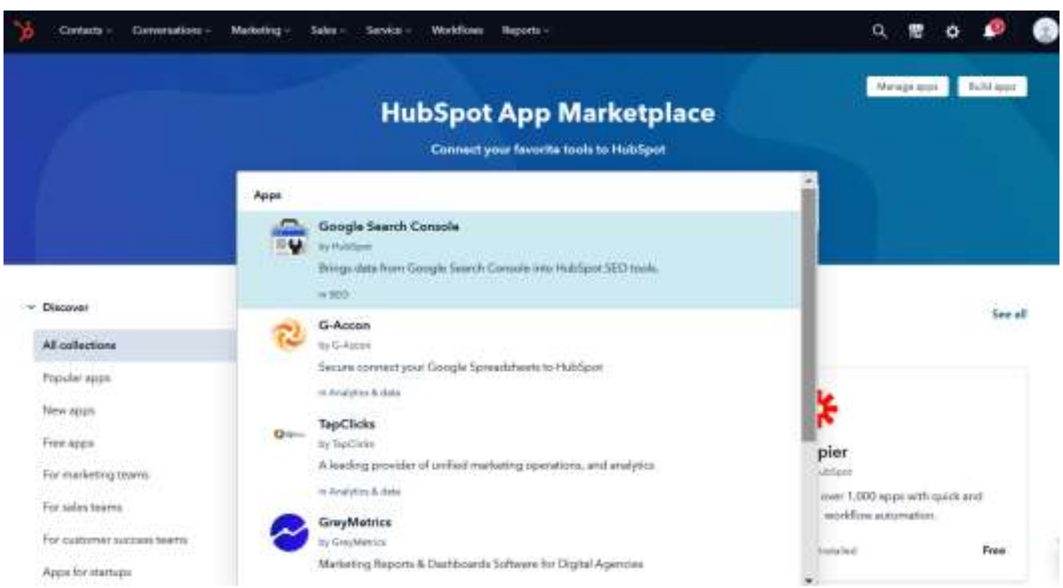


Figure 5.30 – Searching for the Google Search Console app in HubSpot

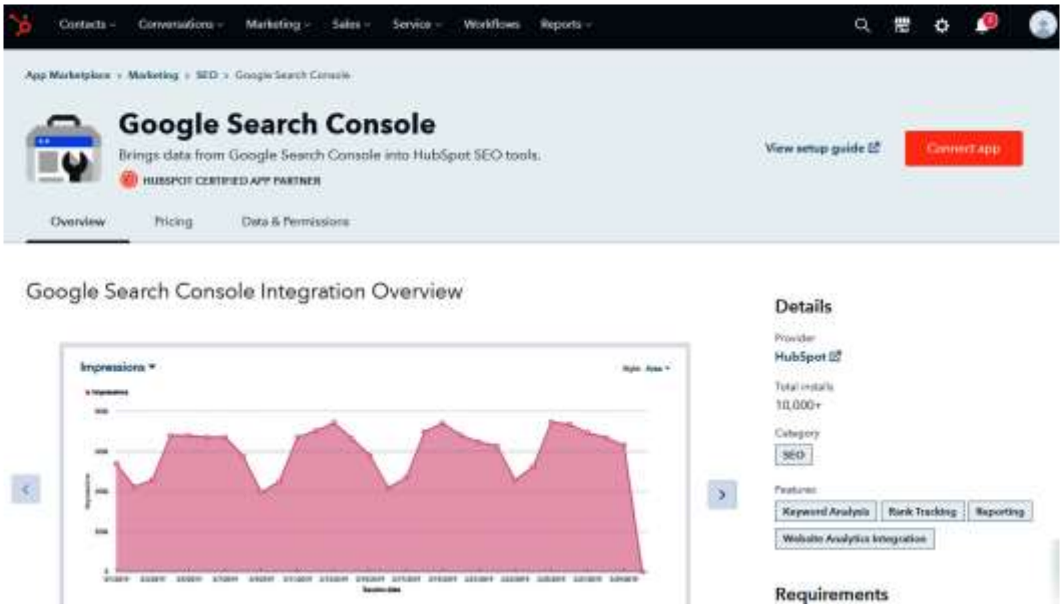


Figure 5.31 – Adding Google Search Console to HubSpot

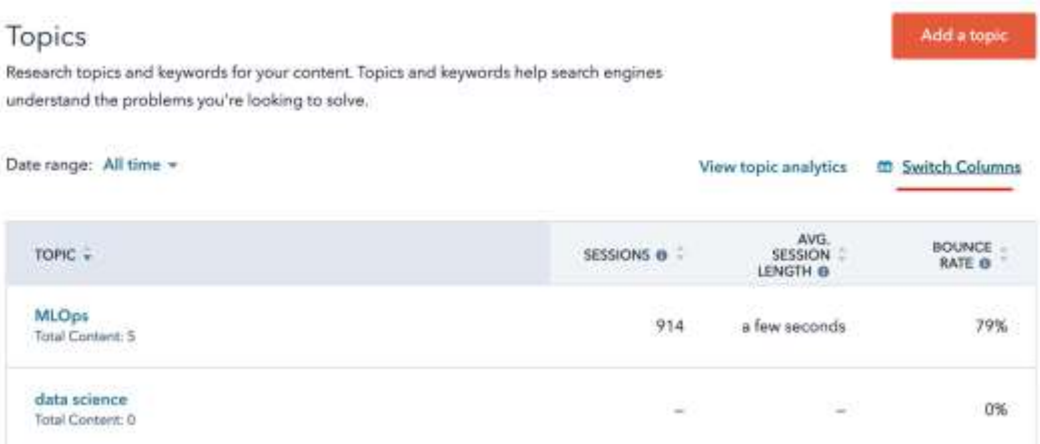


Figure 5.32 – Analyzing further the SEO analytics using Google Search Console

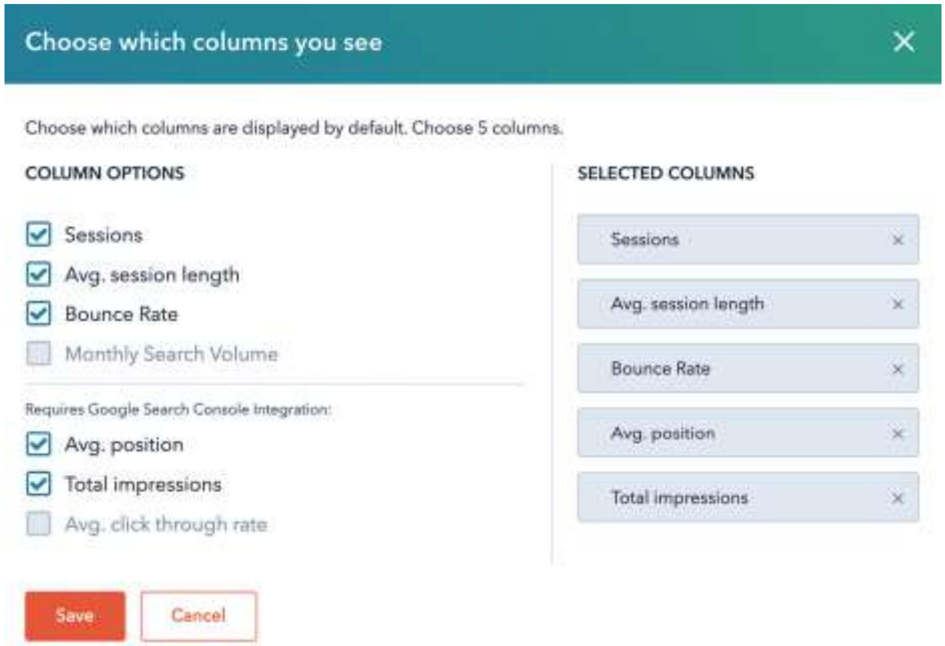


Figure 5.33 – Adding Google Search Console analytics to your reports

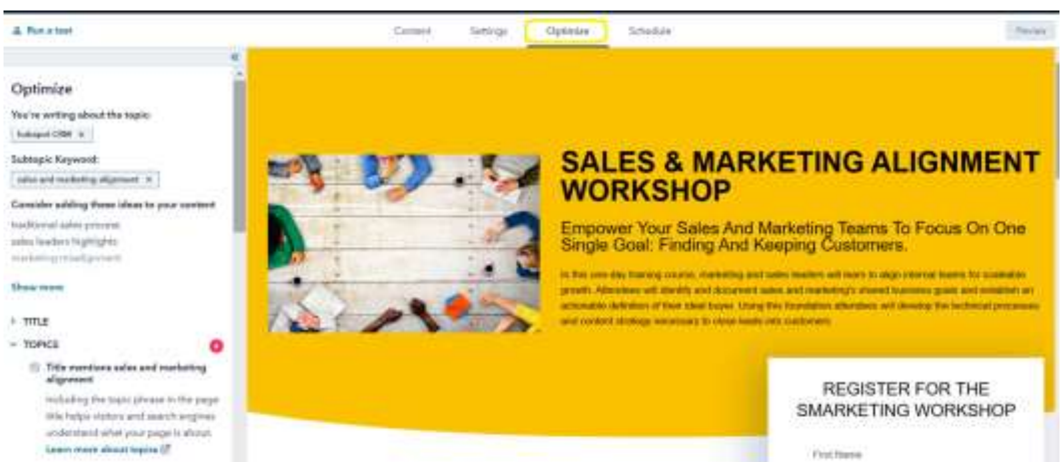


Figure 5.34 – Accessing the on-page SEO tool within HubSpot

Figure 5.35 – Analyzing the recommendations of the SEO tool

Questions

To ensure you understand the value of the steps you've just completed, let's practice some common troubleshooting tactics you can implement if faced with any of these issues:

1. If you want to search for a new topic in a specific country, what should you do?
2. If one of your team members asks why you need to use the HubSpot SEO tool when you already use Google Search Console, what would be your response?
3. If you would like to plan content creation where you could search for topics and keywords that you can focus on?

Further reading

- Search Engine Journal: https://www.searchenginejournal.com/
- *SEO Starter Guide* from Google: https://developers.google.com/search/docs/beginner/seo-starter-guide
- *19 SEO Tips Straight From the Mouths of HubSpot's SEO Team*: https://blog.hubspot.com/marketing/seo-tips

- *The Beginner's Guide to SEO* (MOZ): https://moz.com/beginners-guide-to-seo
- *What Is SEO? (Learn How to Do It in 5 Minutes)* by Neil Patel: https://neilpatel.com/what-is-seo/

Chapter 6

Images

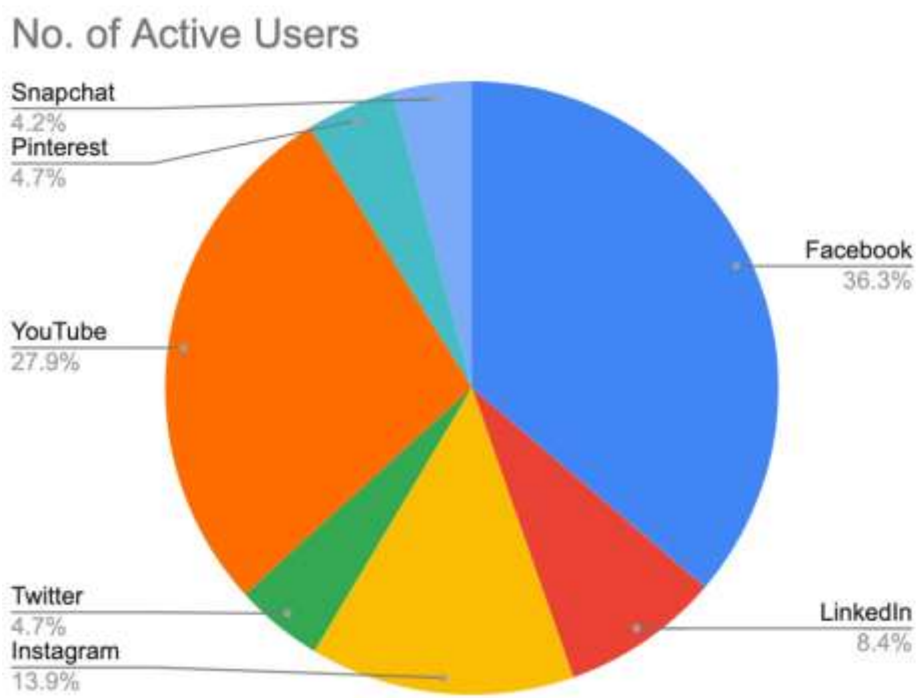


Figure 6.1 – Percentage of active users per social media channel

Figure 6.2 – Connecting your social media accounts to HubSpot

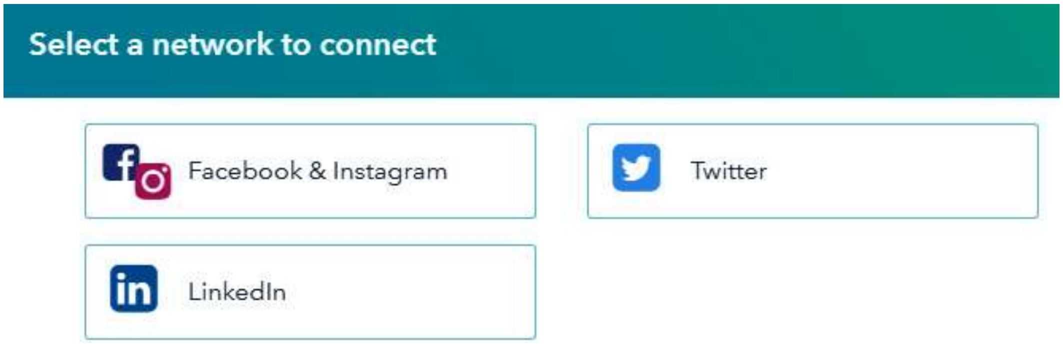


Figure 6.3 – Choosing your platforms

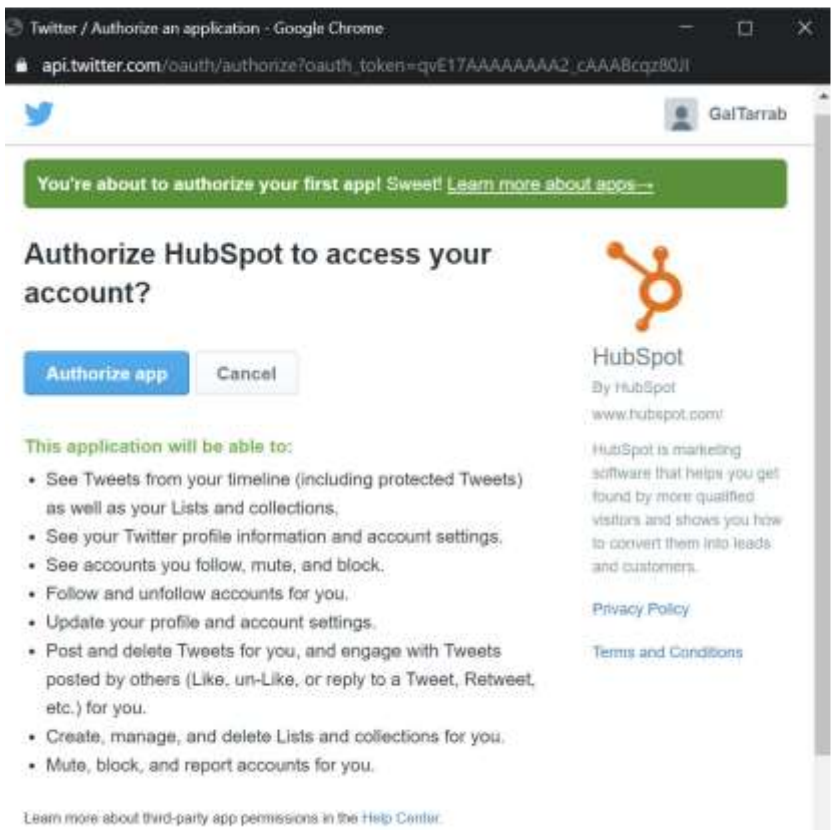


Figure 6.4 – Authorizing HubSpot to connect to your social media apps

Figure 6.5 – Choosing your designated times for publishing posts

Figure 6.6 – Adding or deleting additional times

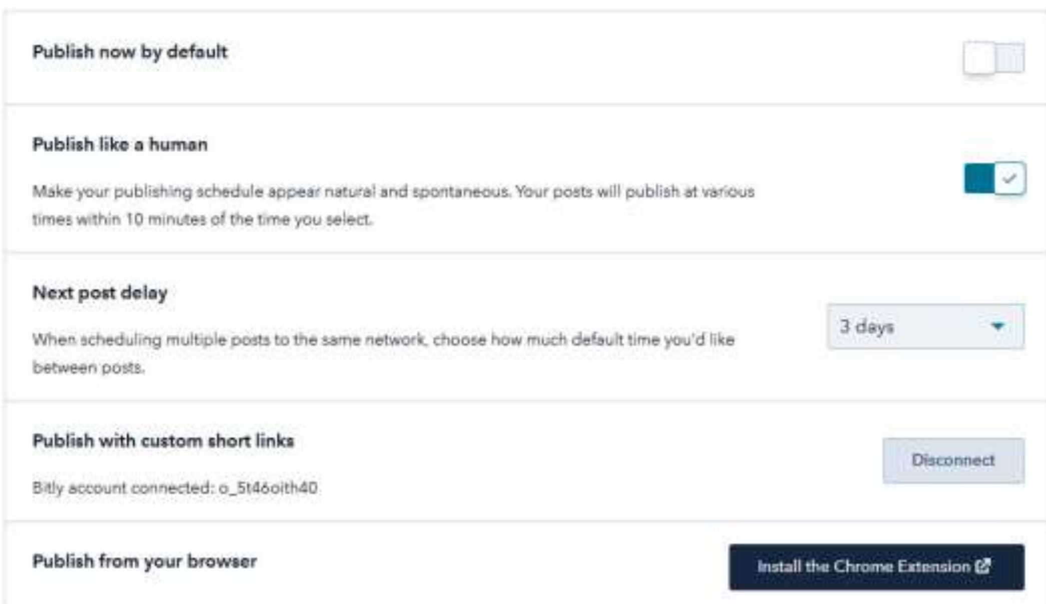


Figure 6.7 – Publish like a human, connect your Bitly account, or decide on the time gap between posts

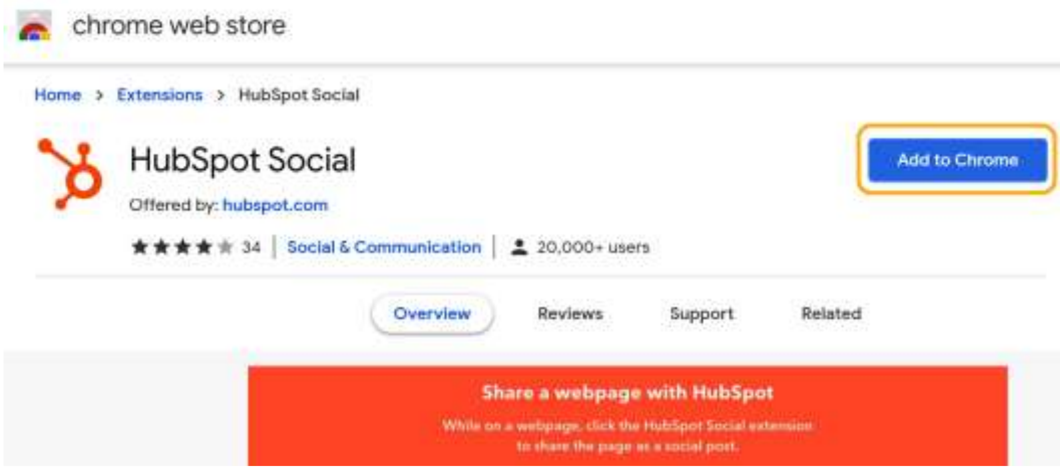


Figure 6.8 – Installing the Chrome extension to post web articles directly to HubSpot

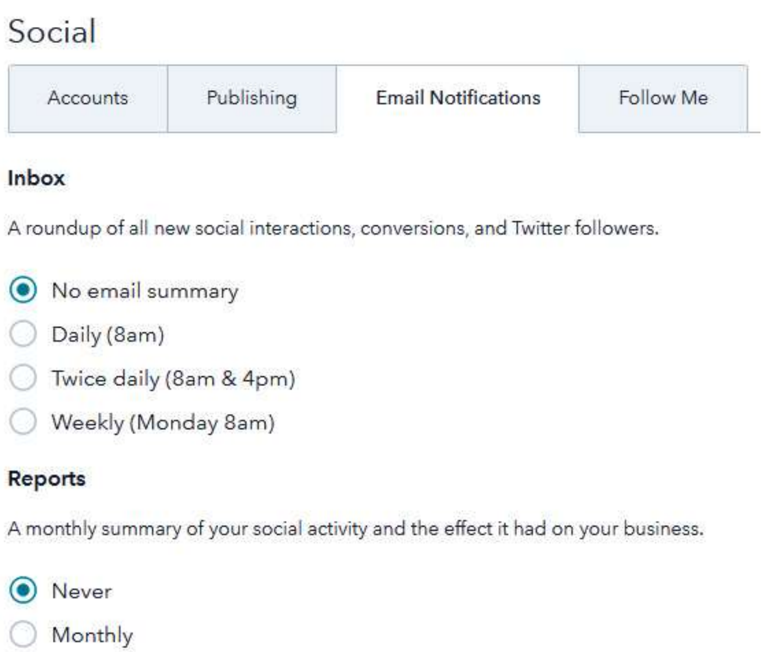


Figure 6.9 – Setting your notifications

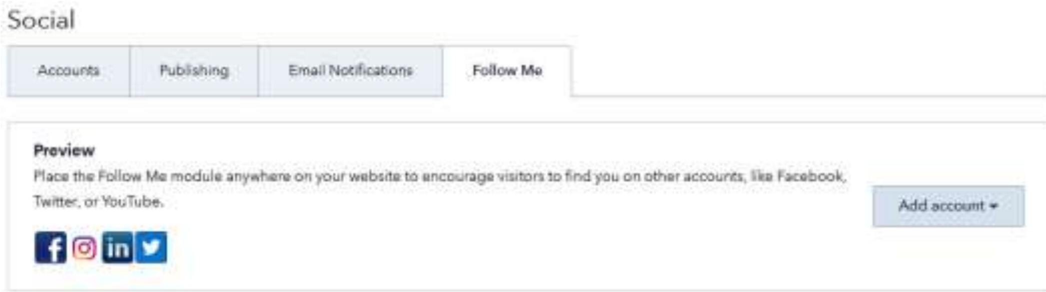


Figure 6.10 – Setting up your Follow Me buttons

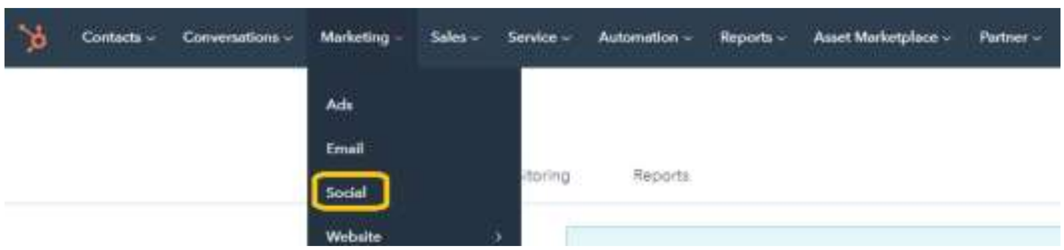


Figure 6.11 – Accessing the Social tool in HubSpot

Figure 6.12 – Creating your social posts

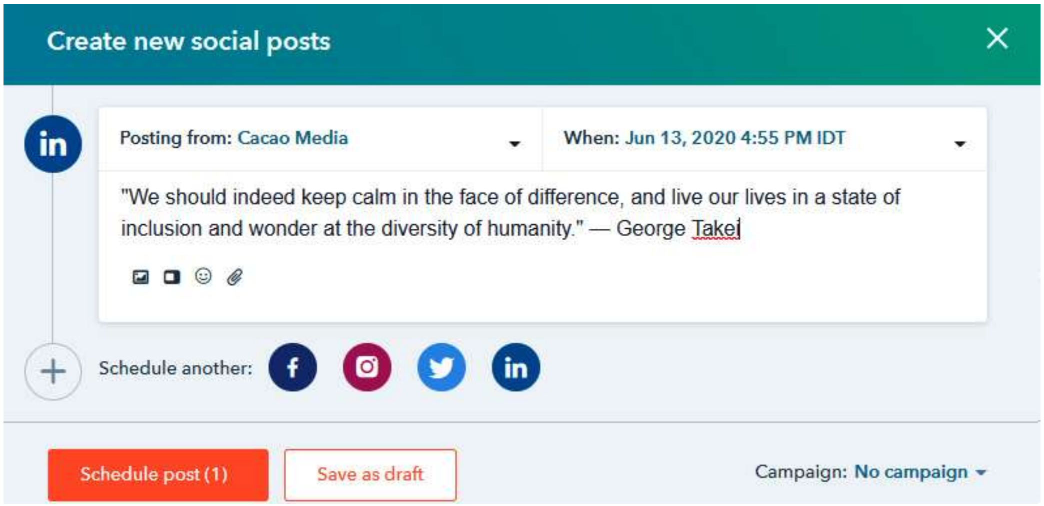


Figure 6.13 – Scheduling another post

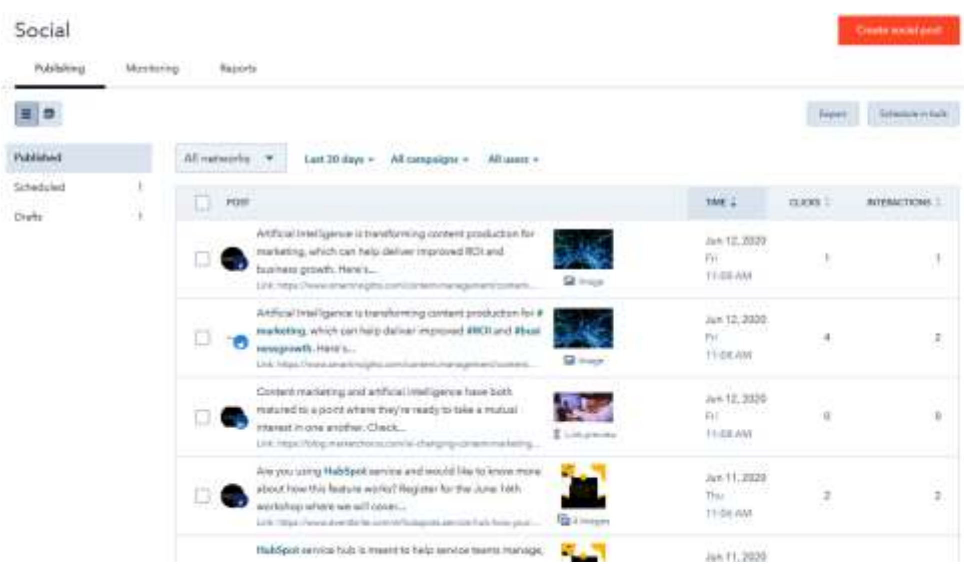


Figure 6.14 – Viewing your list of scheduled, published, or posts in draft form

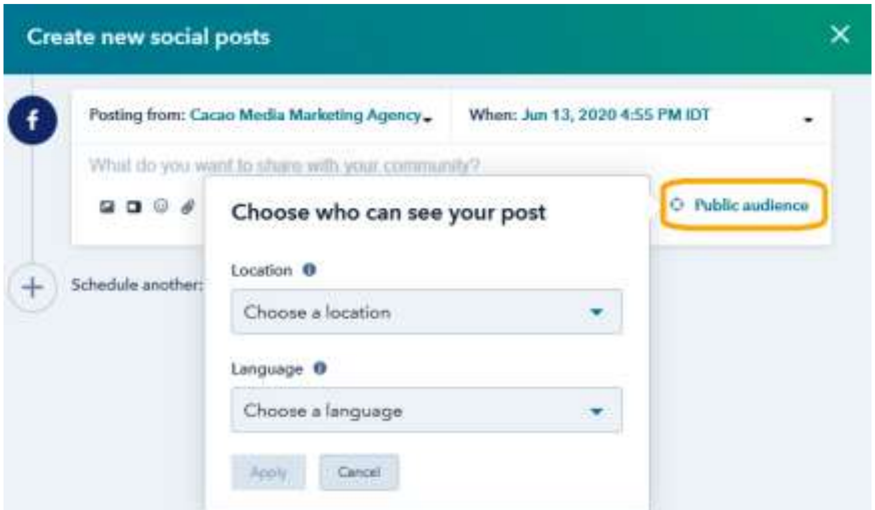


Figure 6.15 – Creating a public audience

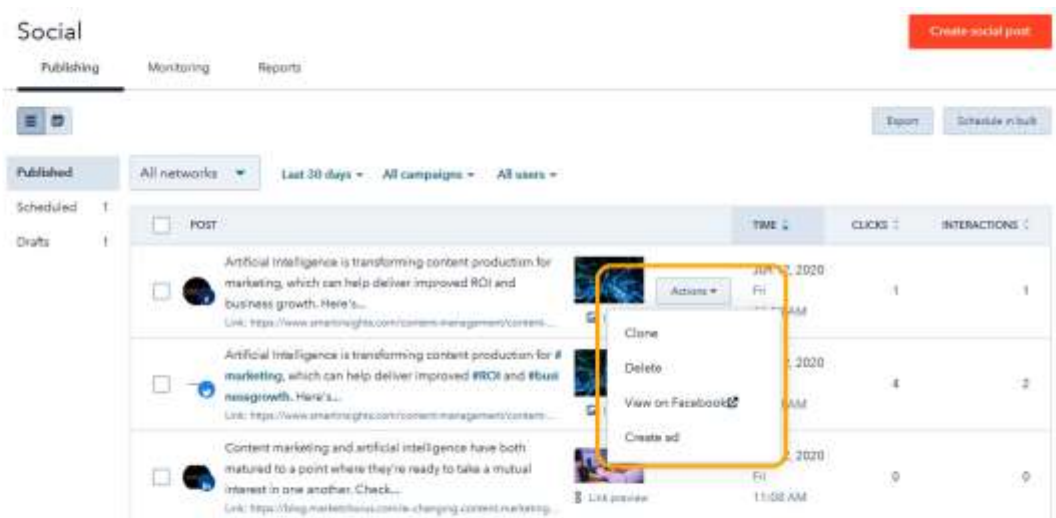


Figure 6.16 – Accessing more actions for your posts

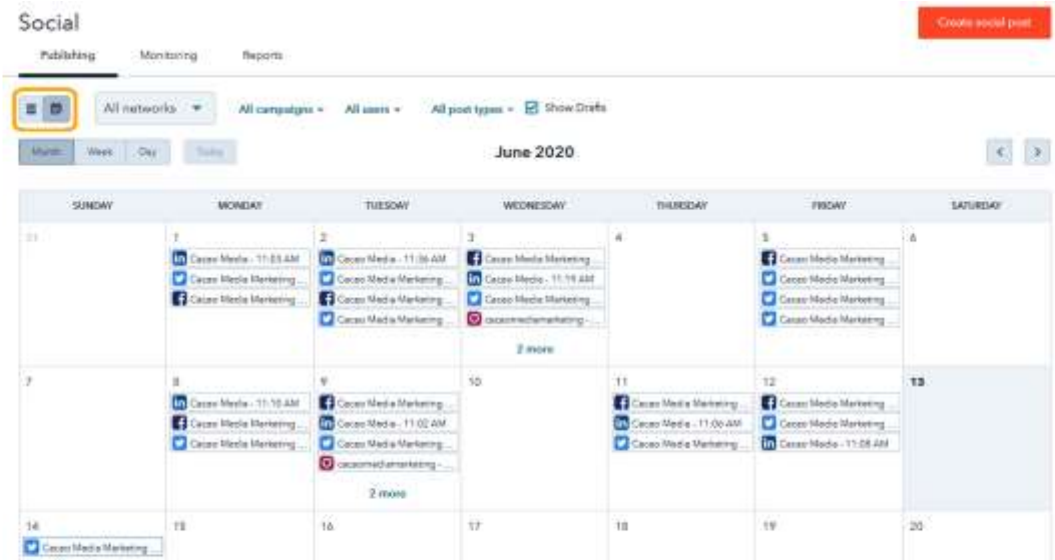


Figure 6.17 – Viewing the calendar tool

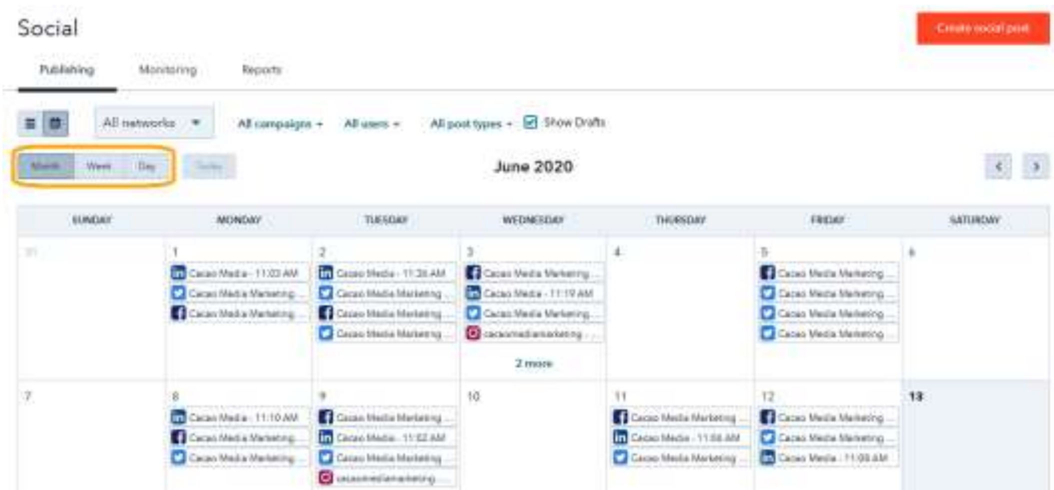


Figure 6.18 – Viewing the calendar tool within a specific period

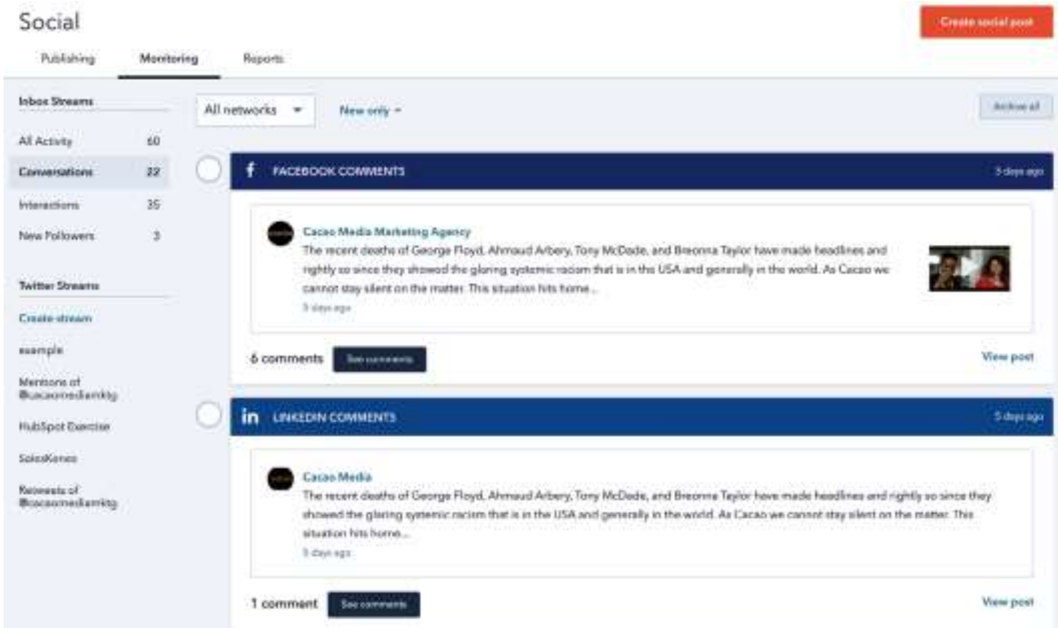


Figure 6.19 – How to view all posts that have comments

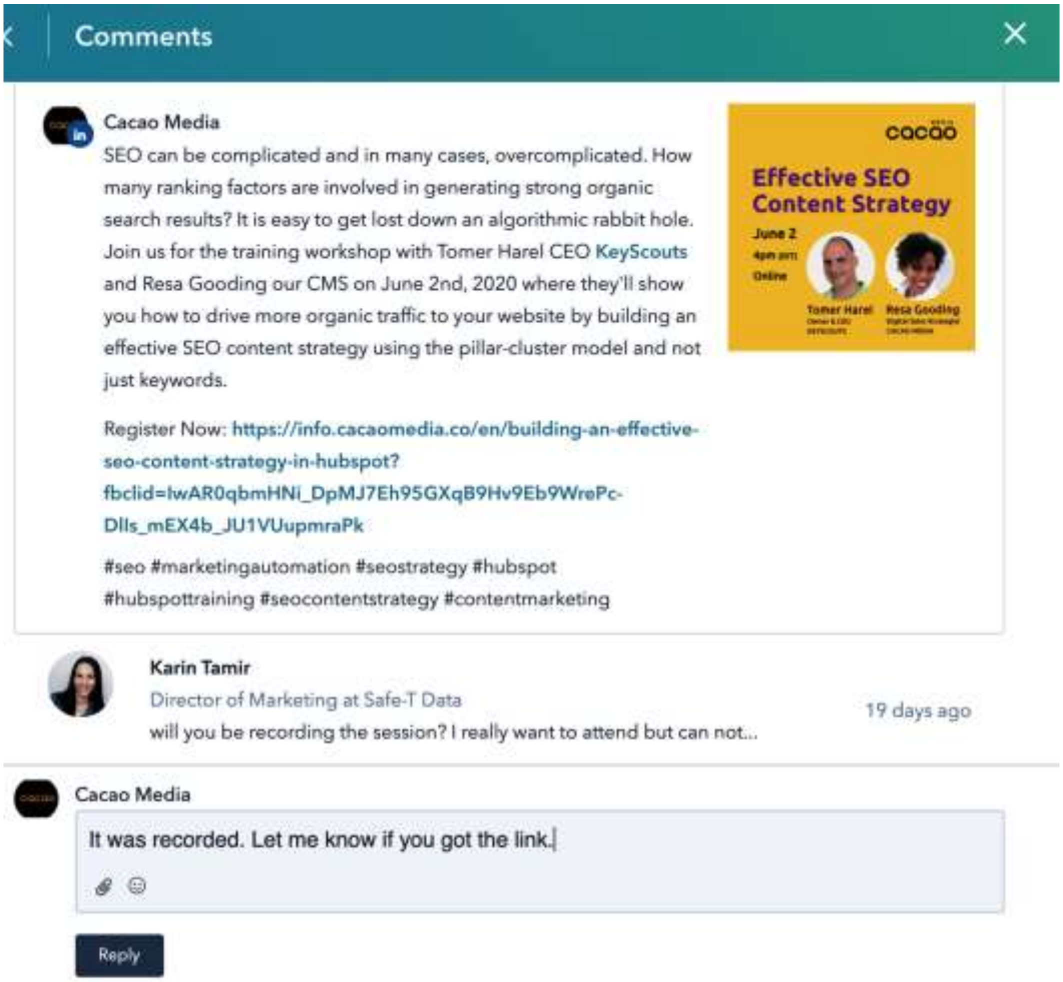


Figure 6.20 – Responding to comments on social media posts

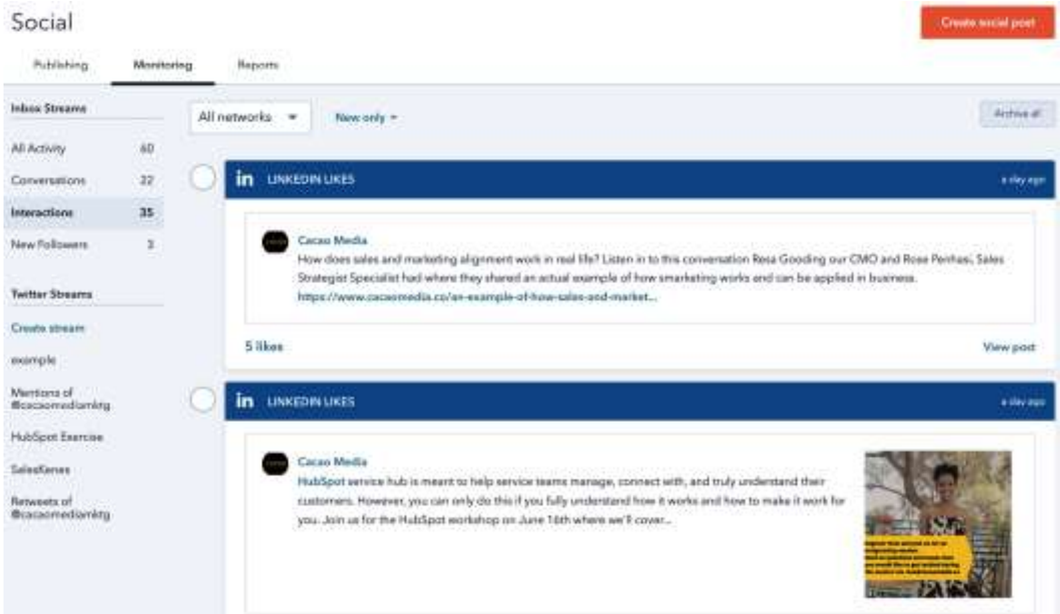


Figure 6.21 – Keeping up to date with the most recent interactions

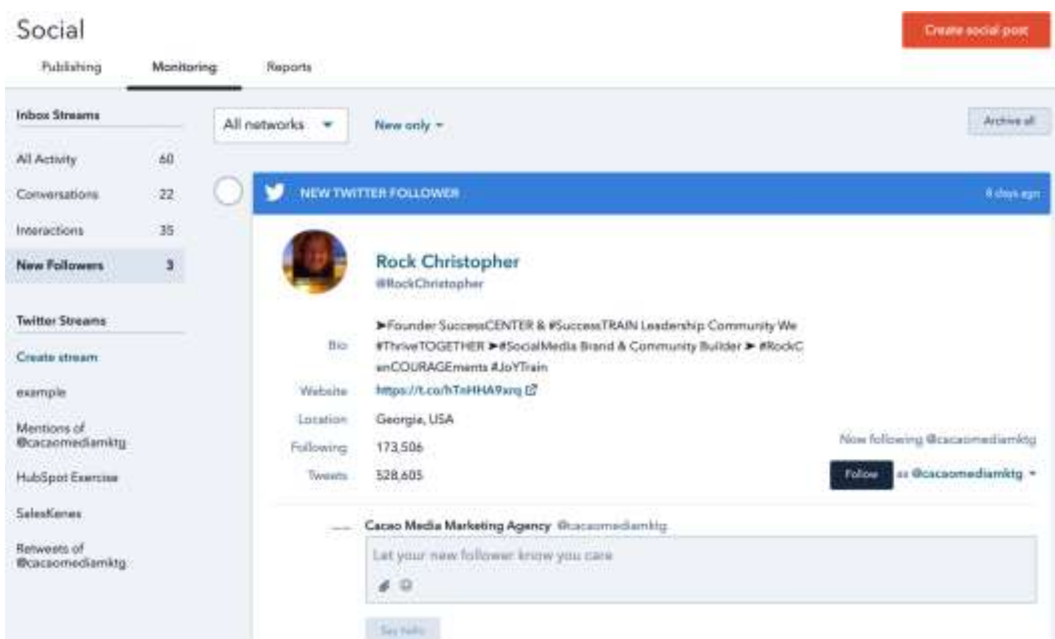


Figure 6.22 – Viewing all new followers from Twitter

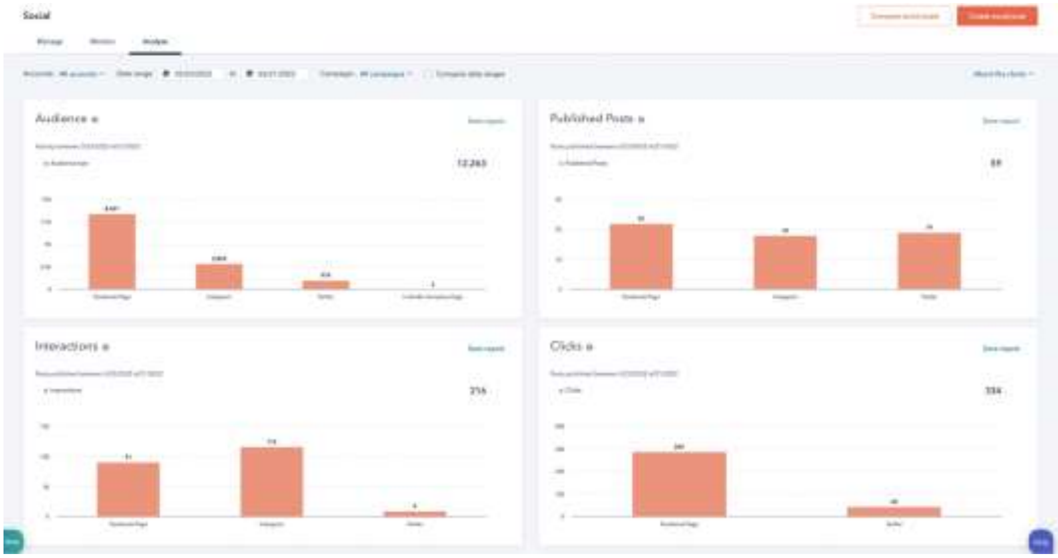


Figure 6.23 – View of all the reports for social media

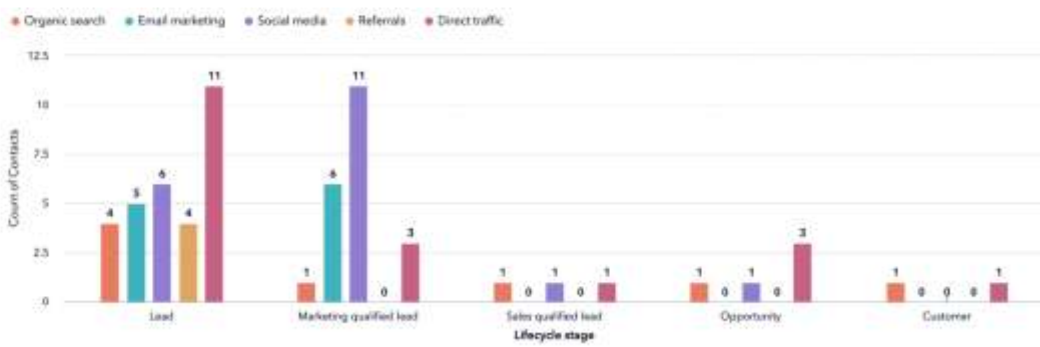


Figure 6.24 – Visit-to-lead conversion report based on life cycle stages

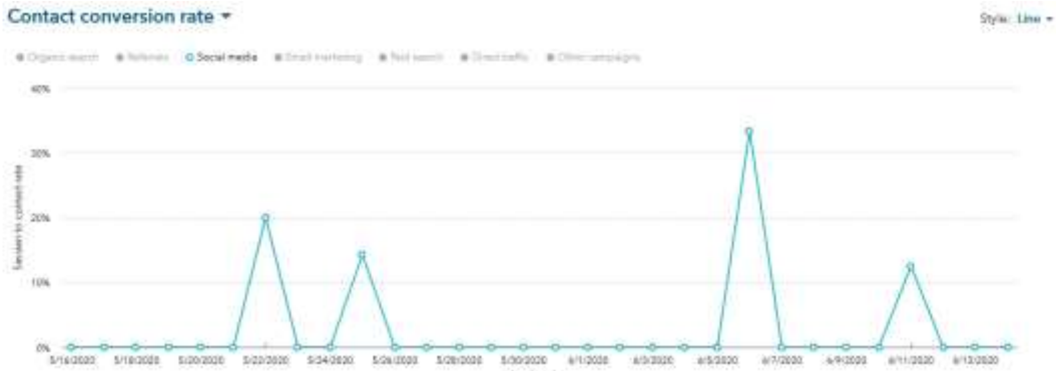


Figure 6.25 – The performance of social media posts on different days

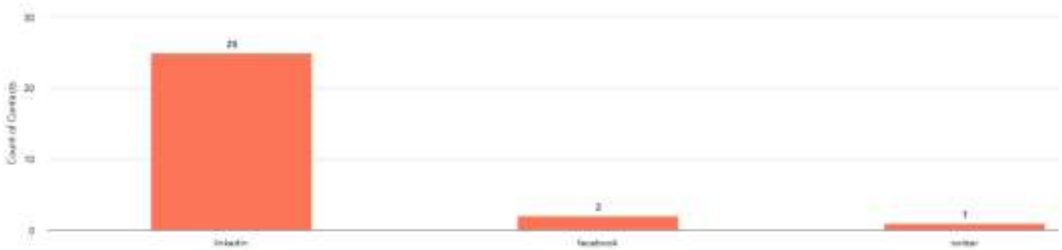


Figure 6.26 – Viewing a combined report of all social media platforms' performance

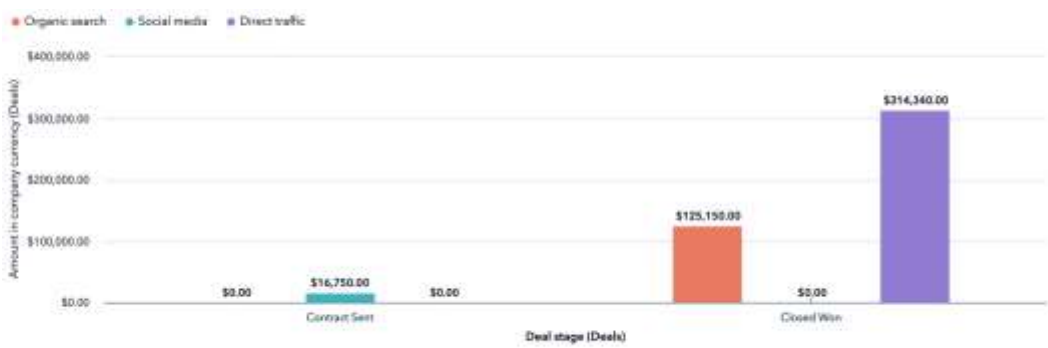


Figure 6.27 – Lead-source-to-deal conversion

Tables

Platform	No. of Active Users	Relevant Industries	Best For
Facebook	2.6 billion	B2C and B2B	Brand awareness, lead gen, advertising
LinkedIn	600 million	B2B	B2B relationships, business development, employment marketing
Instagram	1 billion	B2C	Natural-looking media, behind-the-scenes, user-generated content, advertising, and employees' social lives
Twitter	335 million	B2C and B2B	Public relations, customer service
YouTube	2 billion	B2C and B2B	Brand awareness, entertainment, and king of all things videos (tutorials, products, music, and so on)
Pinterest	335 million	B2C	Visual advertising, inspiration
Snapchat	300 million	B2C	Brand awareness; advertising

Table 6.1 – Breakdown of social media networks

Questions

To ensure you understood the value of the steps you've just completed, let's practice some common troubleshooting tactics you can implement if faced with any of these issues:

1. Which social media platforms are most relevant for B2B businesses?
2. When connecting your social media account, should you only connect your company profiles or some members of your team as well?

3. Which types of reports help you track whether your social media efforts are resulting in opportunities for your sales team?

Further reading

To learn more about the topics that were covered in this chapter, take a look at the following resources:

- Social Media Examiner: https://www.socialmediaexaminer.com/
- *9 Types of Social Media and How Each Can Benefit Your Business*: https://blog.hootsuite.com/types-of-social-media/
- HubSpot Academy – Social Media Courses: https://www.hubspot.com/resources/courses/social-media

Chapter 7

Images

Figure 7.1 – Connecting an Ads account to HubSpot

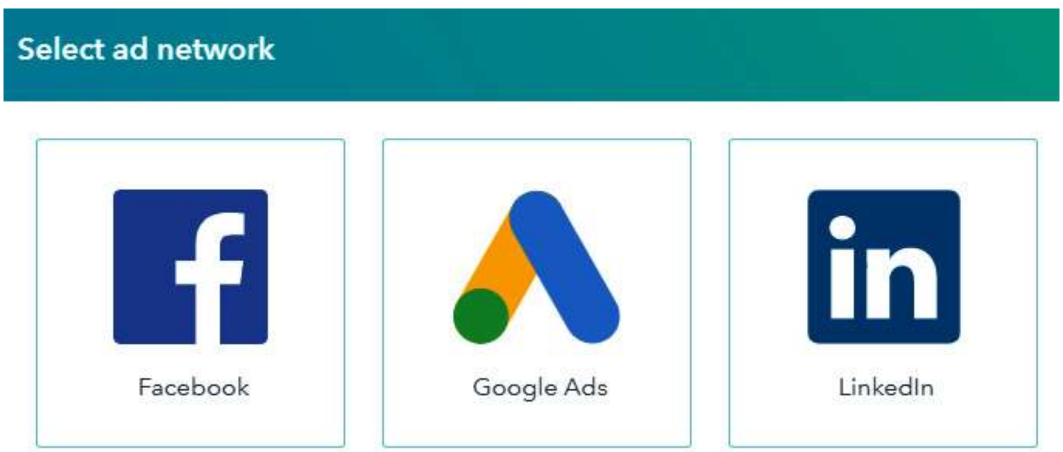


Figure 7.2 – Ads platforms to connect in HubSpot

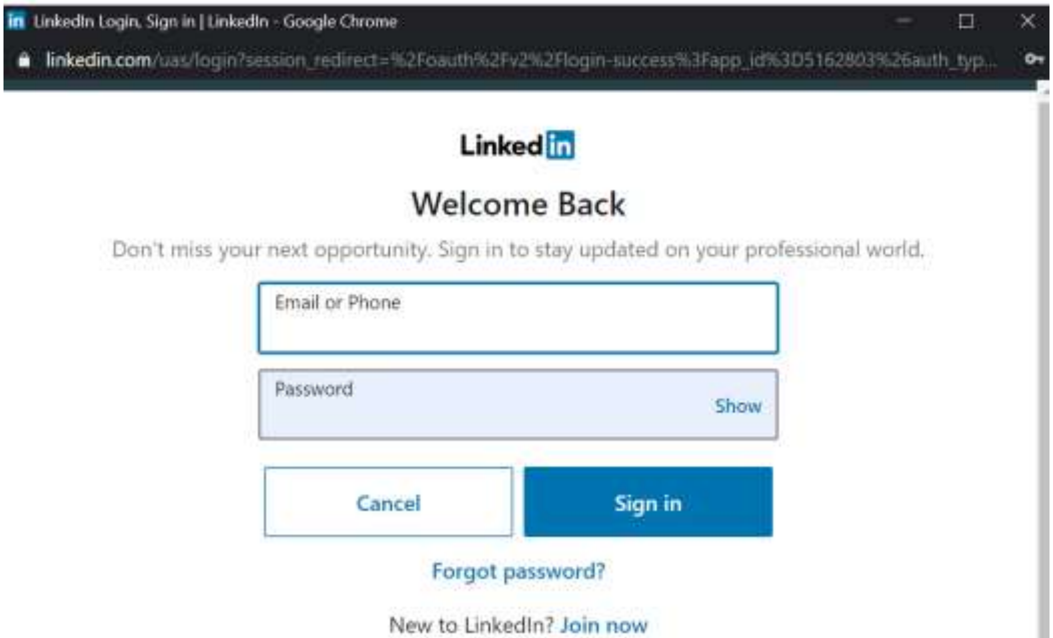


Figure 7.3 – LinkedIn connection

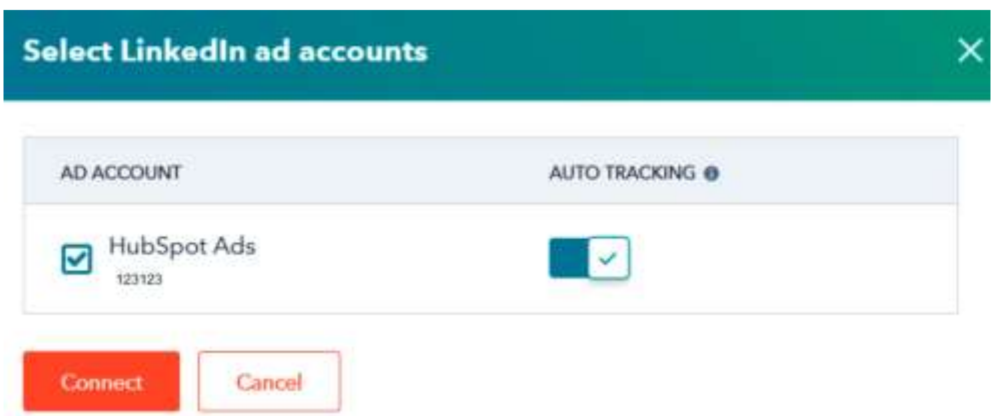


Figure 7.4 – HubSpot Ads autotracking switch on

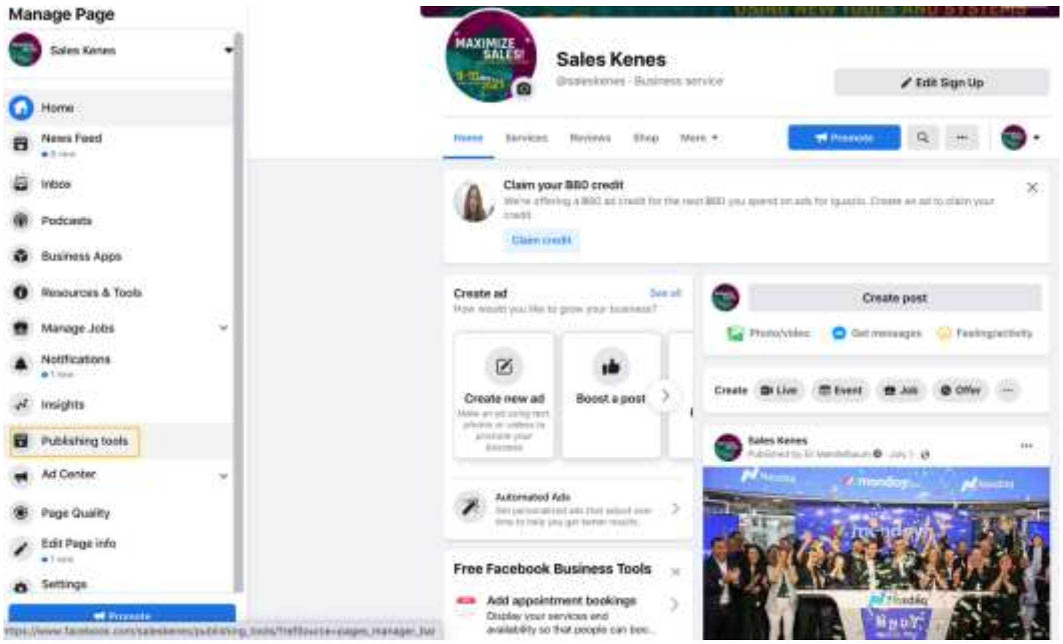


Figure 7.5 – Facebook company page publishing tool

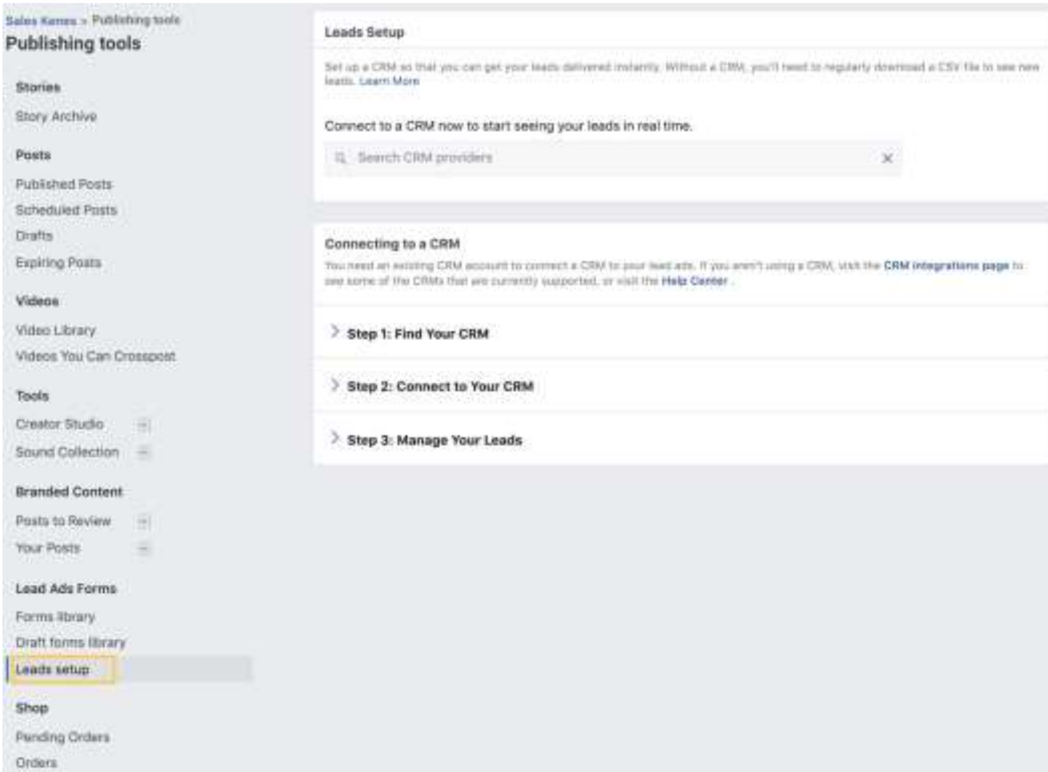


Figure 7.6 – Lead setup page on Facebook

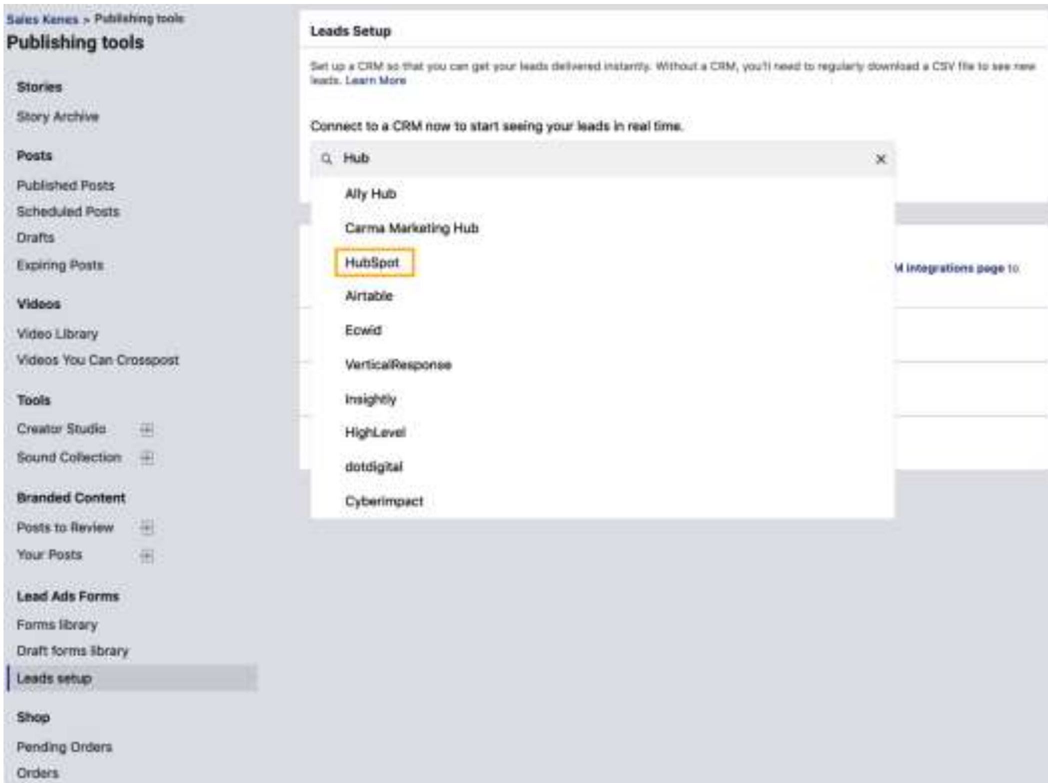


Figure 7.7 – Searching for HubSpot

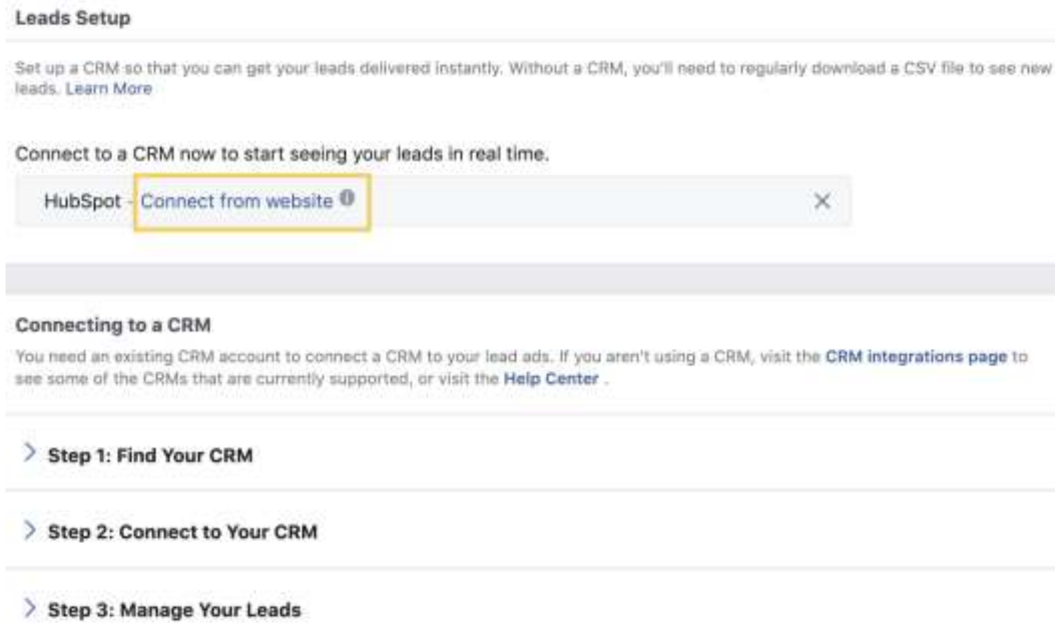


Figure 7.8 – Connecting HubSpot to the website

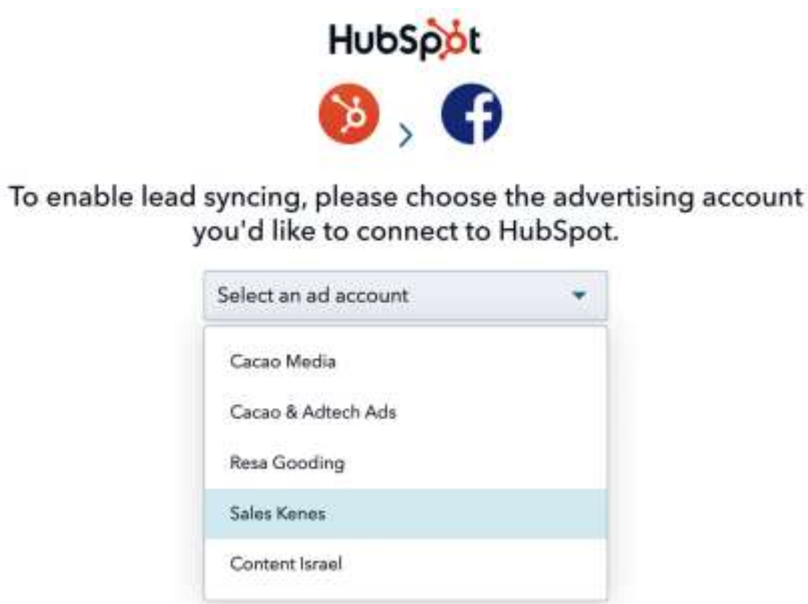


Figure 7.9 – Selecting the relevant Facebook ad account to connect to HubSpot

Figure 7.10 – Facebook lead setup connection on HubSpot

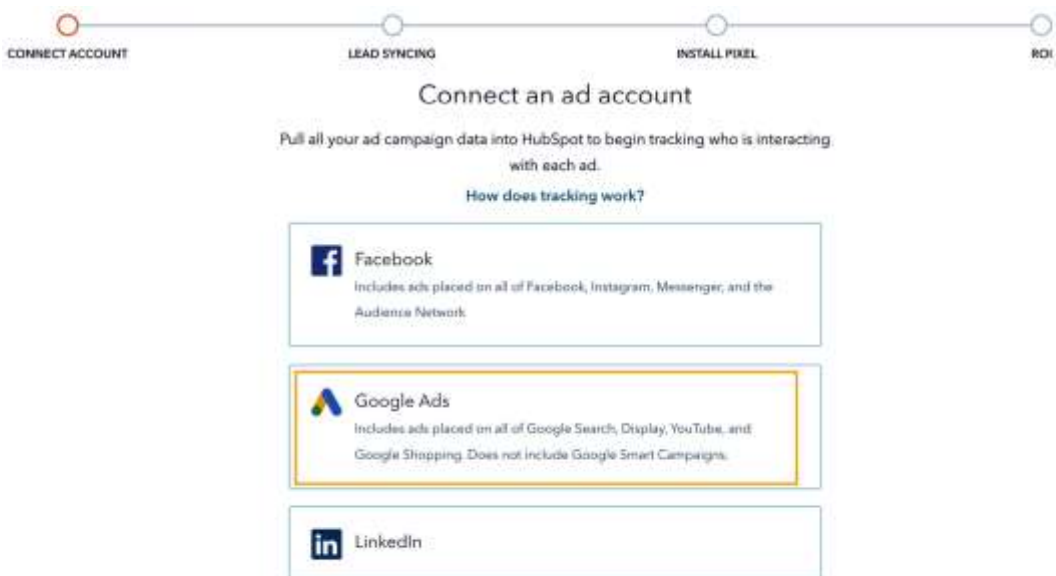


Figure 7.11 – Connecting a Google Ads account to HubSpot

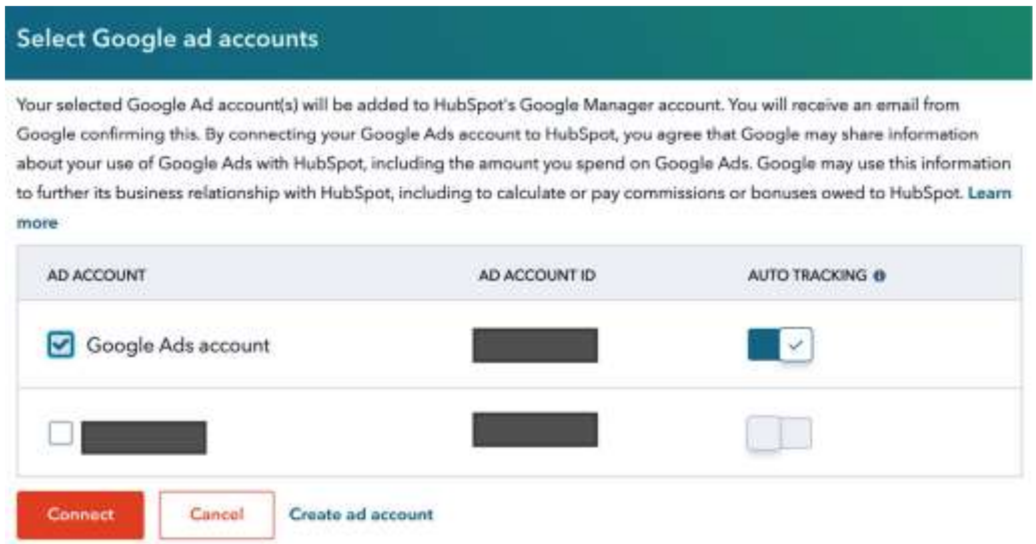


Figure 7.12 – Selecting the relevant Google Ads account

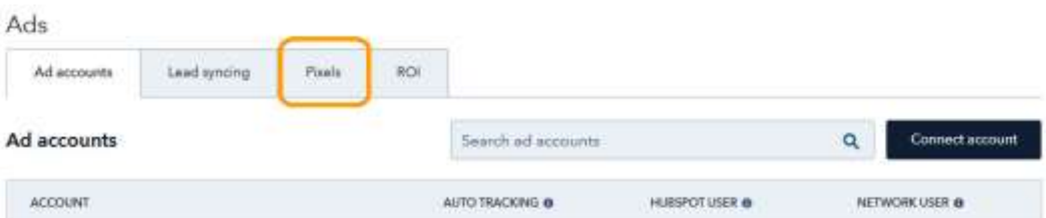


Figure 7.13 – Google pixel tracking code

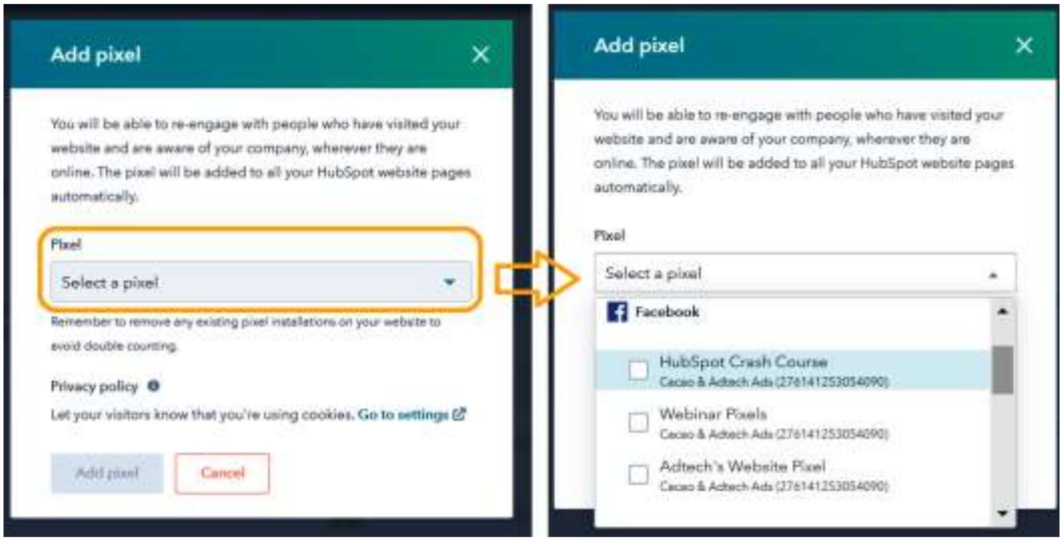


Figure 7.14 – Selecting pixel code from HubSpot

Figure 7.15 – Creating an audience for ads on HubSpot

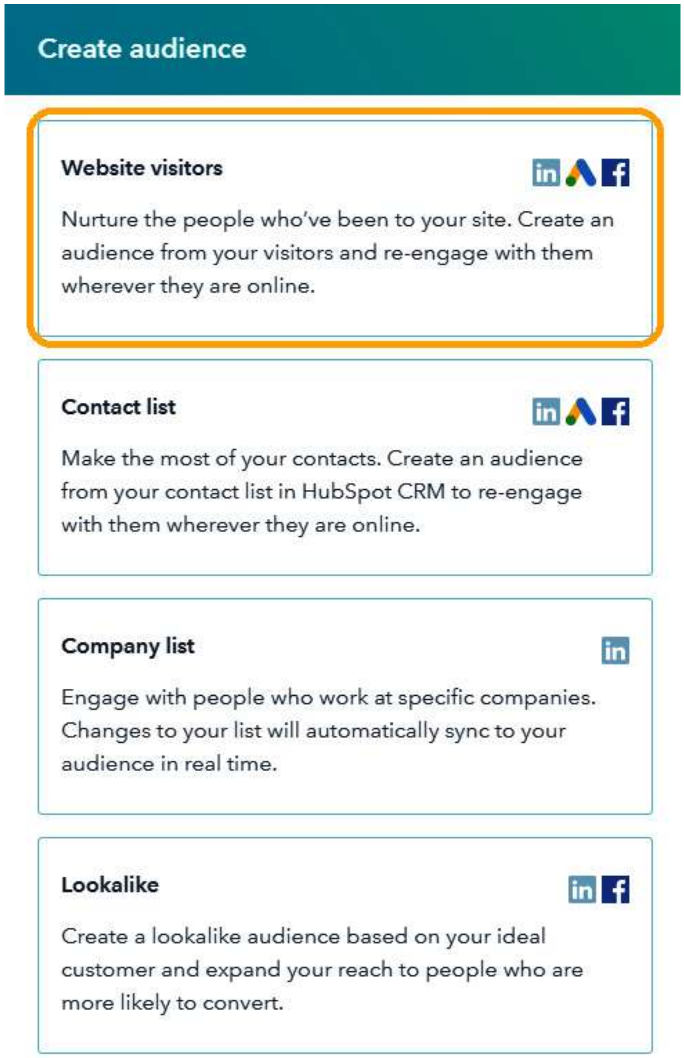


Figure 7.16 – Creating an ad audience by website visitors

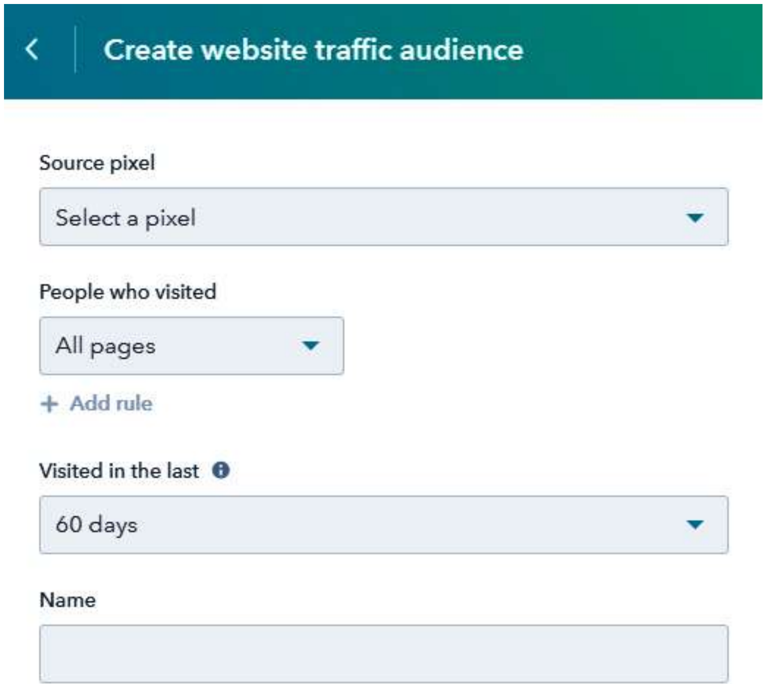


Figure 7.17 – Create website traffic audience

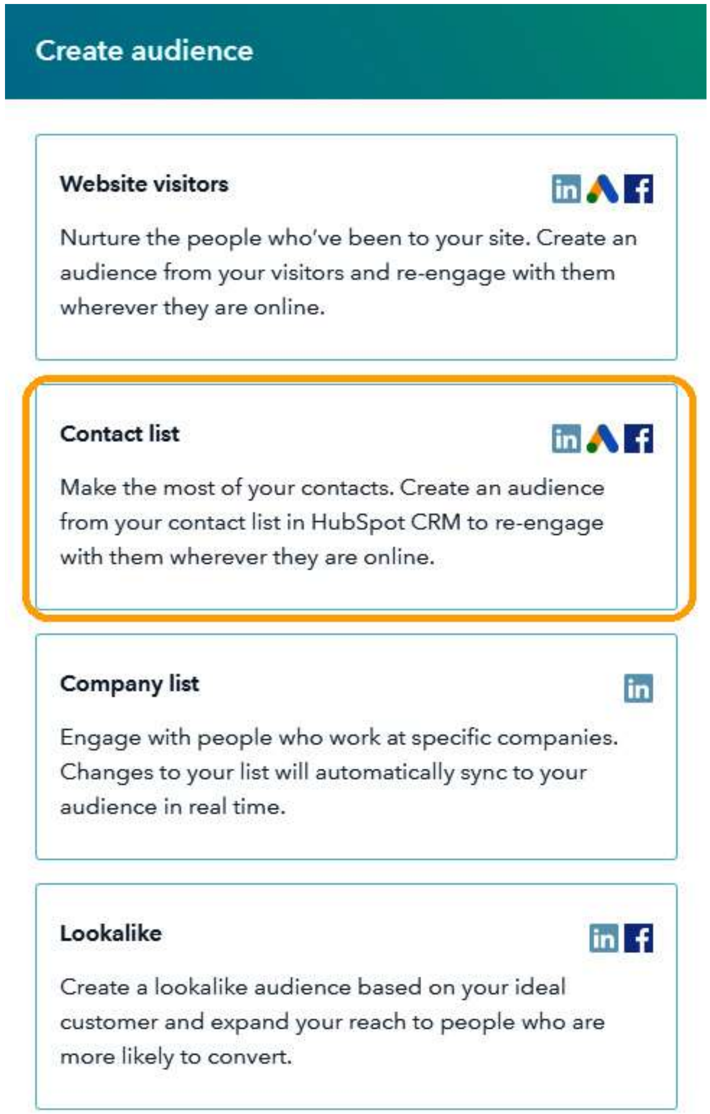


Figure 7.18 – Creating a website audience based on contact

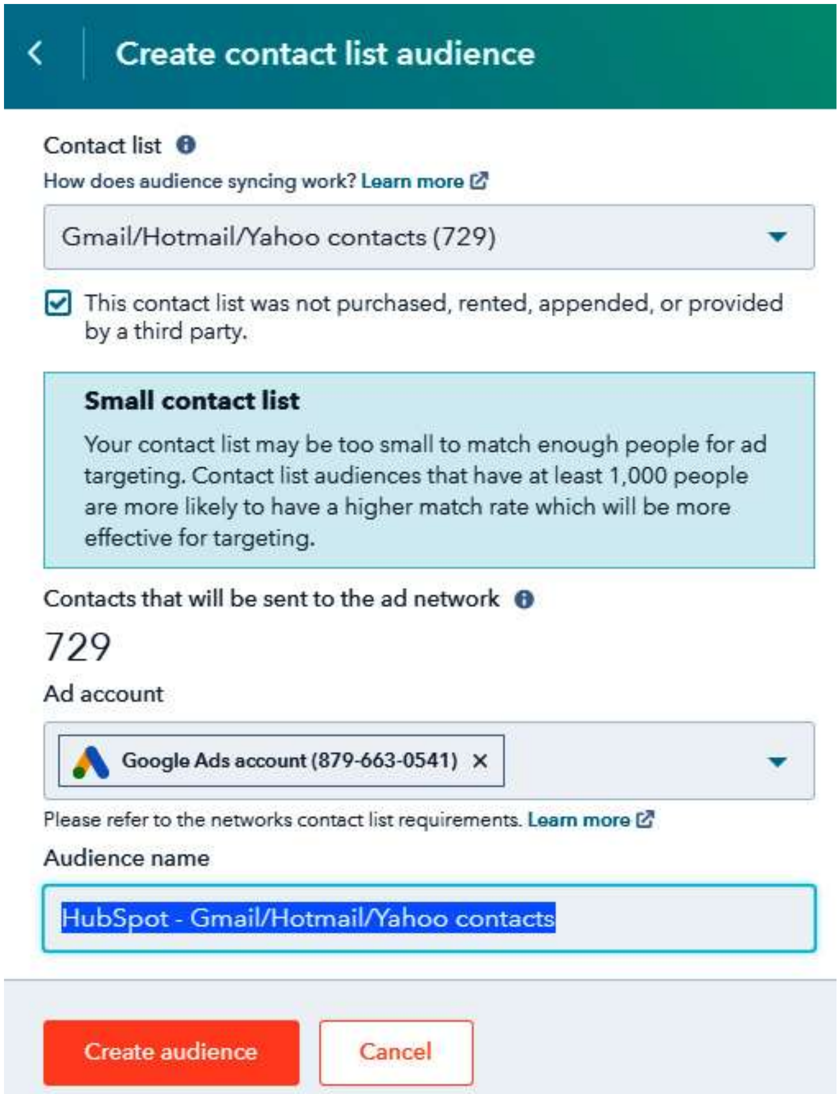


Figure 7.19 – Creating a contacts list

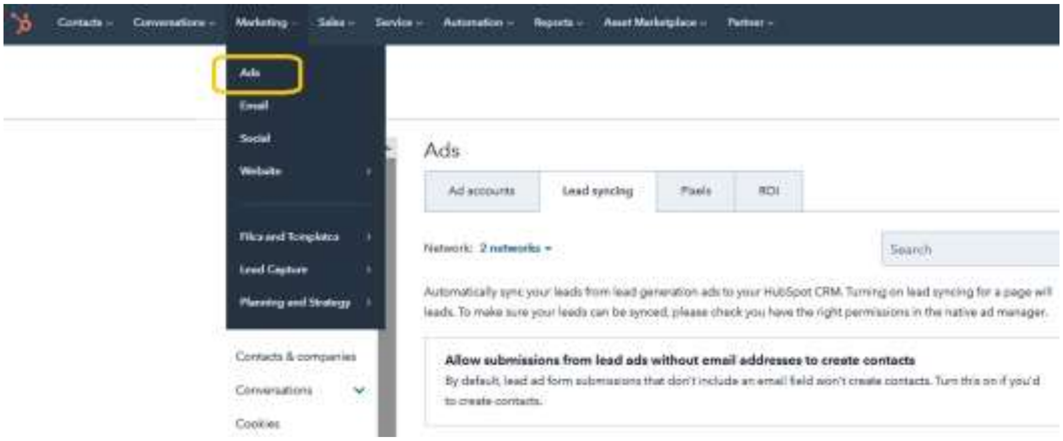


Figure 7.20 – Ads option in HubSpot

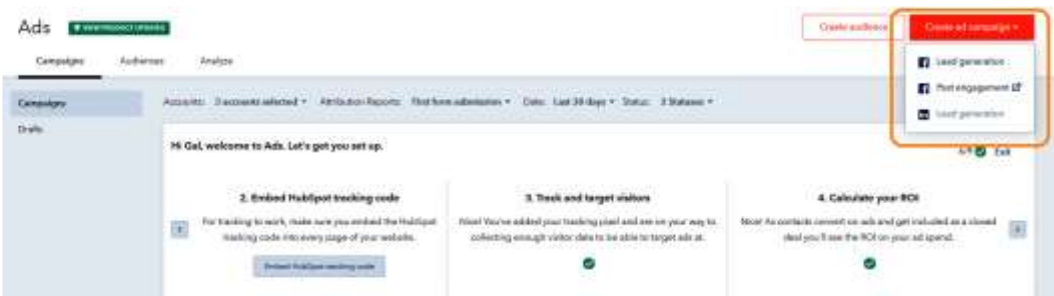


Figure 7.21 – Create ad campaign

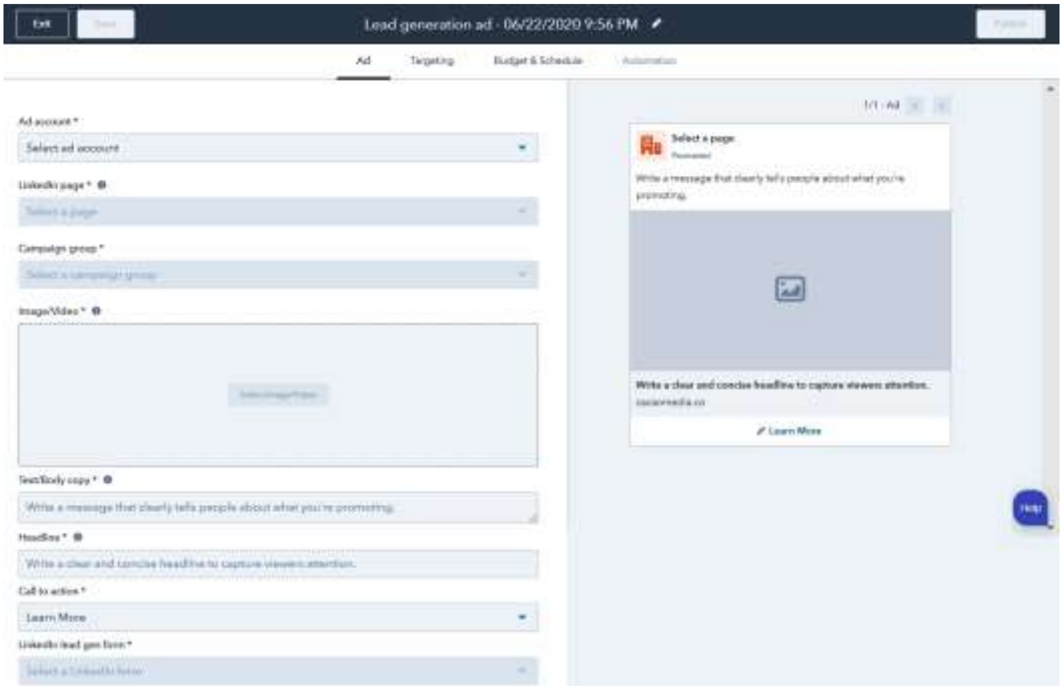


Figure 7.22 – Ad creation page in HubSpot

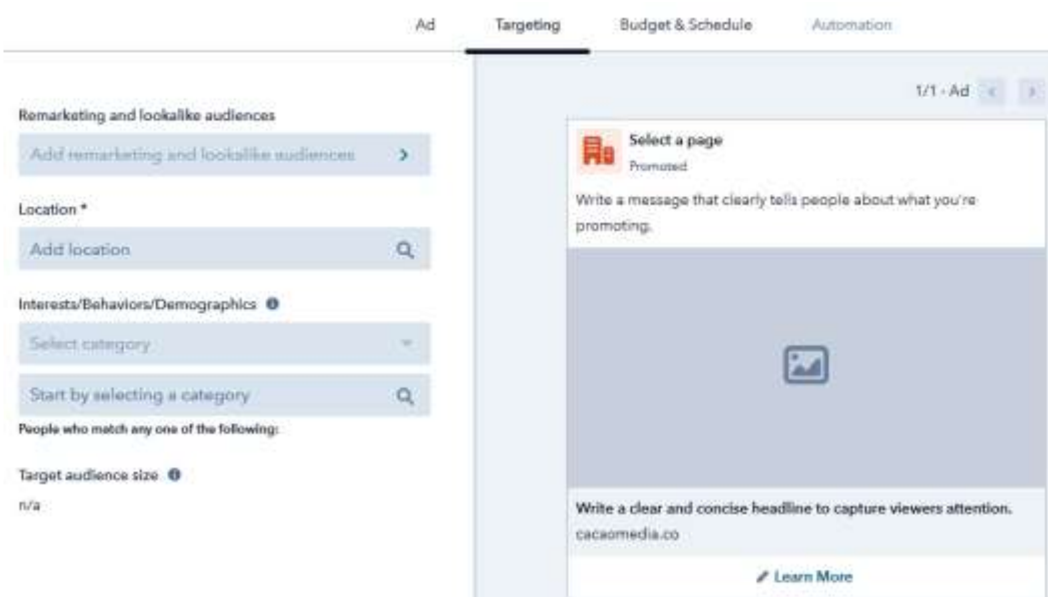


Figure 7.23 – Targeting section in ad creation

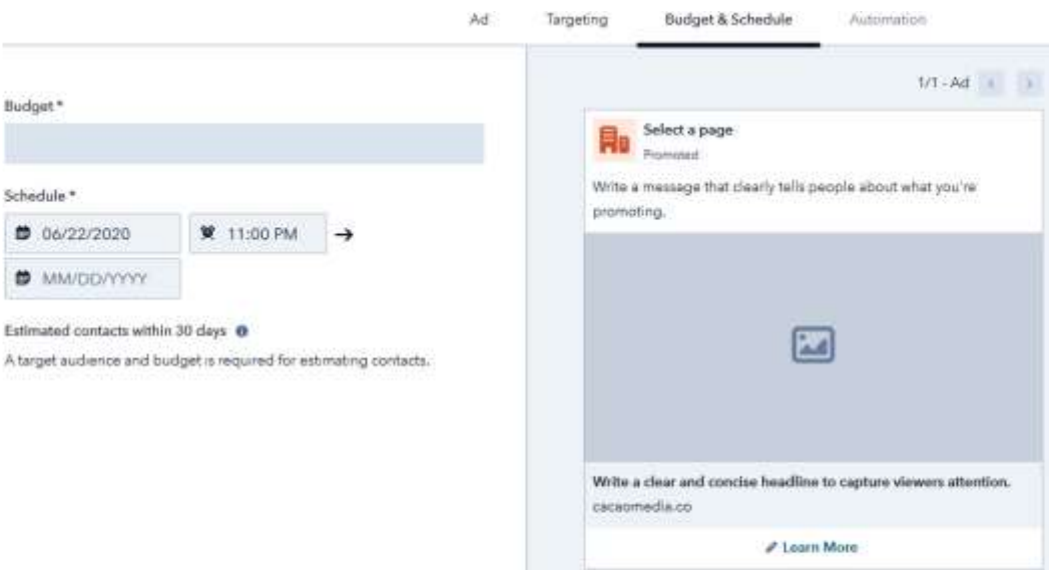


Figure 7.24 – Budget & Schedule section in ad creation

`utm_source`	Ad platform where you're running your ads, for example Google.
`utm_medium`	Type of channel, in our case, it will be CPC (short for cost per click).
`utm_term`	Keyword defined in your ad campaign. Set it to {`keyword`} to automatically pass the keyword that the user searched for.
`utm_campaign`	Name of your PPC campaign.
`utm_device`	Type of device, such as computer, tablet or mobile. Set it to {`device`} to automatically pass the device that the user is on.
`utm_matchtype`	Keyword match type, such as broad, phrase, or exact. Set it to {`matchtype`} to automatically pass how your keyword will be matched.

Figure 7.25 – URL parameters

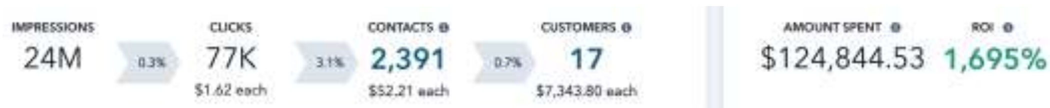


Figure 7.26 – ROI chart from paid ads

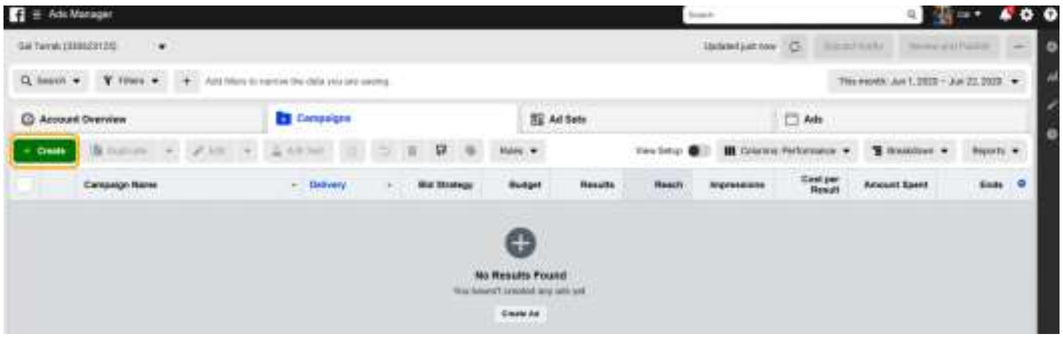


Figure 7.27 – Ad creation on Facebook

Figure 7.28 – Ad analysis

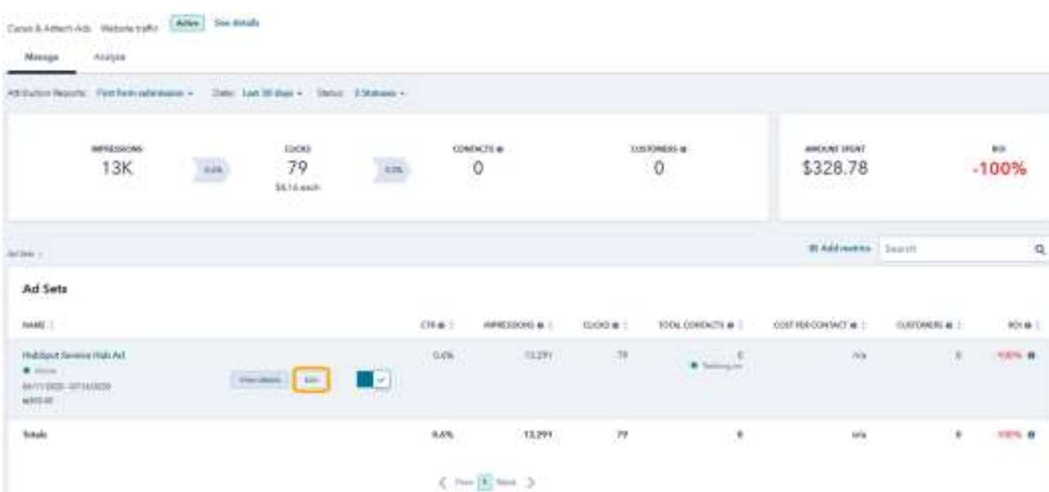


Figure 7.29 – Editing ad sets

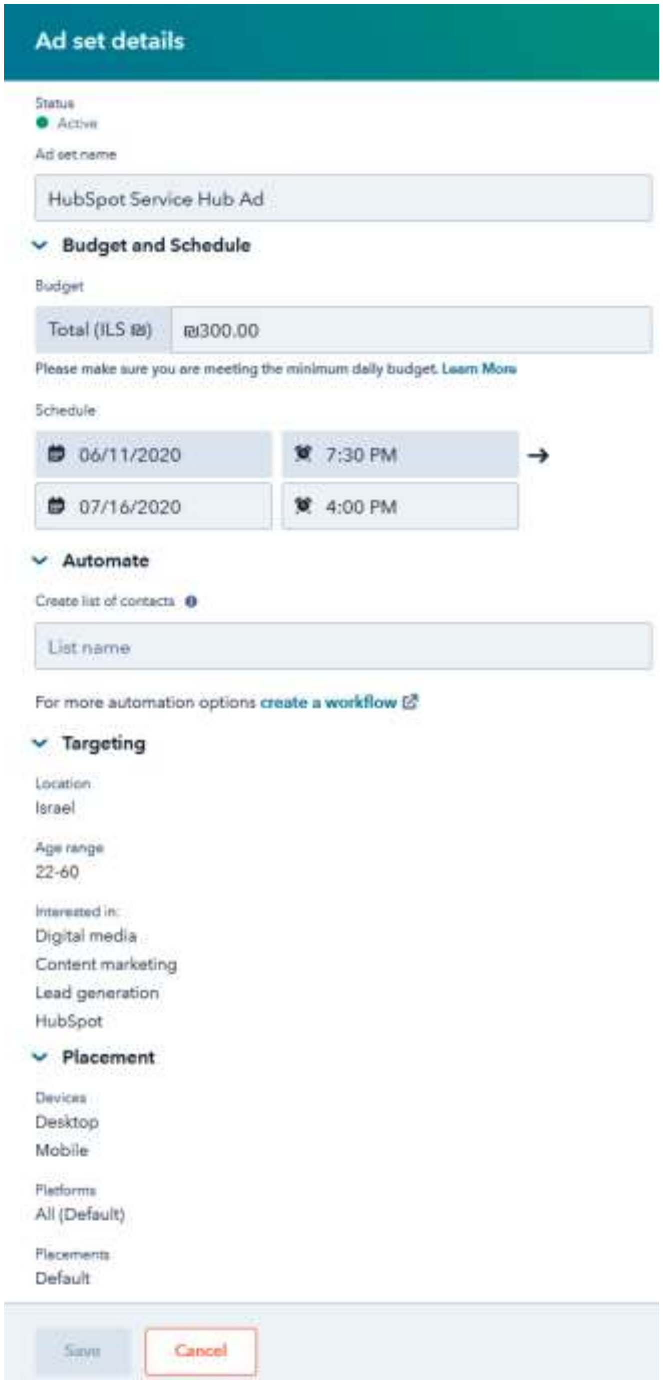

Ad set details
Status
Active
Ad set name
HubSpot Service Hub Ad
Budget and Schedule
Budget
Total (ILS ₪)
₪300.00
Please make sure you are meeting the minimum daily budget. Learn More
Schedule
06/11/2020
7:30 PM
07/16/2020
4:00 PM
Automate
Create list of contacts
List name
For more automation options create a workflow
Targeting
Location
Israel
Age range
22-60
Interested in:
Digital media
Content marketing
Lead generation
HubSpot
Placement
Devices
Desktop
Mobile
Platforms
All (Default)
Placements
Default
Save
Cancel

Figure 7.30 – Different ad metrics to edit

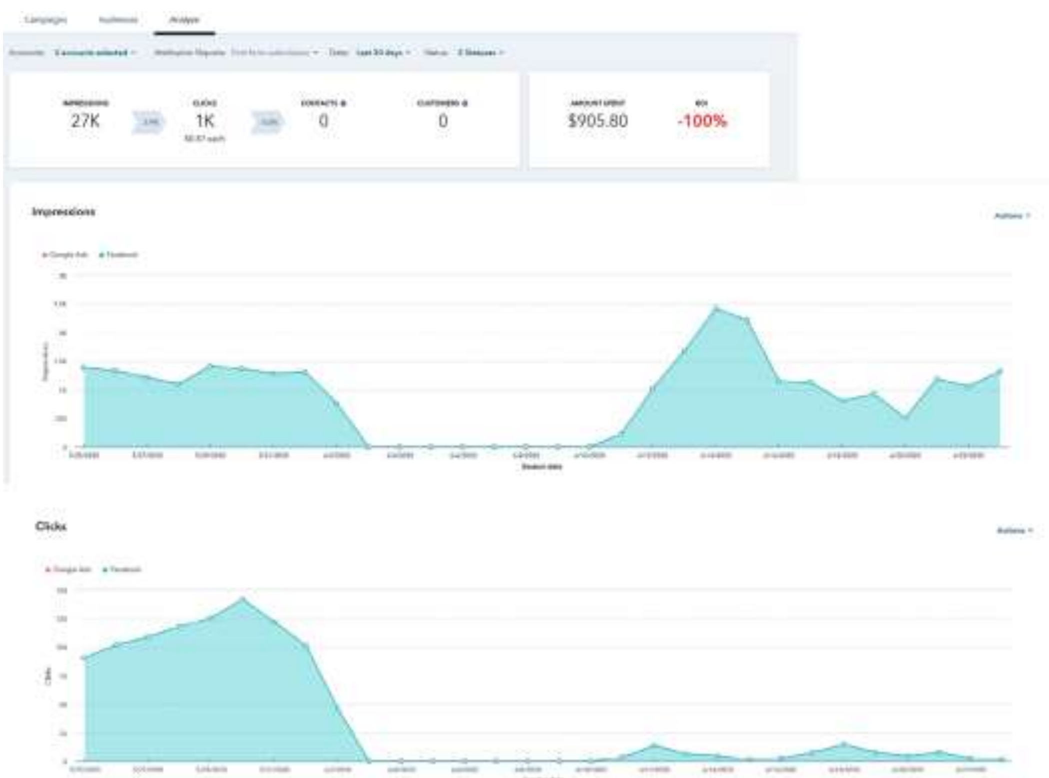


Figure 7.31 – Ad campaign reports

Questions

To help you remember some key concepts and tips discussed in this chapter, here are a few review questions to consider:

1. Which permission levels are necessary to connect an ad account to HubSpot?
2. Can you connect a Google Ad Manager account to HubSpot?
3. What must be the audience size when creating an audience in HubSpot to push to LinkedIn?

Further reading

- *The Ultimate Guide to PPC Marketing*: https://blog.hubspot.com/marketing/ppc
- *How to Generate Quality Leads From Your PPC Campaigns*: https://blog.hubspot.com/marketing/9-strategies-to-improve-lead-quality-b2b-ppc-campaigns
- *How to Perfectly Manage a PPC Campaign [Template]*: https://blog.hubspot.com/blog/tabid/6307/bid/33882/how-even-you-can-master-ppc-campaign-management-template.aspx

Chapter 8

Images

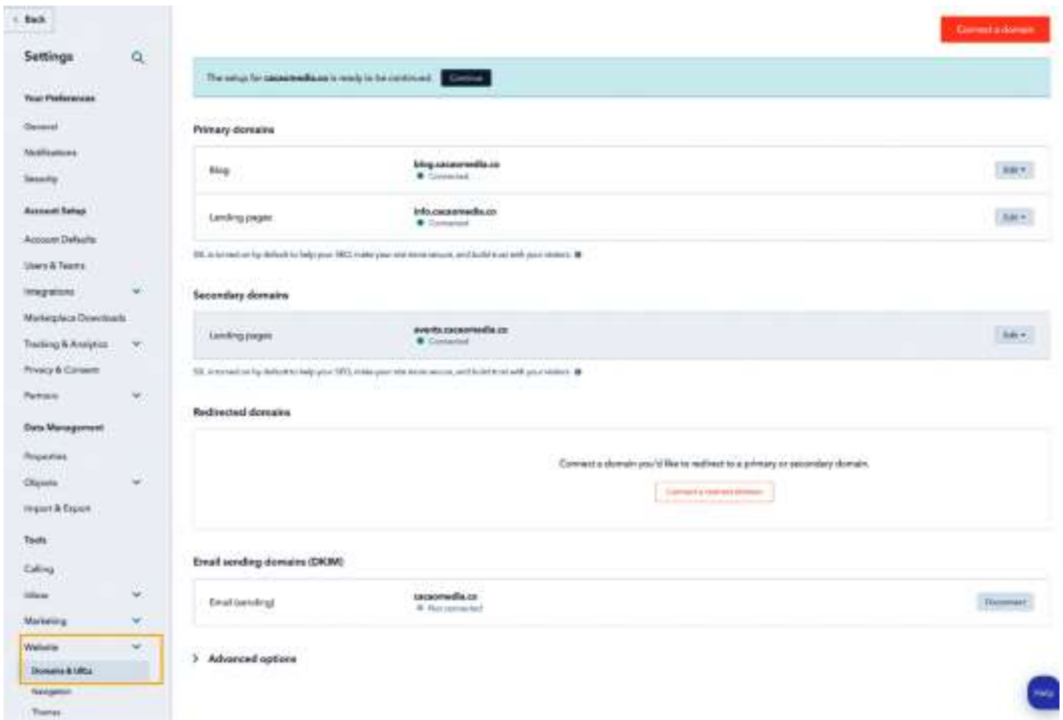


Figure 8.1 – Connecting your domains to HubSpot

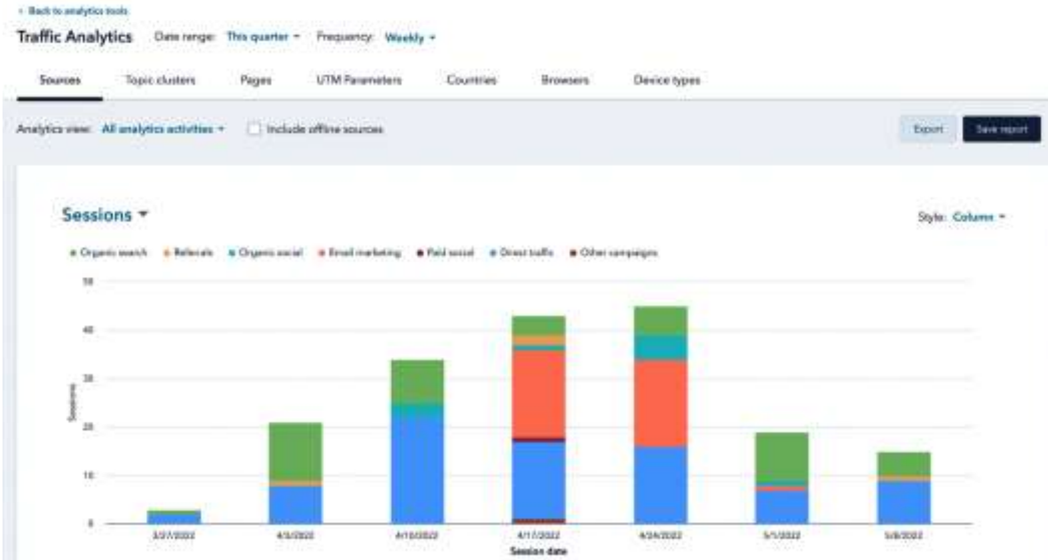


Figure 8.2 – Traffic analytics report

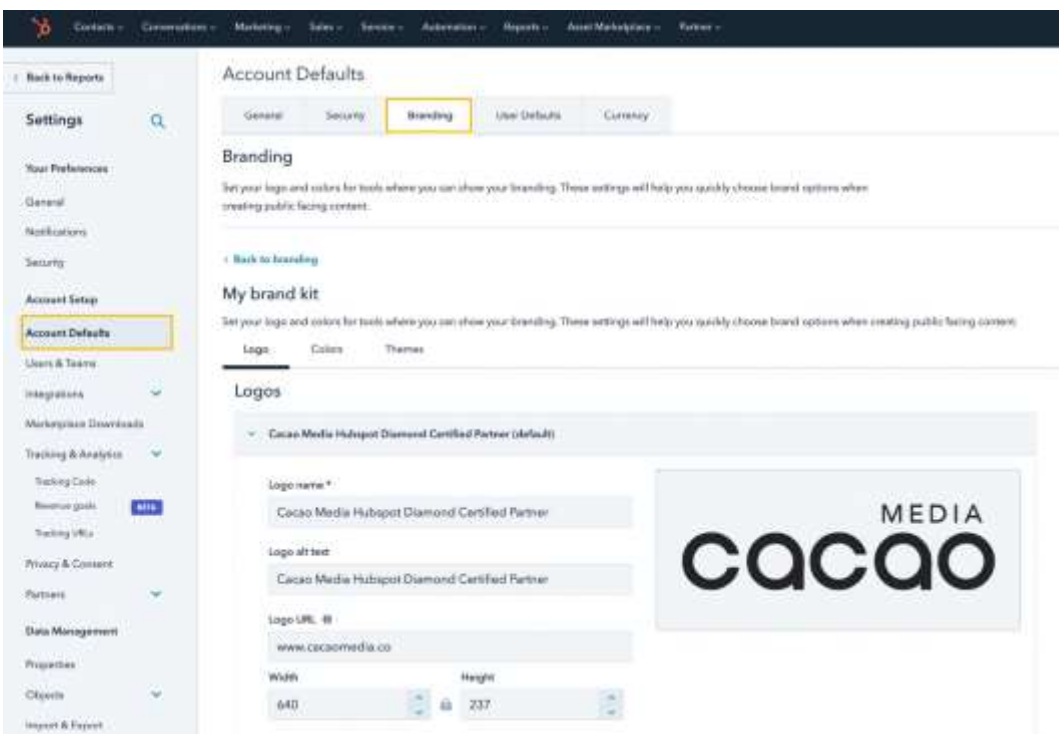


Figure 8.3 – Setting up your brand assets for public-facing content

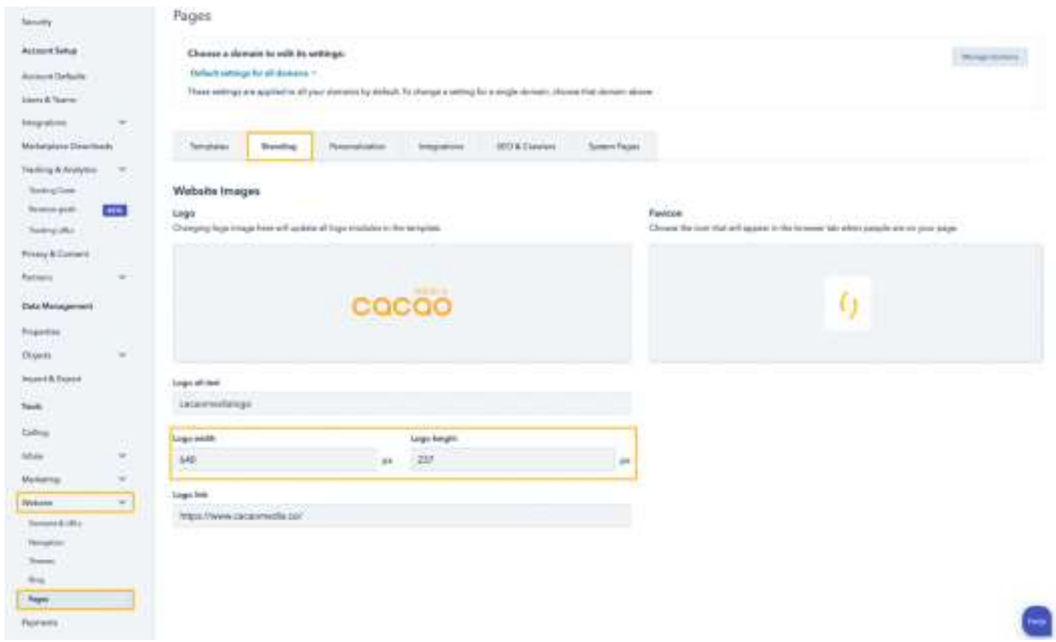


Figure 8.4 – Setting up brand assets for pages in HubSpot

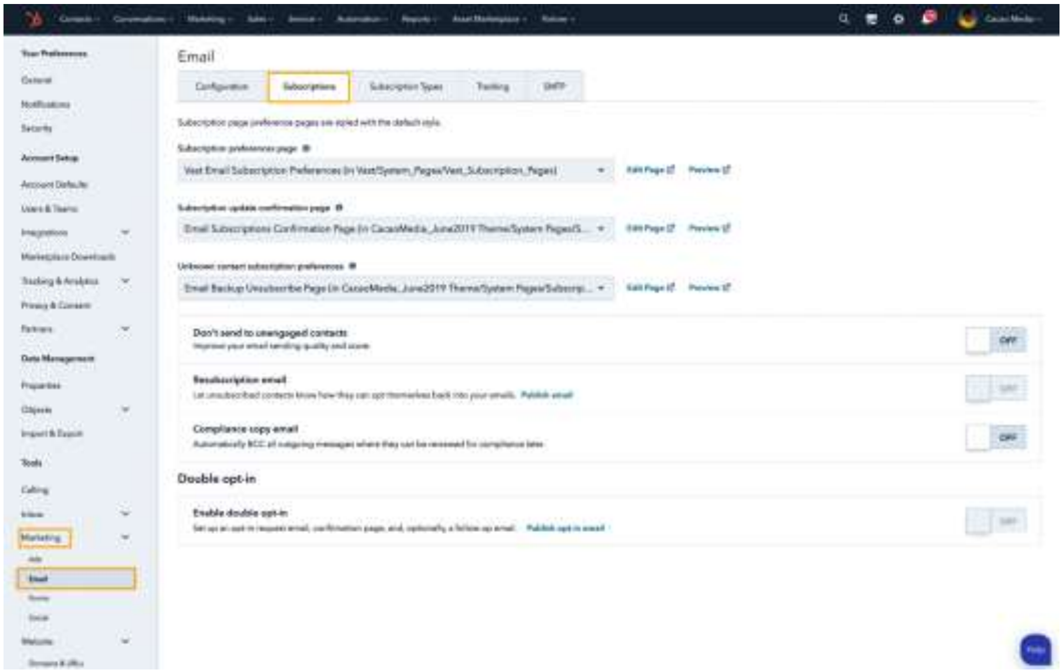


Figure 8.5 – Subscription pages in HubSpot

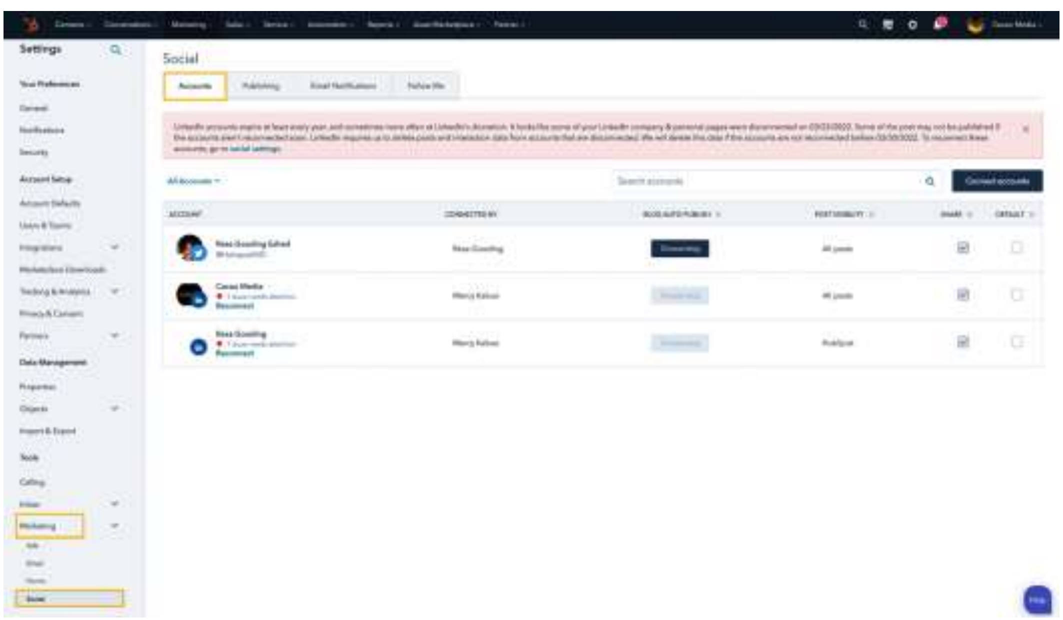


Figure 8.6 – Reconnecting your social media channels

Figure 8.7 – Filters for building a list to check for invalid contacts in your database

SOURCE	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
Direct traffic	9,934	2.91%	289	11.07%	32	67.66%	2.6 minutes
Organic search	8,316	0.82%	68	11.76%	8	81.29%	49 seconds
Paid social	7,369	8.47%	624	0.16%	1	79.12%	26 seconds
Referrals	1,780	4.49%	80	1.25%	1	55.84%	124 seconds
Organic social	1,373	7.5%	103	2.91%	3	71.38%	59 seconds
Email marketing	1,143	3.24%	37	5.41%	2	53.54%	61 seconds
Other campaigns	193	0%	-	0%	-	91.71%	7 seconds
Paid search	1	0%	-	0%	-	0%	37 seconds
Offline sources	-	0%	2,977	10.51%	313	0%	-
Report Total	30,109	13.88%	4,178	8.62%	360	73.31%	84 seconds

Figure 8.8 – Sources of traffic

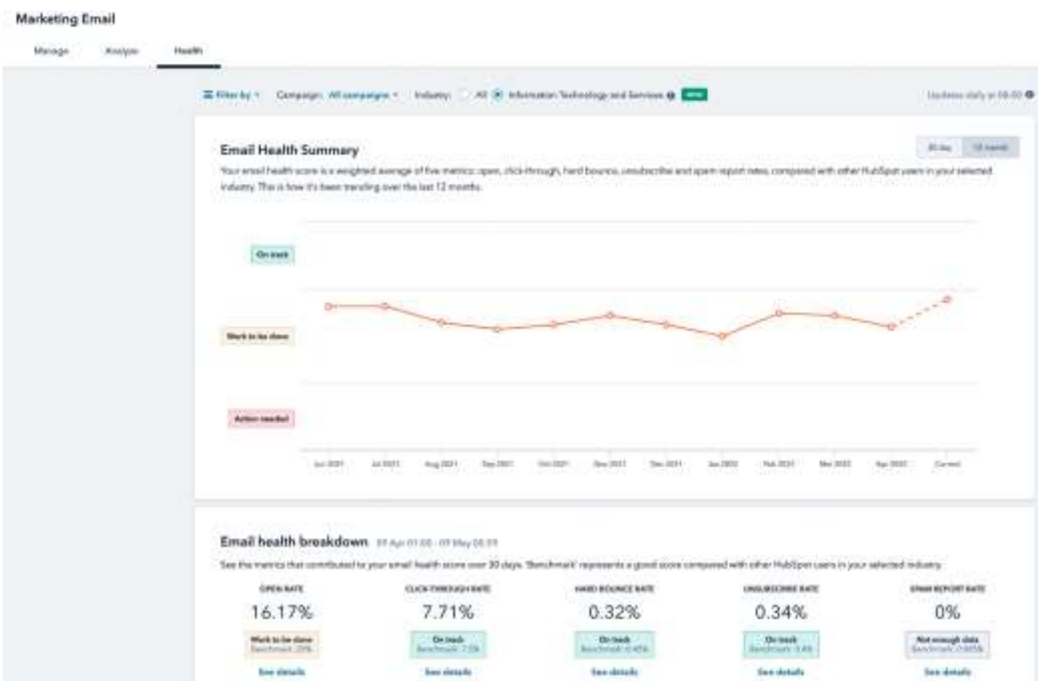


Figure 8.9 – Email health summary

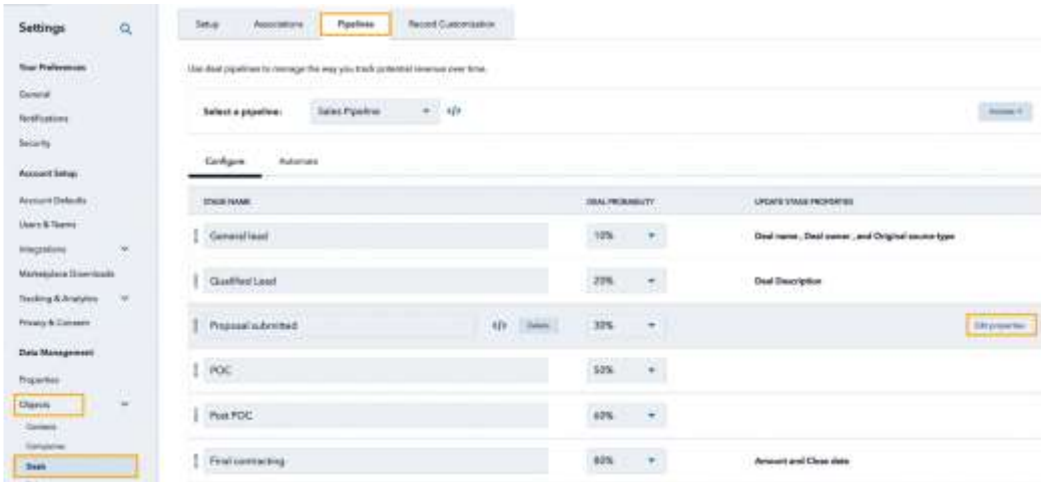


Figure 8.10 – Edit properties

Questions

Let's now see whether the concepts in this chapter have resonated with you:

1. Why is it important to do a portal audit?
2. If leads are not coming from your website to your HubSpot portal, what should you check?
3. If you cannot generate reliable reports from your portal, what should you focus on fixing?

Further reading

To learn more about the topics that were covered in this chapter, take a look at the following resources:

- *How to audit your HubSpot Portal*: https://events.hubspot.com/events/details/hubspot-madison-presents-how-to-audit-your-hubspot-portal/
- *HubSpot Partner Directory*: https://ecosystem.hubspot.com/marketplace/solutions

Chapter 9

Images

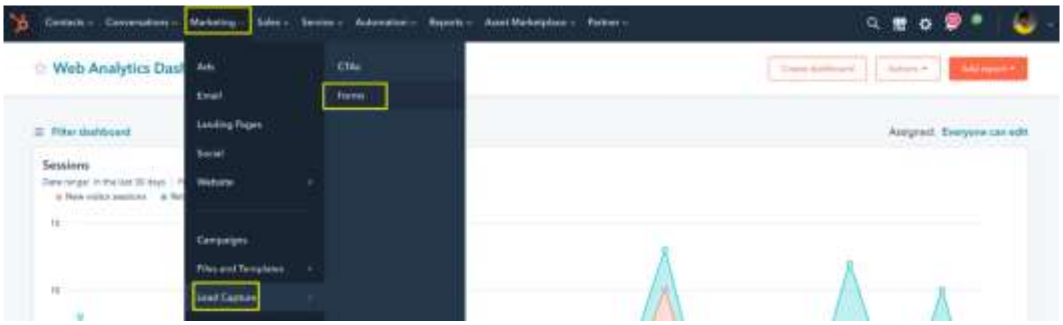


Figure 9.1 – Accessing the Forms tool in HubSpot

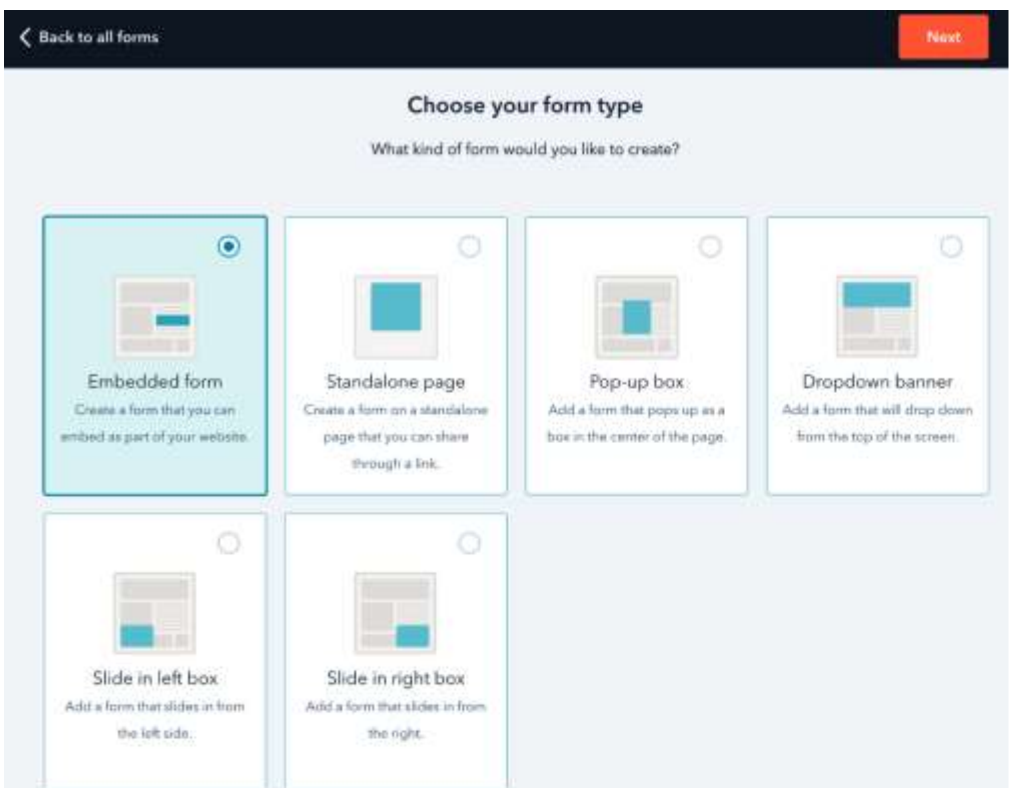


Figure 9.2 – Types of forms in HubSpot

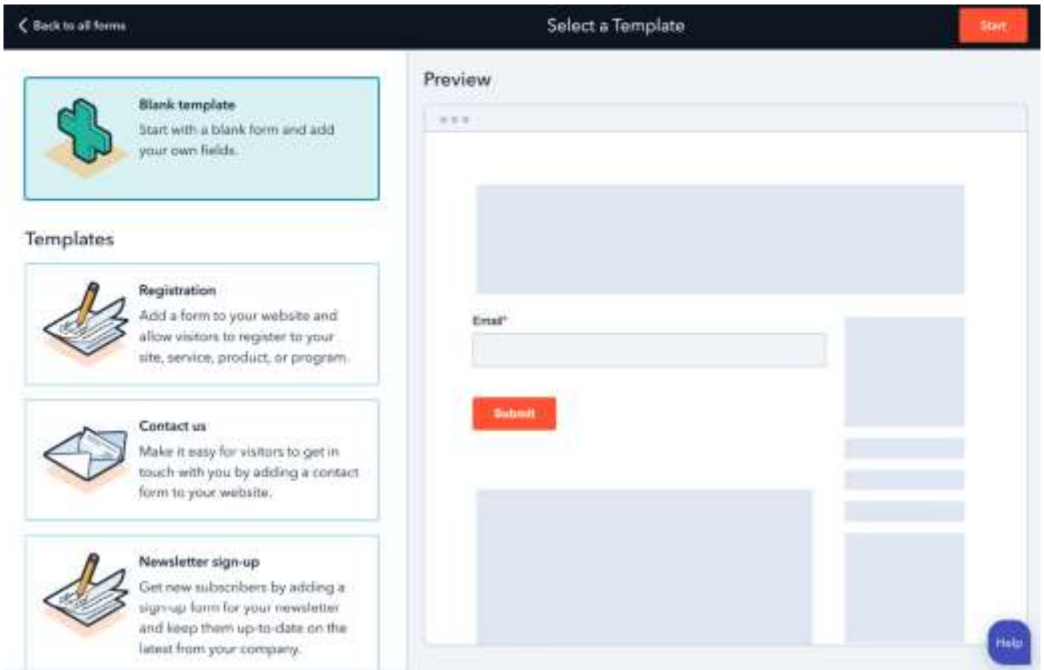


Figure 9.3 – Selecting a template for your forms

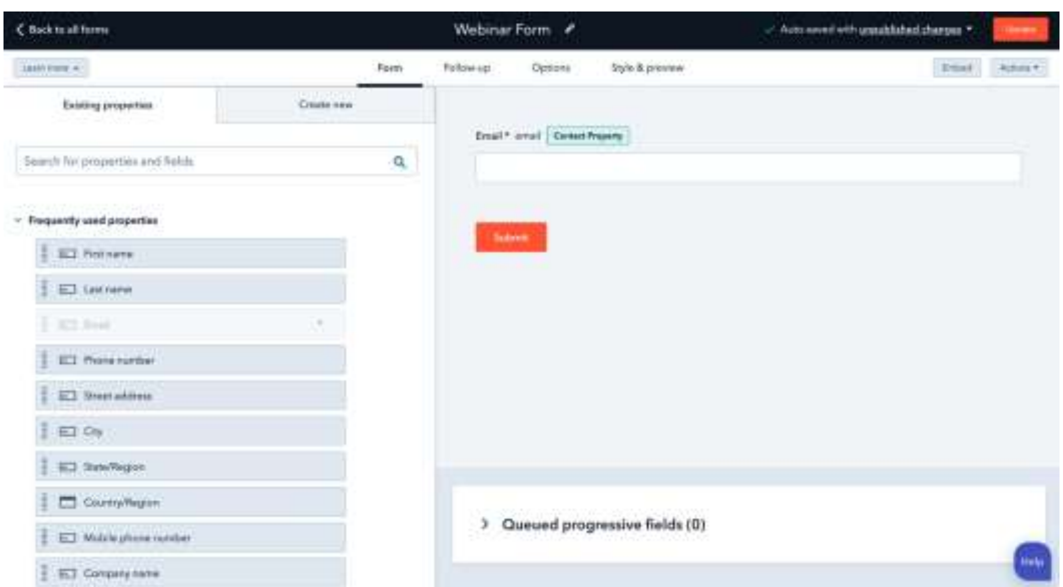


Figure 9.4 – Understanding form fields

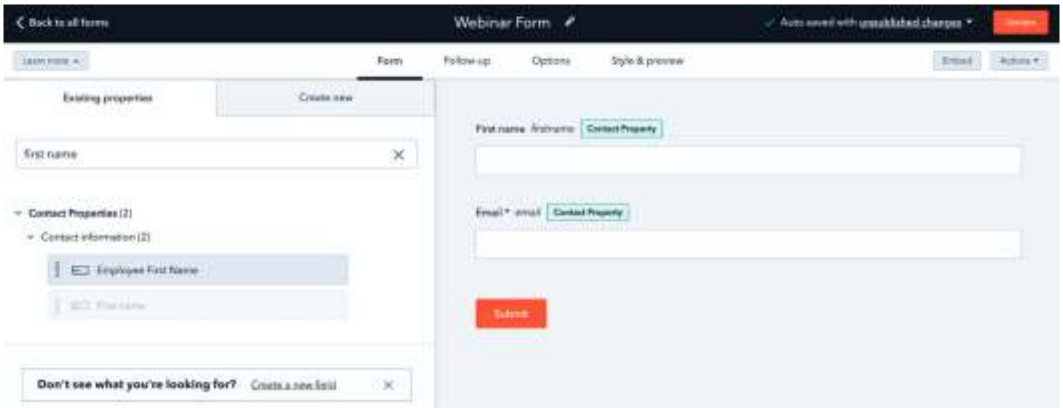


Figure 9.5 – Building fields in a form

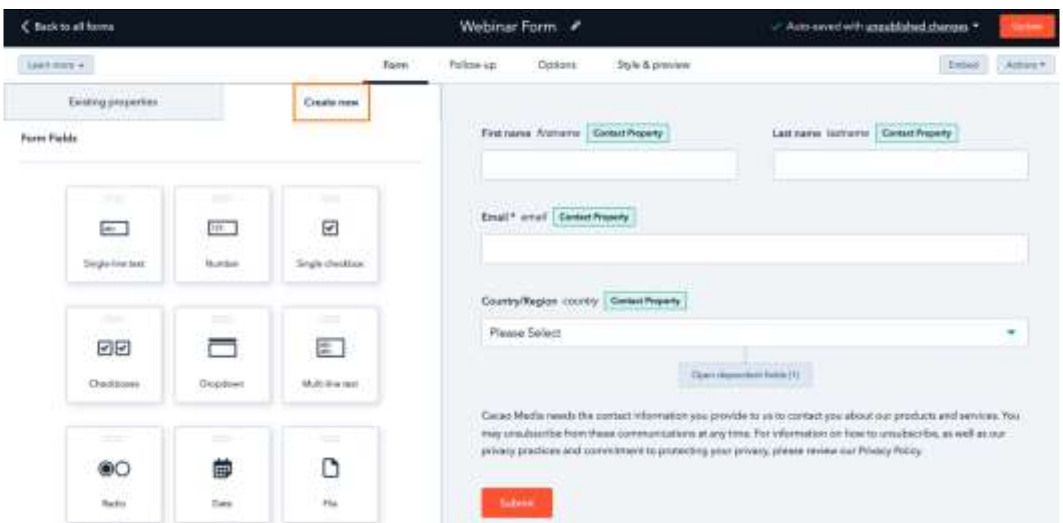


Figure 9.6 – Creating additional fields

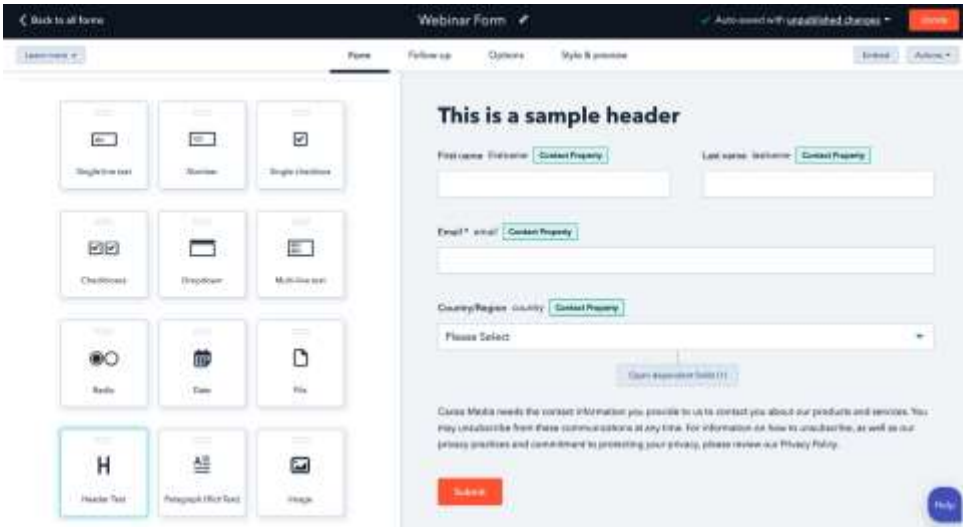


Figure 9.7 – Adding header text

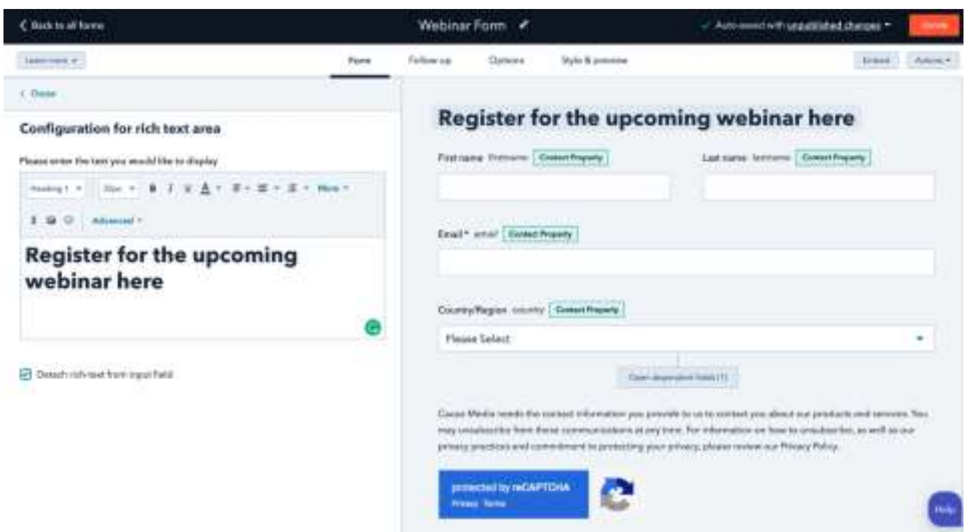


Figure 9.8 – Editing the header text

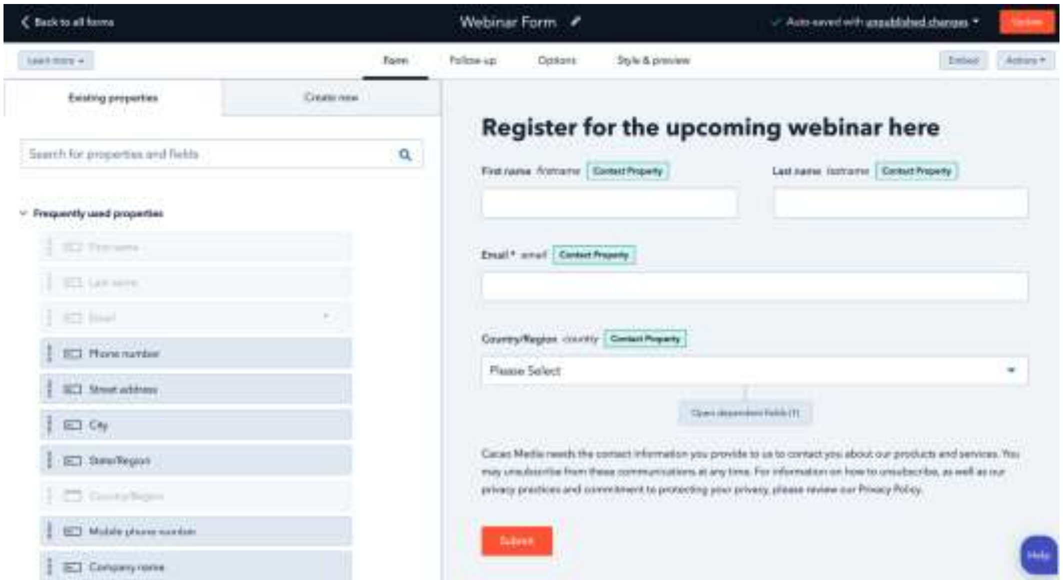


Figure 9.9 – Completed form

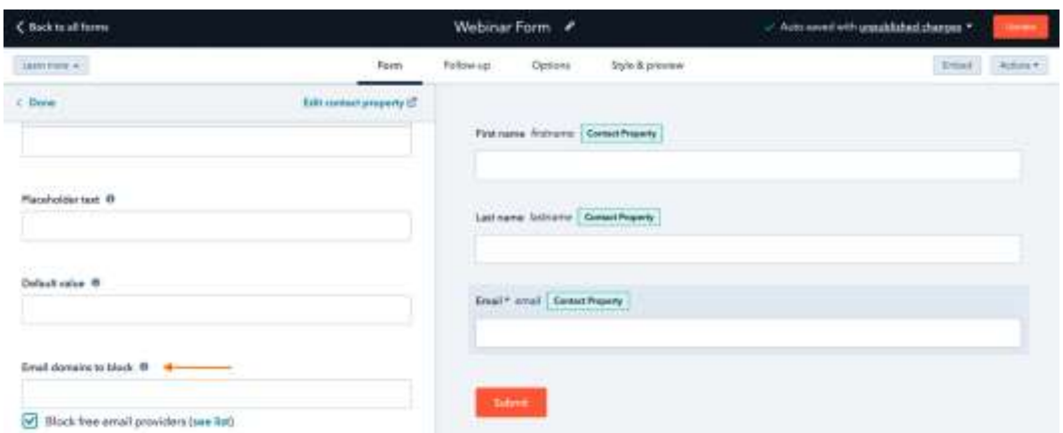


Figure 9.10 – Blocking free email providers

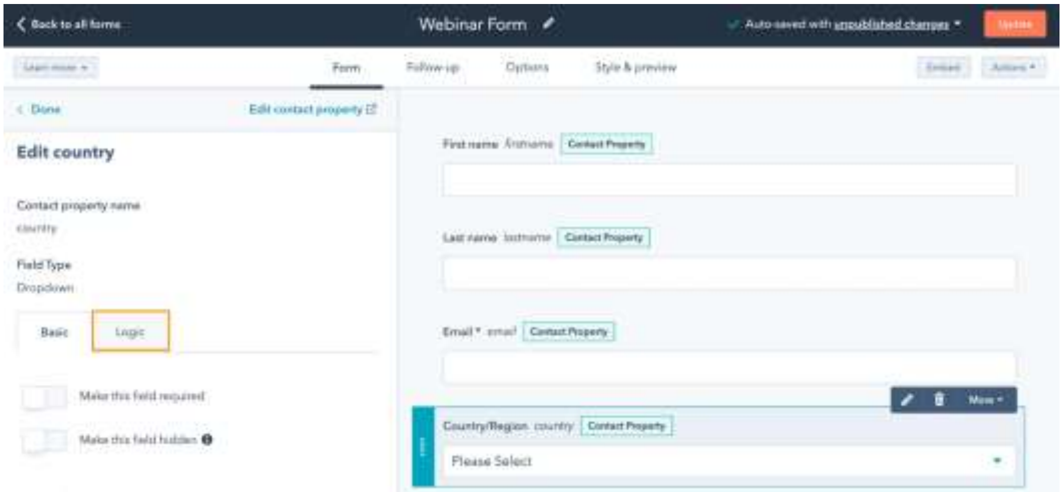


Figure 9.11 – Building logic into fields

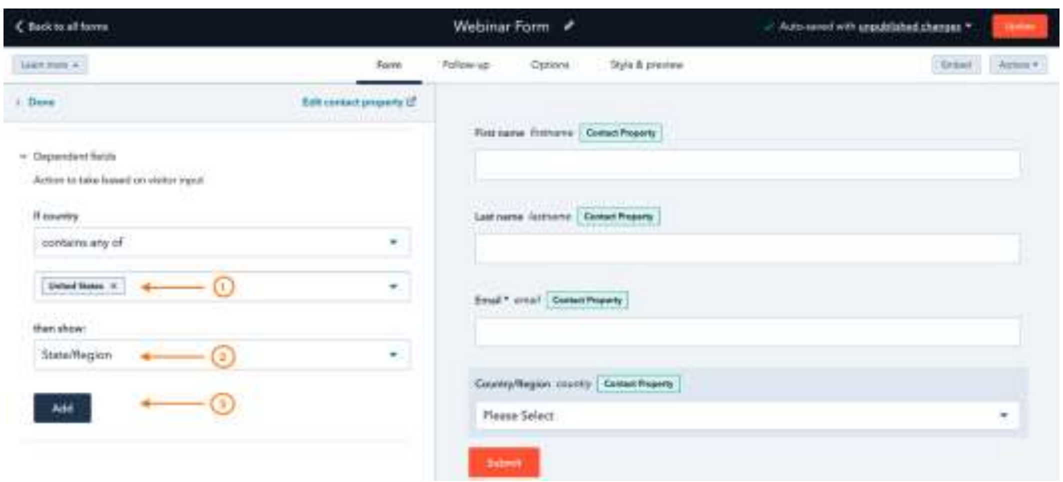


Figure 9.12 – Building dependent fields in a form

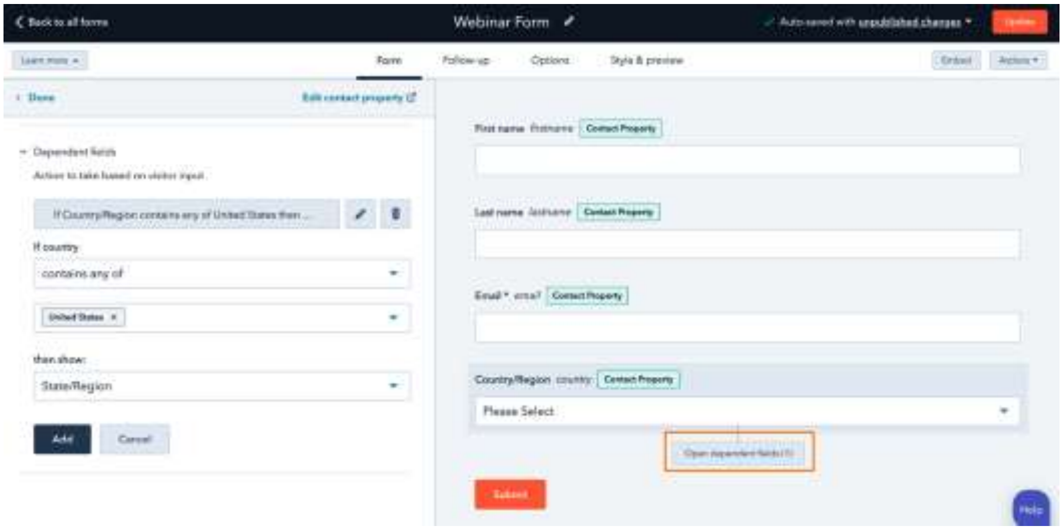


Figure 9.13 – Dependent field in a form

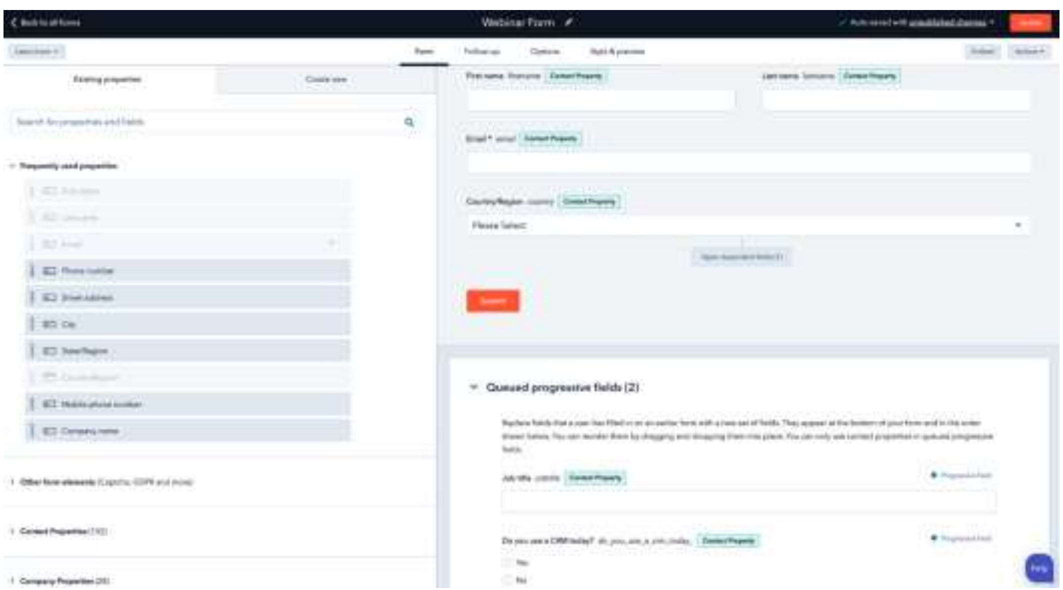


Figure 9.14 – Successfully adding progressive fields to a form

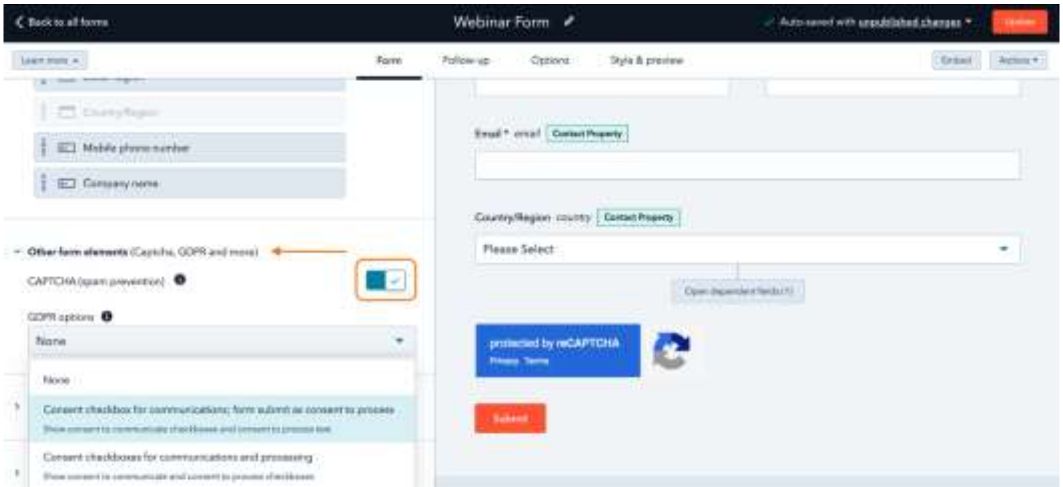


Figure 9.15 – Adding reCAPTCHA

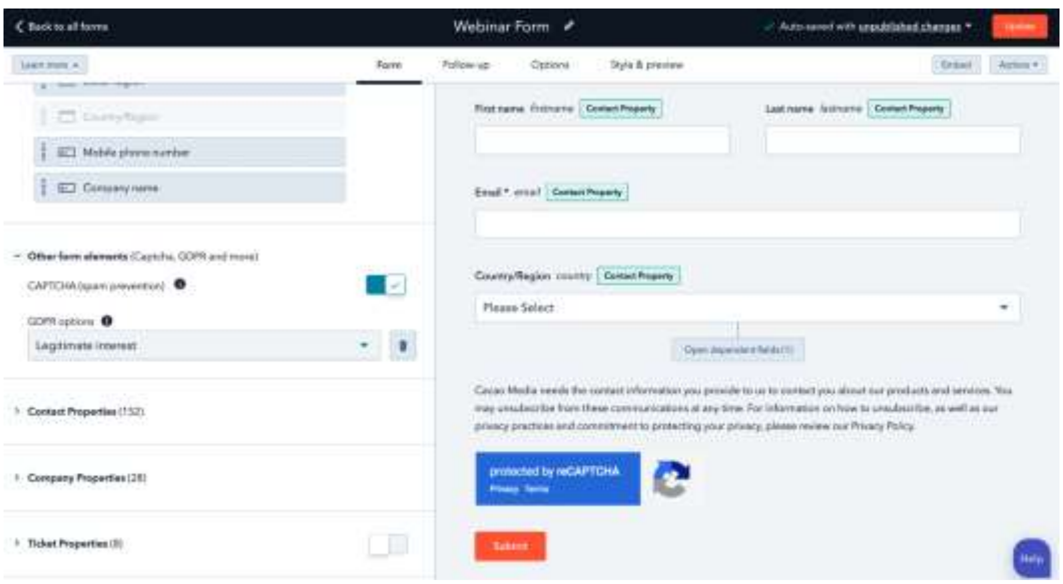


Figure 9.16 – Adding GDPR notices

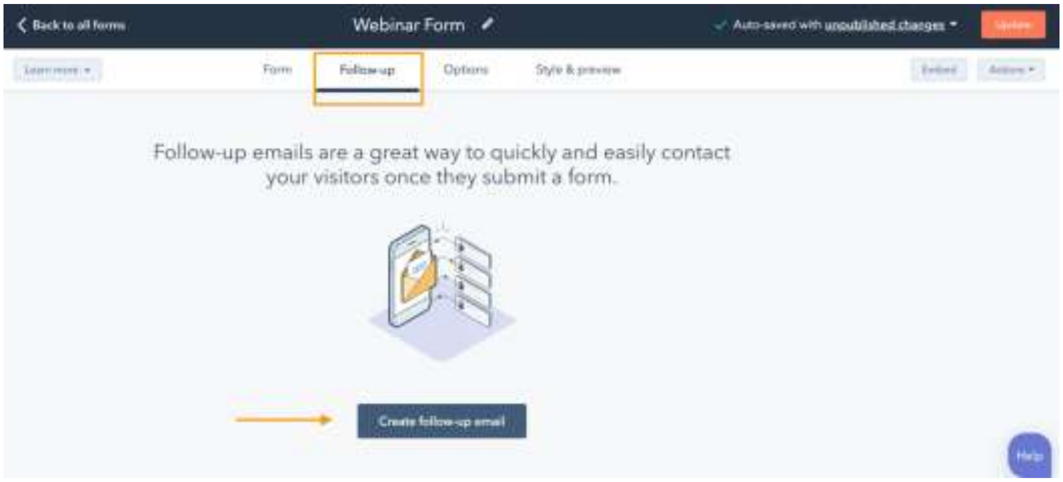


Figure 9.17 – Accessing follow-up emails

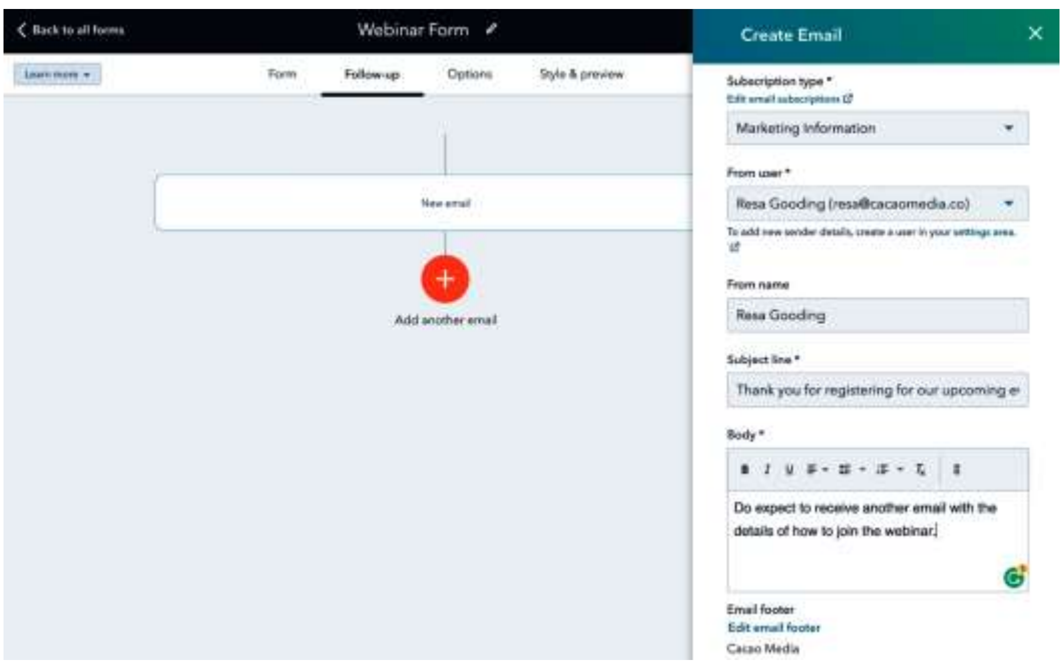


Figure 9.18 – Building a follow-up email

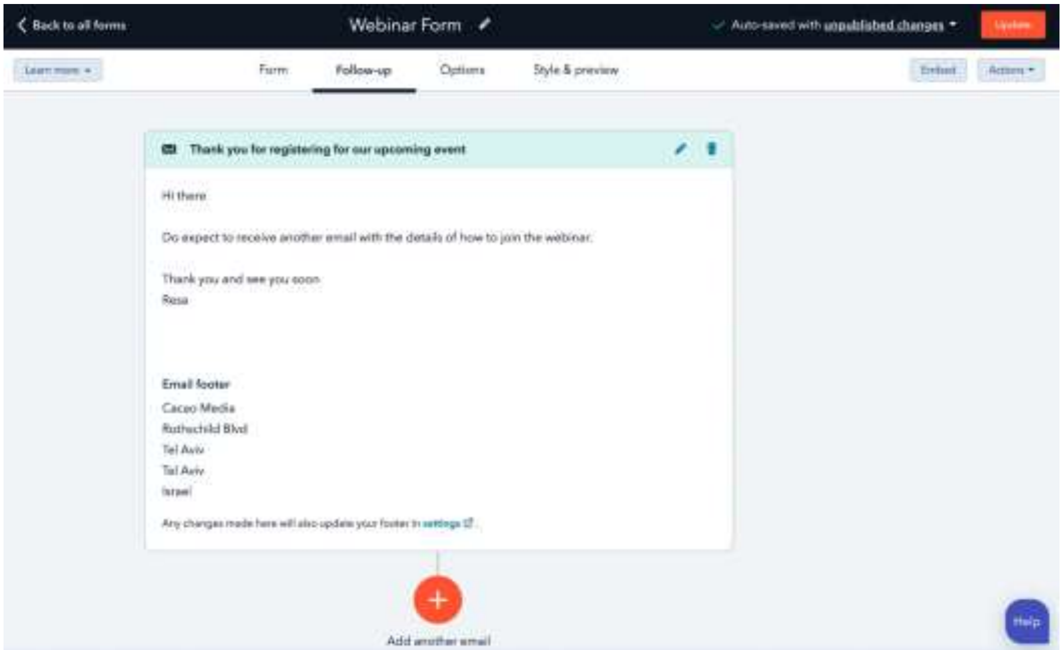


Figure 9.19 – Example of a follow-up email

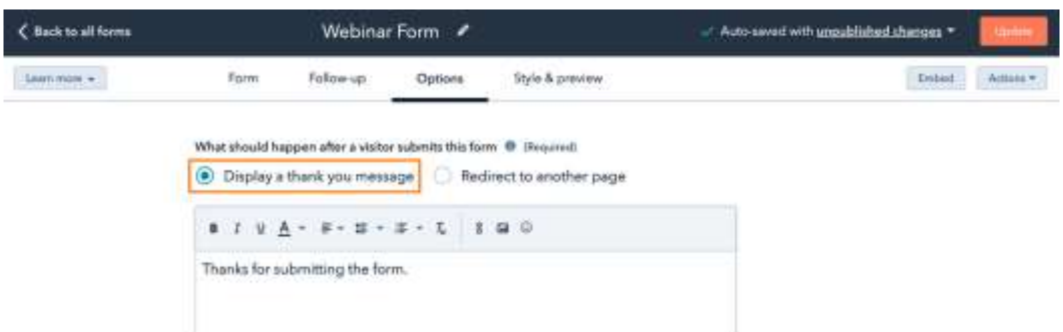


Figure 9.20 – Setting up a thank-you message after a contact submits a form

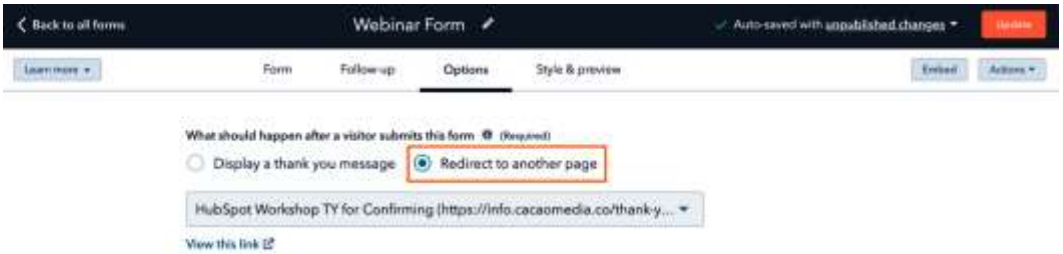


Figure 9.21 – Setting up a redirect link after a contact submits a form

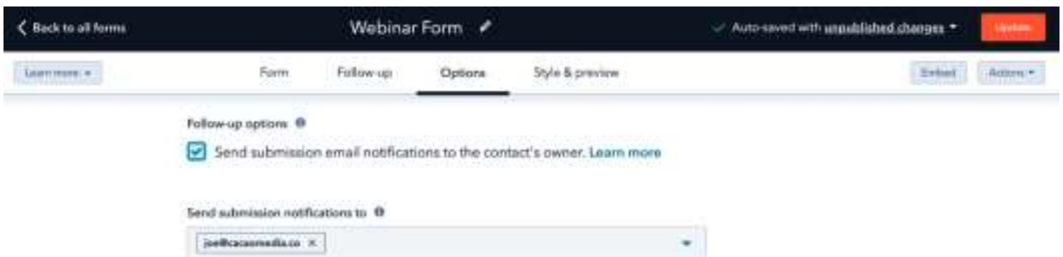


Figure 9.22 – Setting up notifications for form submissions

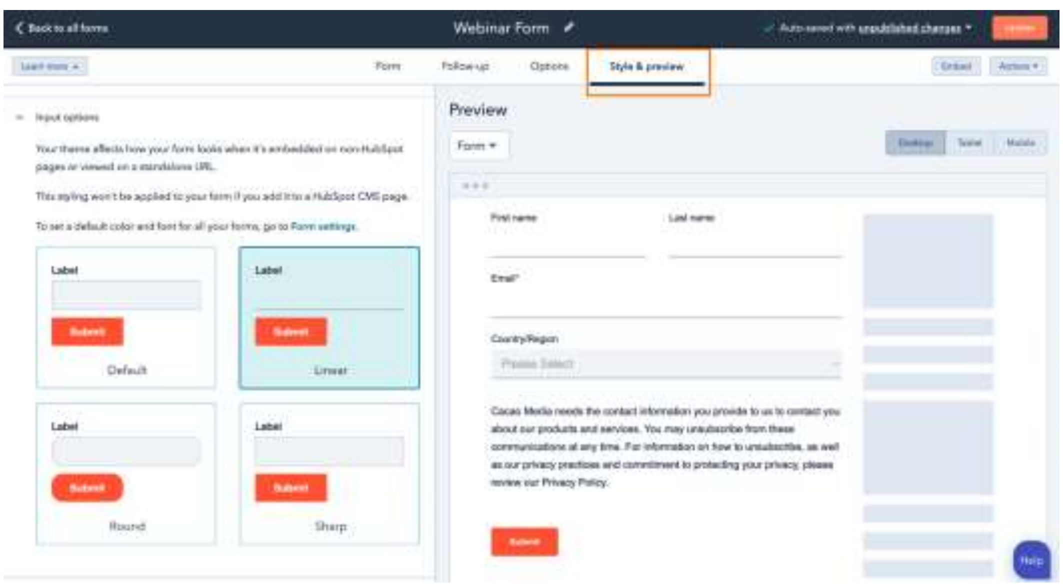


Figure 9.23 – Styling forms

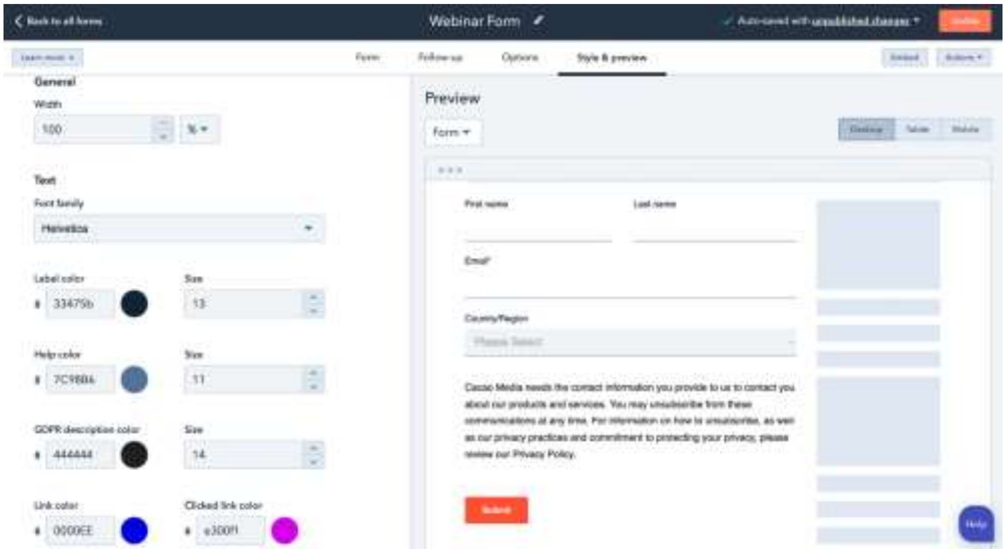


Figure 9.24 – Changing the font and size of form fields

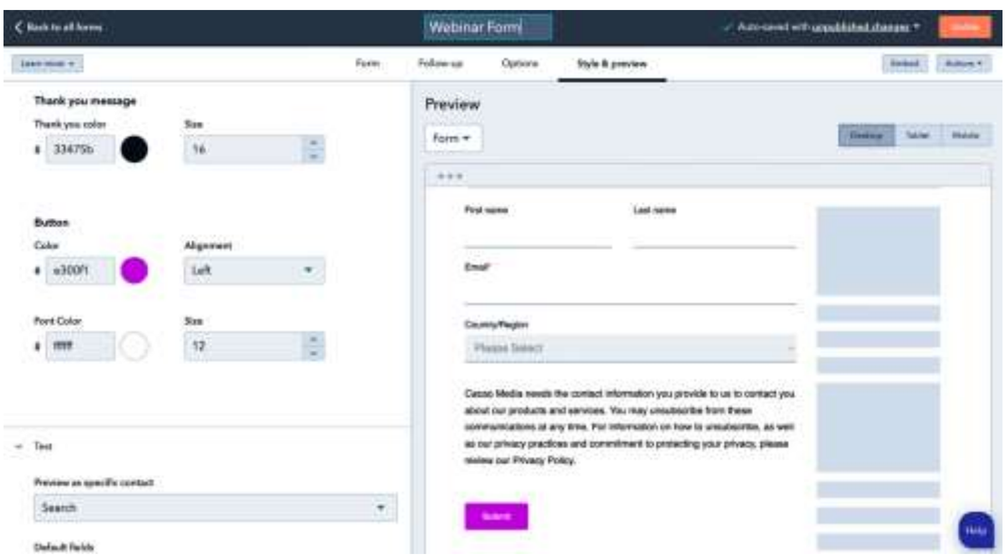


Figure 9.25 – Changing the thank-you message and button design

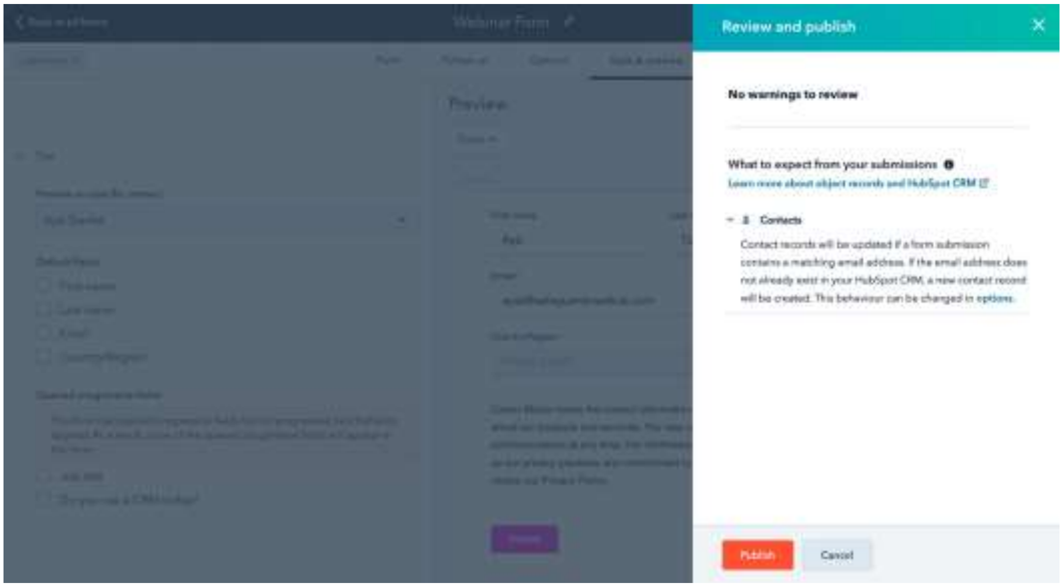


Figure 9.26 – Publishing a form

Figure 9.27 – Using the embed code to set a HubSpot form live on a non-HubSpot asset

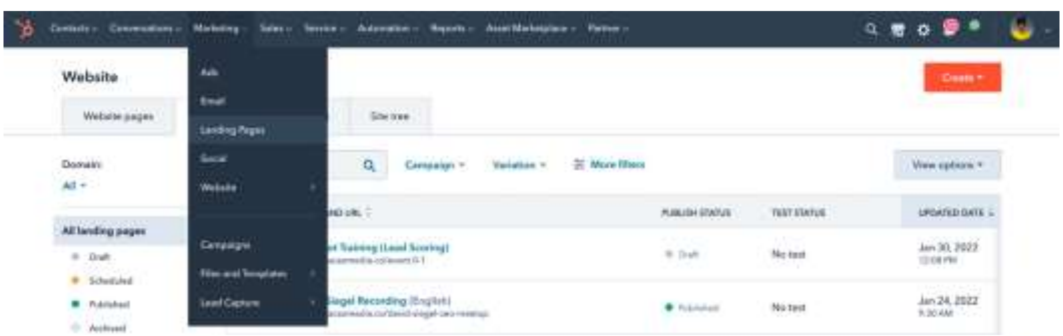


Figure 9.28 – Accessing Landing Pages

Figure 9.29 – Choosing Landing page

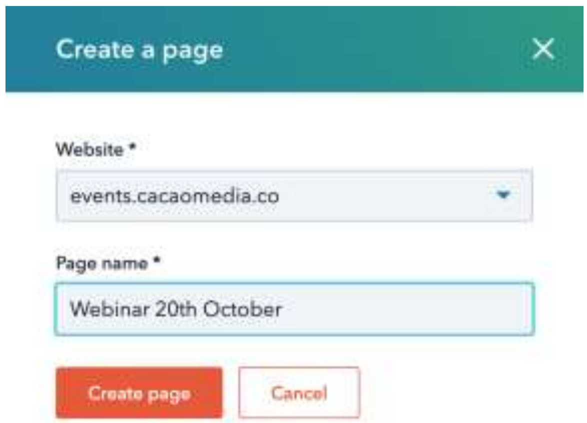


Figure 9.30 – Choosing a subdomain and a page name

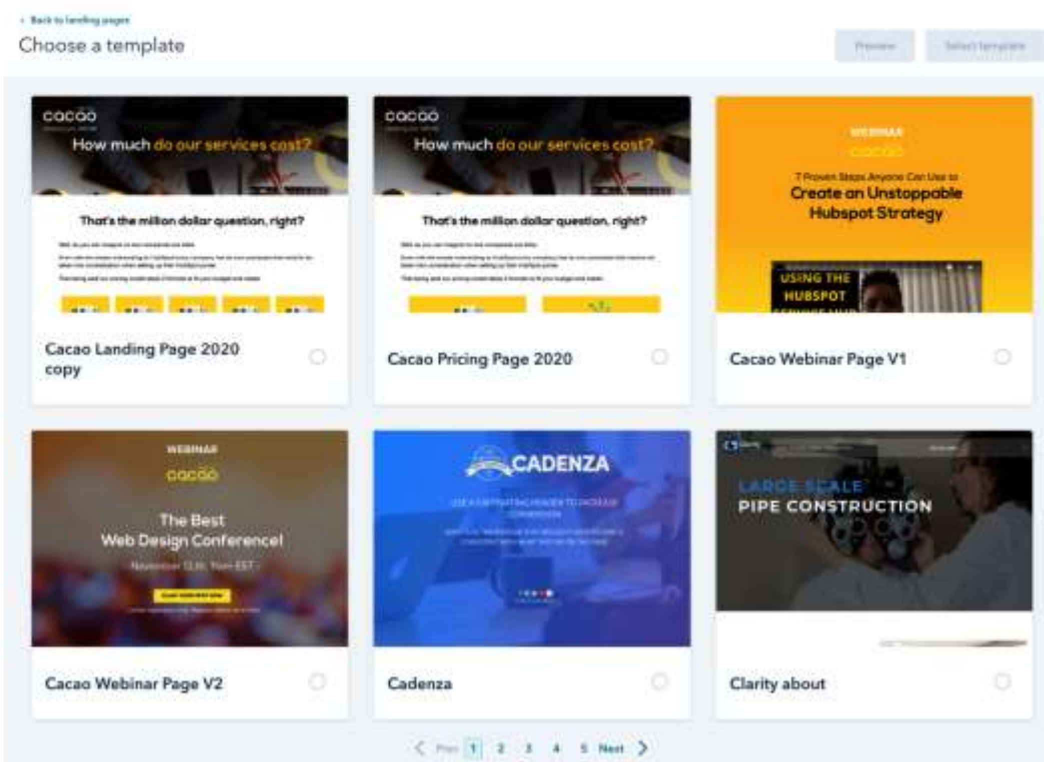


Figure 9.31 – Select a landing page template

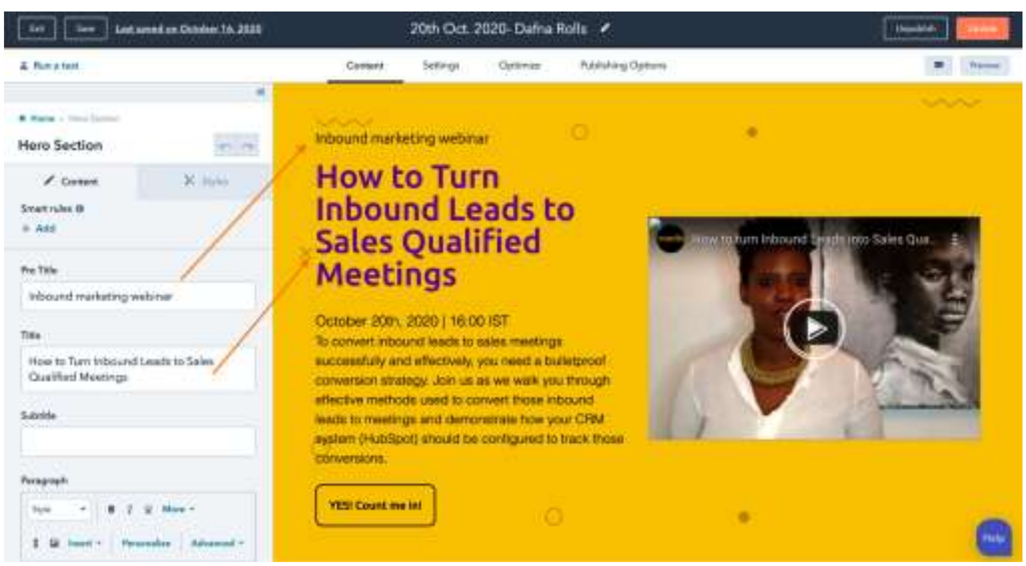


Figure 9.32 – Editing the text on the landing page

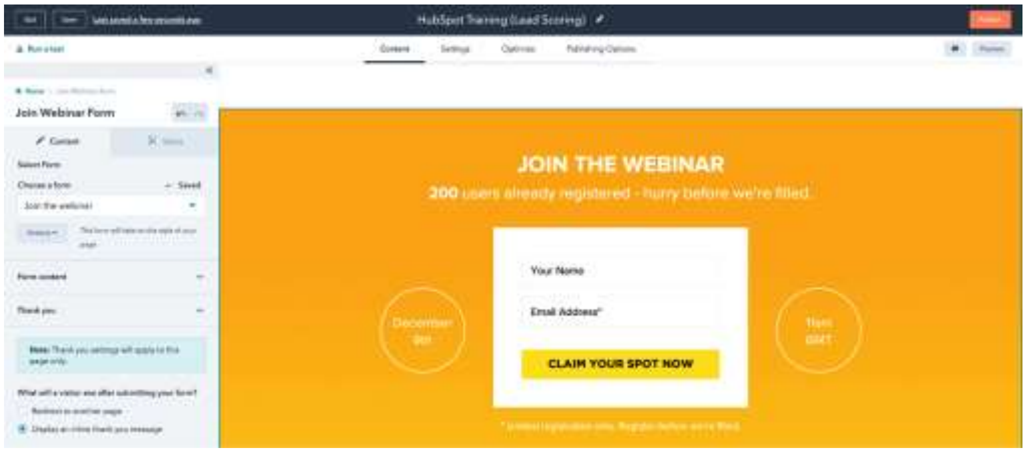


Figure 9.33 – Adding the form on the landing page

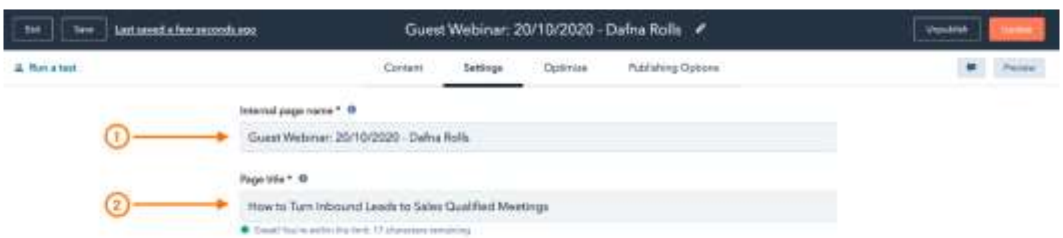


Figure 9.34 – Choosing a page name and title

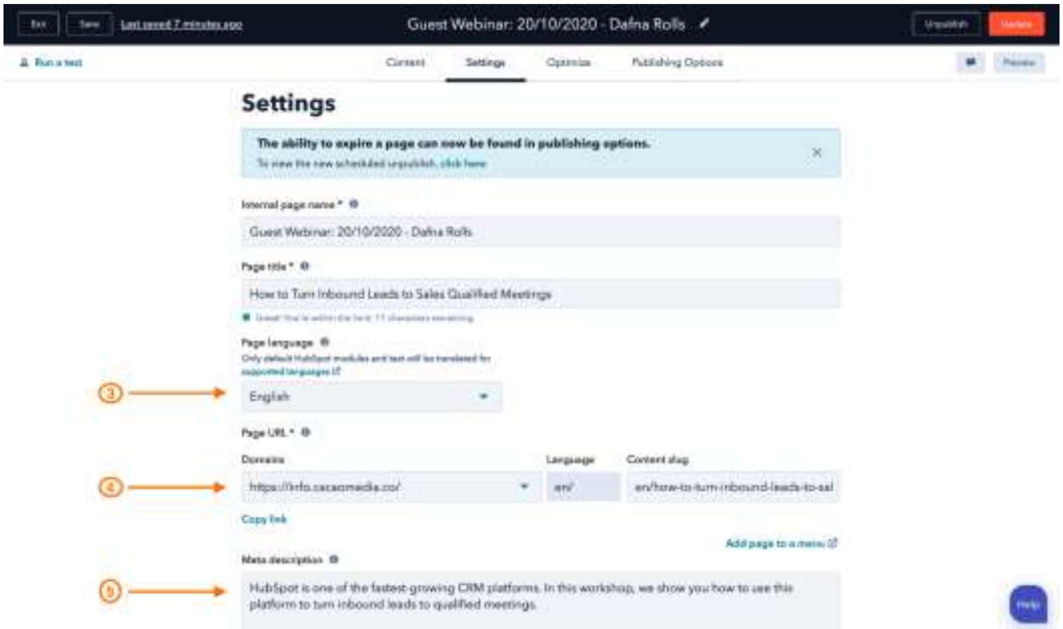


Figure 9.35 – Choosing a page name and title (continued)

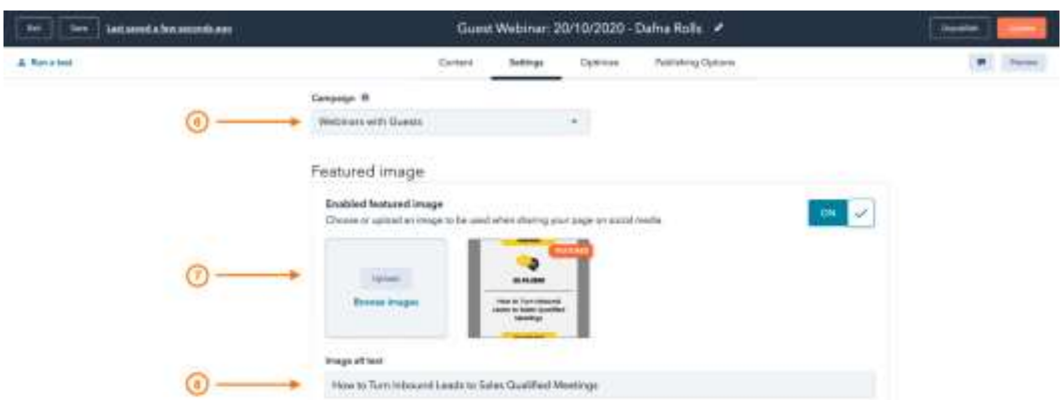


Figure 9.36 – Adding campaigns and featured images

Figure 9.37 – Optimizing the page for SEO

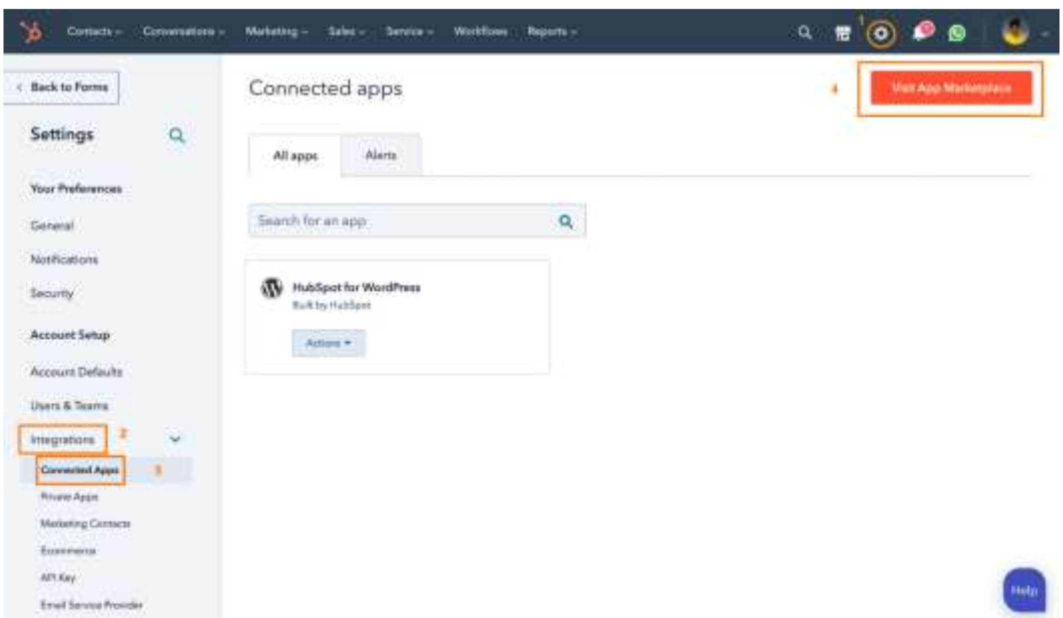


Figure 9.38 – Connecting Zoom or GoTo Webinar to HubSpot

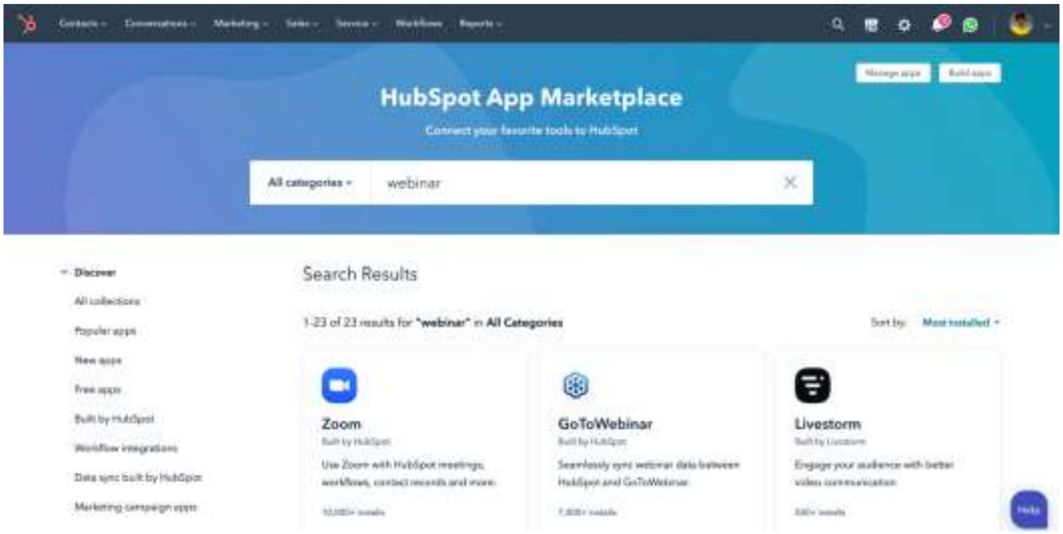


Figure 9.39 – HubSpot's App Marketplace

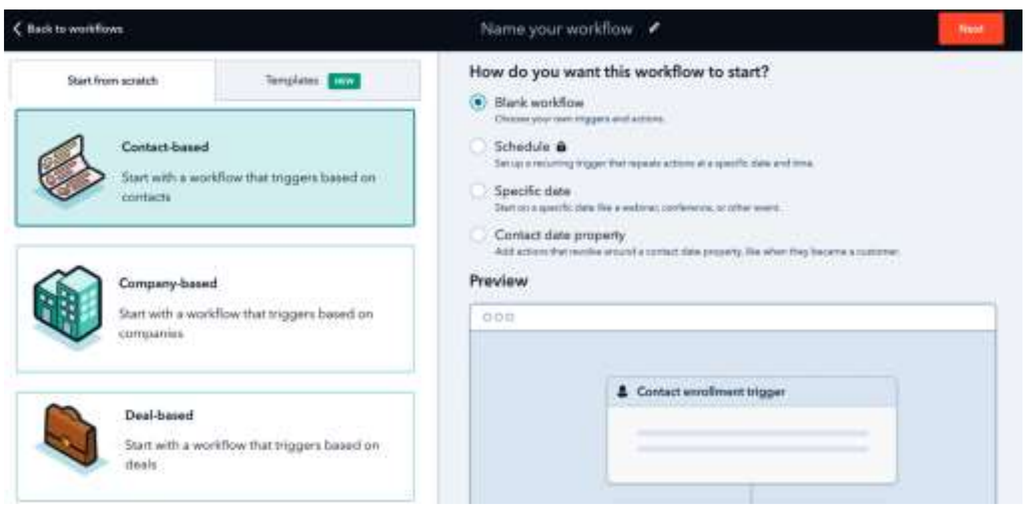


Figure 9.40 – Types of workflows

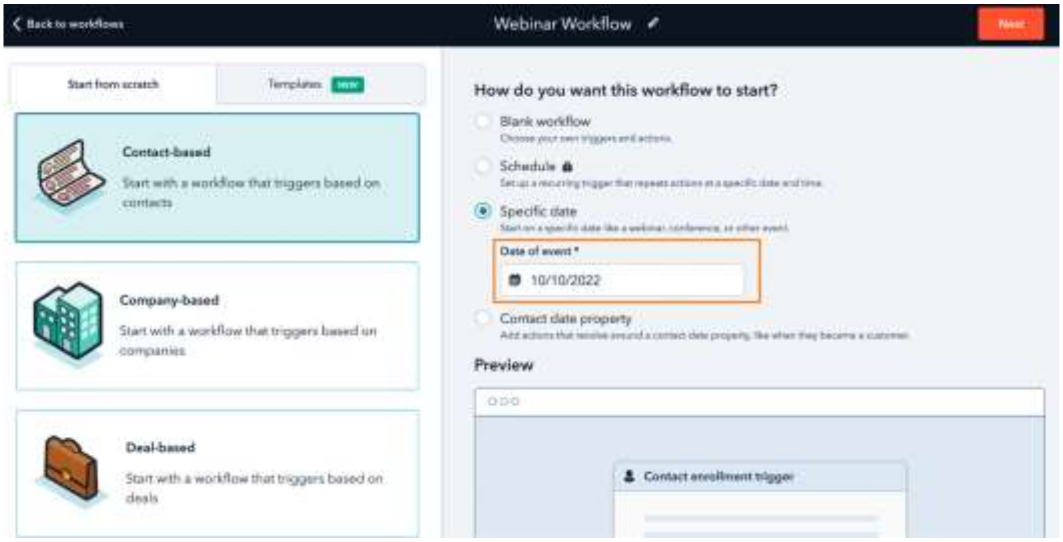


Figure 9.41 – Building a specific date workflow

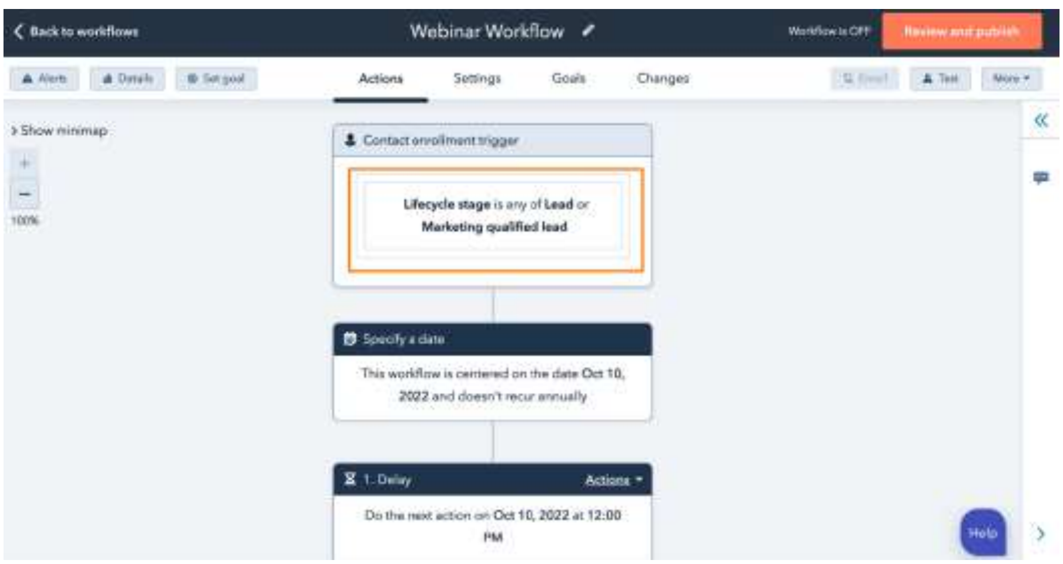


Figure 9.42 – Adding a list of contacts to receive invitation emails

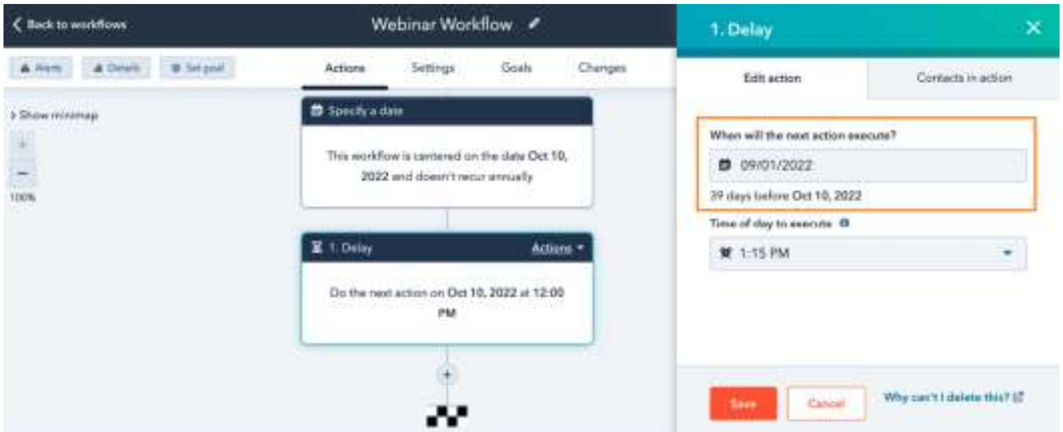


Figure 9.43 – Selecting a date and time you would like contacts to receive the first email

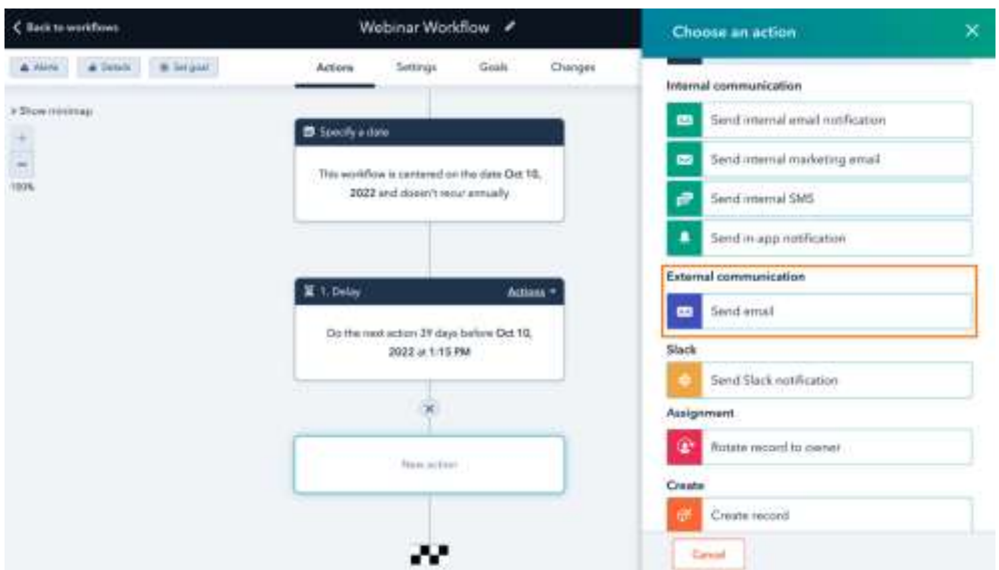


Figure 9.44 – Choosing the Send email option for external communication to send out an email invitation

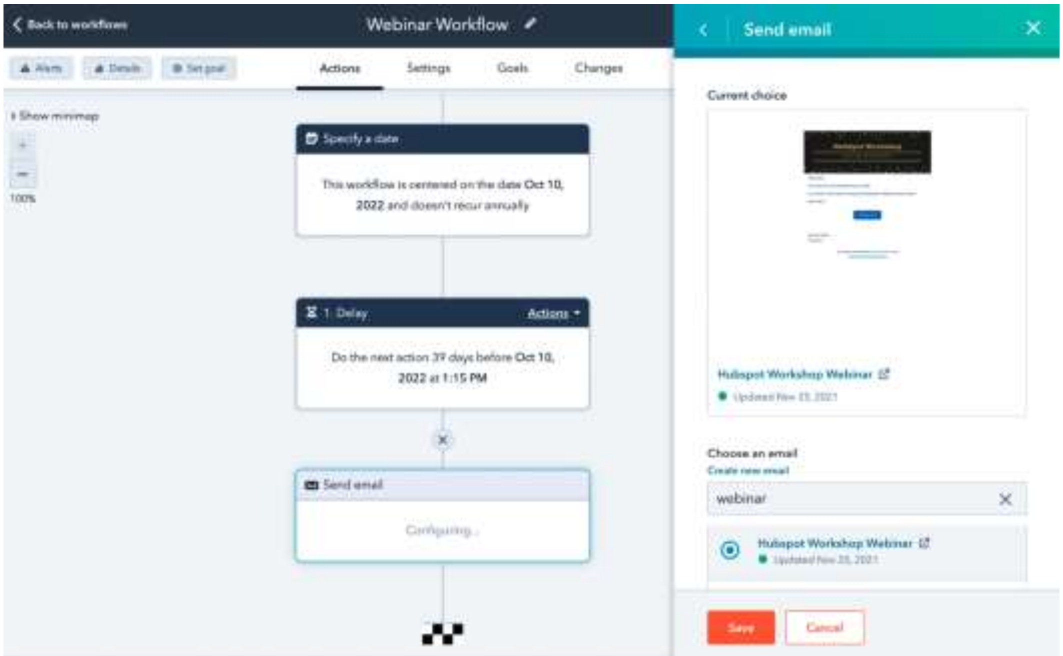


Figure 9.45 – Choosing an automated email from the list

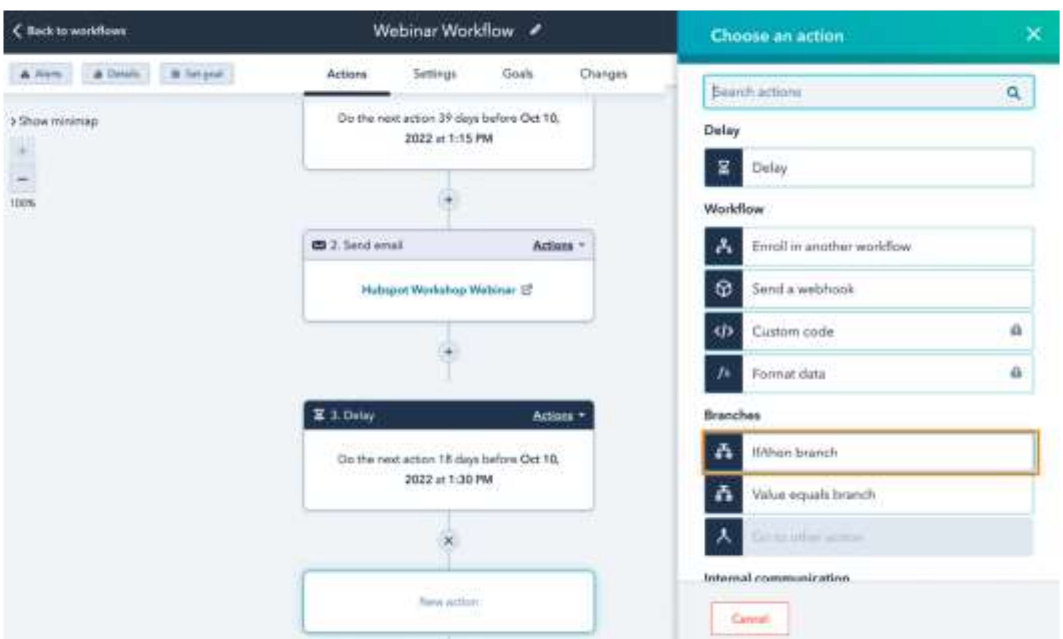


Figure 9.46 – Selecting If/then branch

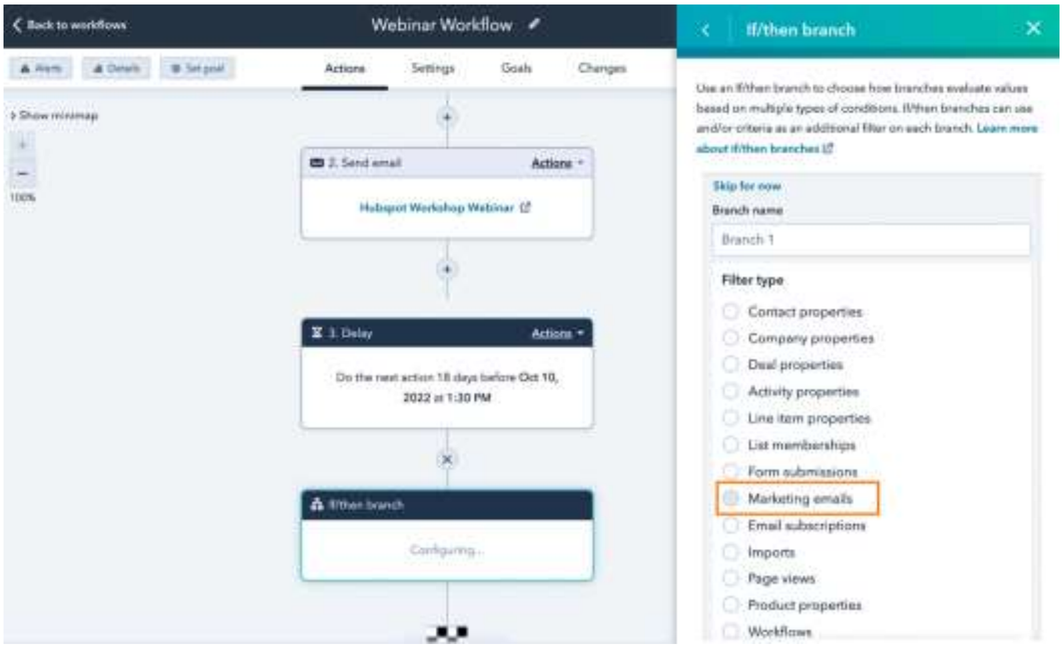


Figure 9.47 – Selecting the Marketing emails filter type

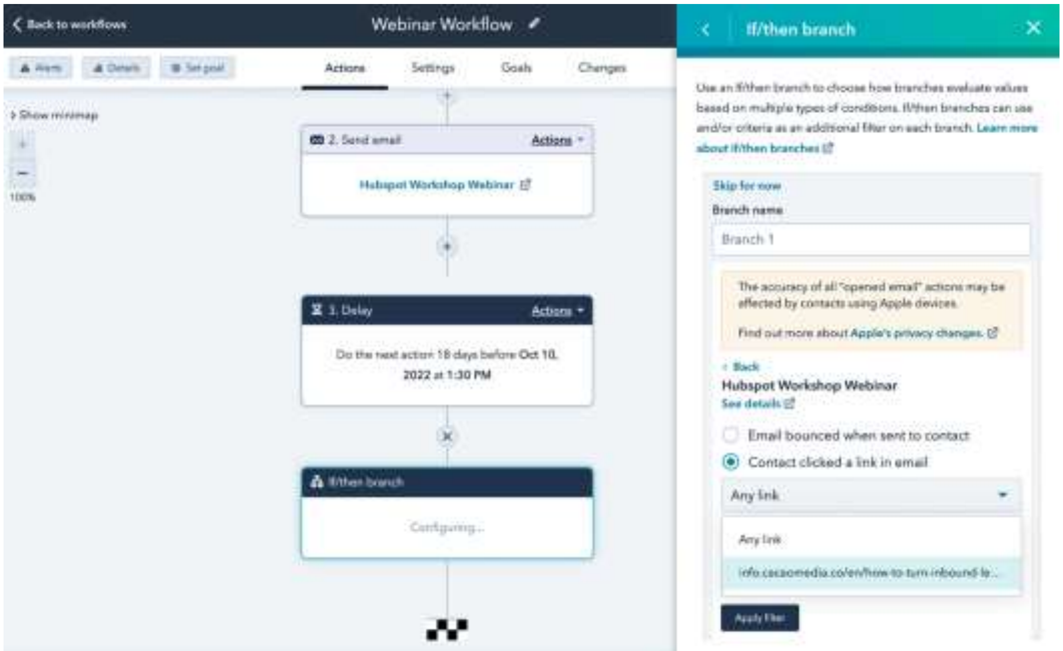


Figure 9.48 – Selecting a link that contacts should click to join the webinar

Figure 9.49 – Adding a second email to the relevant branch

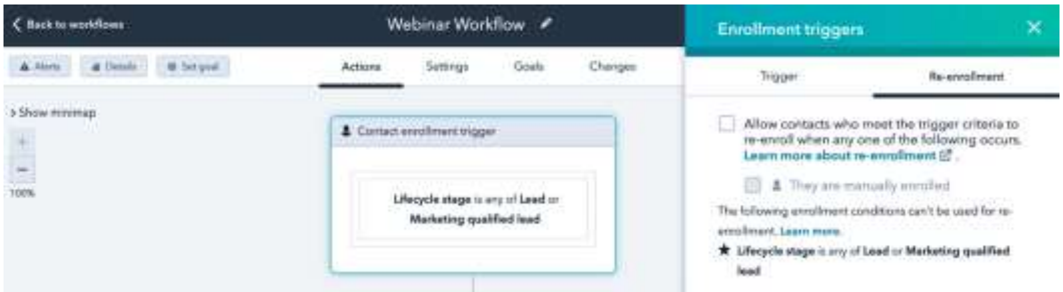


Figure 9.50 – Re-enrollment function of workflows

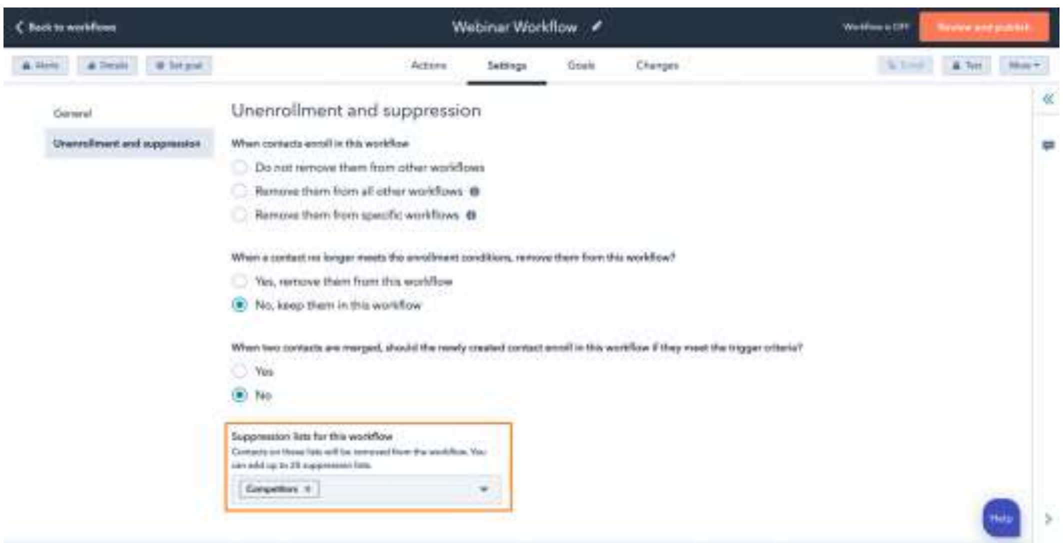


Figure 9.51 – Suppression function of workflows

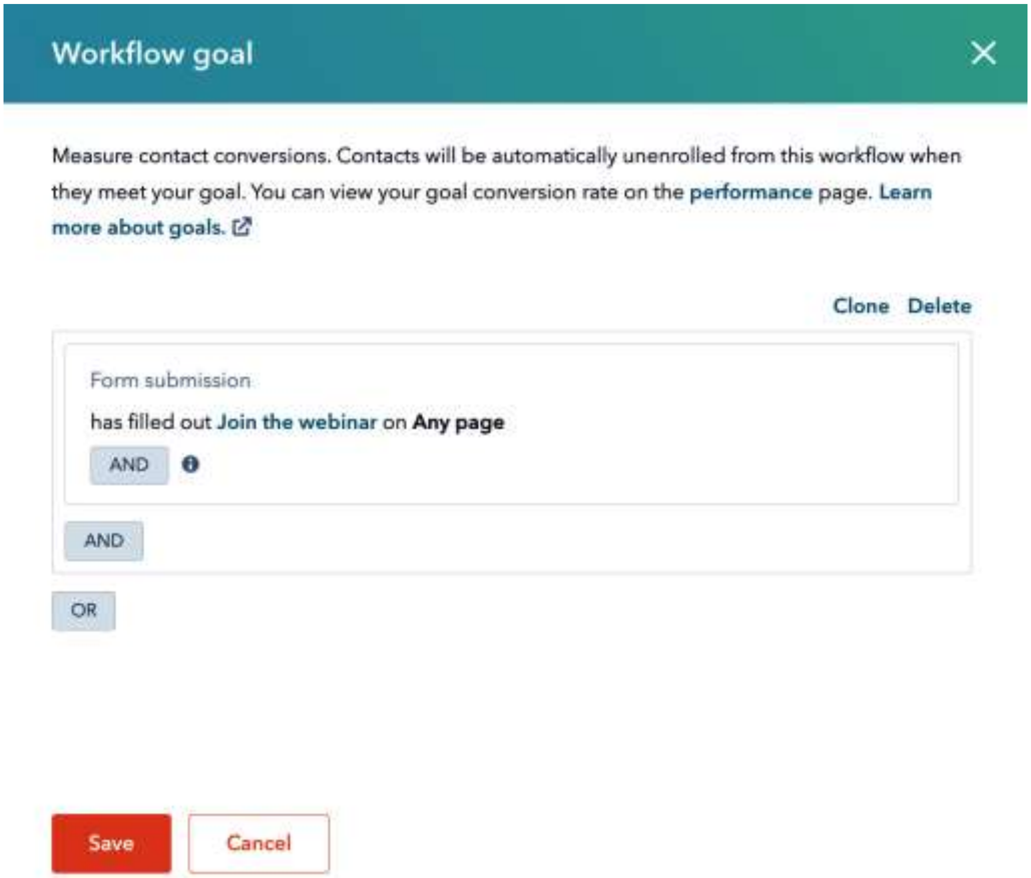


Figure 9.52 – Setting goals in workflows

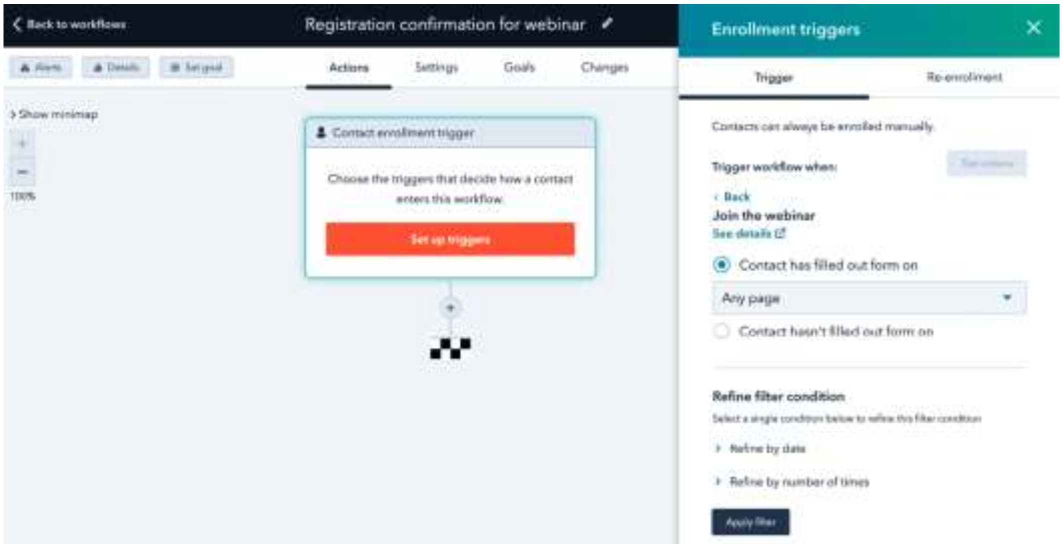


Figure 9.53 – Selecting a form as the enrollment trigger

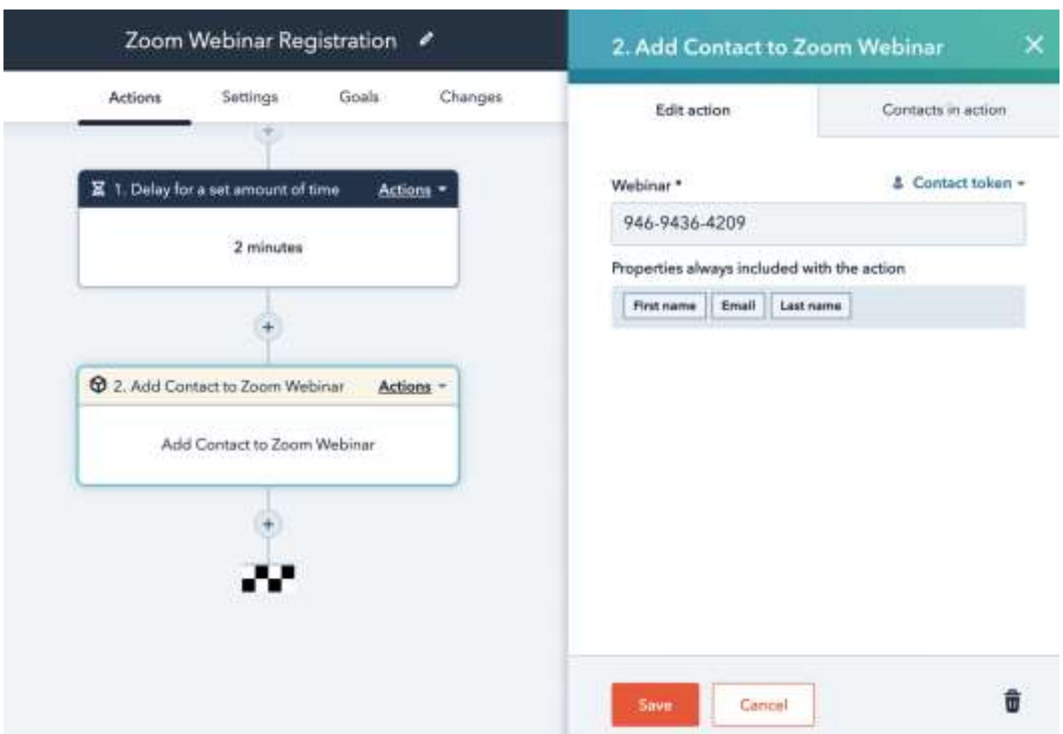


Figure 9.54 – Zoom webinar registration

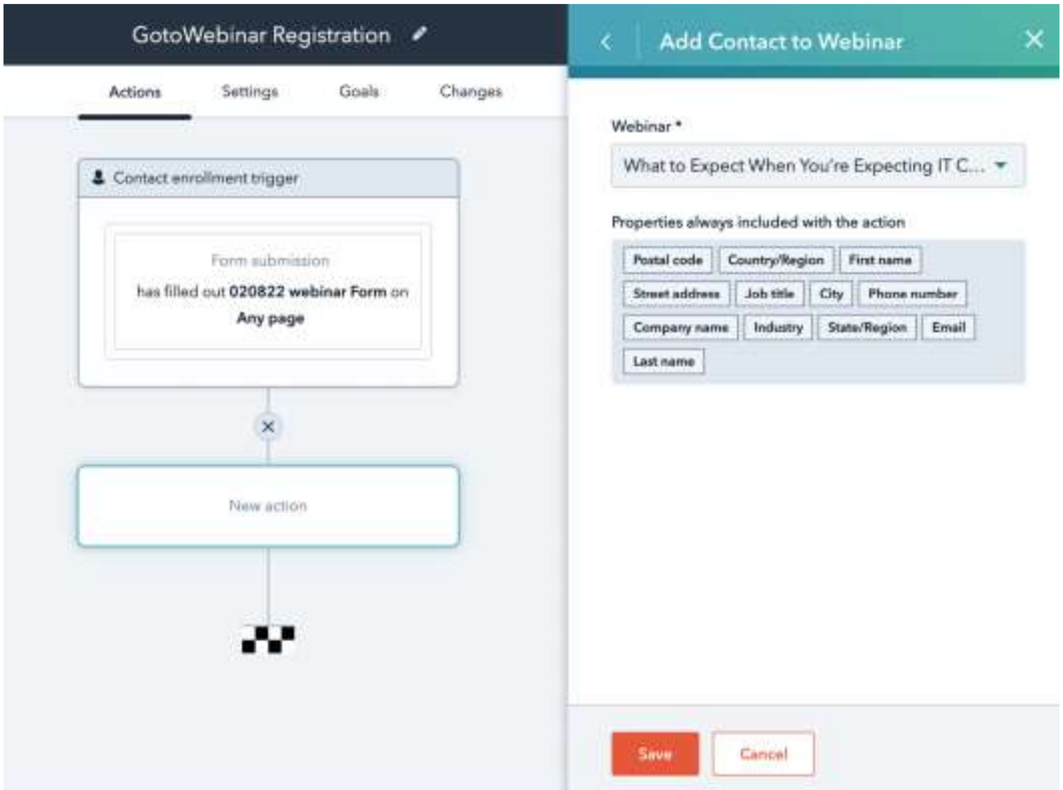


Figure 9.55 – GoTo Webinar registration

Questions

Have a go at answering the following questions:

1. Which feature in HubSpot helps prevent spam submissions and ensures data privacy?
2. What are the five features most landing pages should have?
3. How do you prevent contacts from re-enrolling in your workflows?

Further reading

- *Understanding Workflows in HubSpot*: https://academy.hubspot.com/lessons/understanding-workflows-in-hubspot
- *Using Workflows to Power Your Inbound Strategy*: https://academy.hubspot.com/lessons/Using-Workflows-to-Power-Your-Inbound-Strategy
- *How to Implement Workflows in Each Stage of the Flywheel*: https://blog.hubspot.com/customers/implement-workflows-hubspot
- *56 Ways Customers Use Workflow Integrations*: https://blog.hubspot.com/customers/56-ways-customers-use-workflow-integrations
- *5 Biggest Workflow Mistakes (and How to Avoid Them)*: https://blog.hubspot.com/customers/5-biggest-workflow-mistakes-how-to-avoid-them

Chapter 10

Images

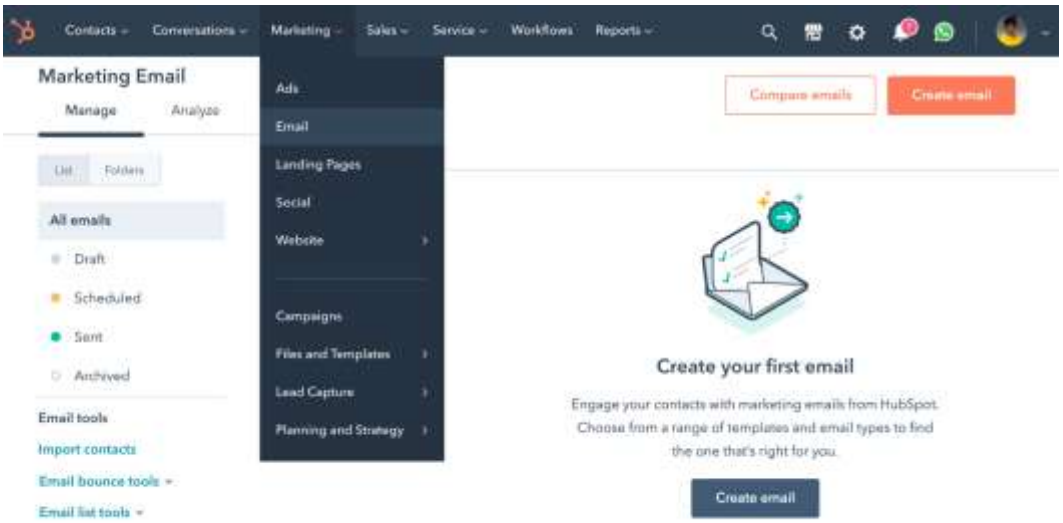


Figure 10.1 – Creating your email

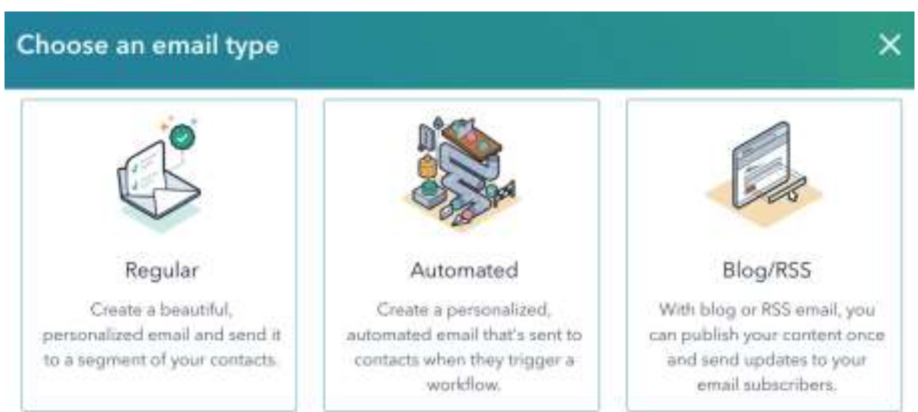


Figure 10.2 – Different types of emails in HubSpot

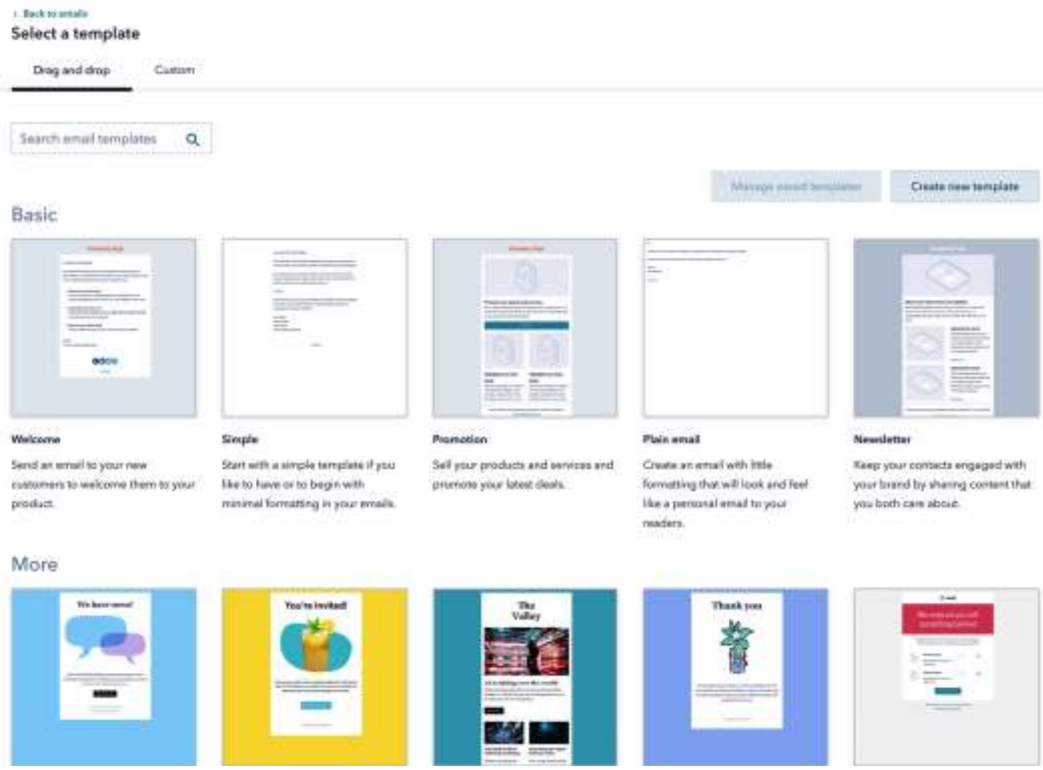


Figure 10.3 – Selecting a template

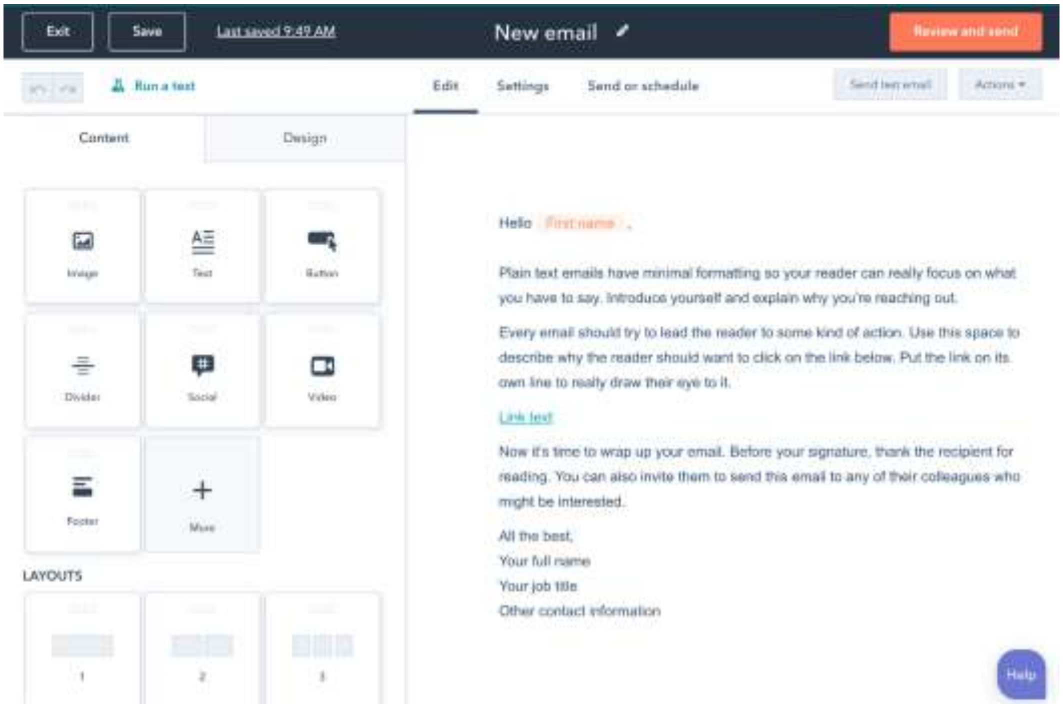


Figure 10.4 – The email template

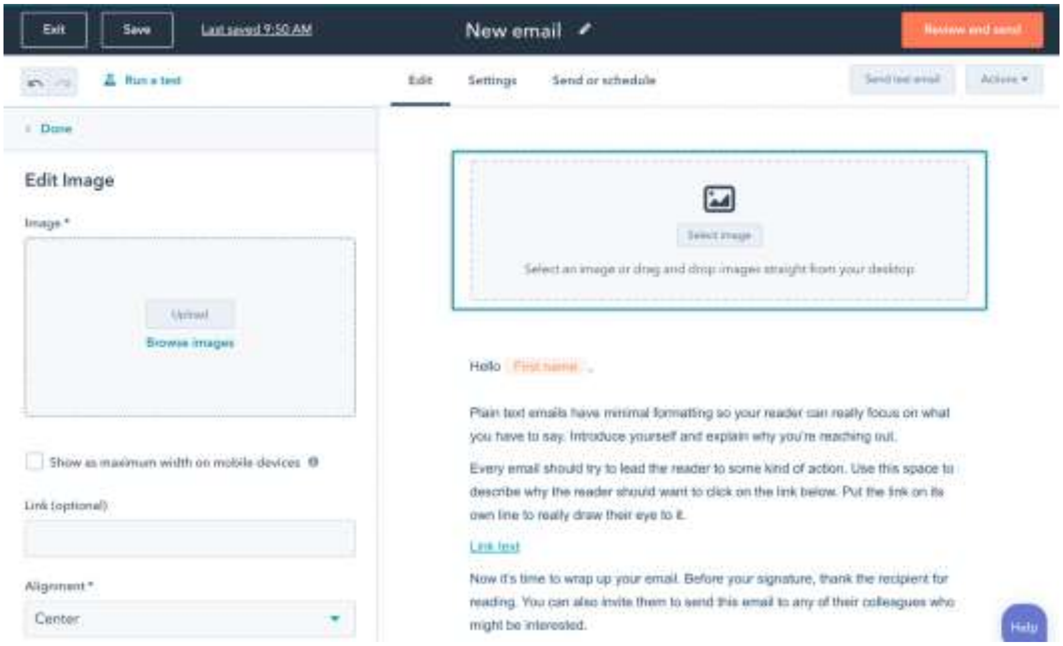


Figure 10.5 – Adding an image module to your email

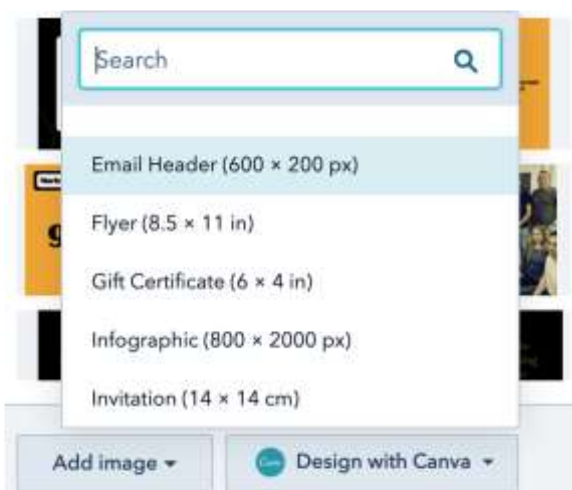


Figure 10.6 – Accessing Canva to create images within your email

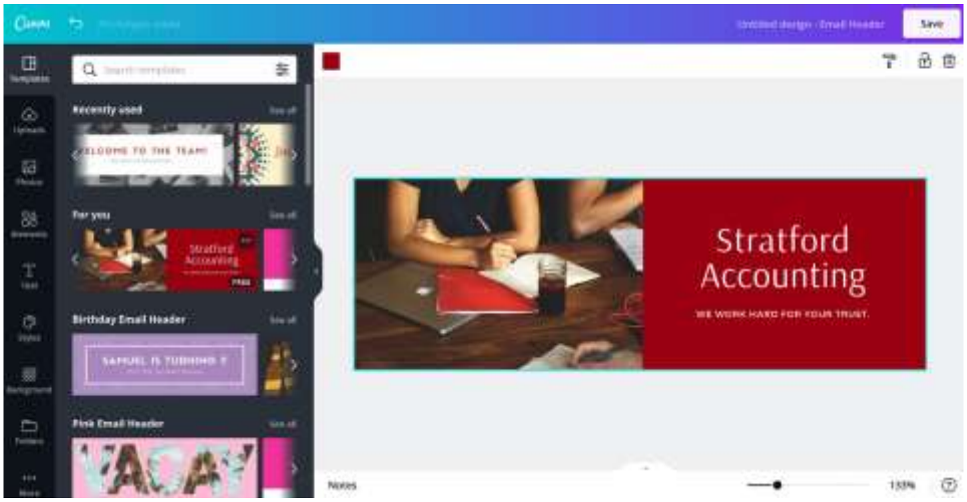


Figure 10.7 – Choosing an email header template

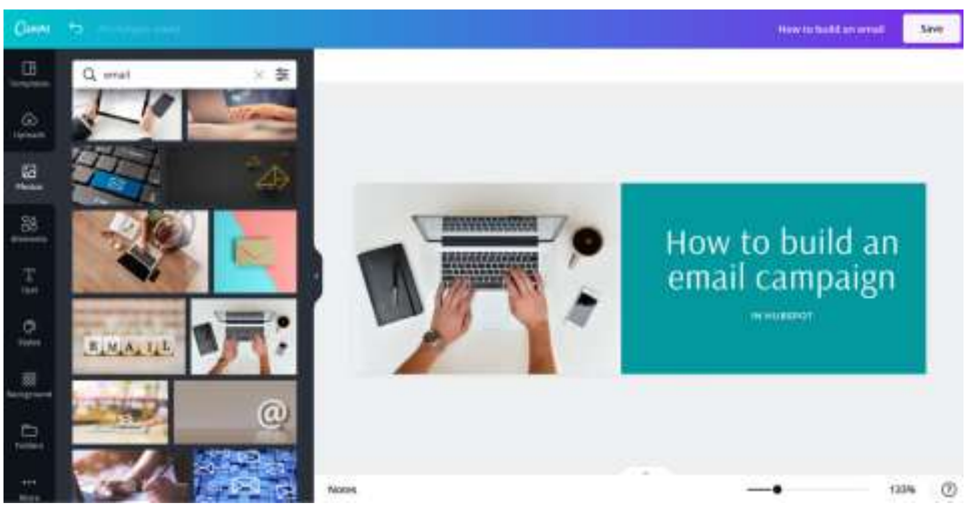


Figure 10.8 – Designing your email header in Canva

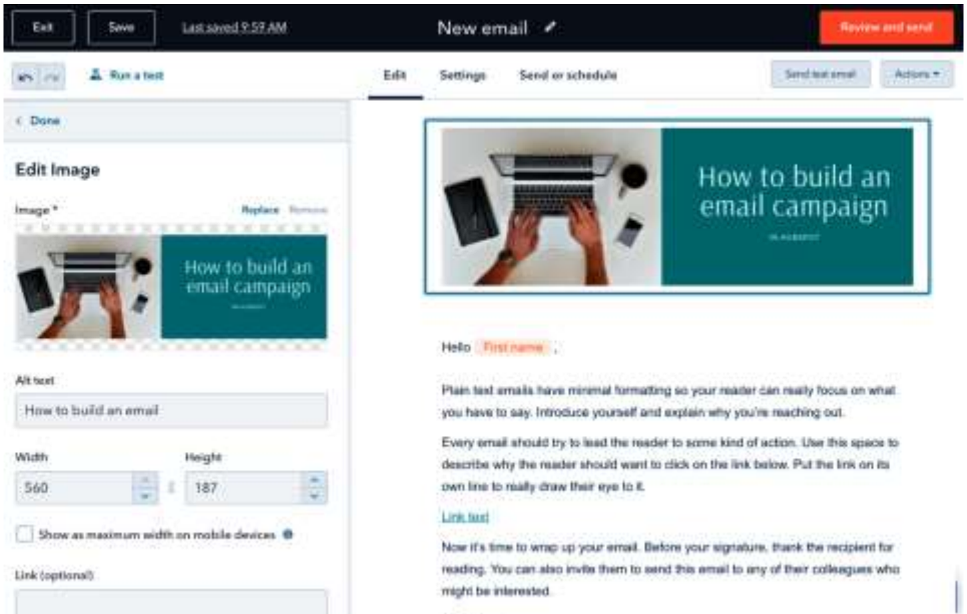


Figure 10.9 – Adding the email header to your HubSpot email

Figure 10.10 – Filling out the Alt text and Link sections

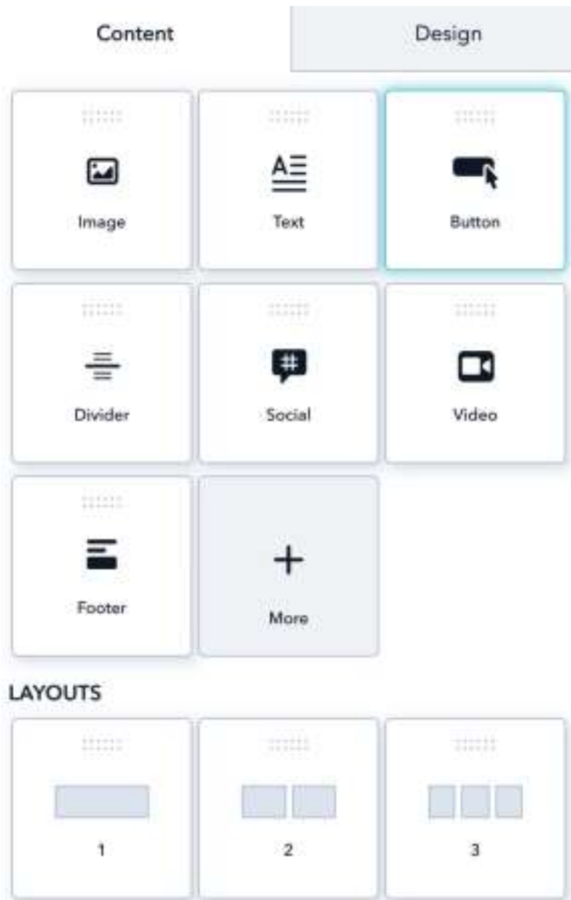


Figure 10.11 – Adding the CTA modules to your email

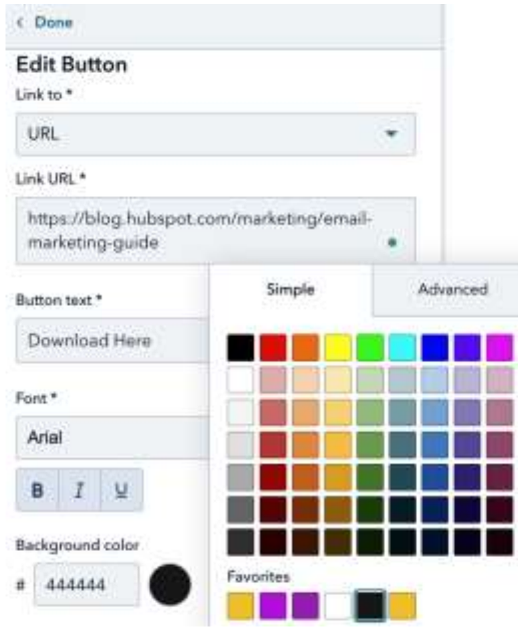


Figure 10.12 – Customizing your CTA

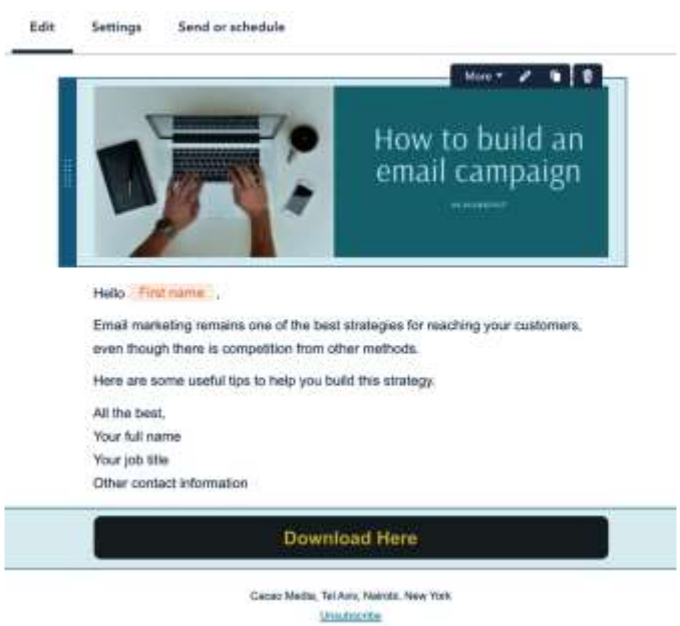


Figure 10.13 – Adding your CTA to the email

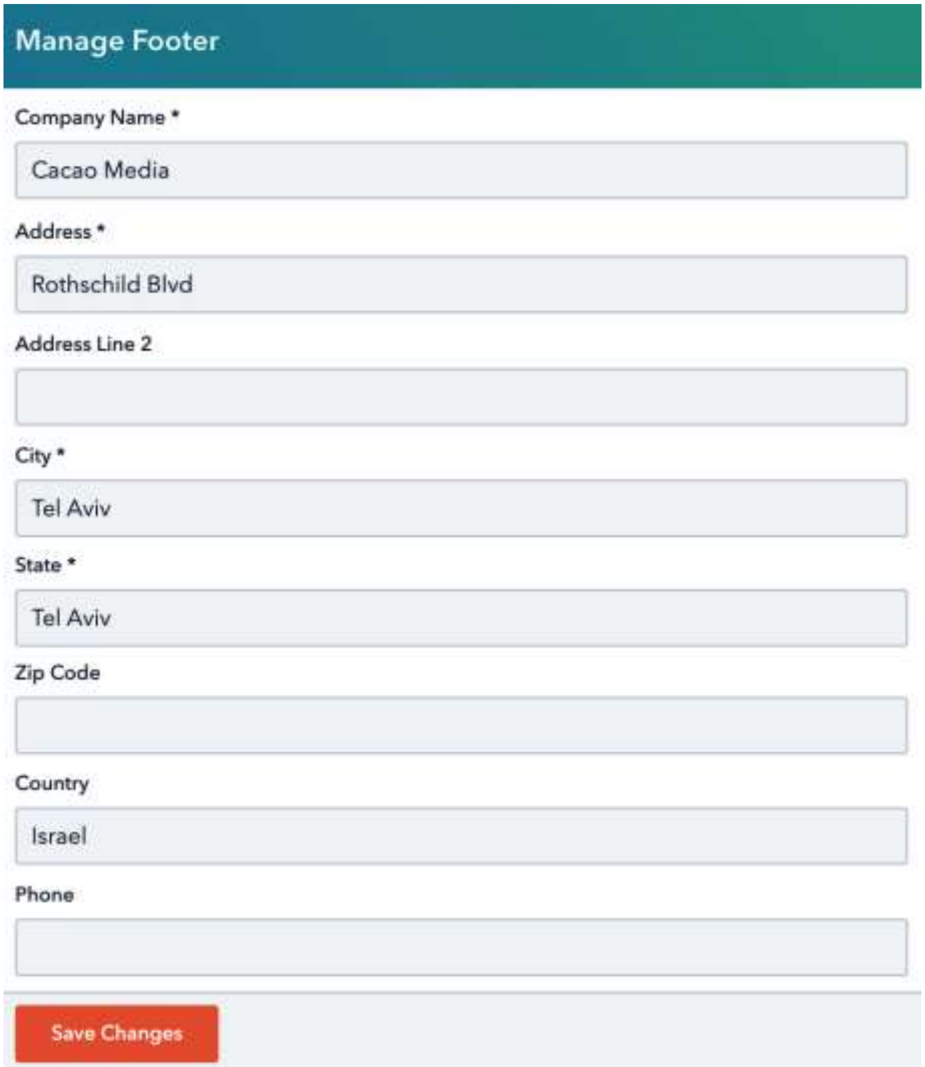


Figure 10.14 – Editing the footer of your emails

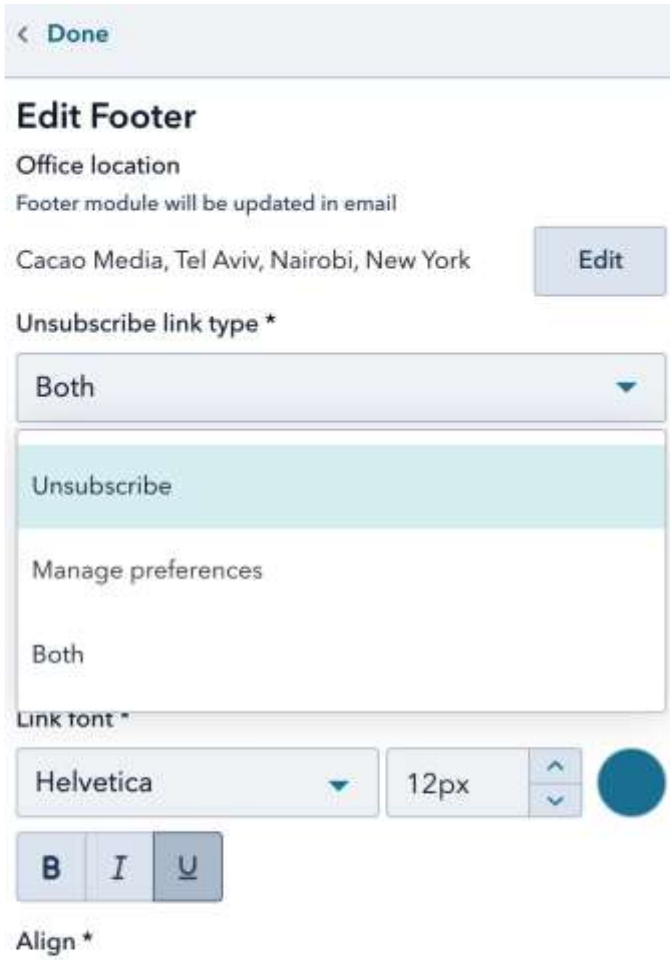


Figure 10.15 – Selecting your subscription type

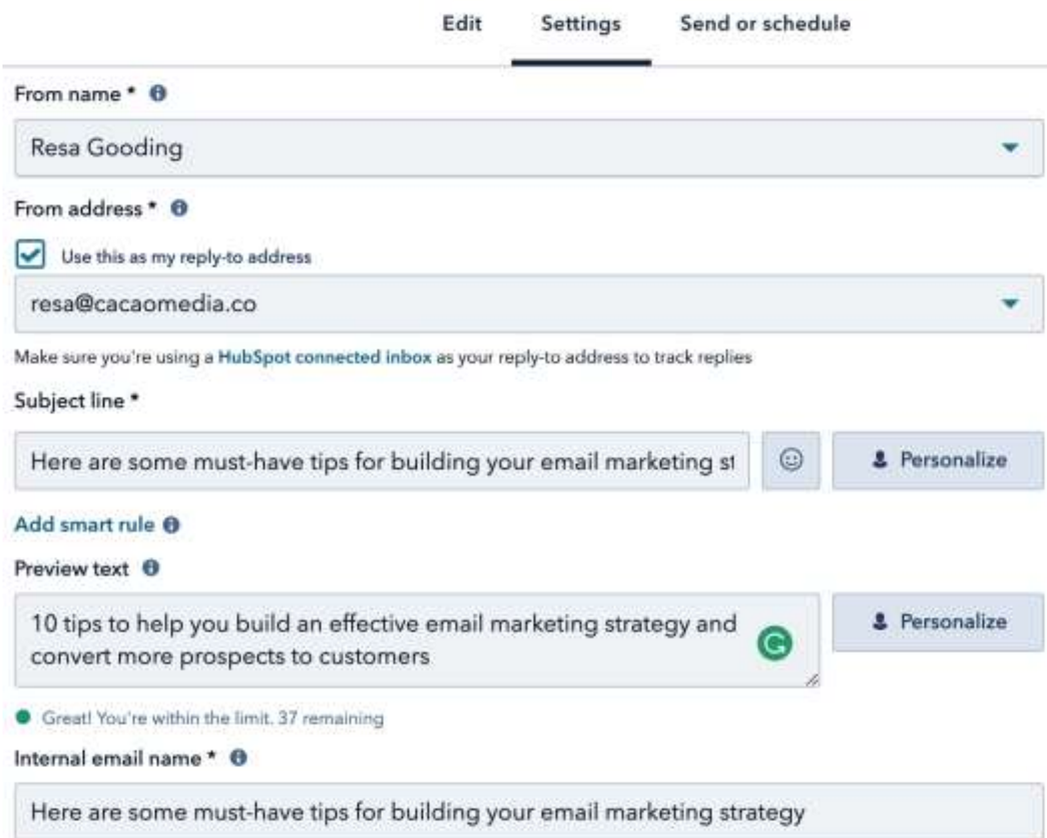


Figure 10.16 – Setting the sender's name and email, subject line, and previewing the text

Figure 10.17 – Selecting recipients for the email

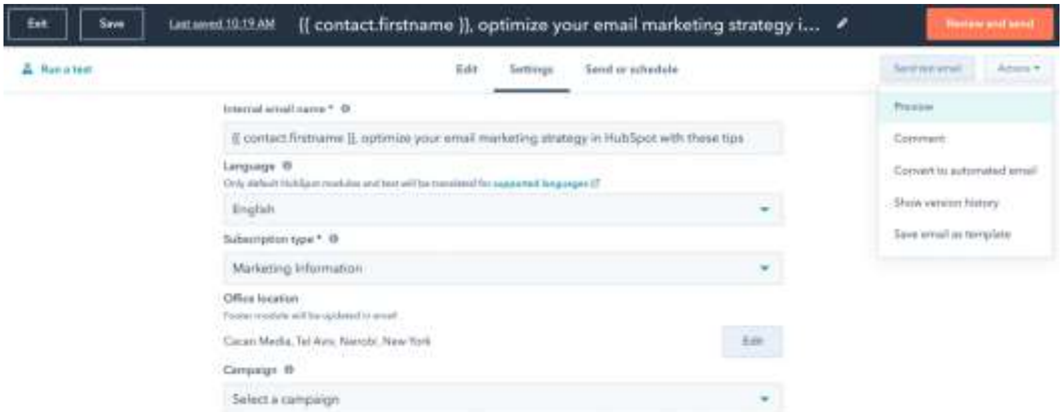


Figure 10.18 – Previewing your email on a desktop and mobile

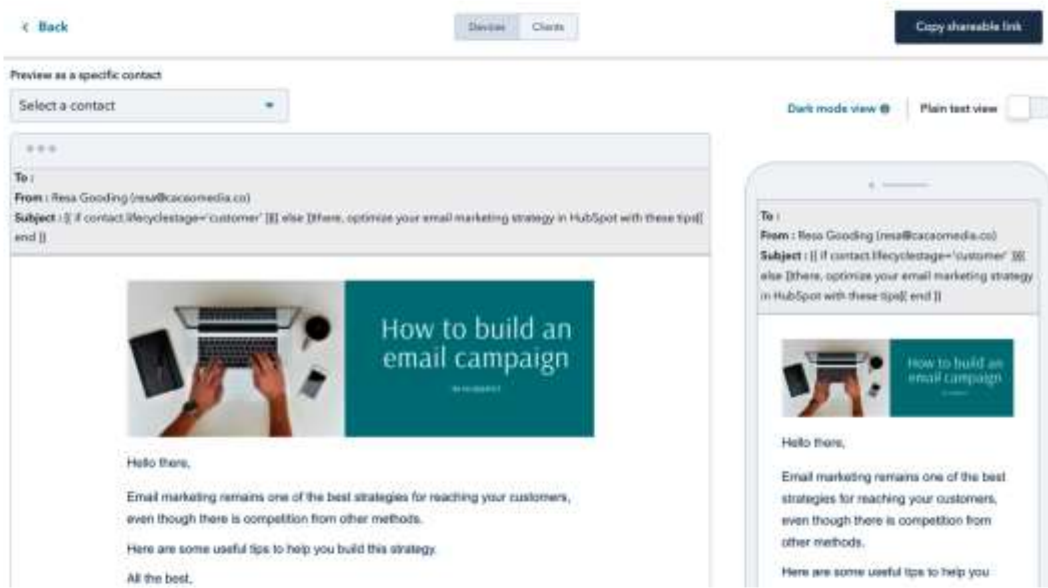


Figure 10.19 – The desktop and mobile preview of the email content

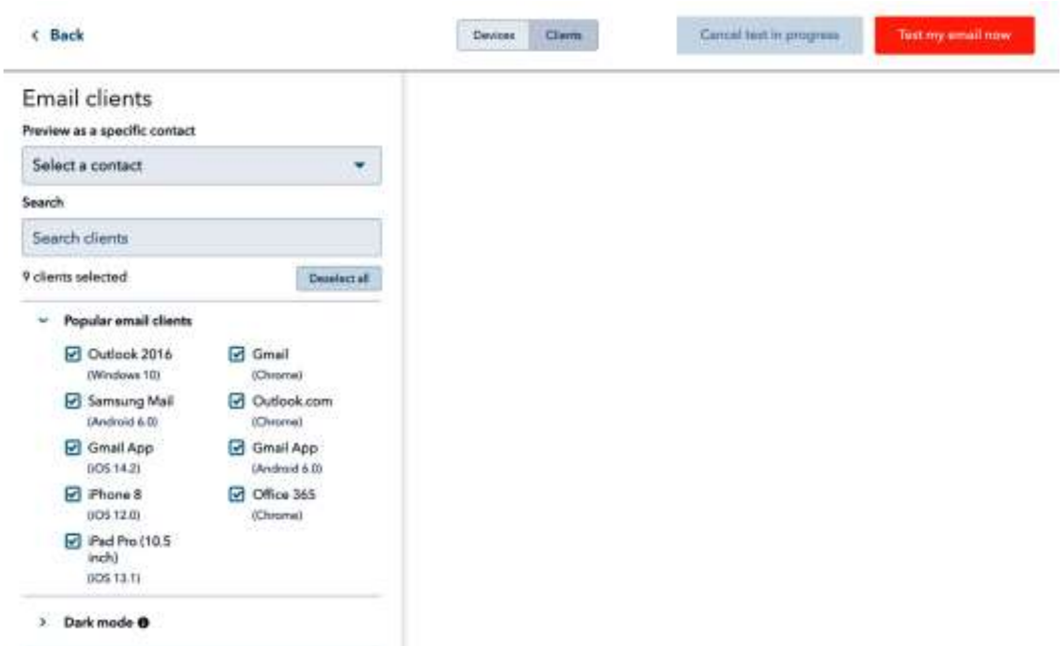


Figure 10.20 – Testing your email on different email clients

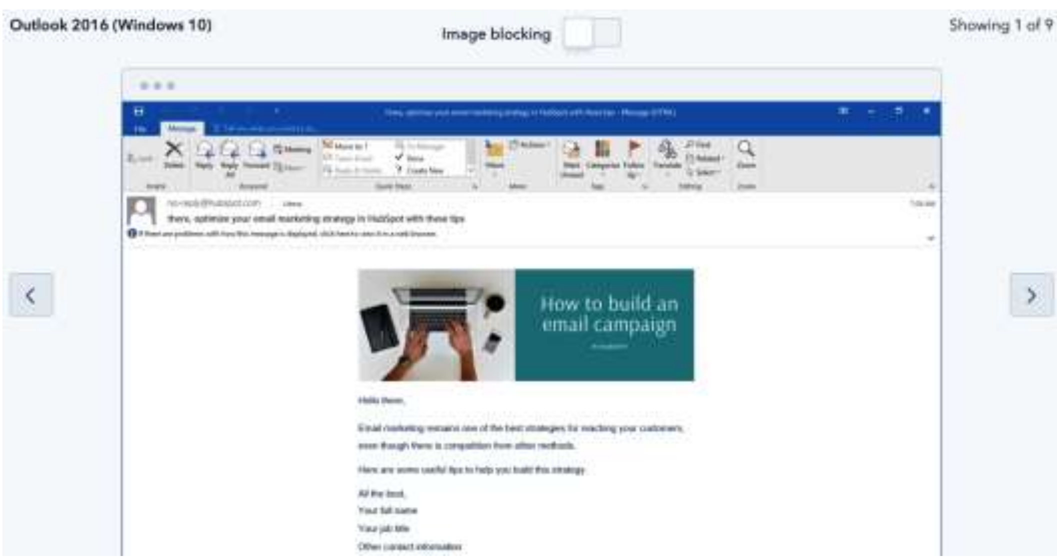


Figure 10.21 – The Microsoft Outlook email preview

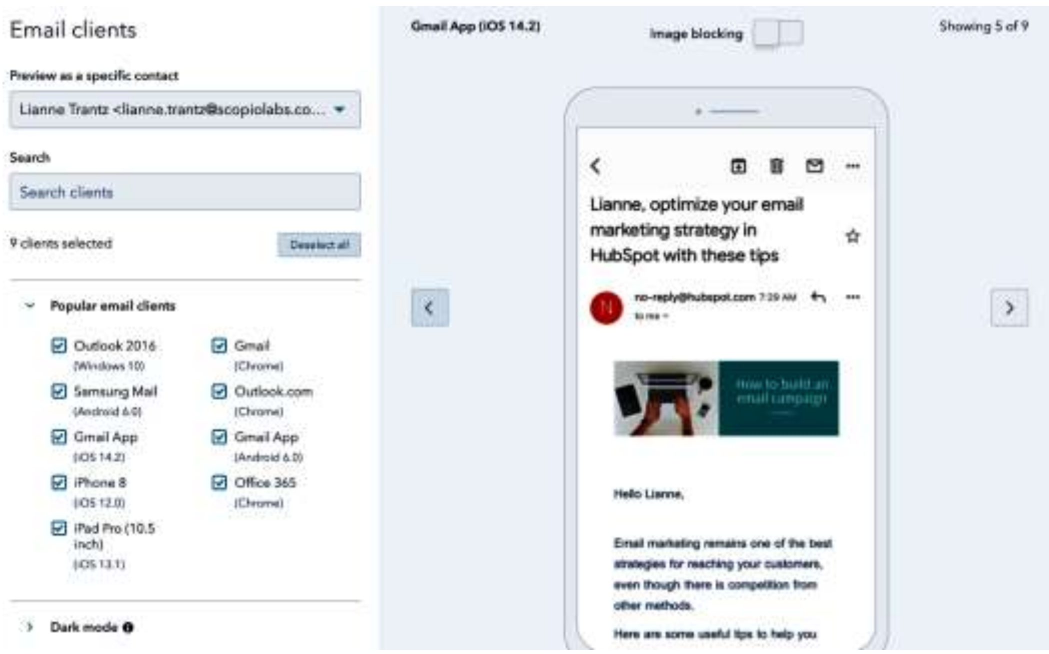


Figure 10.22 – Gmail App on the iPhone email preview

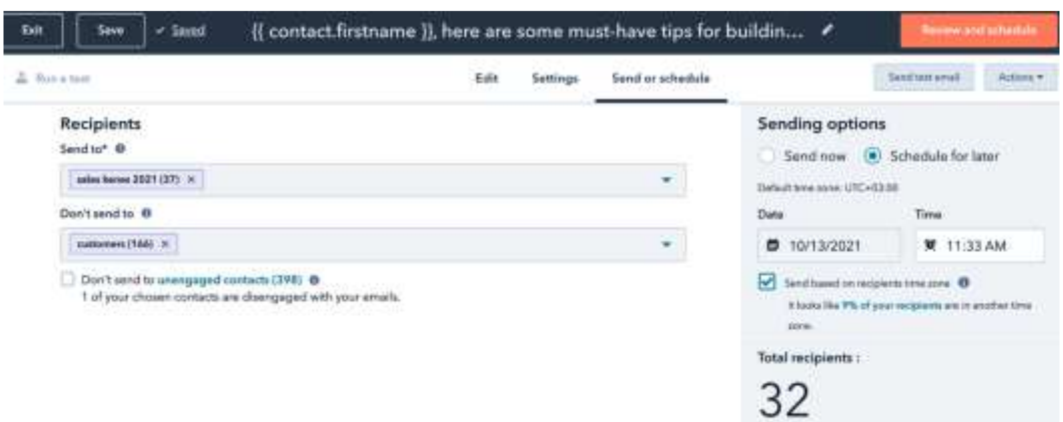


Figure 10.23 – Sending or scheduling your email

Figure 10.24 – The overall performance rate of the email

Figure 10.25 – Delivery rates

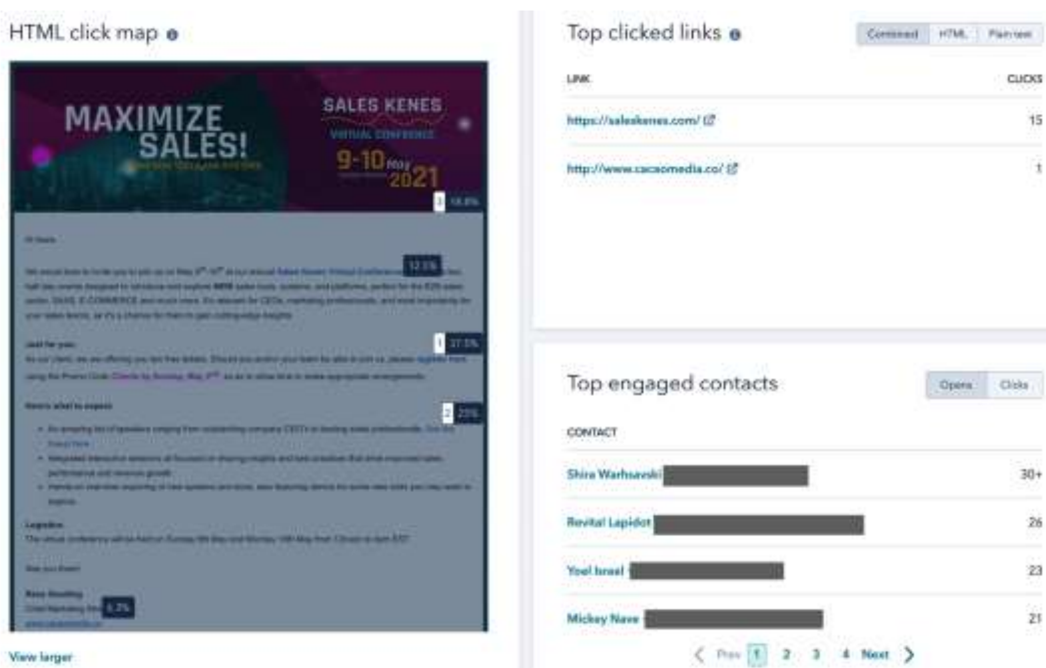


Figure 10.26 – Heat map for email engagement

Figure 10.27 – Time spent viewing the email

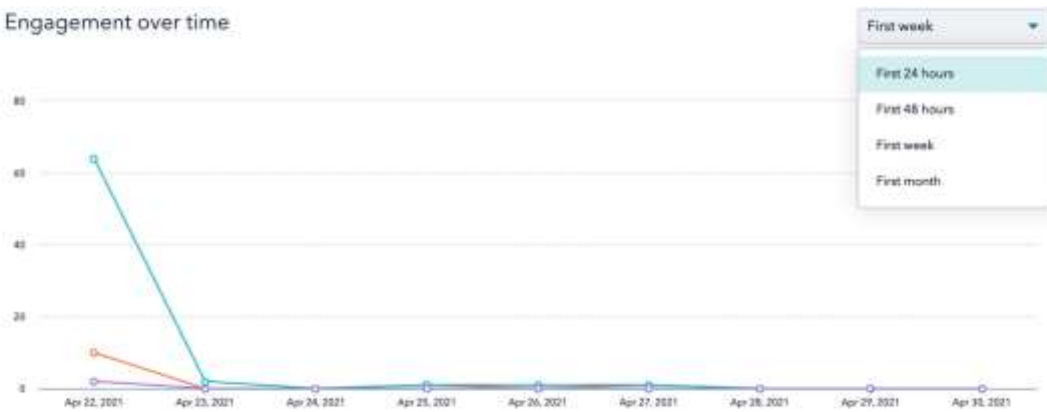


Figure 10.28 – Engagement over time

Figure 10.29 – The number of opens by email client

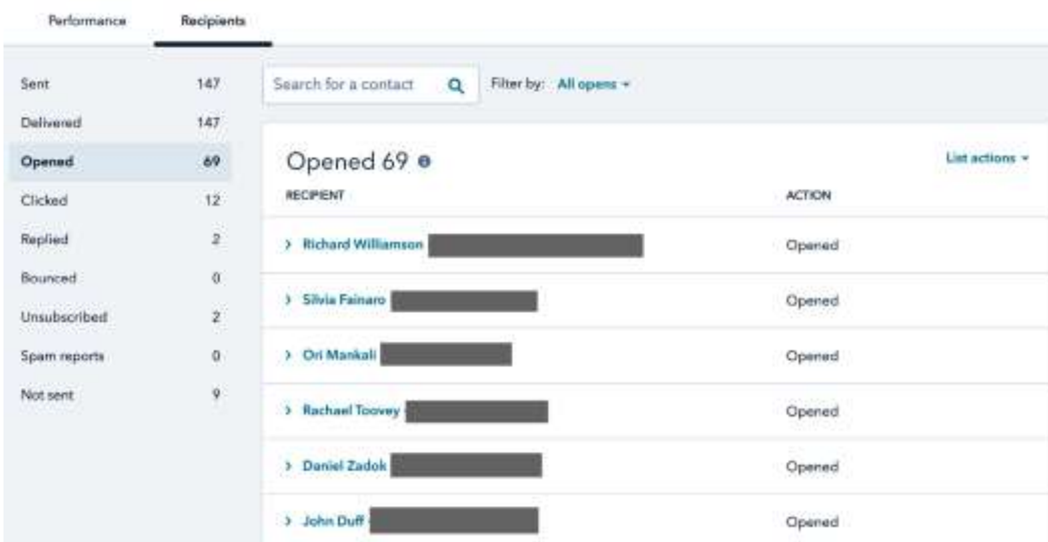


Figure 10.30 – The open rates of the email

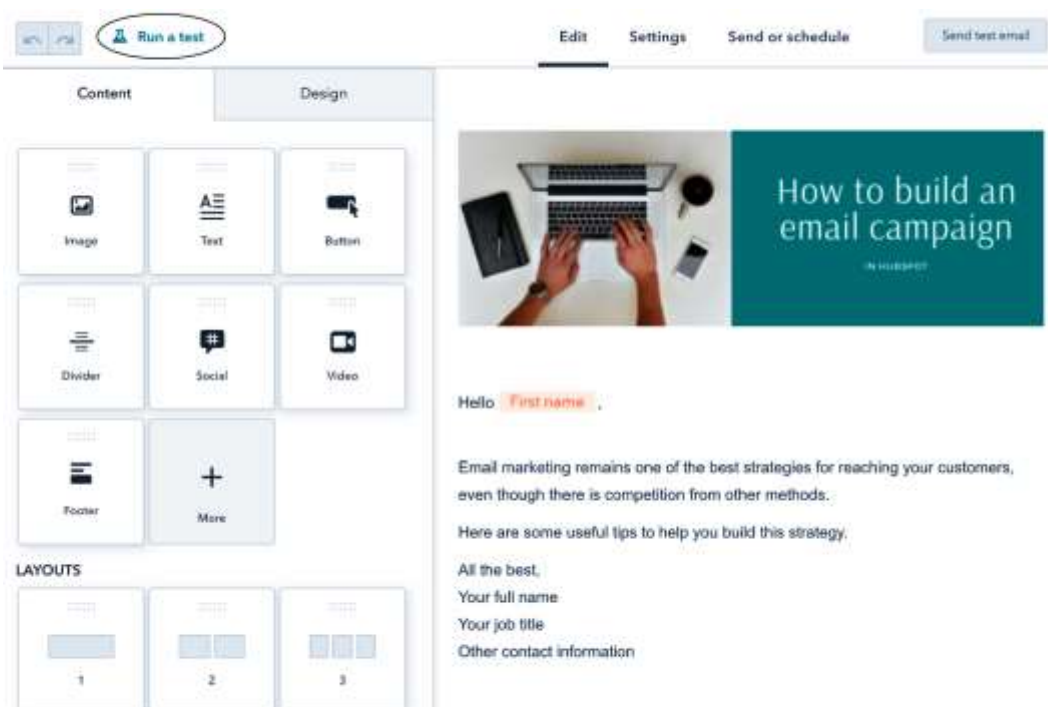


Figure 10.31 – Running an A/B test

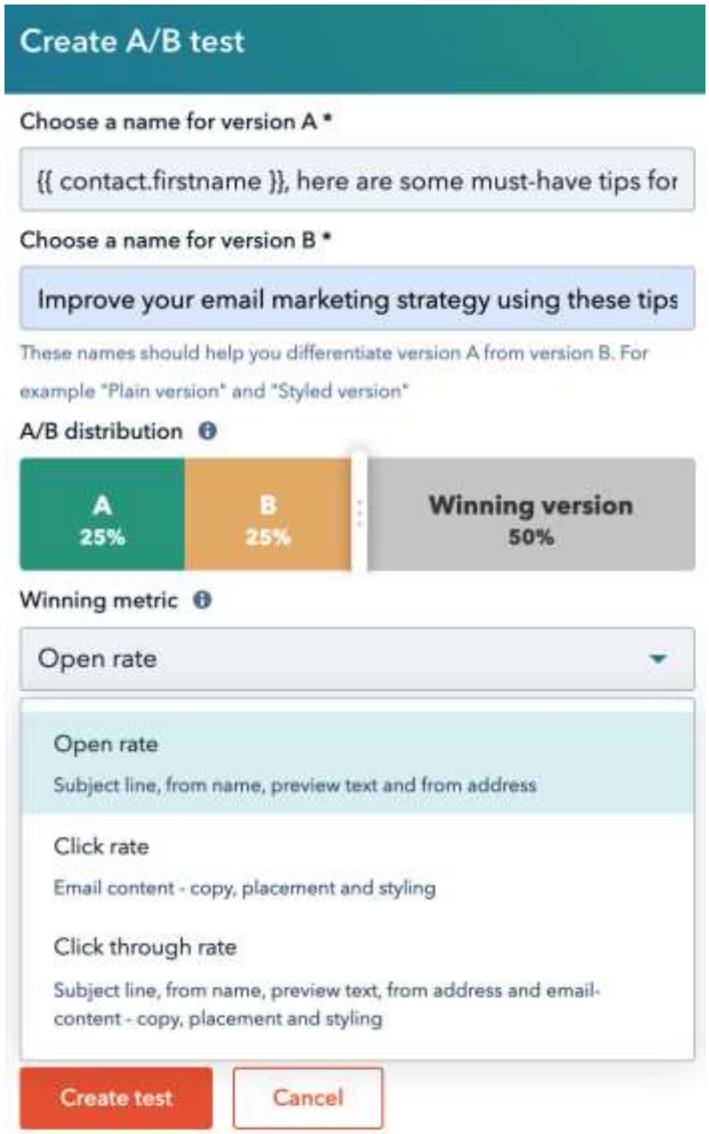


Figure 10.32 – Setting up an A/B test

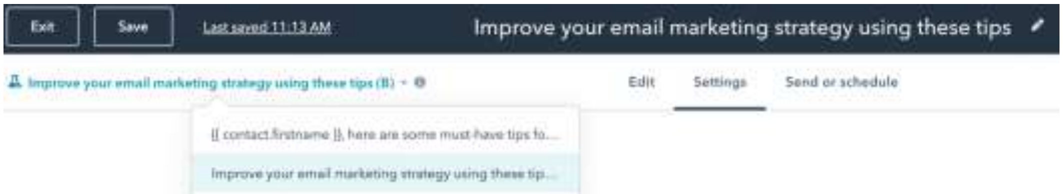


Figure 10.33 – Setting up two versions of the email

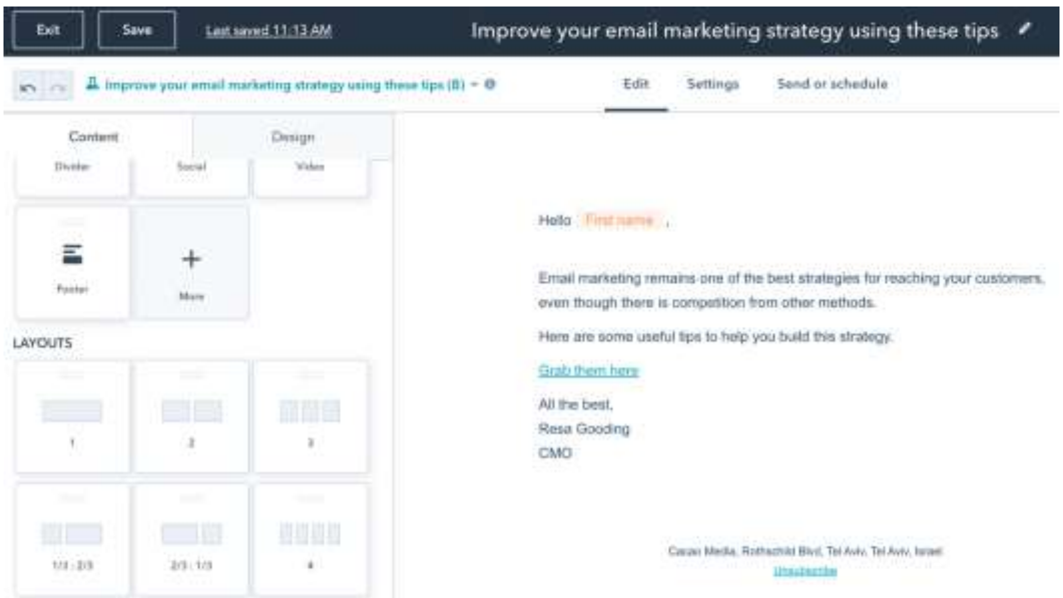


Figure 10.34 – A plain text email as version B

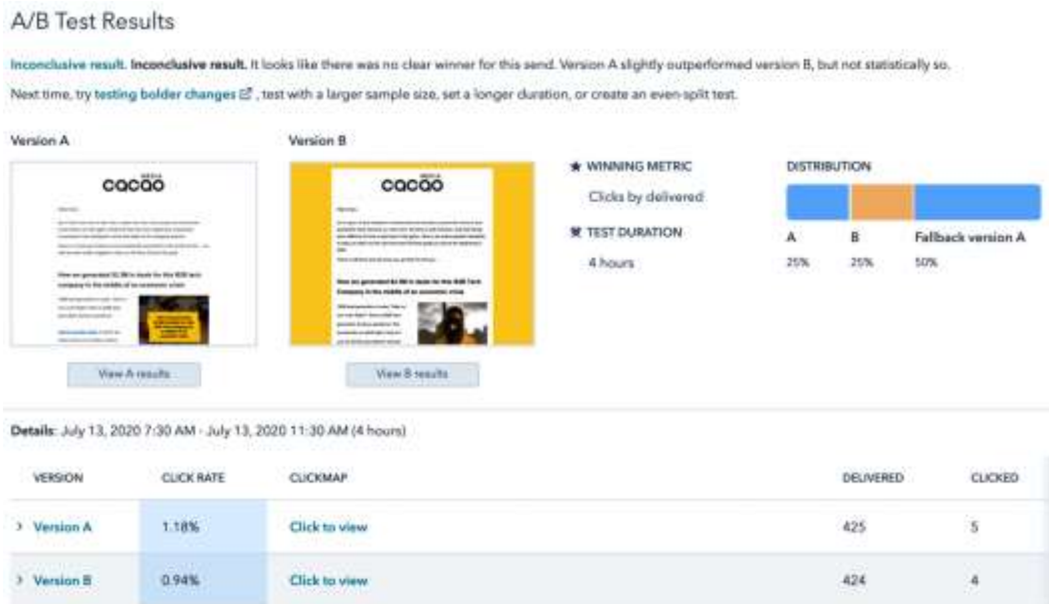


Figure 10.35 – The A/B test results

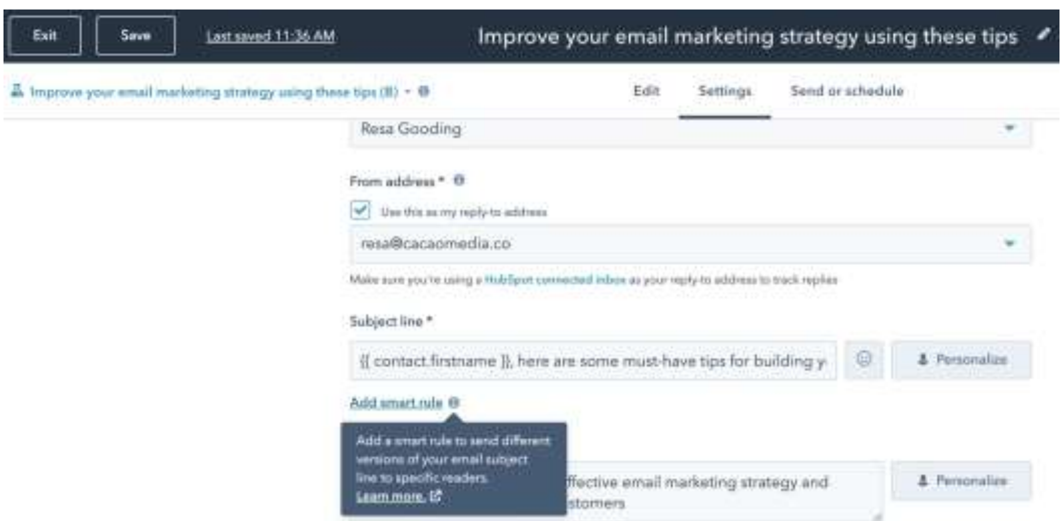


Figure 10.36 – Adding a smart module

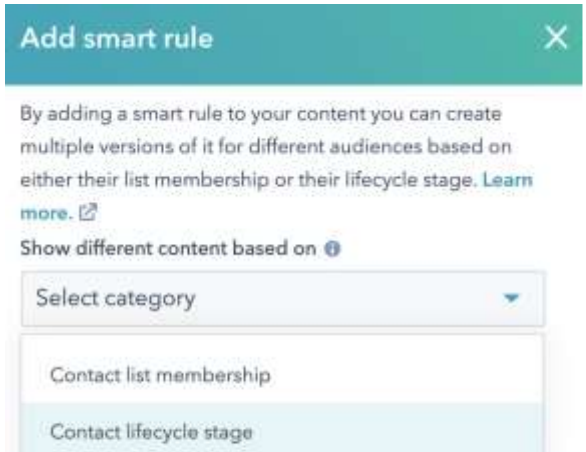


Figure 10.37 – Choosing a category

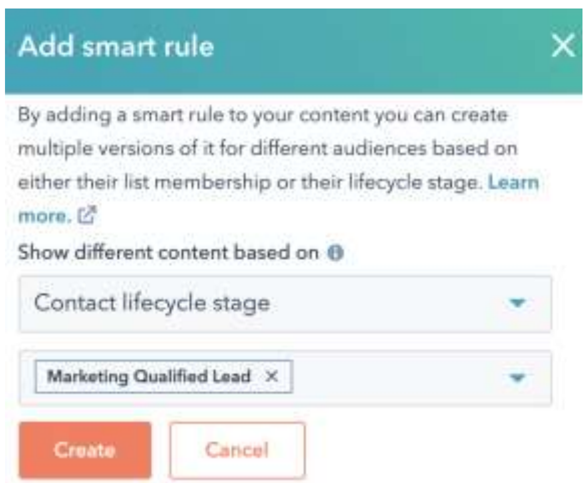


Figure 10.38 – Choosing the sub-category

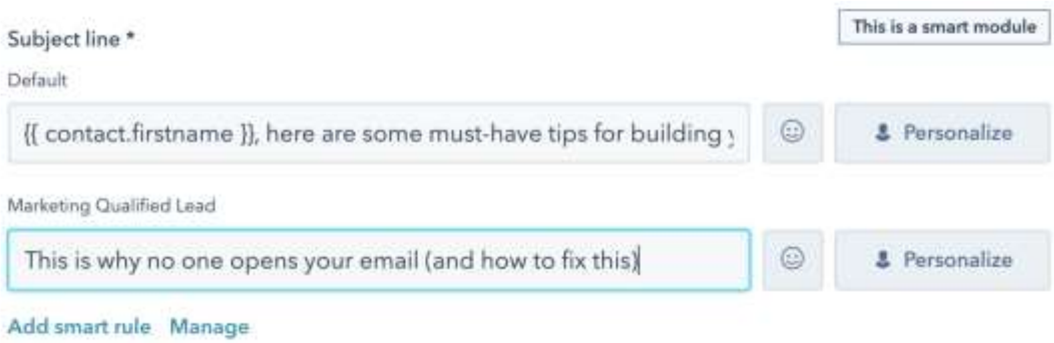


Figure 10.39 – Entering the subject line that the separate segment of contacts can receive

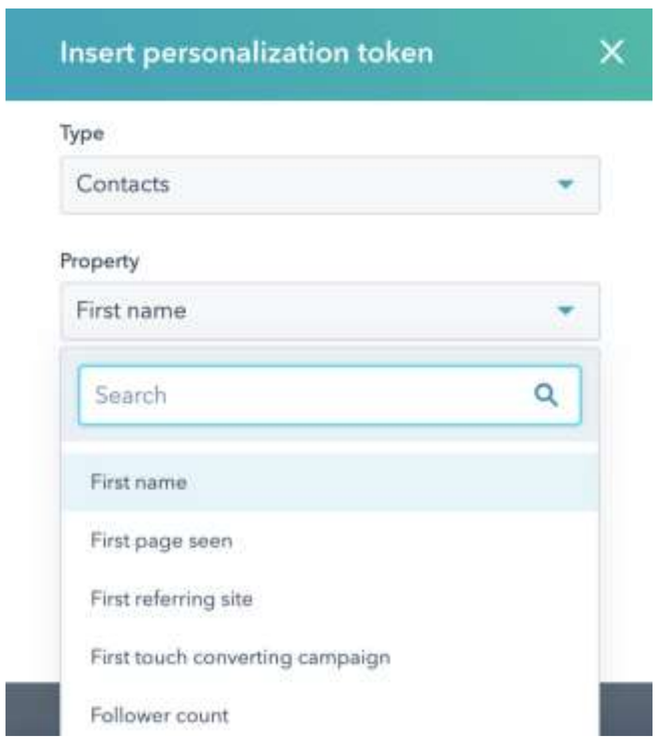


Figure 10.40 – Setting up a personalization token

Figure 10.41 – Email personalization tokens

Figure 10.42 – Setting up a generic default

Questions

Email is probably the most important weapon in a marketer's arsenal. So, we won't want you to leave this chapter without ensuring you understand the important concepts of gaining great results from your email campaigns. Let's recap with a few short questions:

1. Which elements do you need to consider when building an email strategy?
2. Can you design images within HubSpot for your email campaigns?
3. What are two best practices you can implement right now to improve your email campaigns?

Further reading

- *The Modern Guidebook to Email Marketing*: https://www.campaignmonitor.com/resources/guides/modern-guidebook-email-marketing/
- *The Ultimate Guide to Email Marketing*: https://blog.hubspot.com/marketing/email-marketing-guide
- *23 Simple Email Marketing Tips to Improve Your Open and Clickthrough Rates*: https://blog.hubspot.com/marketing/make-emails-more-clickable-list

Chapter 11

Images

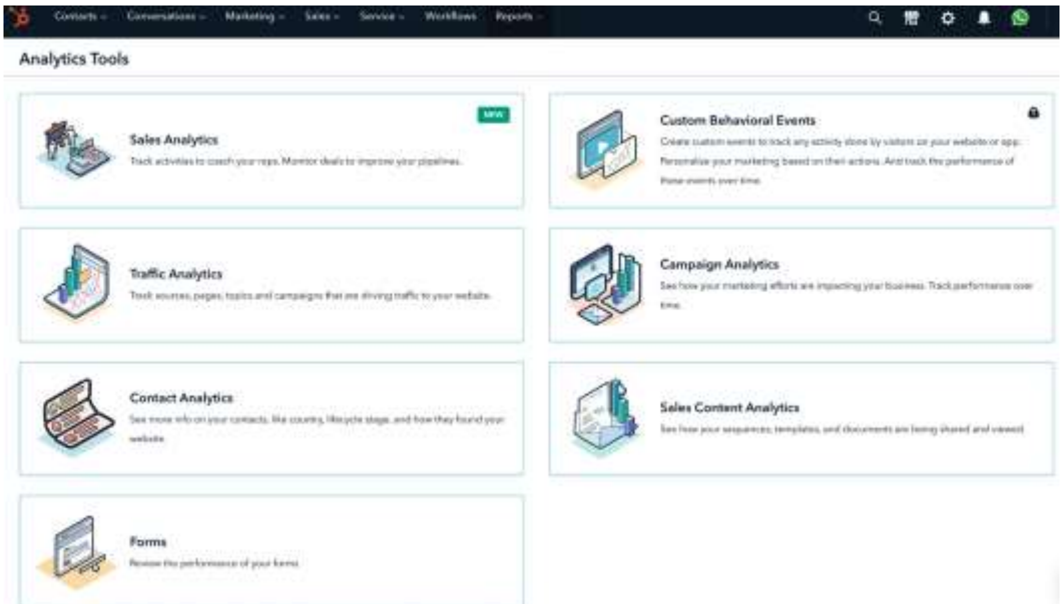


Figure 11.1 – Analytics tool

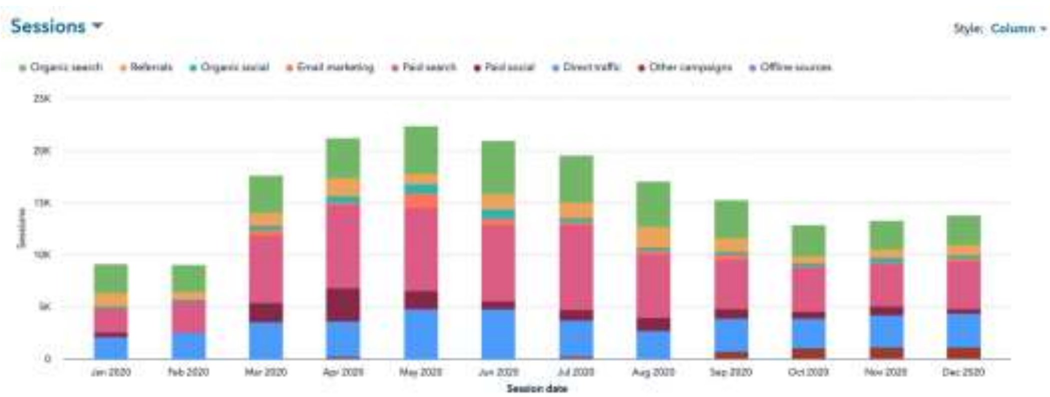
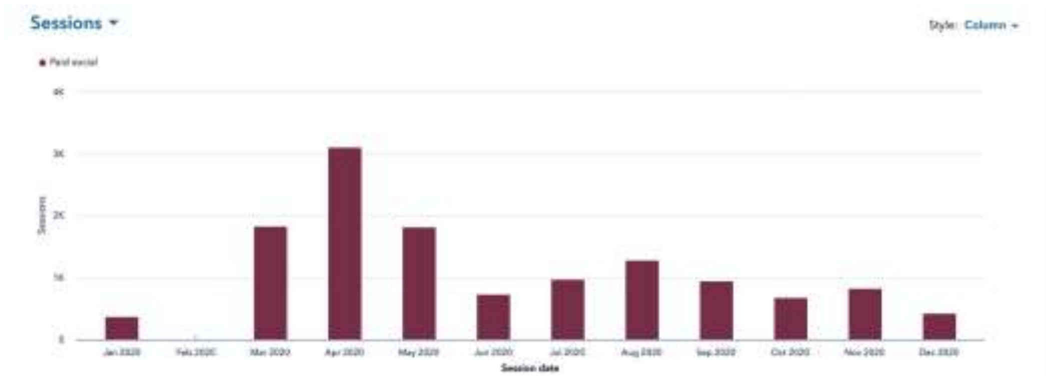


Figure 11.2 – Graph of traffic sources

SOURCE	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
Paid search	66,963	2.28%	1,527	0.39%	6	82.69%	36 seconds
Organic search	43,251	1.17%	504	6.15%	31	71.72%	87 seconds
Direct traffic	39,794	2.03%	809	5.19%	42	65.94%	122 seconds
Referrals	15,060	0.72%	109	4.59%	5	88.61%	36 seconds
Paid social	13,002	24.08%	3,131	0.73%	23	79%	43 seconds
Other campaigns	4,946	5.8%	287	3.48%	10	91.23%	12 seconds
Email marketing	4,896	11.79%	577	0.52%	3	60.29%	61 seconds
Organic social	4,654	6.92%	322	5.9%	19	71.7%	56 seconds
Offline sources	-	0%	9,512	3.17%	302	0%	-
Total	192,566	8.71%	16,778	2.63%	441	76.36%	66 seconds

Figure 11.3 – Table of traffic sources



All sources › Paid social

Edit columns

Search

SITE	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
Facebook	6,176	39.14%	2,417	0.62%	15	71.96%	47 seconds
Quora	4,162	2.4%	100	0%	-	89.14%	24 seconds
LinkedIn	2,447	25.01%	612	1.31%	8	78.67%	67 seconds
Reddit	217	0.92%	2	0%	-	88.48%	8 seconds
Total	13,002	24.08%	3,131	0.73%	23	79%	43 seconds

Figure 11.4 – Paid social

All sources > Organic social > LinkedIn

CAMPAIGN	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS
Unknown campaign	47	17.02%	8
uk webinars	2	50%	1
social media	5	0%	-
content marketing	1	0%	-
webinar series israel	1	0%	-
new hires	9	0%	-
free hubspot workshops	1	0%	-
Total	**66**	**13.64%**	**9**

Figure 11.5 – Campaigns associated with Organic social networks

Figure 11.6 – Traffic sources of countries

All countries

Edit columns

COUNTRY	SESSIONS	% NEW SESSION	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
United States	68,281	78.01%	2.65%	1,811	2.82%	51	80.21%	49 seconds
Israel	36,961	51.81%	1.52%	563	1.95%	11	69.32%	96 seconds
United Kingdom	14,315	78.23%	3.45%	494	1.01%	5	79.24%	47 seconds
Germany	12,436	82.94%	3.82%	475	2.11%	10	80.9%	42 seconds
India	11,238	70.24%	2.76%	310	5.81%	18	73.05%	88 seconds
Singapore	10,824	64.98%	3.17%	343	0.87%	3	77.99%	50 seconds
Canada	4,922	73.73%	4.82%	237	4.64%	11	74.46%	63 seconds
France	2,091	73.27%	2.01%	42	4.76%	2	71.45%	91 seconds
Netherlands	1,758	74.18%	1.93%	34	8.82%	3	71.62%	59 seconds
South Korea	1,715	65.83%	1.75%	30	3.33%	1	69.68%	101 seconds

Figure 11.7 – Breakdown of contacts and the different countries they came from

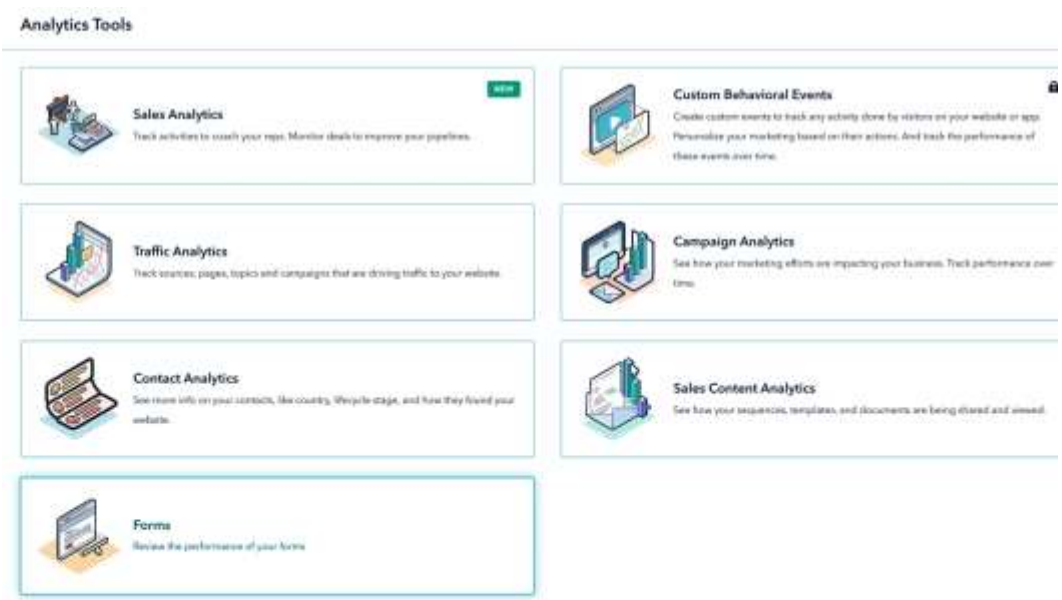


Figure 11.8 – Analytics Tools – Forms

Figure 11.9 – Forms analytics

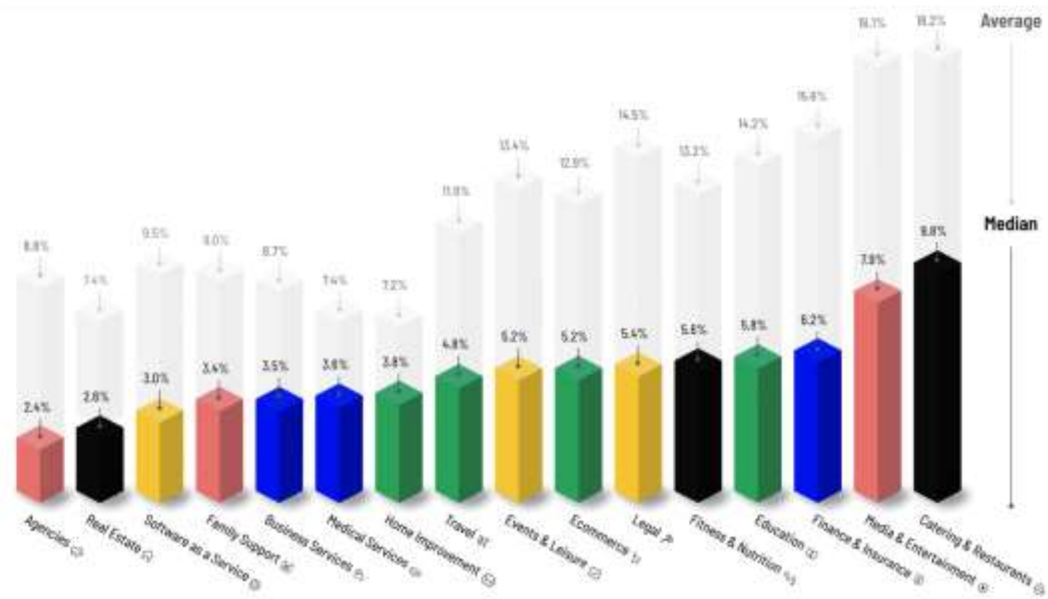


Figure 11.10 – Conversion rates by industry (source: Unbounce)

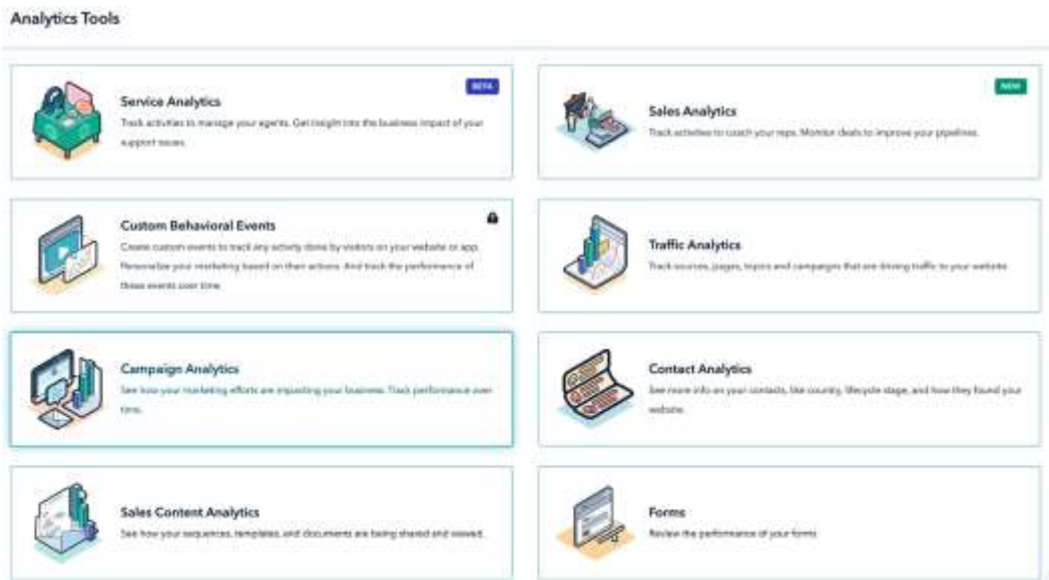


Figure 11.11 – Campaign Analytics

	CAMPAIGN	SESSIONS	NEW CONTACTS (FIRST TOUCH)	INFLUENCED CONTACTS	CLOSED DEALS
	AI for Connected Vehicles Webinar	4,674	136	3,041	0
	The MLOps Live Webinar Series #14	1,591	117	2,866	2
	The MLOps Webinar Series #13	2,020	94	2,486	1
	The MLOPs Webinar Series #12	1,176	85	2,443	1

Figure 11.12 – Measuring the number of sessions, new contacts, and influenced contacts of campaigns

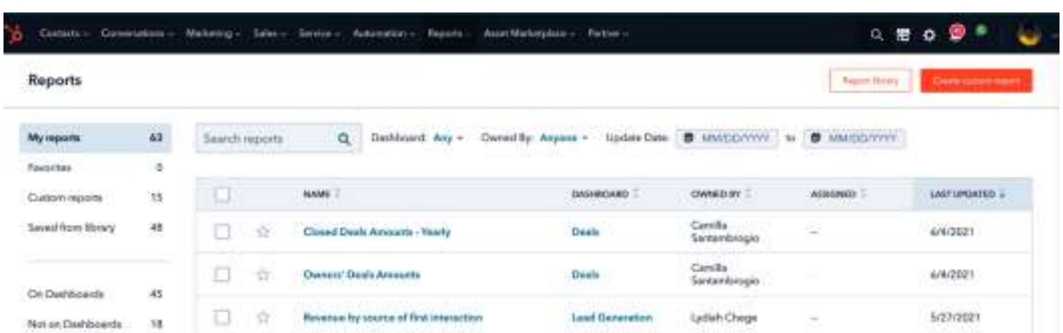


Figure 11.13 – Accessing the report library

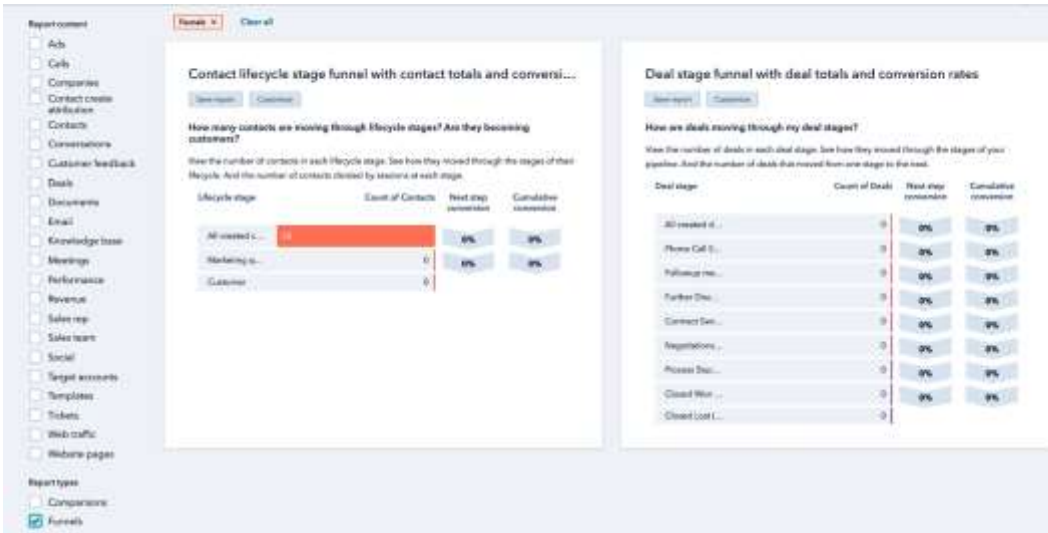


Figure 11.14 – Accessing the funnel reports

Figure 11.15 – Customizing the funnel reports

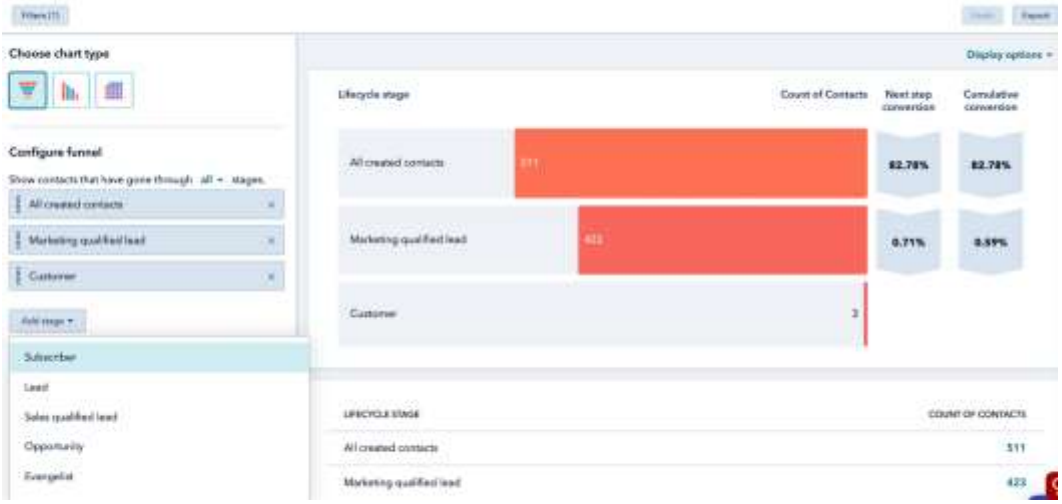


Figure 11.16 – Adding the life cycle stages to the reports

Figure 11.17 – Deciding whether to look at contacts who went through all stages or any stage

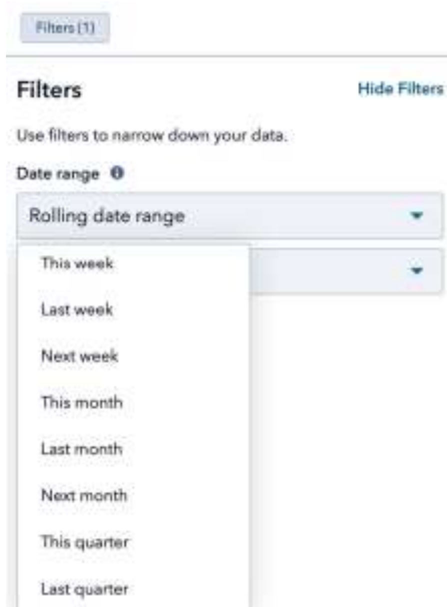


Figure 11.18 – Choosing a date range for your funnel report

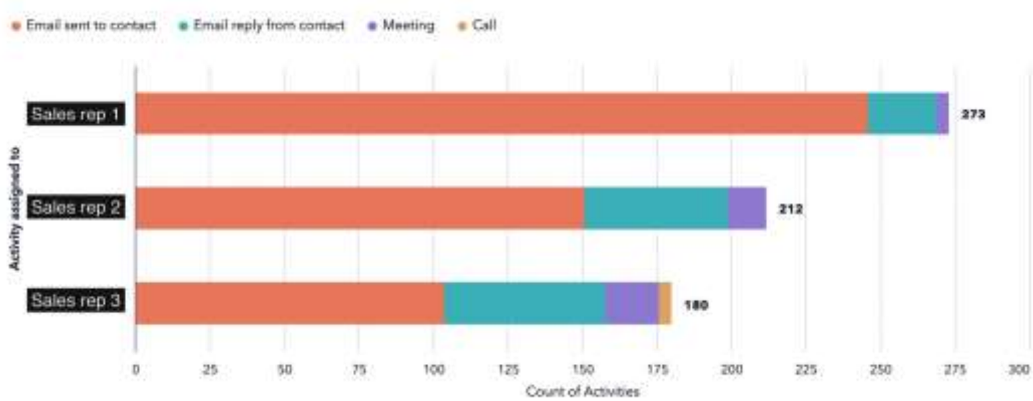


Figure 11.19 – Activity leaderboard – Sales representatives

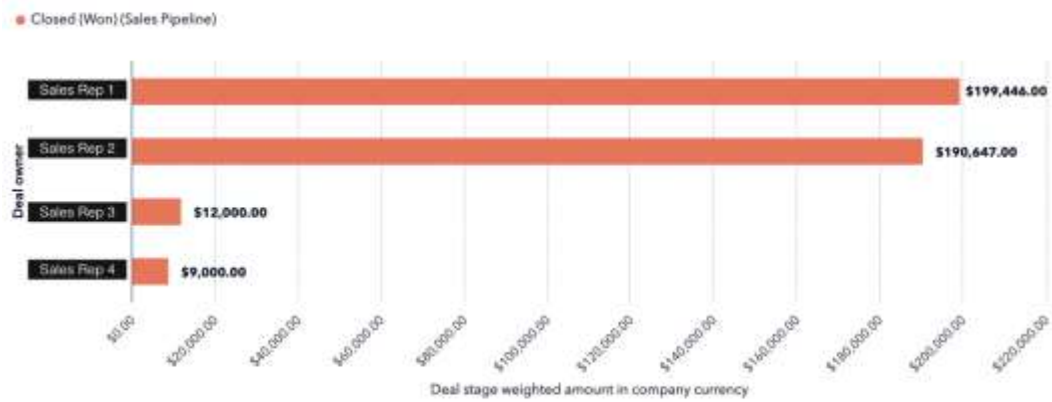


Figure 11.20 – Deal leaderboard – Sales representatives

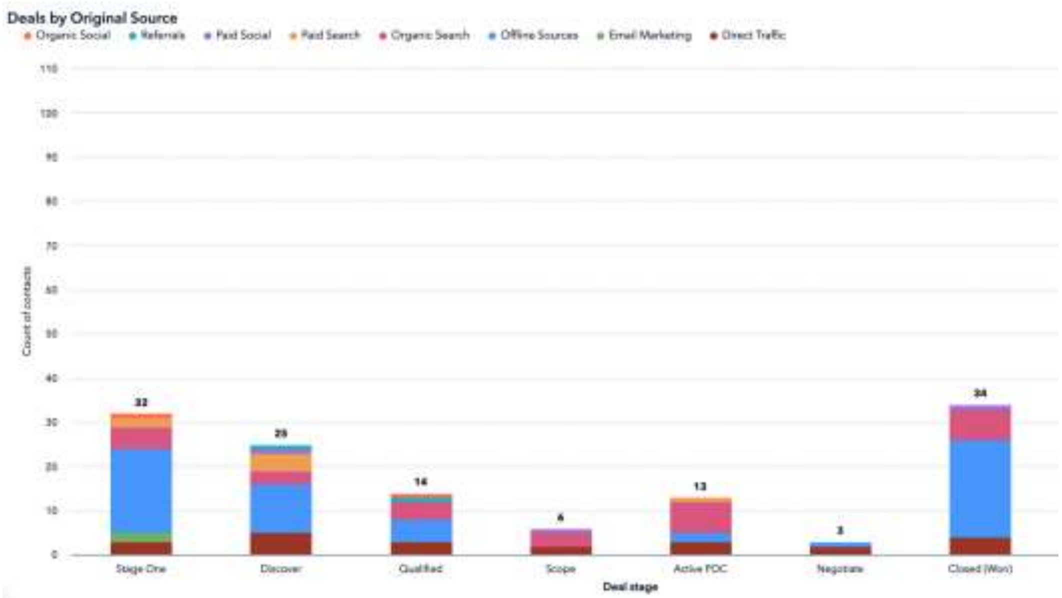


Figure 11.21 – Deals by Original Source

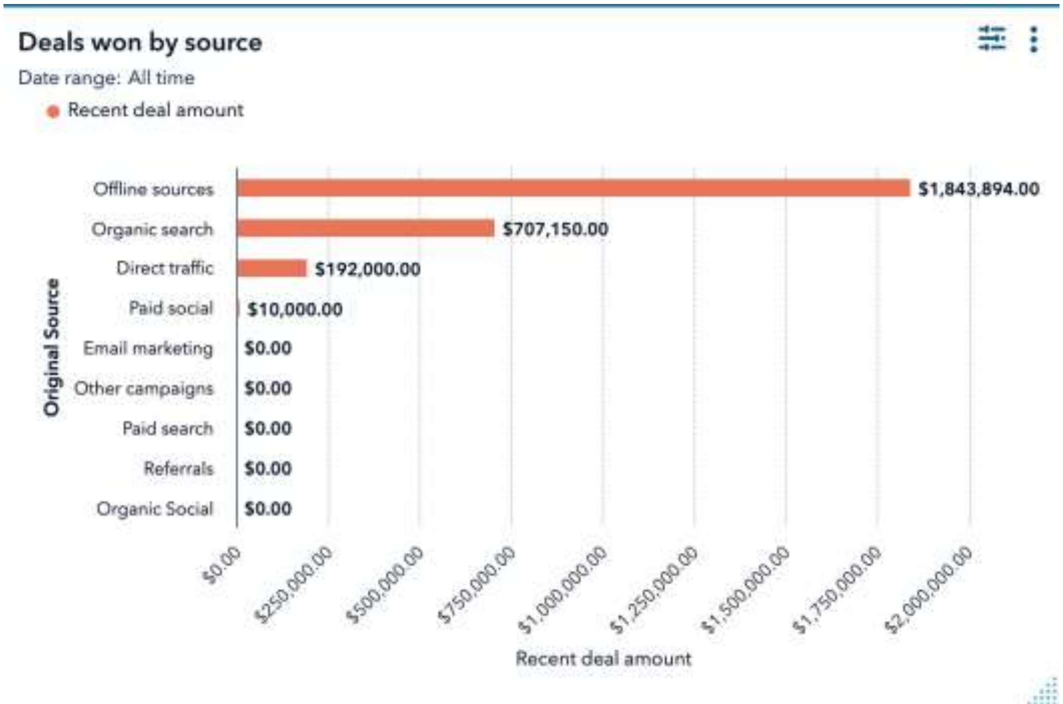


Figure 11.22 – Deals won by source

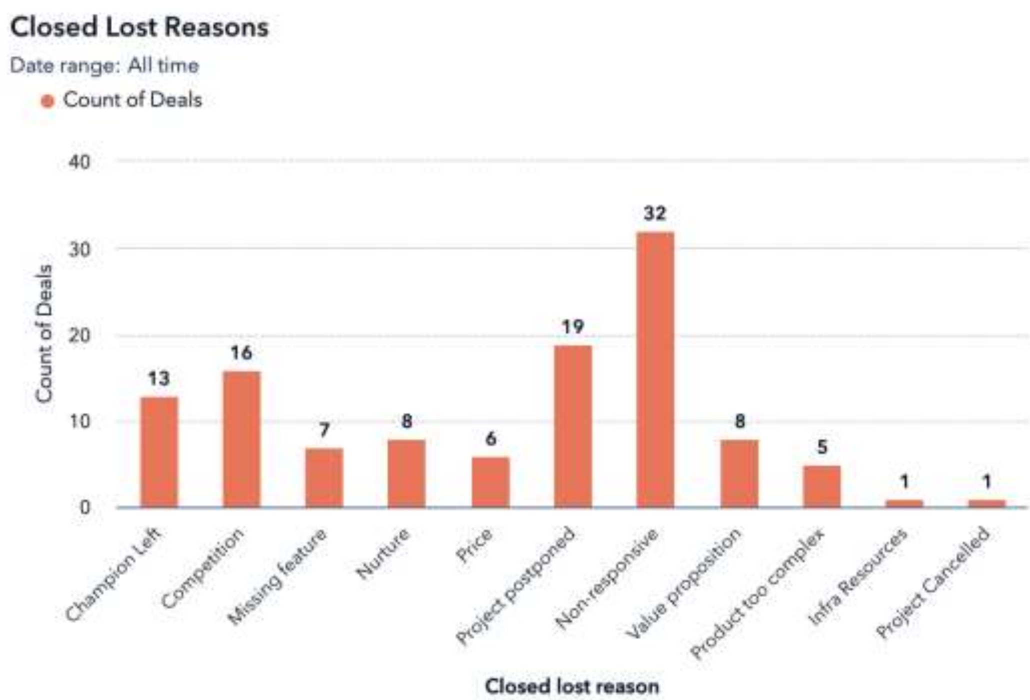


Figure 11.23 – Closed Lost Reasons

Figure 11.24 – Forecast revenue

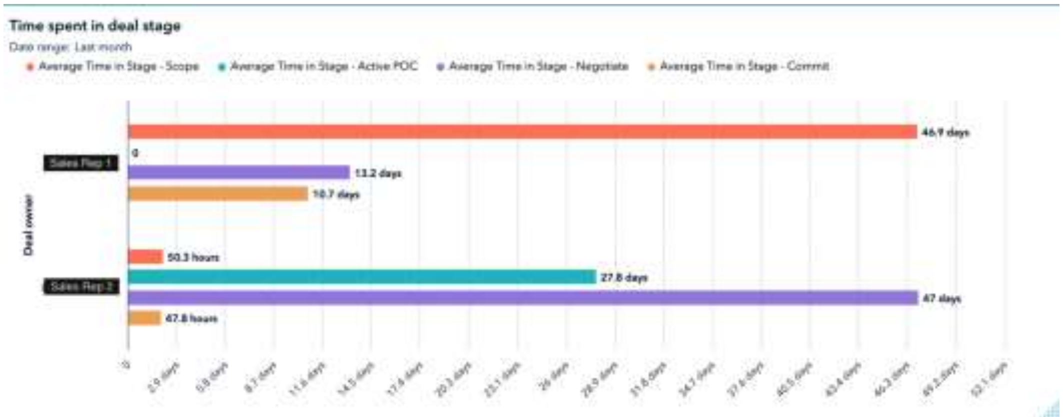


Figure 11.25 – Time spent in deal stage

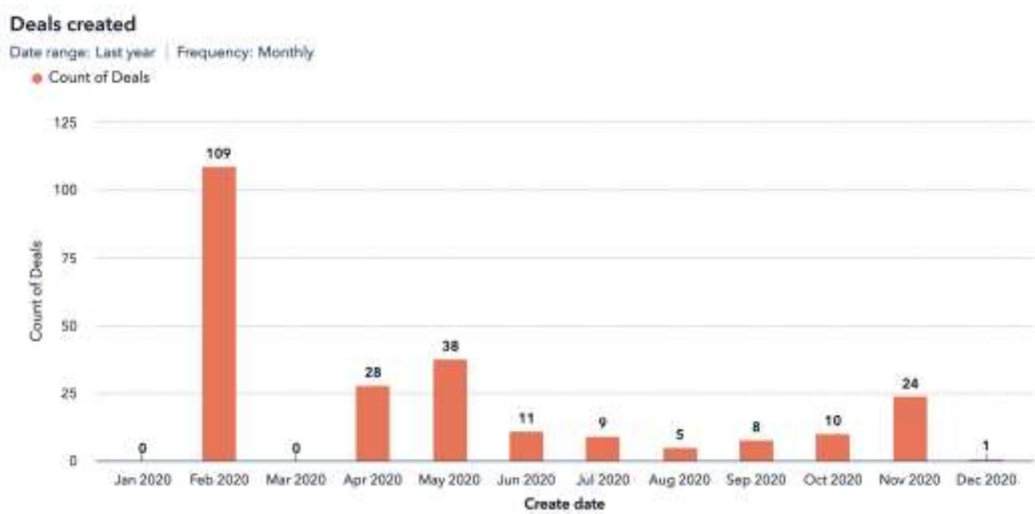


Figure 11.26 – Number of opportunities created in 2020

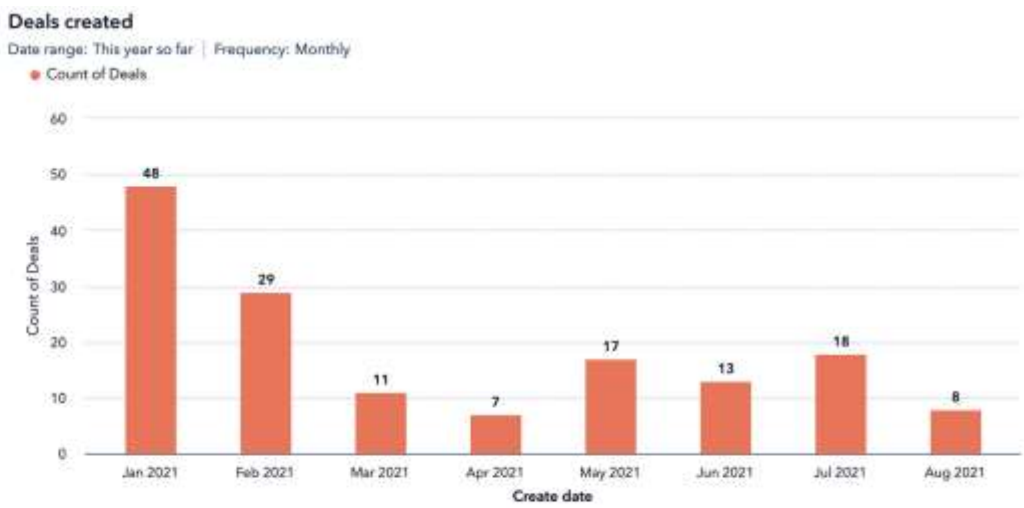


Figure 11.27 – Number of opportunities created in 2021 to date

Figure 11.28 – Deal Velocity

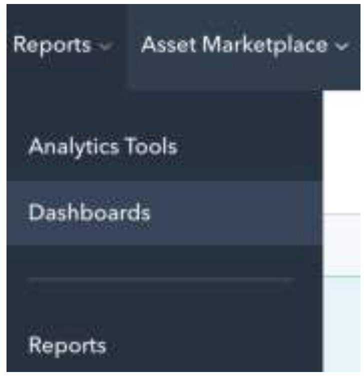


Figure 11.29 – Accessing the reporting dashboards

Figure 11.30 – Create dashboard

SOURCE	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
Paid social	7,280	13.94%	1,015	1.08%	11	86.15%	26 seconds
Organic search	39,399	1.16%	458	6.55%	30	70.05%	87 seconds
Direct traffic	30,495	1.21%	369	3.79%	14	61.4%	140 seconds
Paid search	30,876	1.07%	329	3.04%	10	85.05%	30 seconds
Referrals	36,940	0.3%	110	1.82%	2	94.82%	14 seconds
Organic social	3,253	3.2%	104	8.65%	9	74.52%	70 seconds
Email marketing	2,629	2.93%	77	7.79%	6	63.37%	51 seconds
Other campaigns	11,095	0.35%	39	7.69%	3	98.3%	4 seconds
Total	161,967	1.54%	2,501	3.4%	85	79.57%	60 seconds

Figure 11.31 – Traffic Analytics

Figure 11.32 – Deal revenue by source

Figure 11.33 – Contact funnel report

Questions

Understanding that reports are the bottom line for every decision made within a company, it would be remiss of me if you leave this chapter without ensuring certain principles have been understood. Here are a few questions to help you verify your understanding:

1. When preparing a reporting dashboard for your management team, which five reports would you include in this dashboard?

2. If you had to choose three marketing reports, which would you include to track how your efforts are contributing to deals?
3. How would you measure your contributions to the sales team's efforts?

Further reading

- *How to Build and Analyze Marketing Reports [Examples & Templates]*: https://blog.hubspot.com/marketing/running-marketing-reports-ht
- *How to Calculate ROI in Marketing [Free Excel Templates]*: https://blog.hubspot.com/marketing/how-to-prove-the-roi-of-your-marketing-slideshare
- *How to Create a Funnel Report [Quick Guide]*: https://blog.hubspot.com/marketing/funnel-reporting
- *6 Simple HubSpot Reports Your Dashboard Needs*: https://blog.hubspot.com/customers/6-simple-hubspot-reports-your-dashboard-needs
- *Building Custom Reports in HubSpot*: https://academy.hubspot.com/courses/building-custom-reports-in-hubspot?library=true&library=true&q=reports

Chapter 12

Images

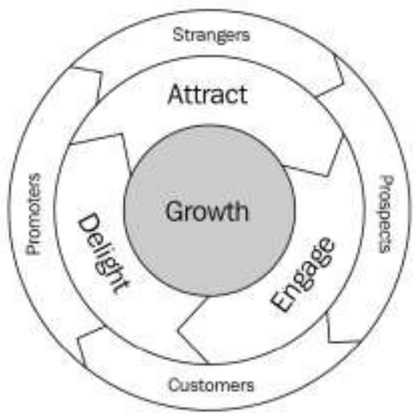


Figure 12.1 – The flywheel

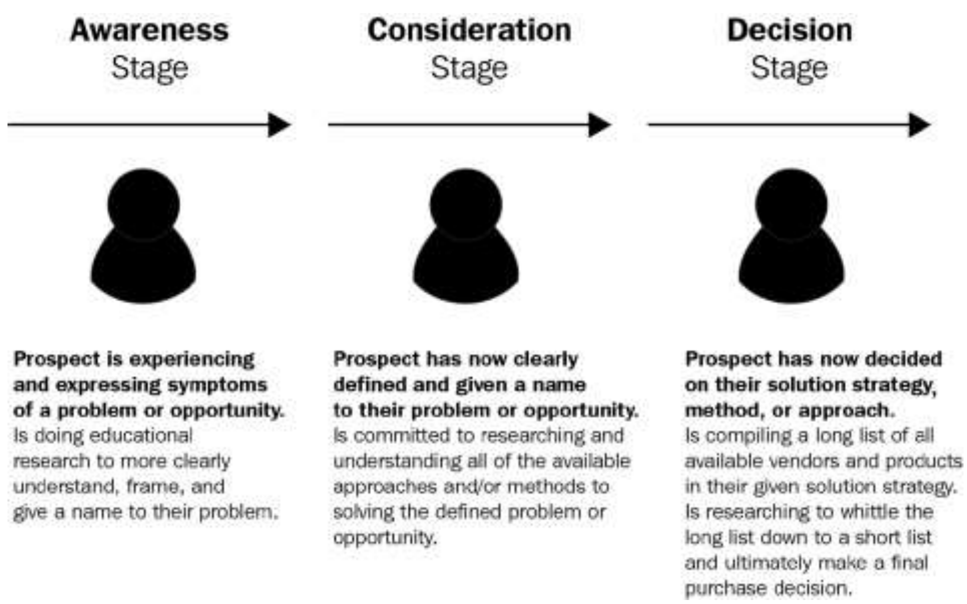


Figure 12.2 – The buyer's journey

Questions

To help you remember some key concepts and tips discussed in this chapter, here are a few review questions to consider:

1. What is the difference between inbound marketing and outbound marketing?
2. What are the three phases of the customer journey?
3. Can you suggest one tactic in each phase of the customer journey that your business can implement in the next 30 days?

Further reading

- *Inbound Marketing, Revised and Updated: Attract, Engage, and Delight* by Brian Halligan and Dharmesh Shah: https://www.amazon.com/Inbound-Marketing-Revised-Updated-Customers/dp/1118896653/ref=sr_1_1?crid=3BL8PCXCZZLKK&keywords=inbound+marketing+brian+halligan&qid=1638723261&sprefix=inbound%2Caps%2C691&sr=8-1
- *What Is Inbound Marketing?*: https://www.hubspot.com/inbound-marketing
- *Inbound Marketing vs. Outbound Marketing*: https://blog.hubspot.com/blog/tabid/6307/bid/2989/inbound-marketing-vs-outbound-marketing.aspx

Chapter 13

Images

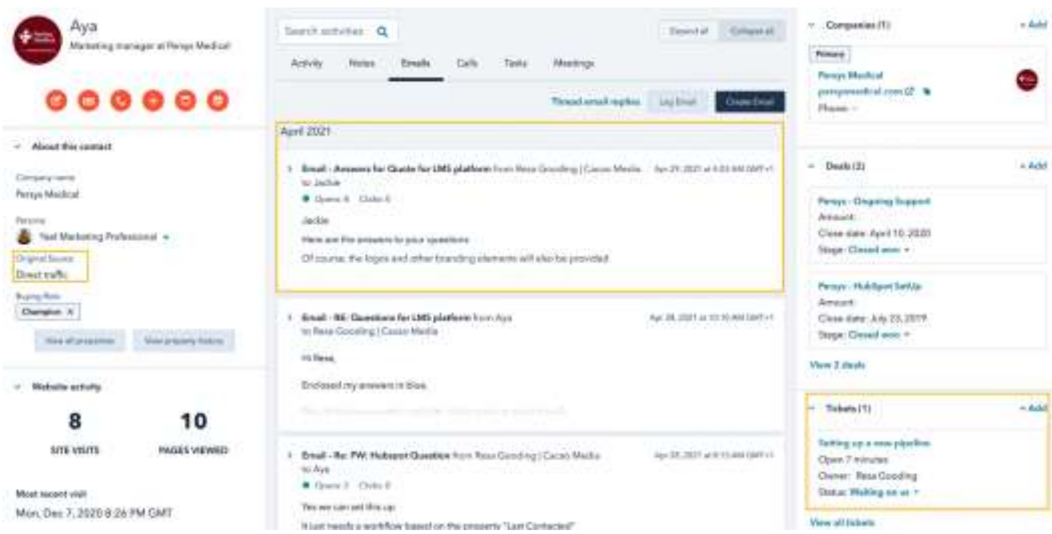


Figure 13.1 – HubSpot customer lifecycle view per contact

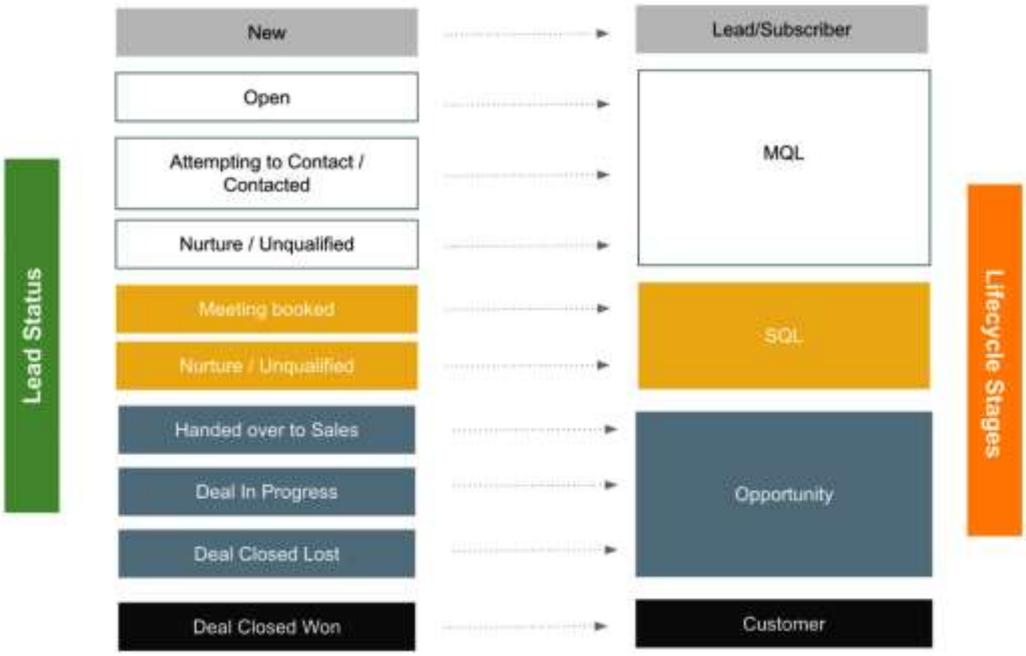


Figure 13.2 – Aligning lead status to lifecycle stages

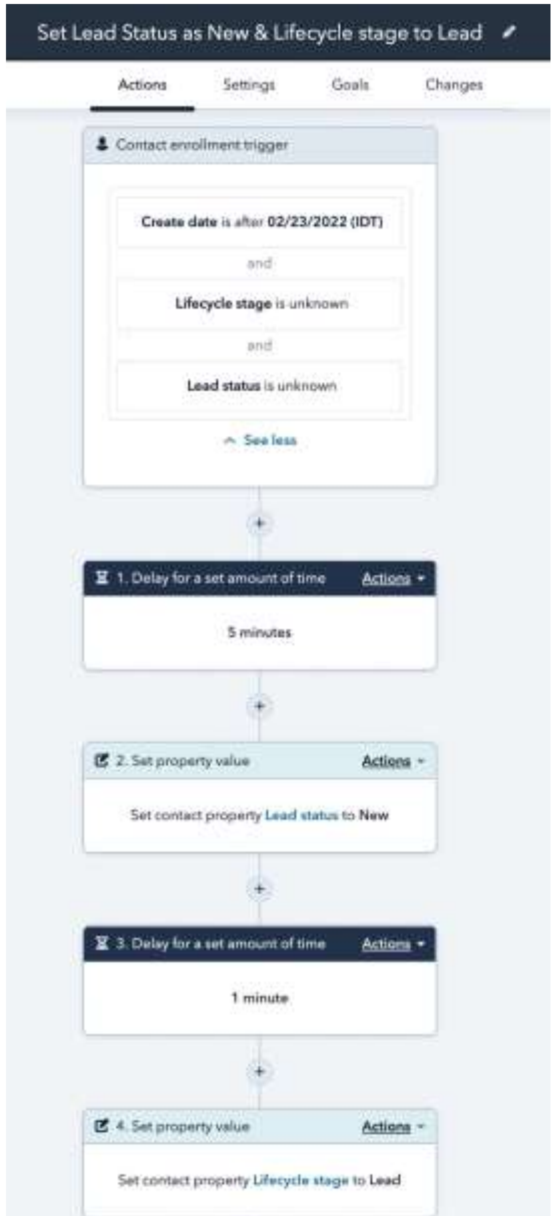


Figure 13.3 – Enrollment triggers for workflow when setting contacts as New

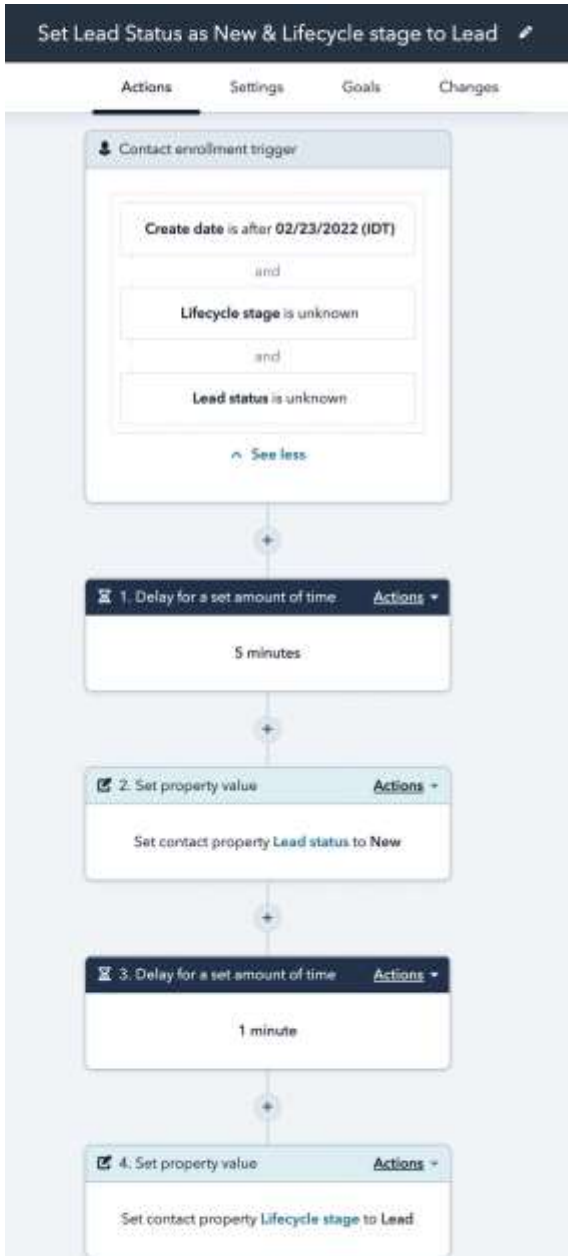


Figure 13.4 – Setting property values in workflows

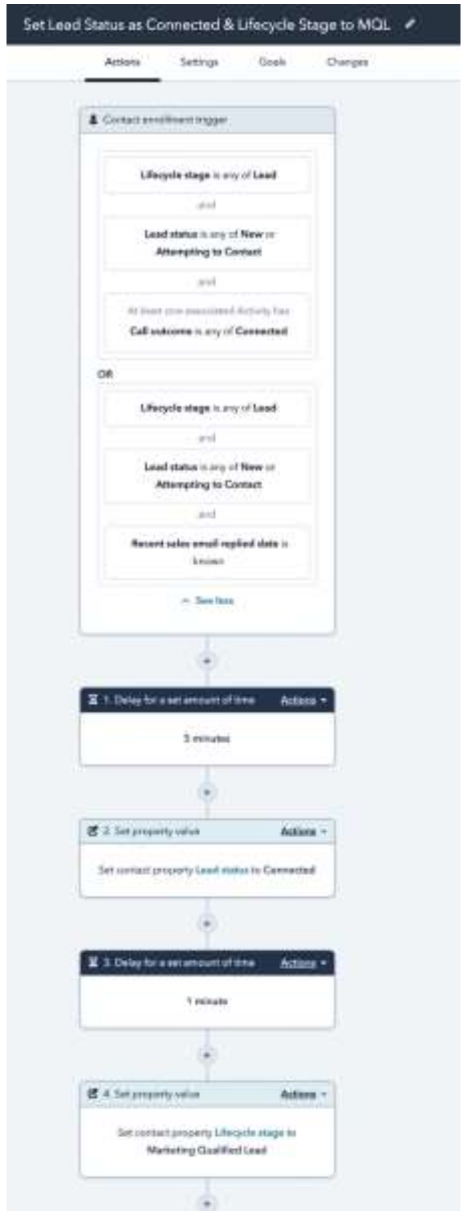


Figure 13.5 – Enrollment triggers for a workflow updating lead status to Connected

Figure 13.6 – Setting Lead status to Connected and Lifecycle stage to Marketing Qualified Lead

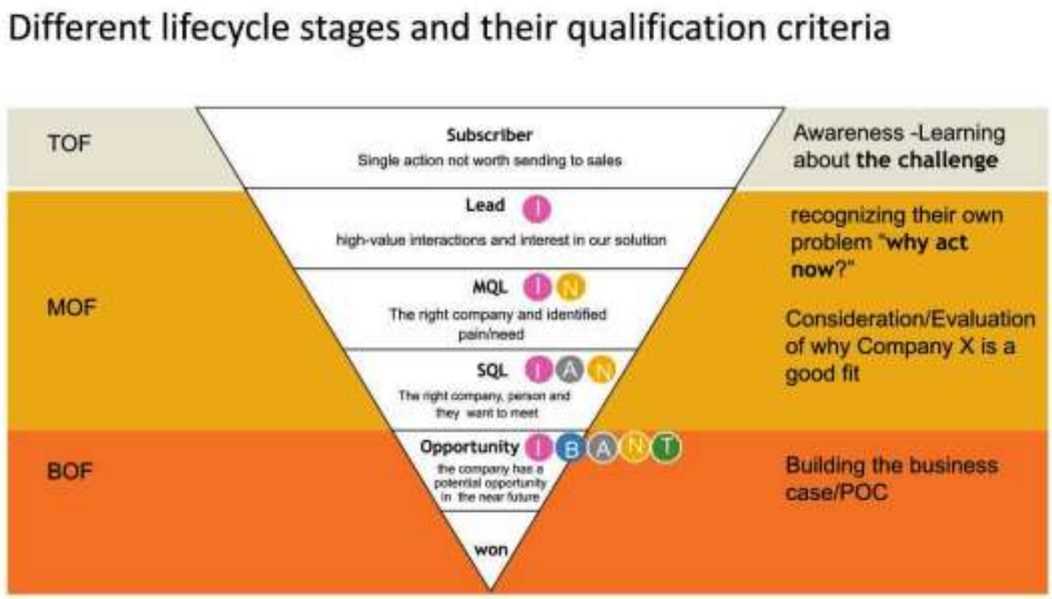


Figure 13.7 – Lifecycle stages mapped to the IBANT methodology

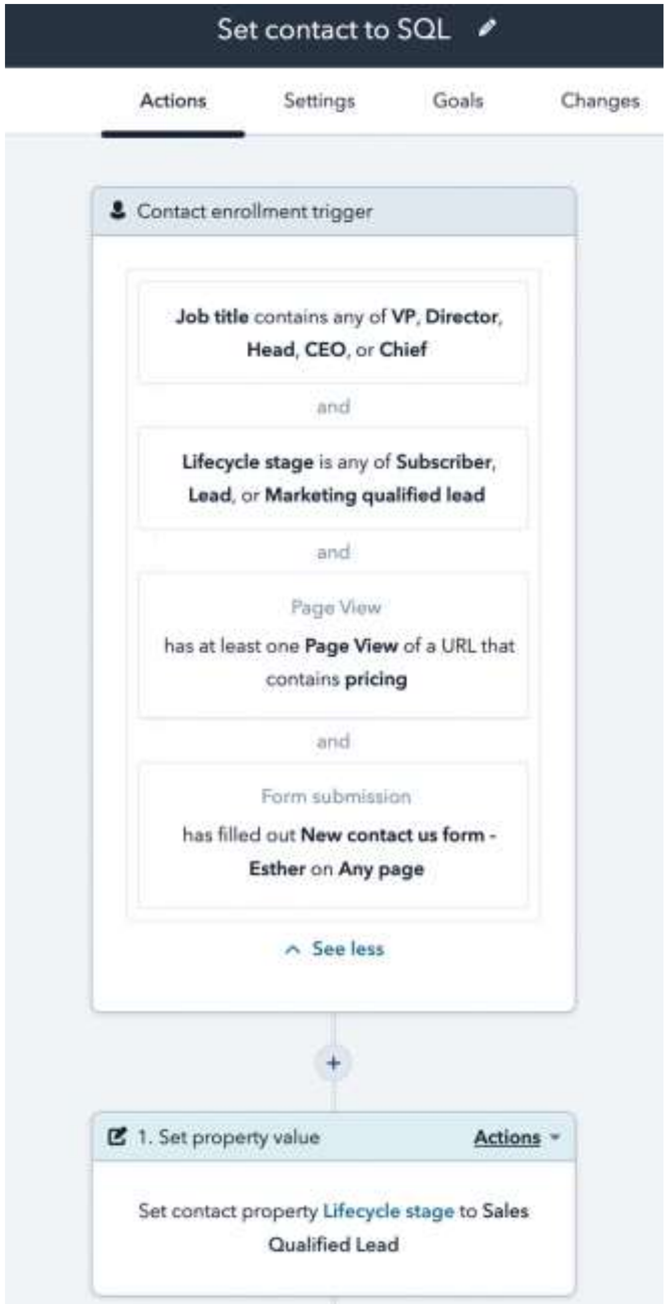


Figure 13.8 – Workflow for updating a contact to Sales Qualified Lead using a buyer-focused approach

Questions

Have a go at answering the following questions:

1. What is the difference between the funnel, the flywheel, and RevOps?
2. How does implementing a RevOps strategy improve alignment between marketing and sales?
3. Which metrics can you use to measure the speed of your flywheel?

References

- *The Flywheel*: https://www.hubspot.com/flywheel
- *How the Flywheel Killed HubSpot's Funnel*: https://blog.hubspot.com/marketing/our-flywheel?_ga=2.227119064.430926925.1652084970-1769221773.1652084970
- *Growing Your Business With a Flywheel Model*: https://academy.hubspot.com/lessons/flywheel?hsCtaTracking=12bfc6bc-820a-4ce1-b29a-e5e21549b948%7C1d137fed-f7d5-4d10-b7d7-9e0e0d0b920f
- *RevOps: The Modern Operating Model for Fast-Forward Organizations*: https://www.gartner.com/en/articles/revops-the-modern-operating-model-for-fast-forward-organizations
- *What Is Revenue Operations (RevOps)? A Complete Guide*: https://www.salesforce.com/resources/articles/what-is-revenue-operations/

Chapter 14

Images

Figure 14.1 – HubSpot pipeline

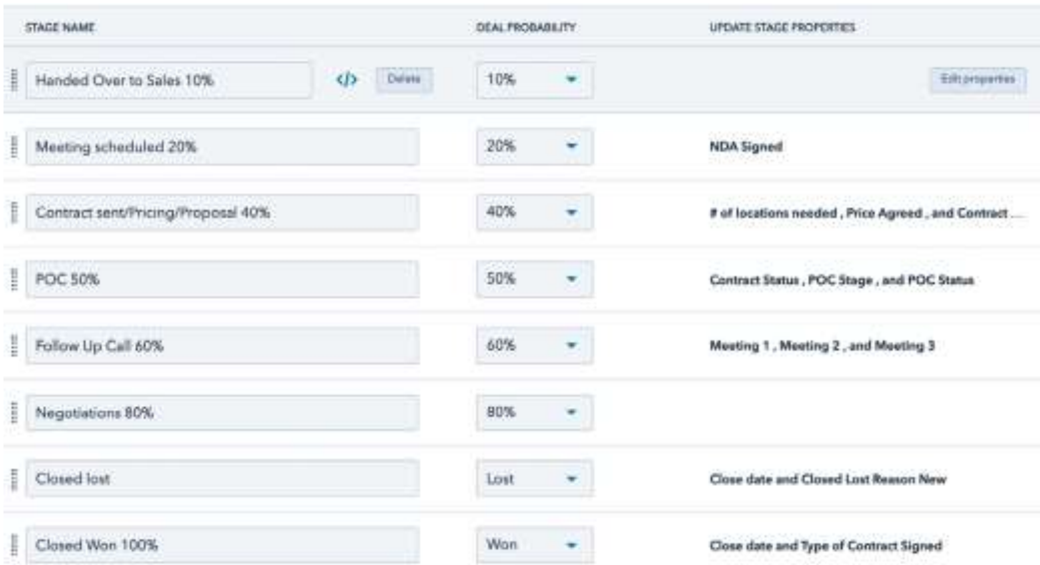


Figure 14.2 – HubSpot pipeline with conditions

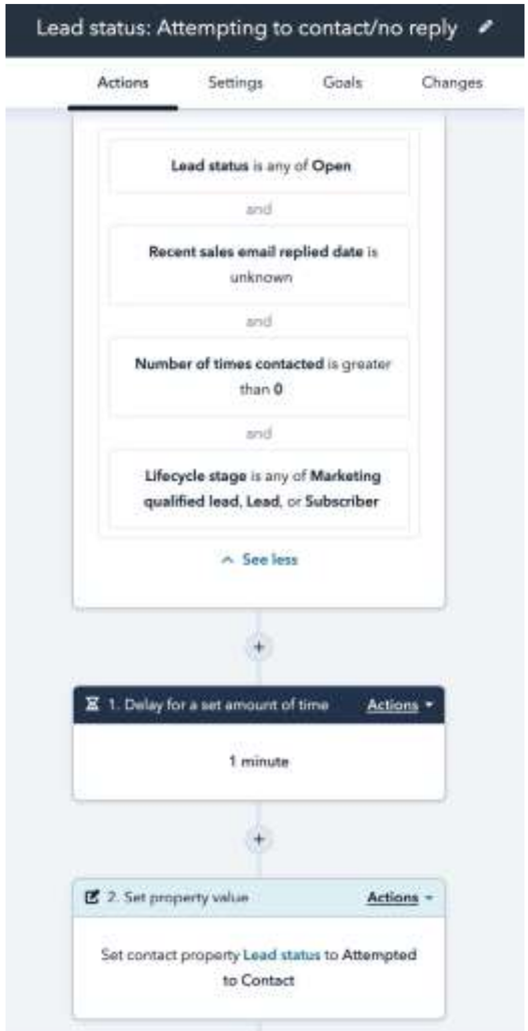


Figure 14.3 – Building a workflow to update lead status

Suggested Deal Stages for SaaS companies

(Free Trials / New Customers / Renewal Customers)

Free Trials & New Customers	Renewals
Demo Scheduled	Renewal Consideration
Demo Completed	Verbal Commit
Free Trial	Contracting
Review post free trial	Closed Won
Contract Sent	Lost (Churn)
Closed Won	
Closed Lost	

Figure 14.4 – Suggested deal stages for SaaS companies

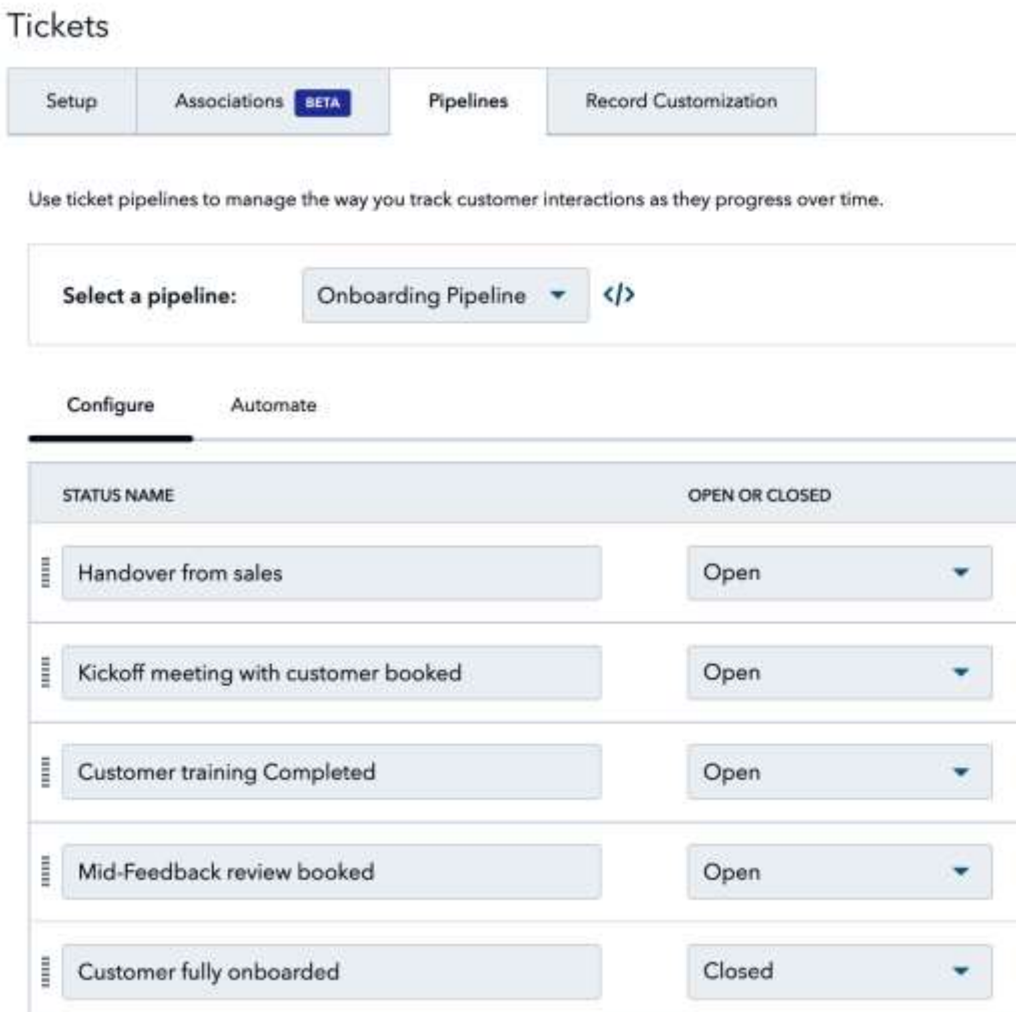


Figure 14.5 – Customer success pipeline in HubSpot Service Hub

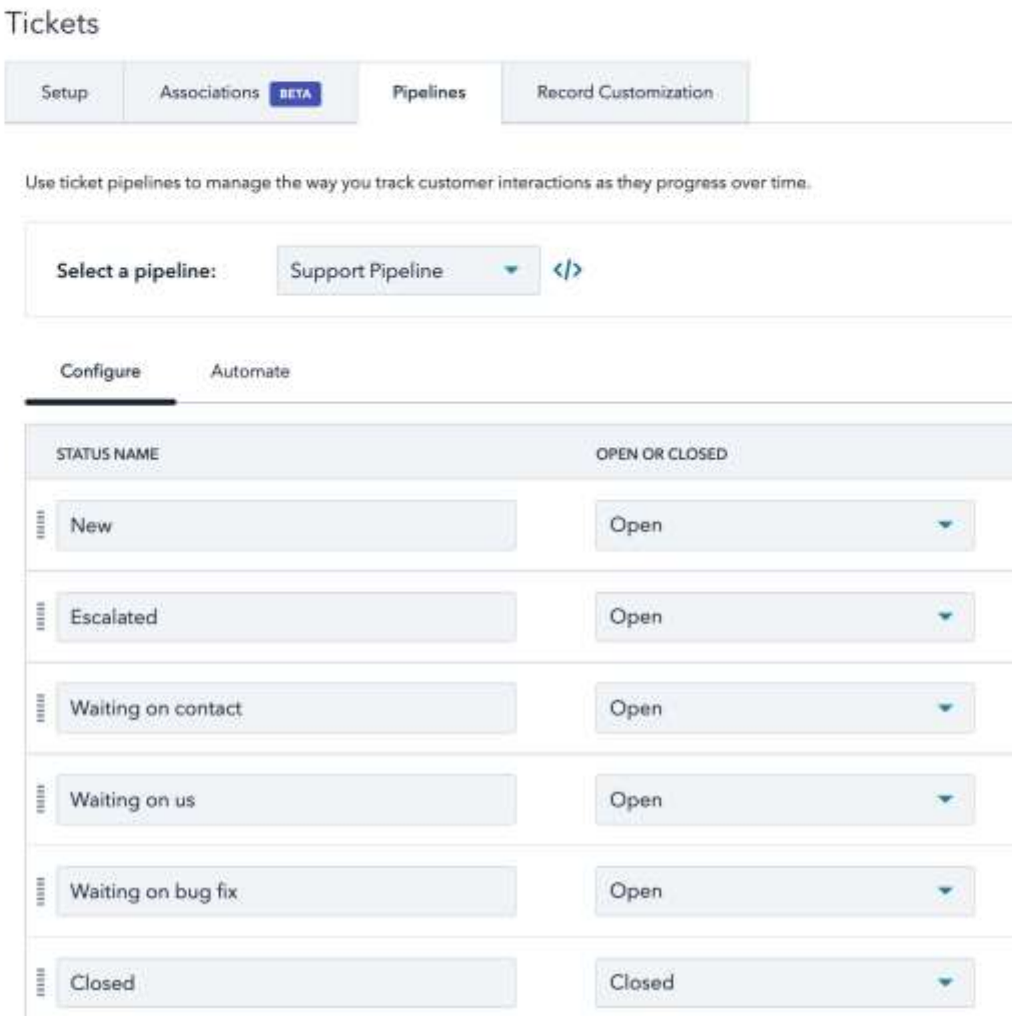


Figure 14.6 – Customer support pipeline in HubSpot Service Hub

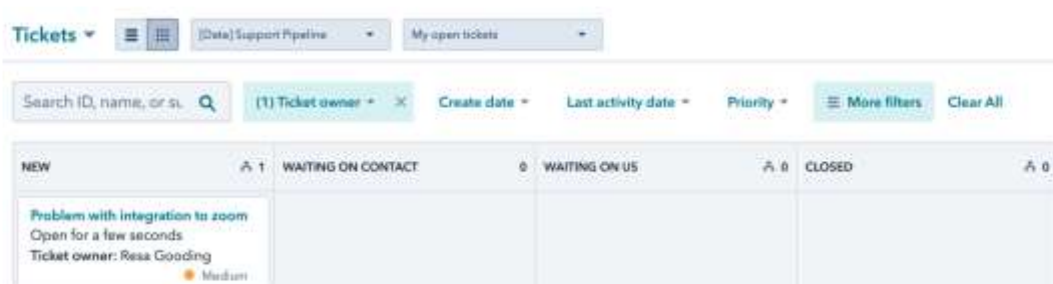


Figure 14.7 – HubSpot's ticketing pipeline

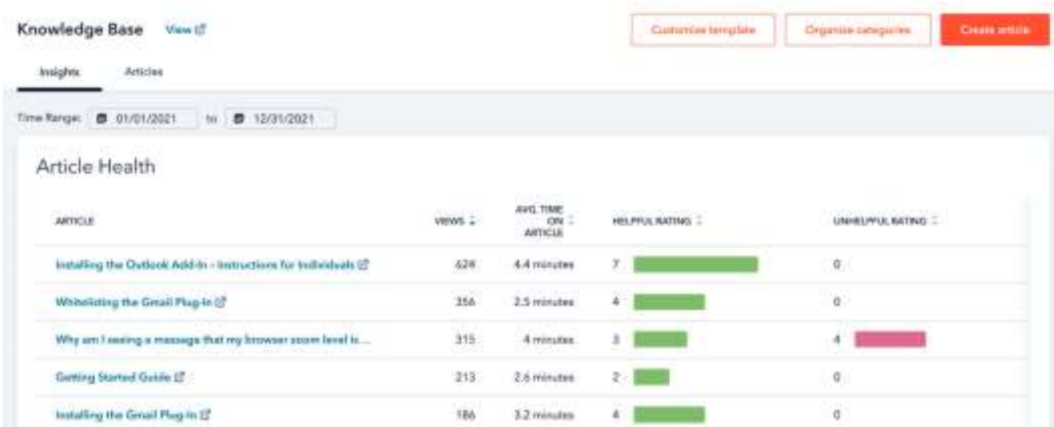


Figure 14.8 – An example knowledge base setup and statistics

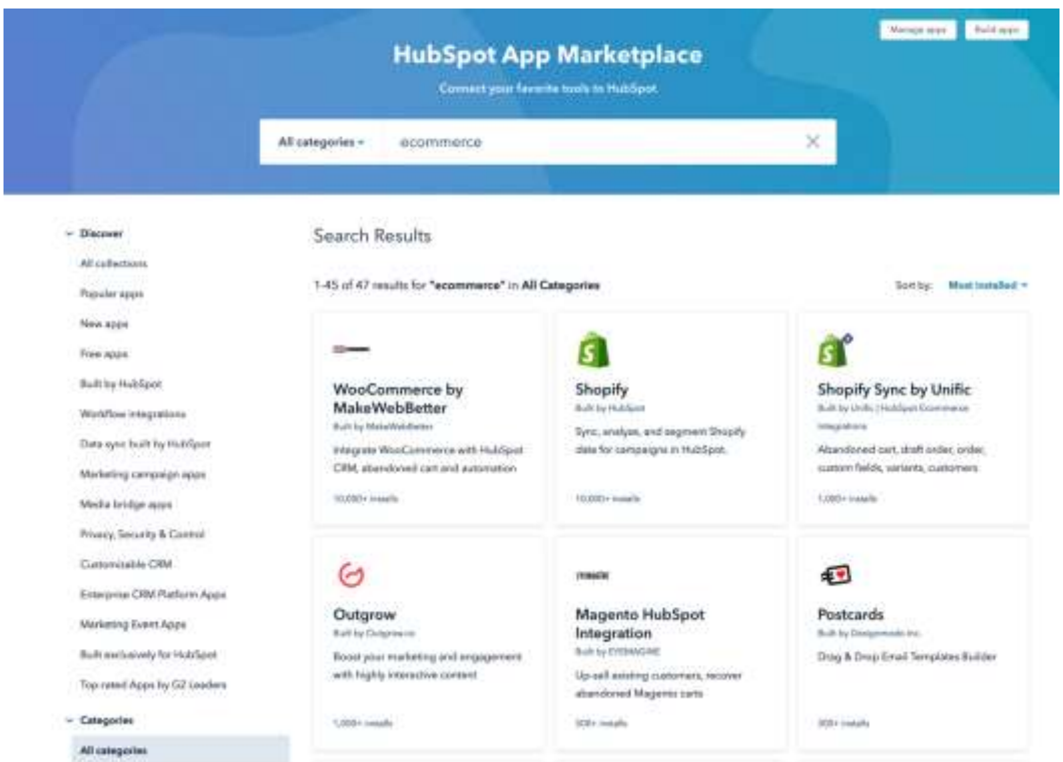


Figure 14.9 – HubSpot Marketplace – e-commerce integrations

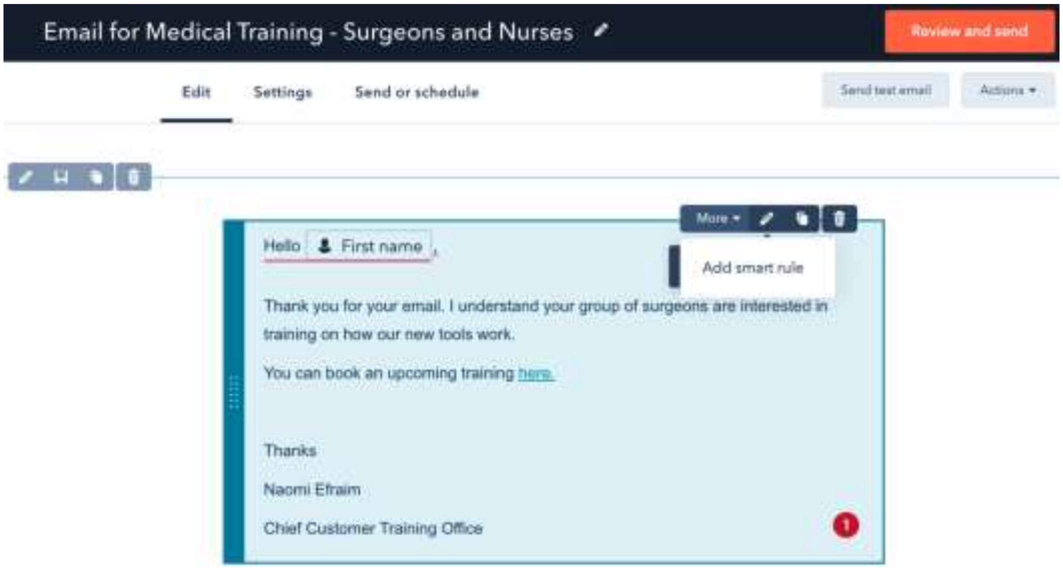


Figure 14.10 – Add smart rule

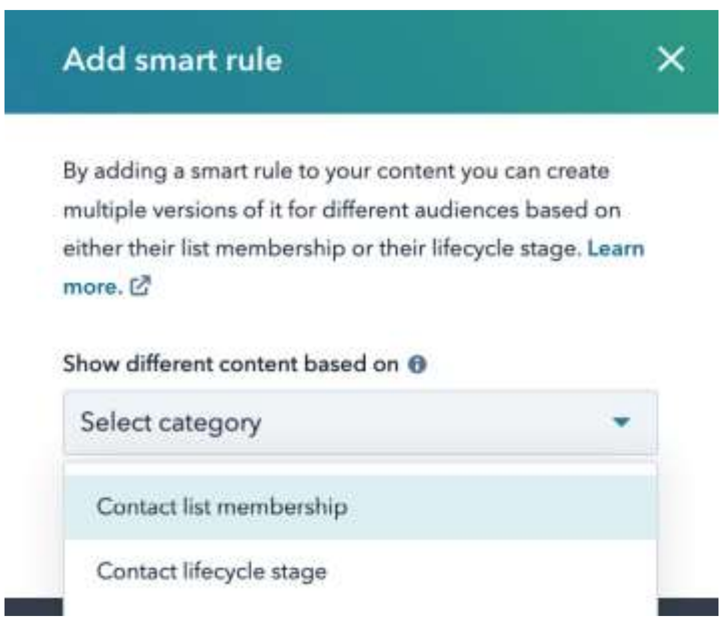


Figure 14.11 – Selecting a category for smart content

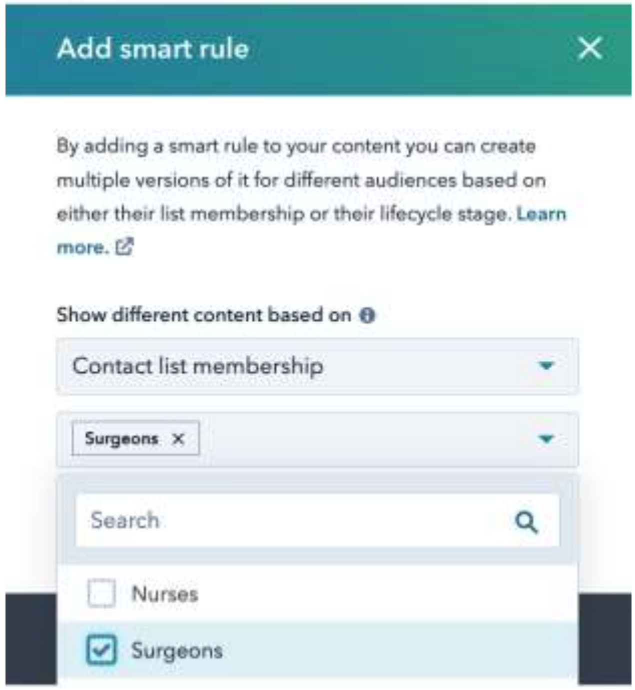


Figure 14.12 – Choosing a segmentation

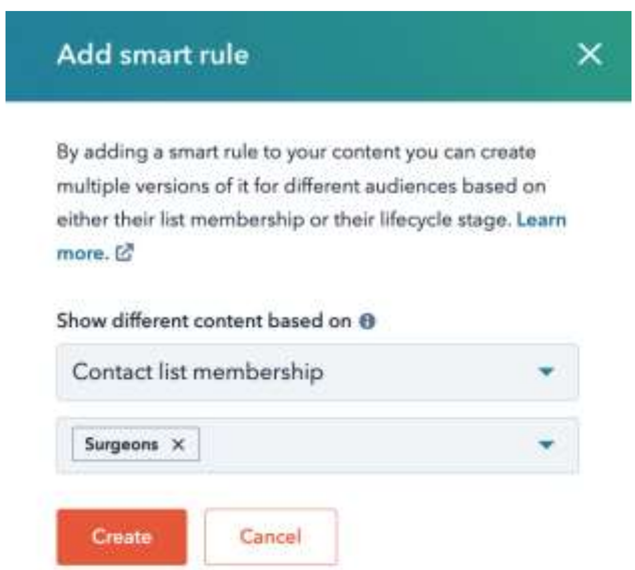


Figure 14.13 – Saving the chosen segmentation

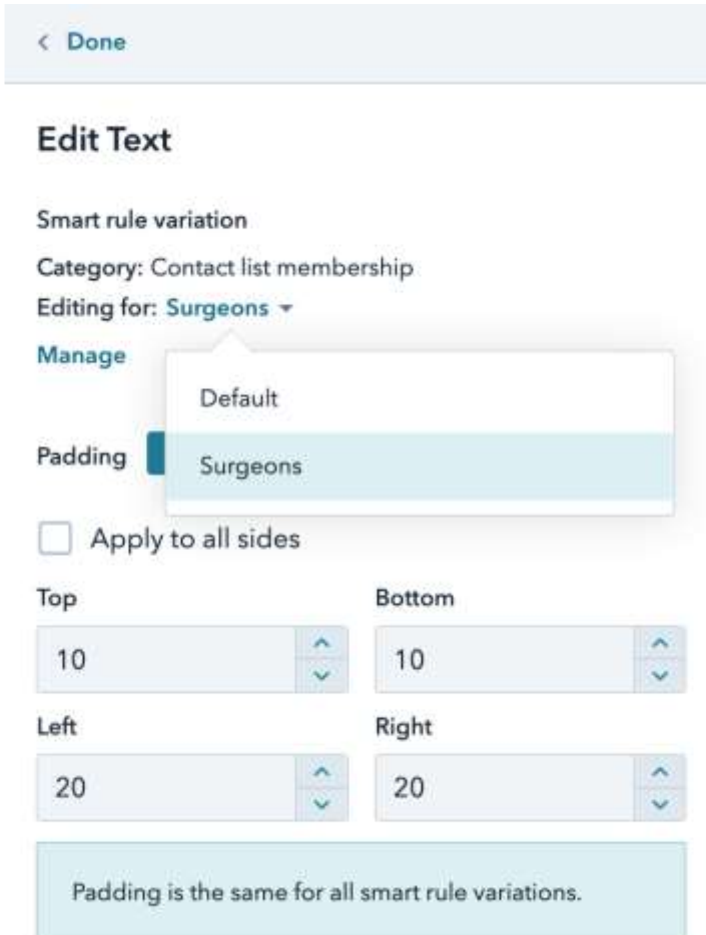


Figure 14.14 – Selecting the relevant category to edit text

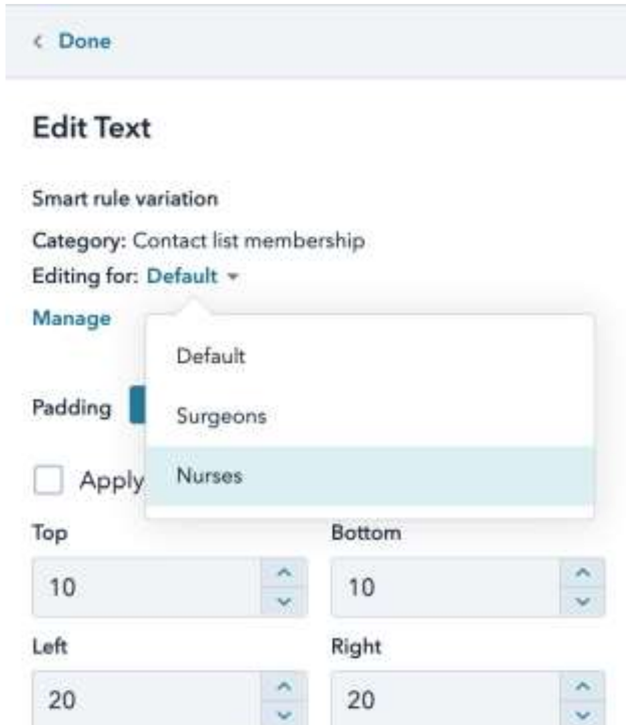


Figure 14.15 – Adding additional segmentations

Figure 14.16 – Editing text for surgeons

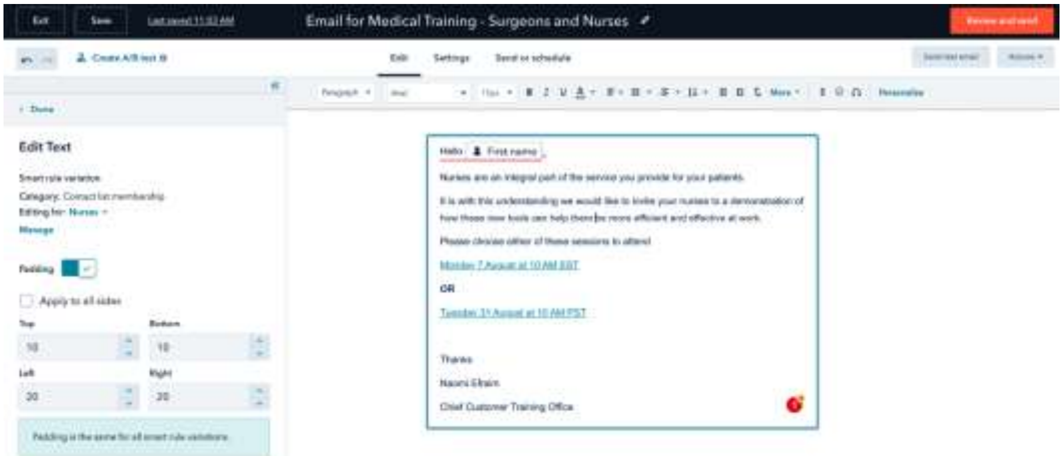


Figure 14.17 – Editing the text for Nurses

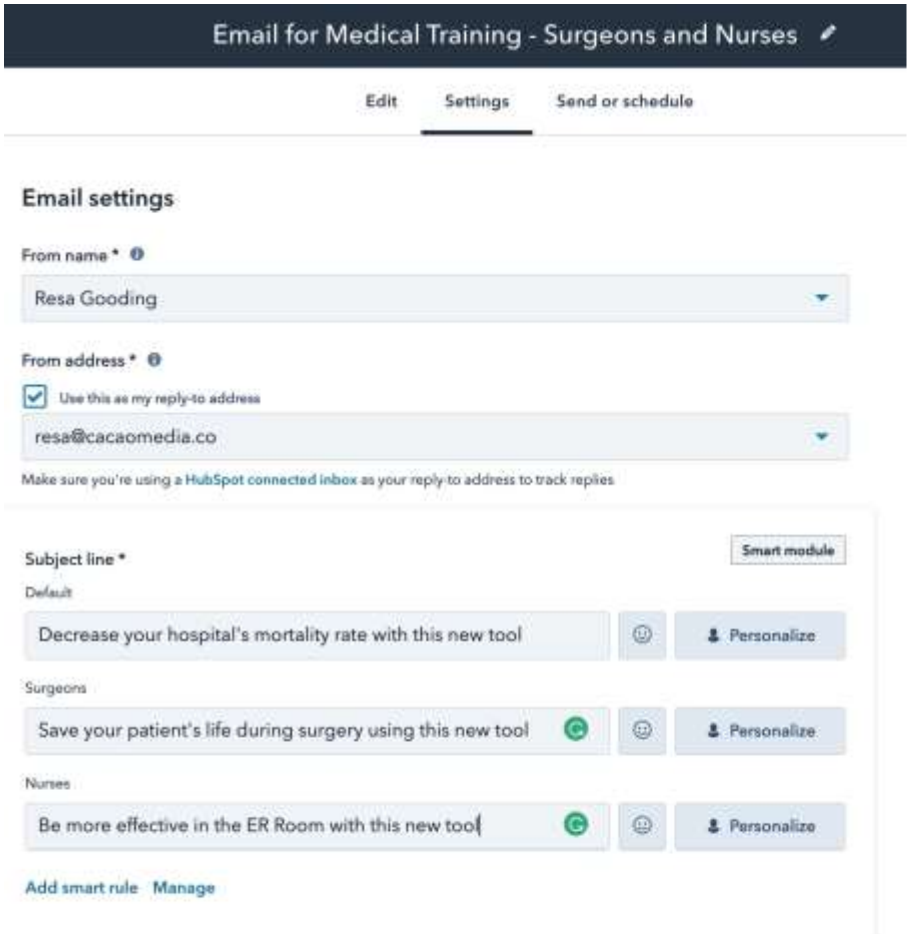


Figure 14.18 – Creating subject lines for each segmentation

Question

Try answering this question: What are some factors you can consider to determine whether HubSpot is right for your business?

Further reading

To learn more about the topics that were covered in this chapter, take a look at the following resources:

- *HubSpot for e-commerce*: https://www.hubspot.com/e-commerce-marketing
- *The Ultimate Guide to e-commerce*: https://blog.hubspot.com/marketing/e-commerce
- *Why HubSpot is a game-changer for healthcare marketing*: https://www.riverbedmarketing.com/why-hubspot-is-a-game-changer-for-healthcare-marketing/
- *Creating a successful inbound marketing strategy in the healthcare sector*: https://www.hubspot.com/case-studies/fatebenefratelli

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Assessments

This section contains the answers to the questions from all of the chapters.

Chapter 1, Overview of HubSpot – What You MUST Know

1. HubSpot is another content management platform in addition to a CMS platform (such as WordPress) that hosts your website. Therefore, you cannot use your regular domain, `www.yourwebsite.com`, to host these additional pages in HubSpot but must instead use a prefix, such as `info.yourwebsite.com` or `pages.yourwebsite.com`.
2. HubSpot uses Google Analytics to populate some of the information seen in the *Analytics* section. However, unlike Google Analytics, HubSpot can give you a further breakdown of exactly *who* came to your website and not just generic numbers.
3. You can visit the **Projects** tool in your portal. This is found by clicking your company name in the top-right corner of your portal and then choosing **Projects** in the dropdown menu.

Chapter 2, Generating Quick Wins with HubSpot in the First 30 Days

1. Analyze the top pages (besides your home page) that bring traffic to your website. Then, do a keyword search and optimize one or two pages with two to three keywords that have high search volume but low SEO difficulty.

2. Give part of something away that is valuable to your audience but invite them to contact you to get the rest of the information. Or, offer a free consultation instead of just inviting them to contact you.
3. Use progressive forms that will change the fields being asked each time a prospect revisits your website.

Chapter 3, Using HubSpot for Managing Sales Processes Effectively

1. Any of the following works:
    - What does the rep need to do to help the prospect move forward?
    - What indicates that the rep has completed their role in that phase of the buying process?
    - Is there any specific information they need to collect from the prospect?
    - Are there certain commitments they need to secure?
2. If you answer yes to any of the following questions:
    - Do you sell multiple products to various segments of your audience?
    - Do you sell across verticals?
    - Is your sales cycle drastically different from one territory to another or one type of customer to another?
    - Do you have distinct funnels?
3. To update other properties as deals progress through the pipeline, or to send internal email notifications for important updates so you don't have to spend time updating colleagues.

Chapter 4, Empowering Your Sales Team through HubSpot

1. Sequences.
2. Yes.
3. Using the **Document** tool allows you to see statistics on the engagement of the document, for example, how many pages the recipient read and how long they stayed on each page. In addition, if they try to forward the document to someone else on their team and you have turned on the GDPR options for the document, the second recipient will not be able to access the document without first entering their email address. This would then alert the sender that another person has accessed the document.

Chapter 5, Increasing Your Online Visibility Using HubSpot's SEO Tool

1. Change the country filter to your desired country.
2. HubSpot's SEO tool allows you to build a pillar and subtopics relational diagram that helps show you gaps in your content and SEO opportunities to maximize. You can then create content for topics or keywords that are frequently being searched for.
3. Semrush, Ubersuggest, and Moz.

Chapter 6, Getting Known through Social Media on HubSpot

1. LinkedIn and Facebook.

2. You should try to connect as many team members' profiles as they give their permission, as this helps increase the reach of your organic profile posts.

3. Lead source to deal conversion.

Chapter 7, Expanding Your Reach with Paid Ads Managed on HubSpot

1. Super Admin in HubSpot and Admin in the Ad accounts.

2. No. Only individual Ad accounts can be connected to HubSpot.

3. At least 300.

Chapter 8, Conducting a Portal Audit

1. A portal audit helps you to identify issues or gaps in the maintenance of data or the current structure of the portal in terms of naming conventions and your inability to find important information.

2. You should first check that your website is connected to HubSpot. This sometimes gets disconnected if there was a recent website redesign or upgrade. To fix this, you would need to reconnect the domains to HubSpot.

3. You should start with understanding the missing gaps in your data. In other words, what information is needed for the report to be generated but isn't currently being collected? Also, looking at how properties are built. If most properties are single-line text and not drop-down, then it is harder to pull the information in reports, so these properties would need to be rebuilt.

Chapter 9, Converting Your Visitors to Customers

1. ReCAPTCHA and GDPR in the **Form** tool.

2. Top-performing landing pages usually have the following five features:
    - A headline text.
    - An explanatory subtext.
    - A form.
    - An image or video.
    - And, in most cases, there is no navigation bar.
3. By turning off the re-enrollment button found in the enrollment trigger of the workflow.

Chapter 10, Revive Your Database with HubSpot Email Marketing Tools

1. Here are the elements needed to build an effective email strategy:
    - Your goals
    - Your audience
    - Content
    - Schedule of sending
    - Reporting
2. Yes, using the integration with Canva
3. Any of the following can work:
    - Pay attention to the subject lines and ensure they are short but click-worthy.
    - Keep the content short. Any email that is over 60 words must offer great value and not just be a long-winded sales pitch.

- Use personalization wherever possible – in the subject line, in the preview of the text, in the body of the email, and, of course, in the salutation.
- Try not to add too many links to the email that take users to different content.
- Ensure the links are relevant to the action you want the contacts to take.

Chapter 11, Proving That Your Efforts Worked Using the Reports

1. Management typically cares about these five reports:
    - Revenue forecast
    - Deal time spent in each stage
    - Number of opportunities created
    - Deal velocity
    - Deal revenue by source
2. Three reports that show marketing influence on deals are as follows:
    - Opportunities by Original Source
    - Deals Won by Source
    - Lead to Opportunity Rate
3. The number of opportunities marketing helped generate for them or the number of deals won that were influenced by marketing efforts.

Chapter 12, Inbound or Outbound – Which Is Better for Your Business?

1. Inbound marketing is when the buyer finds the seller through their own efforts and initiates contact. Examples of inbound tactics are SEO and social media. Outbound is when the seller initiates the sale with the buyer. Examples include billboards, and TV or radio advertisements.
2. Attract, Engage, Delight.
3. A typical answer can include the following:
    - Attract: Promote an offer on social media.
    - Engage: Build an email nurture to further engage those who converted from the offer.
    - Delight: Follow up with customers to get a testimonial from them that can be used on your website

Chapter 13, Leveraging the Benefits of the Marketing Flywheel

1. The funnel is a more linear approach to tracking how many prospects came in from the top and eventually channeled their way to the bottom of the funnel until they became customers. The Flywheel uses the energy of the interactions with customers to generate more customers. RevOps reduces friction and ensures the customers and prospects have a seamless experience when interacting with your company by ensuring all technical and foundational aspects for each team are well connected and transparent.
2. It facilitates the connectivity of the various systems each department uses and how they each reflect the information needed in order to deliver an outstanding customer experience

3. Some metrics to measure the speed of the Flywheel are as follows:

   - Website traffic
   - Intent to purchase
   - Actual purchase
   - CSAT score

Chapter 14, Using Hubspot for All Types of Businesses

Some factors to consider before implementing any CRM system are as follows:

- Ease of use
- Adoption
- Budget
- Connectivity
- Scalability