

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

Chapter 1

Images

< Back to branding

My brand kit

Set your logo and colors for tools where you can show your branding. These settings will help you quickly choose brand options when creating public facing content.

Logo Colors Themes

Logos

▼ Cacao Media Hubspot Diamond Certified Partner (default)

Logo name *
Cacao Media Hubspot Diamond Certified Partner

Logo alt text
Cacao Media Hubspot Diamond Certified Partner

Logo URL ⓘ
www.cacaomedia.co

Width
640 Height
237

A screenshot of the HubSpot branding kit interface. It shows a logo configuration section with fields for 'Logo name' (Cacao Media Hubspot Diamond Certified Partner), 'Logo alt text' (Cacao Media Hubspot Diamond Certified Partner), 'Logo URL' (www.cacaomedia.co), and dimensions 'Width' (640) and 'Height' (237). To the right, there is a preview area displaying the logo with the text 'MEDIA' above 'cacao' in a large, bold, sans-serif font.

Figure 1.1 – Adding your branding assets to HubSpot

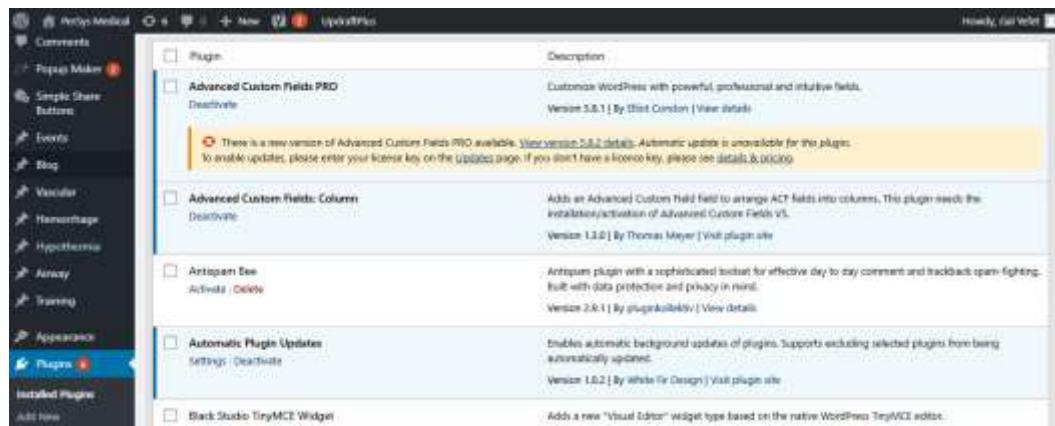
A screenshot of the WordPress Plugins page. The sidebar shows various site sections like Comments, Posts, Pages, Events, Blog, Visuals, Hemorragie, Hypothemia, News, Training, Appearance, and Plugins. The Plugins section is selected and shows a list of installed plugins. One plugin, 'Automatic Plugin Updates', is highlighted. Its details are shown in a box: it's version 1.0.2 by White Fir Design, it's active, and it enables automatic background updates of plugins while excluding selected ones. A note indicates that automatic updates are unavailable for this plugin unless a license key is entered.

Figure 1.2 – WordPress plugins

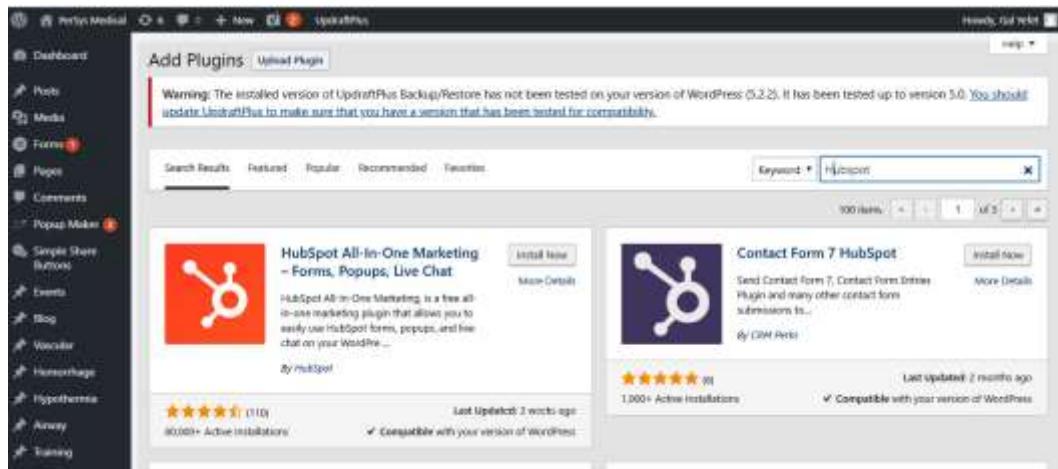


Figure 1.3 – HubSpot plugin

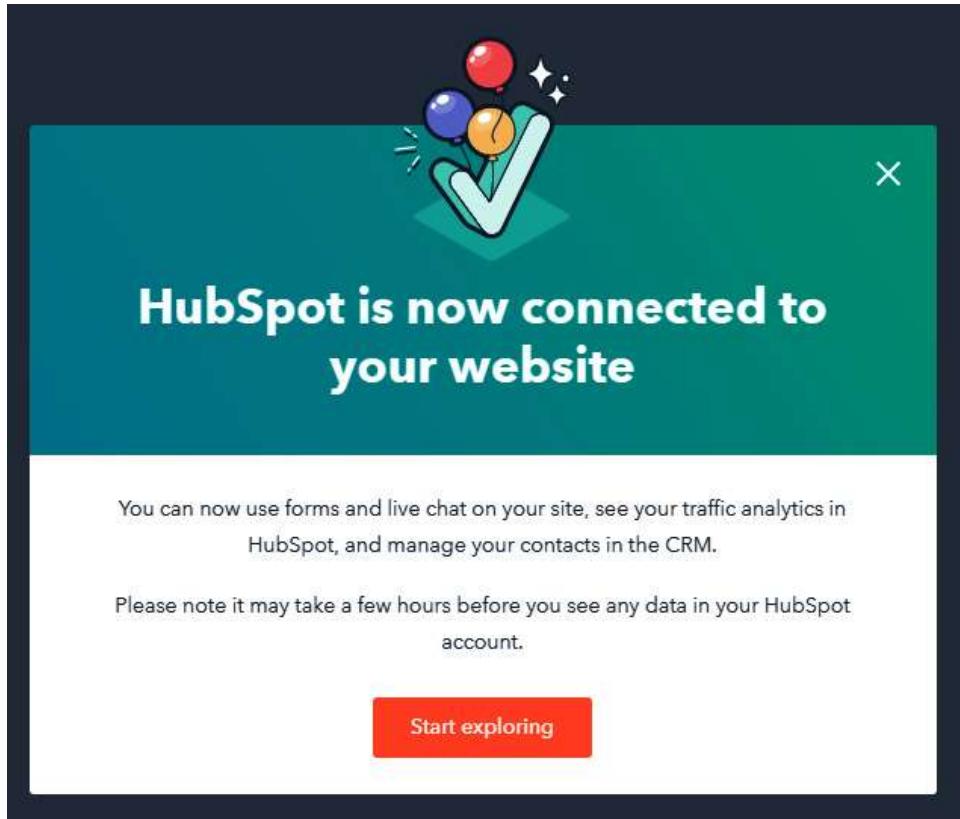


Figure 1.4 – Success screen: your website is now connected to HubSpot

Pages

Choose a domain to edit its settings: [Manage domains](#)

Default settings for all domains <[Edit](#)>

These settings are applied to all your domains by default. To change a setting for a single domain, choose that domain above.

Templates Branding Personalization Integrations SEO & Crawlers System Pages

Tracking integrations

Integrate with Google Analytics [?](#)

Enter your Google Analytics tracking ID

UA-118903541-1

Figure 1.5 – Installing the Google Analytics tracking code



Figure 1.6 – Exclude Traffic screen

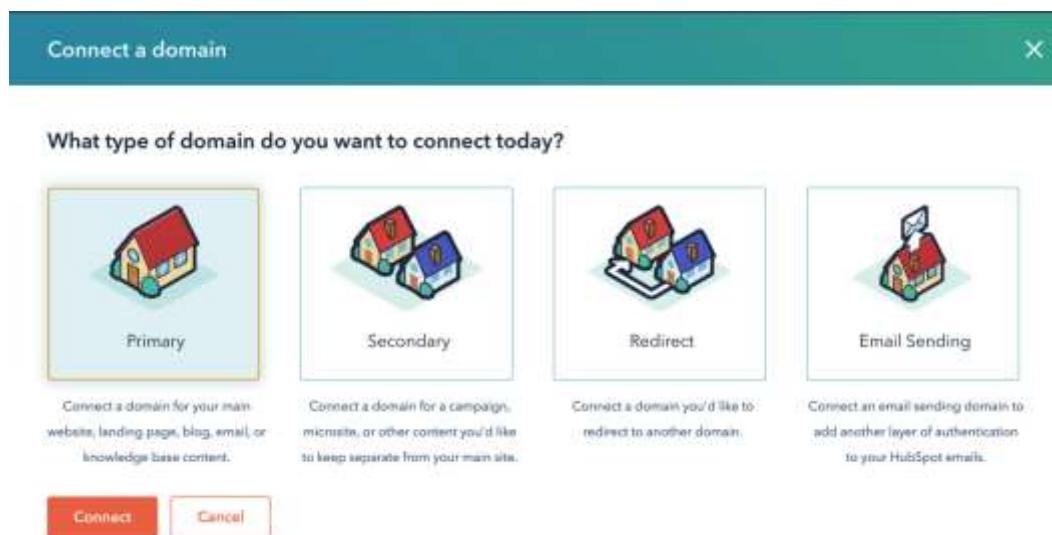


Figure 1.7 – Connect a domain screen

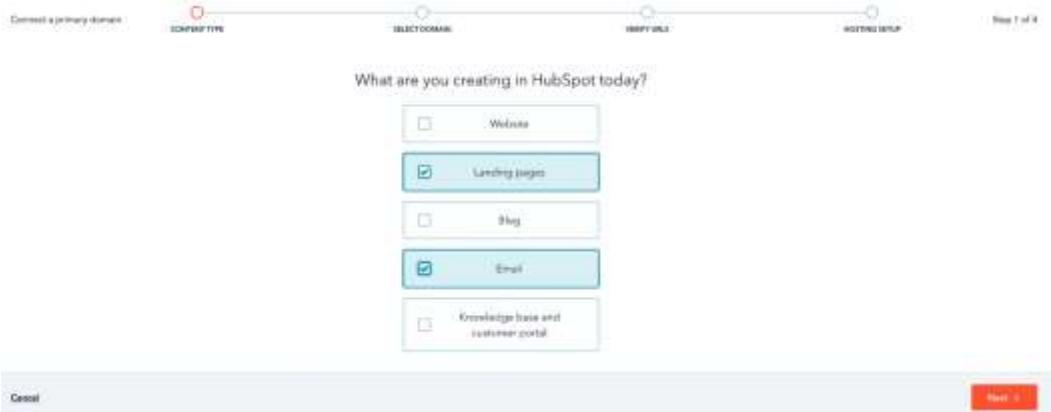


Figure 1.8 – Choosing content type

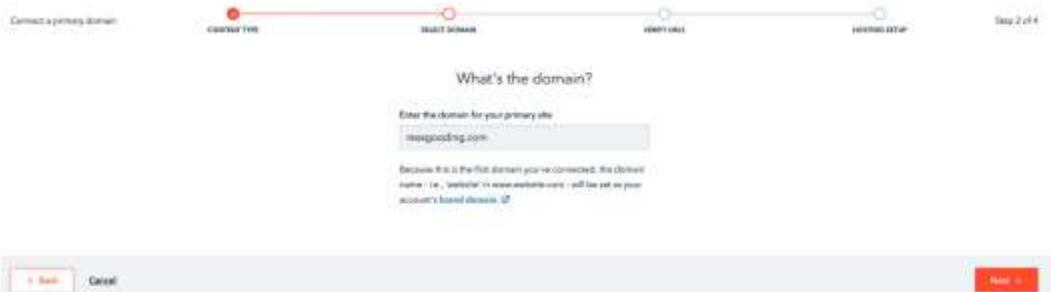


Figure 1.9 – Entering your root domain

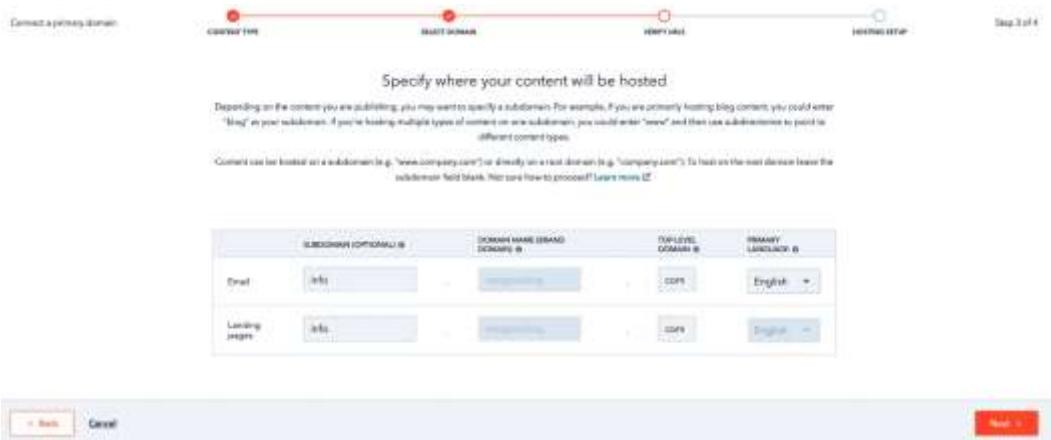


Figure 1.10 – Entering information for your subdomain



Figure 1.11 – Verifying your URLs



Figure 1.12 – Setting up your host



Figure 1.13 – Confirming access with GoDaddy



Your domain was successfully connected!

Note that DNS changes can sometimes take up to 72 hours to take effect worldwide. If users are unable to view your site after 72 hours, ask them to clear their browser's cache and try again. You can also use www.whatismydns.net to check a domain name's current IP address and DNS record information against multiple name servers located in different parts of the world.



Figure 1.14 – Domain connection is successful

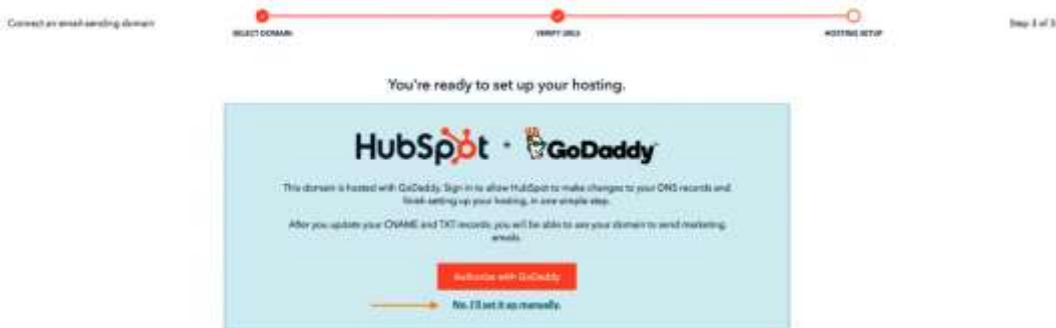


Figure 1.15 – Choosing the manual option to connect your domains to HubSpot

The screenshot shows the third step of a three-step wizard for setting up hosting. The steps are: SELECT DOMAIN, VERIFY URLs, and HOSTING SETUP. The current step, HOSTING SETUP, has a title 'You're ready to set up your hosting.' Below it, there's a note about skipping instructions and viewing DNS records. Step 1, 'Log in to your domain provider's site', has an 'I'm logged in' checkbox checked. Step 2, 'Locate DNS record settings', has 'What is DNS?' and 'I'm there.' buttons. Step 3, 'Update your DNS records', is expanded and shows two CNAME records with their host and value fields, each with a 'Copy' button.

RECORD TYPE	HOST	VALUE
CNAME	hs1-21780799._domainkey.resagoooding.com	resagoooding-com.hs18a.dkim.hubspotemail.net
CNAME	hs2-21780799._domainkey.resagoooding.com	resagoooding-com.hs18b.dkim.hubspotemail.net

Figure 1.16 – Updating your DNS records

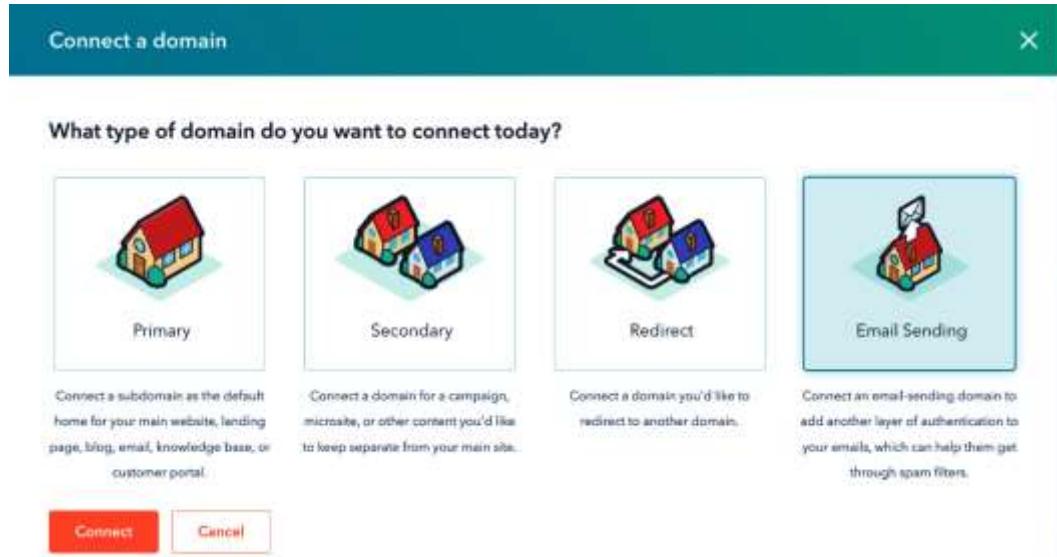


Figure 1.17 – Connecting your email domain

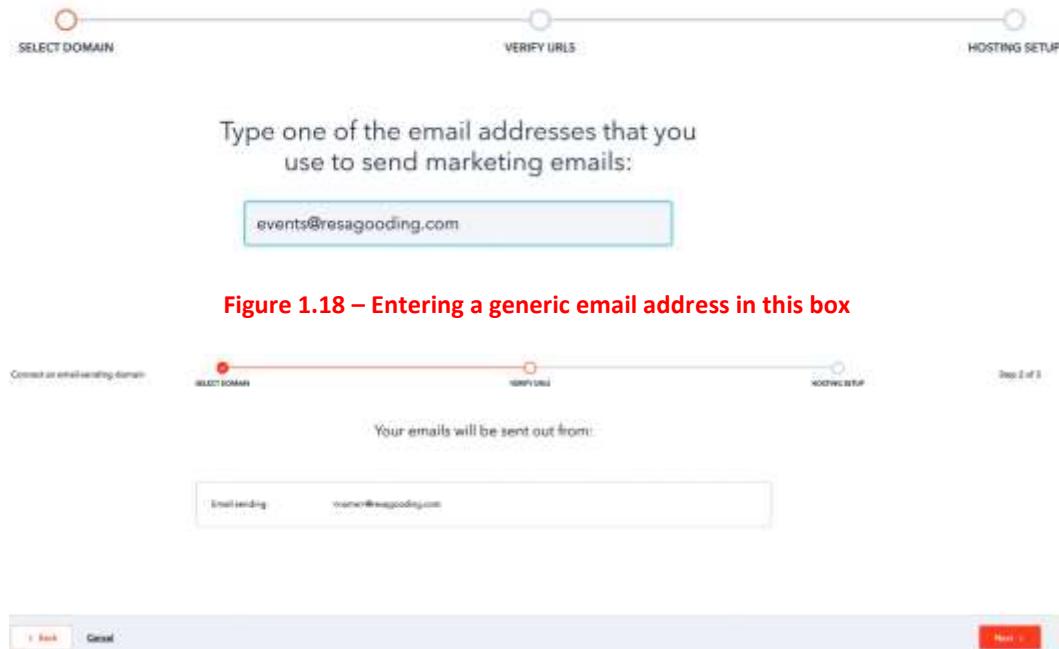


Figure 1.18 – Entering a generic email address in this box

Figure 1.19 – Verifying the email sender

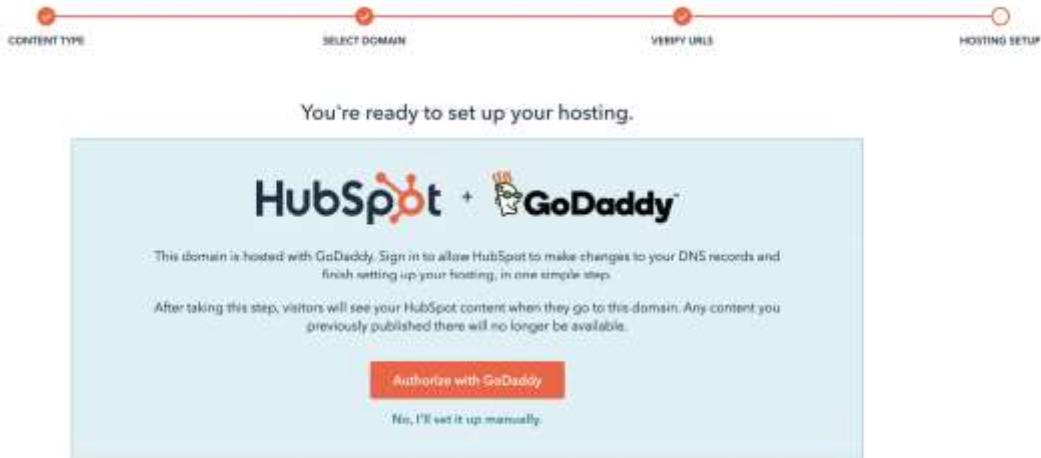


Figure 1.20 – Connecting to your hosting provider

The screenshot displays the "Primary domains" section with two entries: "Landing pages" (info.megooding.com, Connected) and "Email (web version)" (info.megooding.com, Connected). Below this is a note: "SSL is turned on by default to help your site make your site more secure, and build trust with your visitors." The "Secondary domains" section has a placeholder: "Connect a domain for a campaign, microsite, or other content you'd like to keep separate from your main site." The "Connected a secondary domain" button is visible. The "Redirected domains" section has a placeholder: "Connect a domain you'd like to redirect to a primary or secondary domain." The "Connect a redirected domain" button is visible. At the bottom is the "Email sending domains (DMARC)" section with one entry: "Email (sending)" (megooding.com, Connected).

Figure 1.21 – Confirmation that all domains are connected

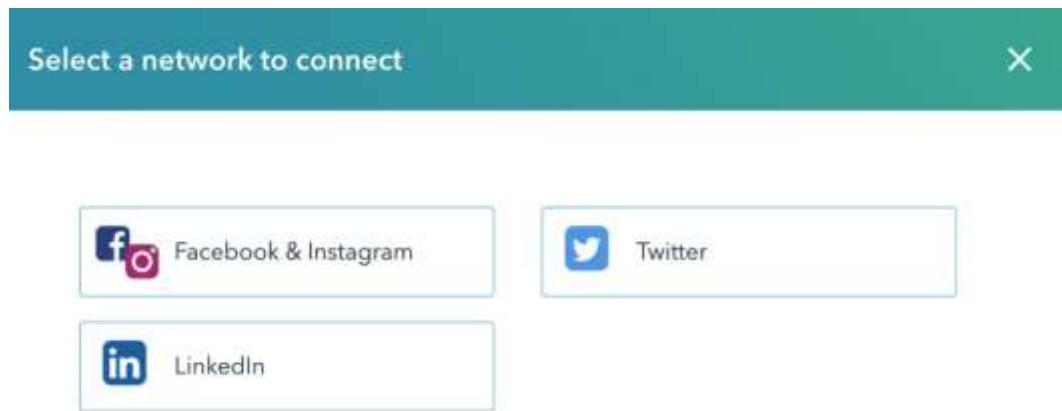


Figure 1.22 – Choosing which social media accounts to connect to HubSpot

A screenshot of the HubSpot publishing schedule interface. At the top, there's a navigation bar with tabs: "Social", "Accounts", "Publishing" (which is selected), "Email Notifications", and "Follow Me". Below the navigation is a section titled "Schedule". A weekly grid shows times for posting on Sunday through Saturday. The grid has three rows of time slots: 11:00 AM, 2:00 PM, and 4:45 PM. A small "Add time" button is located at the bottom center of the grid. Below the grid are three sections: "Publish now by default" (with a calendar icon), "Publish like a human" (with a checked checkbox), and "Next post delay" (with a dropdown menu set to "2 days").

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
11:00 AM	11:00 AM	11:00 AM	11:00 AM	11:00 AM	11:00 AM	11:00 AM
2:00 PM	2:00 PM	2:00 PM	2:00 PM	2:00 PM	2:00 PM	2:00 PM
4:45 PM	4:45 PM	4:45 PM				4:45 PM

Figure 1.23 – Publishing schedule

Social

Accounts	Publishing	Email Notifications	Follow Me
----------	------------	---------------------	-----------

Inbox

A roundup of all new social interactions, conversions, and Twitter followers.

- No email summary
- Daily (8am)
- Twice daily (8am & 4pm)
- Weekly (Monday 8am)

Reports

A monthly summary of your social activity and the effect it had on your business.

- Never
- Monthly

Figure 1.24 – Email Notifications

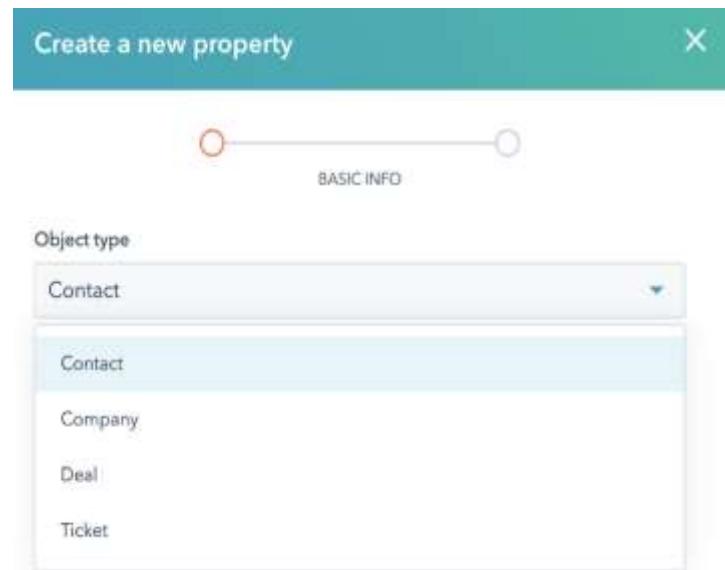


Figure 1.25 – Creating a custom property: choosing an object type

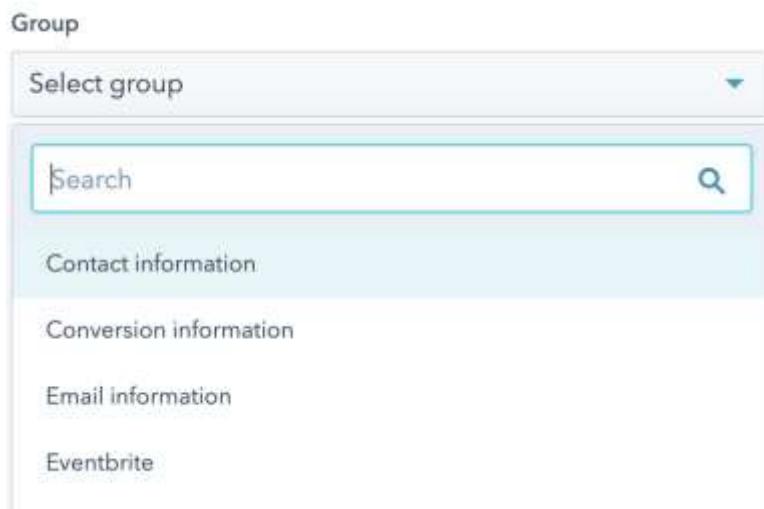


Figure 1.26 – Creating a custom property: selecting a group

Create a new property X

BASIC INFO:

Object type: Contact

Group: Contact information

Label: Which version of HubSpot do you have </>

Description: Optional
Used to understand if customer has a free or paid version of HubSpot

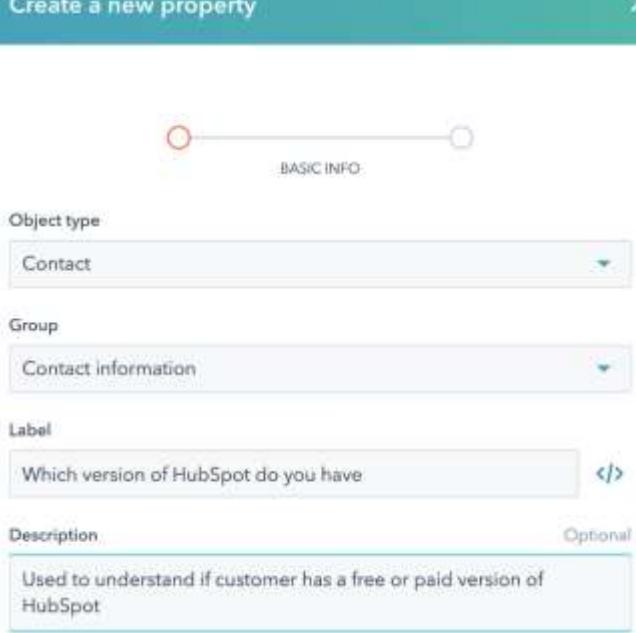


Figure 1.27 – Creating a custom property: choosing a label and description

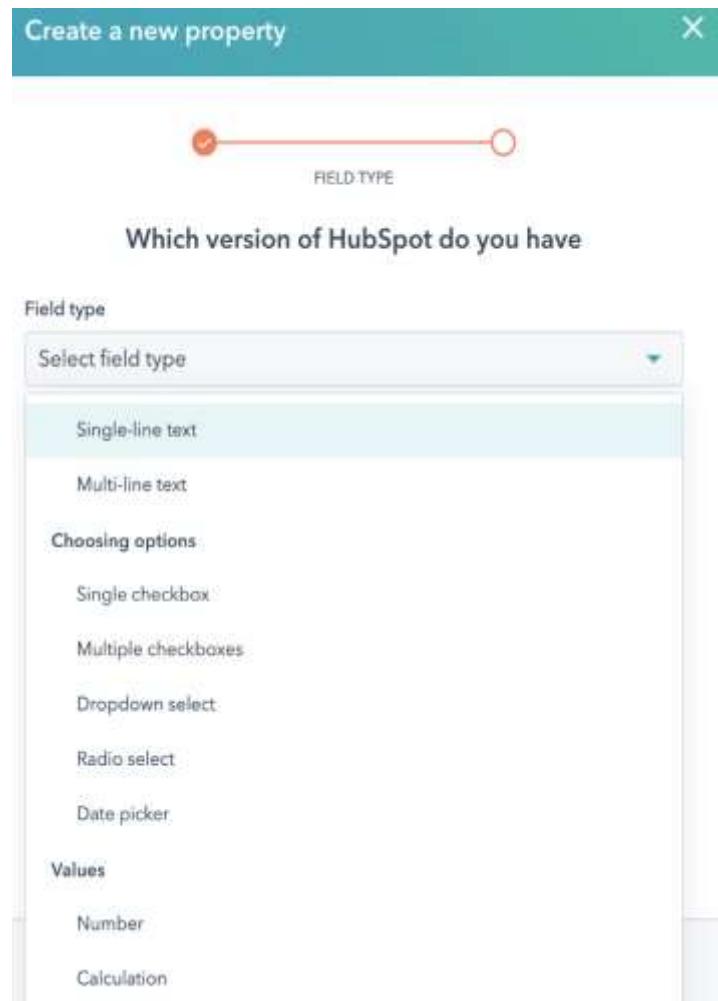


Figure 1.28 – Creating a custom property: selecting a field type

Contacts

[« Back](#)

Resa's Leads

Showing 1,319 contacts

Contact owner

is any of

 X ▼

is none of

is known

is unknown

Apply filter

Contacts

[« Back](#)

All contacts

Showing 11 contacts

Country/Region

is any of

 X ▼

is none of

is known

is unknown

Apply filter

Contacts

[« Back](#)

All contacts

Showing 20 contacts

First name

contains exactly

doesn't contain exactly

is known

is unknown

Apply filter

Figure 1.29 – Various filters created in Contacts

[« Back to lists](#)

Marketing managers

[Active list](#) Size: 836 contacts

[Filters](#)

 Test

[Cancel editing](#)

All filters

Group 1

Job title contains any of marketing, CMO, or marketer

AND

[+ Add filter](#)

OR

[+ Add filter group](#)

Figure 1.30 – Active list

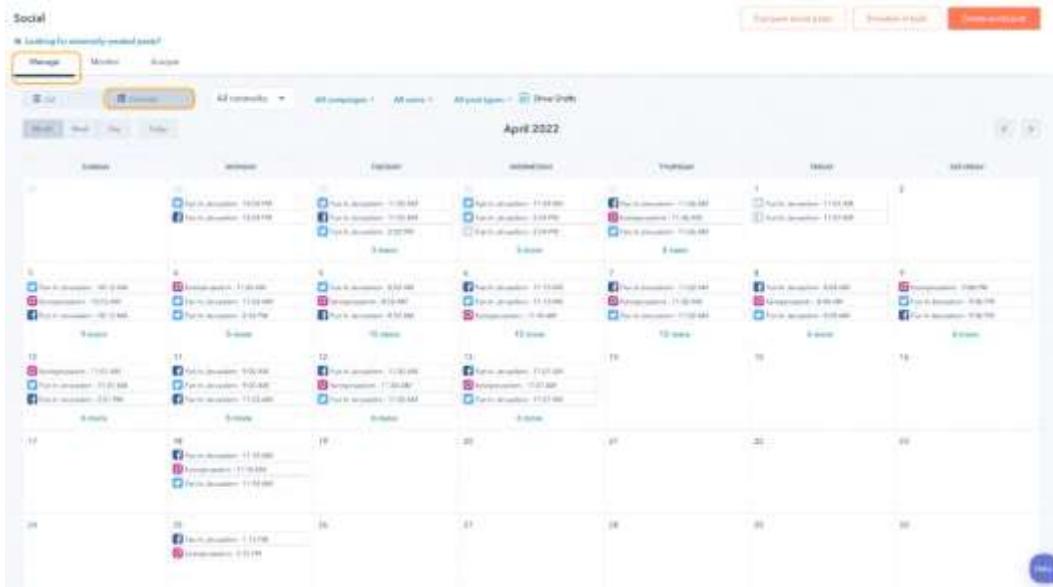


Figure 1.31 – Calendar tool

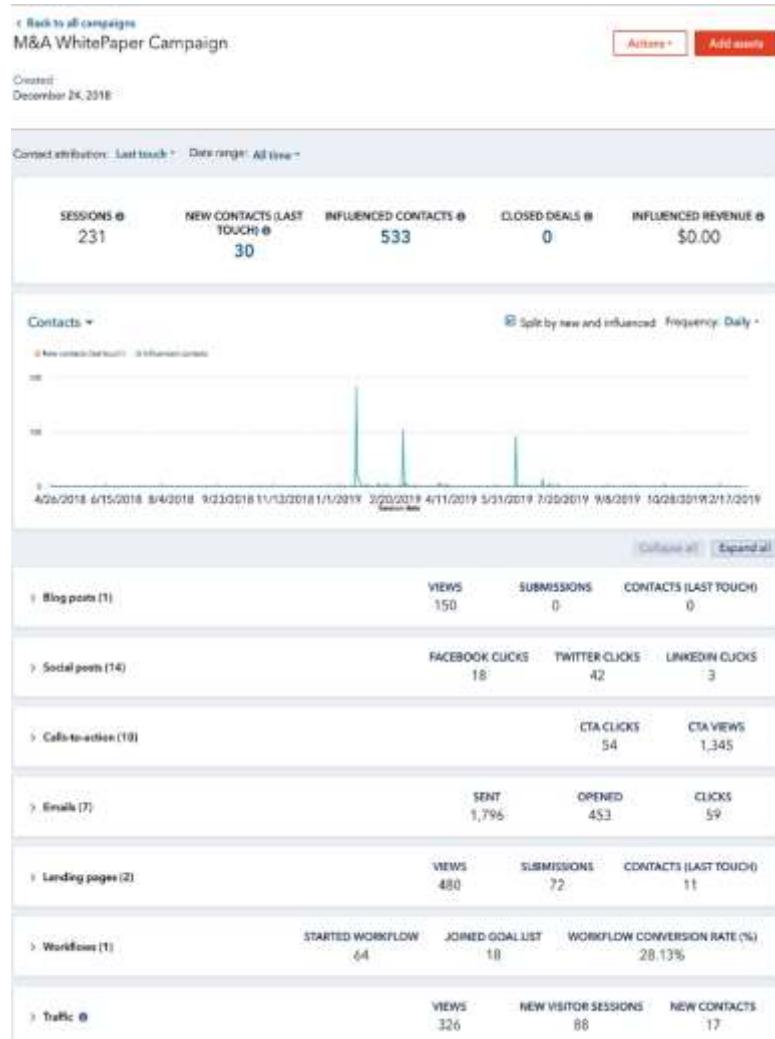


Figure 1.32 – Campaigns tool

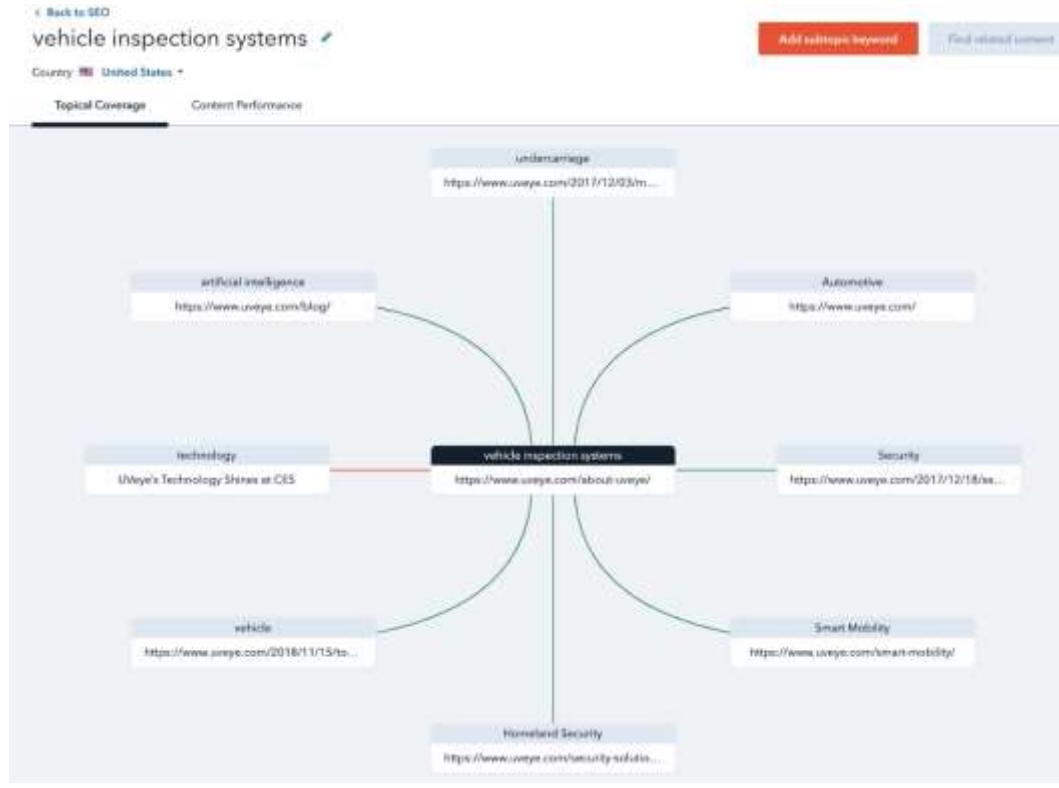


Figure 1.33 – SEO tool

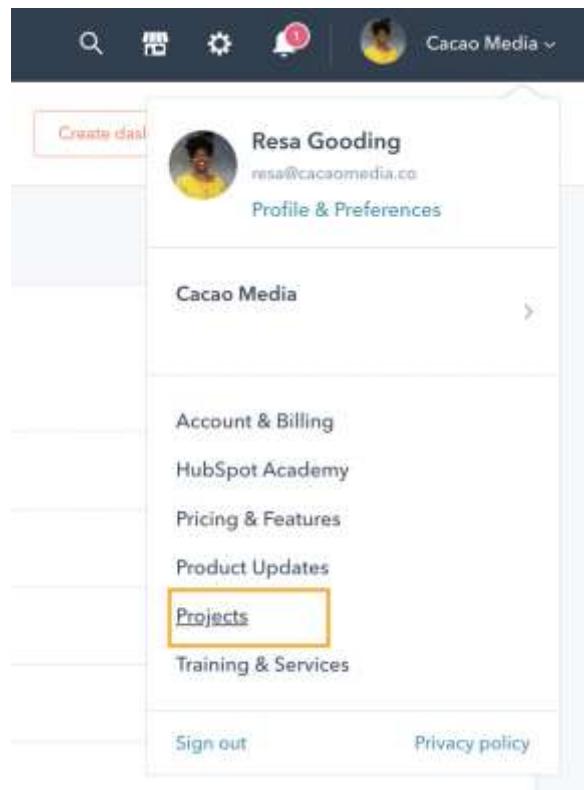


Figure 1.34 – Projects

Projects

All Tasks All Projects Project Templates

[Developing a Local SEO Strategy](#)

[Hosting a Webinar](#)

[Sales General Setup Tasks](#)

Creating, Launching, and Tracking a Content Offer

Show project details

+ Type here to add a task

- Create a call-to-action
- Create or select a list of contacts
- Create an email to promote your content offer
- Write related blog posts
- Schedule your related social media posts
- Launch your campaign

Hide completed tasks

6 tasks with no due date

[Help](#)

1. Guided Client Onboarding | New Client Fundamentals

2. Guided Client Onboarding | CRM Setup (HubSpot)

3. Guided Client Onboarding | CRM Setup (Salesforce)

4. Guided Client Onboarding | Getting Started

5. Guided Client Onboarding | Quick Wins

6. Guided Client Onboarding | Quick Wins

Setting up the HubSpot CRM

Professional Suite Onboarding - Getting Started

4. Guided Client Onboarding | Quick Wins

Creating, Launching, and Tracking a Content Offer

4. Guided Client Onboarding | Quick Wins

4. Guided Client Onboarding | CRM Setup (Salesforce)

4. Guided Client Onboarding | CRM Setup (HubSpot)

1. Guided Client Onboarding | New Client Fundamentals

6. Guided Client Onboarding | Quick Wins

Figure 1.35 – Projects tool



Figure 1.36 – Website Analytics



Figure 1.37 – Traffic Analytics

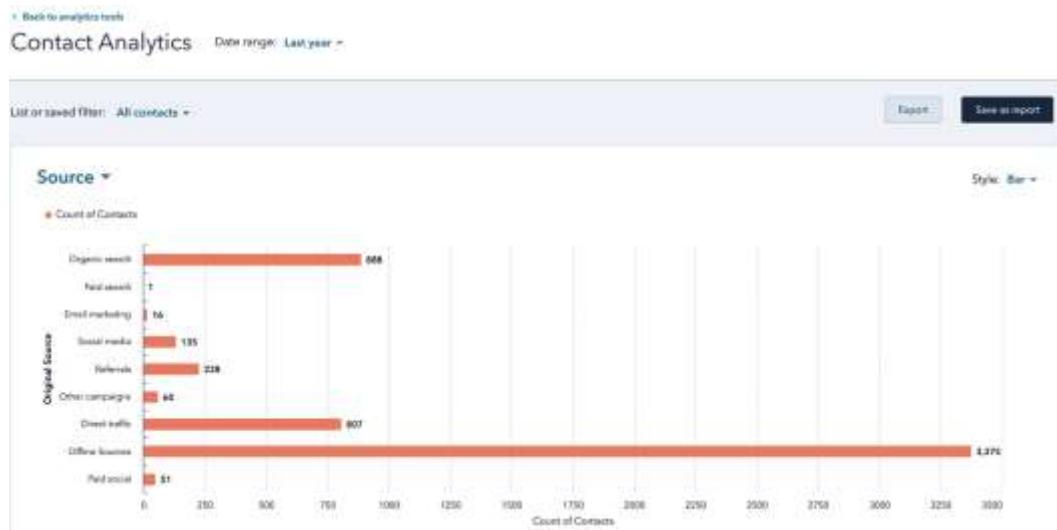


Figure 1.38 – Contact Analytics



Figure 1.39 – Campaign Analytics

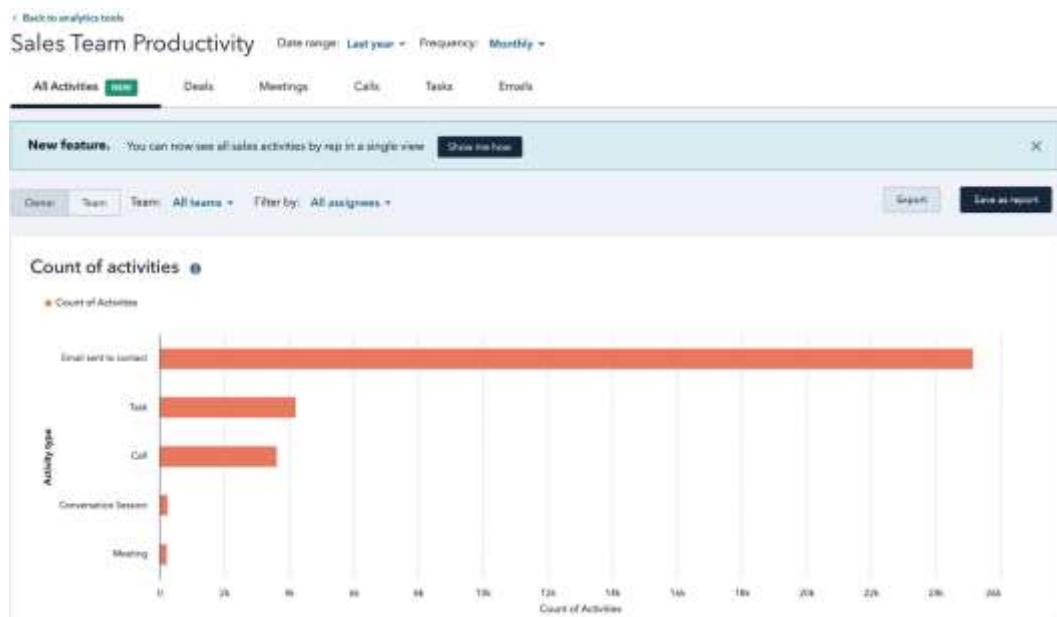


Figure 1.40 – Sales Team Productivity

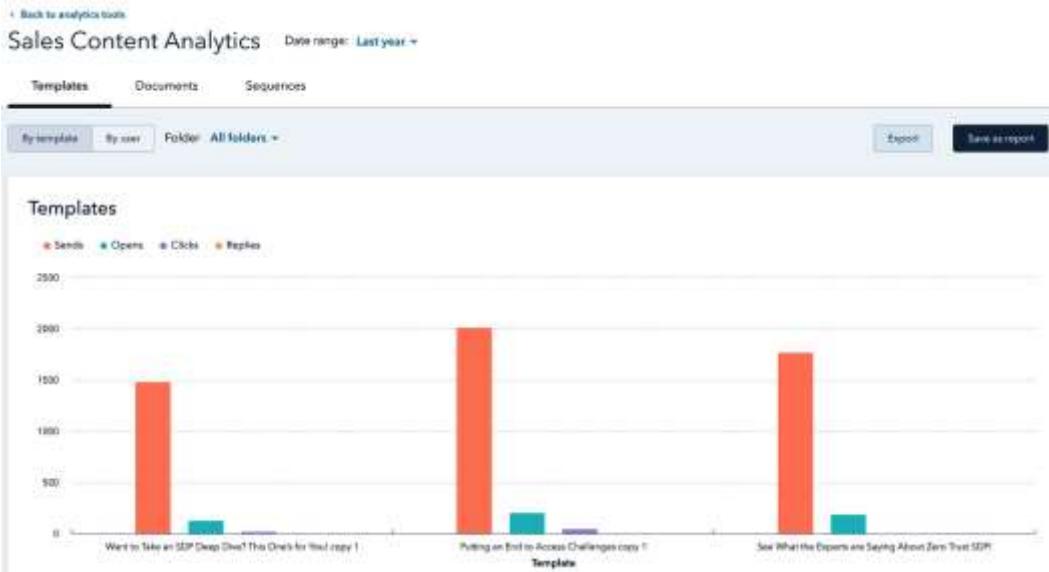


Figure 1.41 – Sales Content Analytics

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

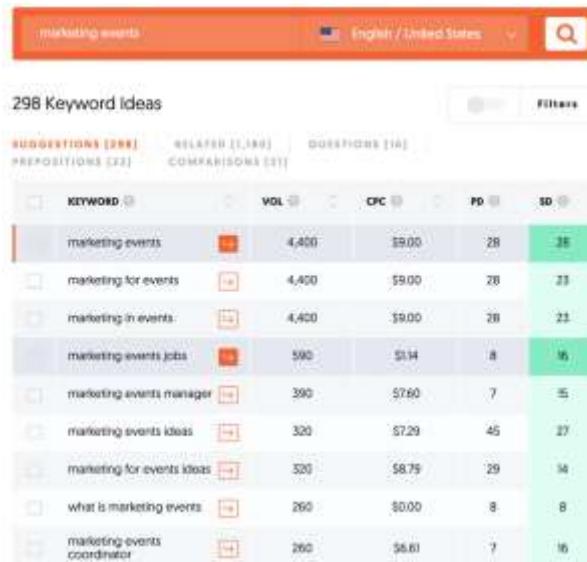


Figure 2.2 – Top SEO keywords for Inbound.com. Source: Ubersuggest



Figure 2.3 – HubSpot SEO tool

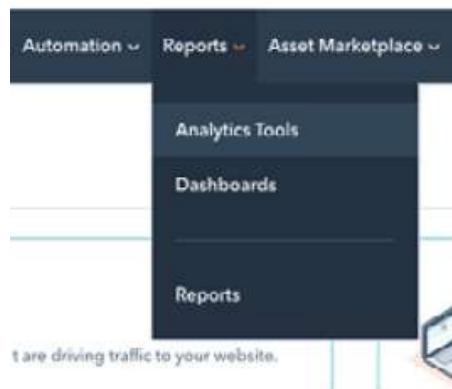


Figure 2.4 – Analytics Tools in Reports



Figure 2.5 – Accessing Tracking URL Builder

The screenshot shows the 'Create tracking URL' form. At the top, there is a green header bar with the title 'Create tracking URL' and a close button ('X'). Below the header, there are several input fields:

- URL ***: A text input field containing the URL <https://contentisrael.com/>. A placeholder text 'Enter a URL for a page that has the HubSpot tracking code installed.' is visible to the right of the input.
- UTM campaign ***: A dropdown menu set to 'Content Marketing'.
- Source ***: A dropdown menu set to 'Social'. A small explanatory text 'Used to organize traffic to your website.' is located to the right of this field.
- UTM source ***: A dropdown menu set to 'LinkedIn'.

Below these fields, there is a section titled 'Use the fields below to add more UTM parameters to your tracking URL. ⚡' It includes a 'UTM medium' field which contains the value 'social'.

Figure 2.6 – HubSpot's Tracking URL Builder

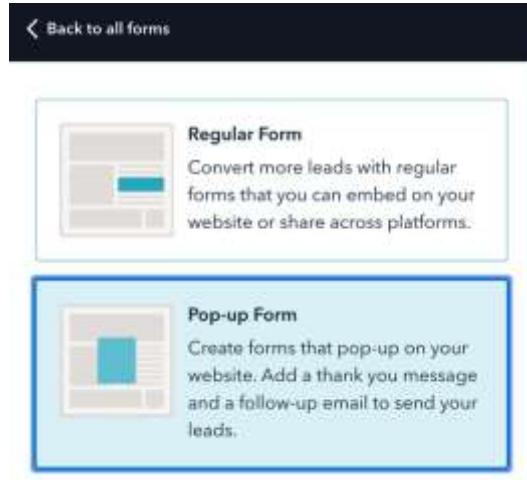


Figure 2.7 – Choosing the type of form in order to create an exit popup

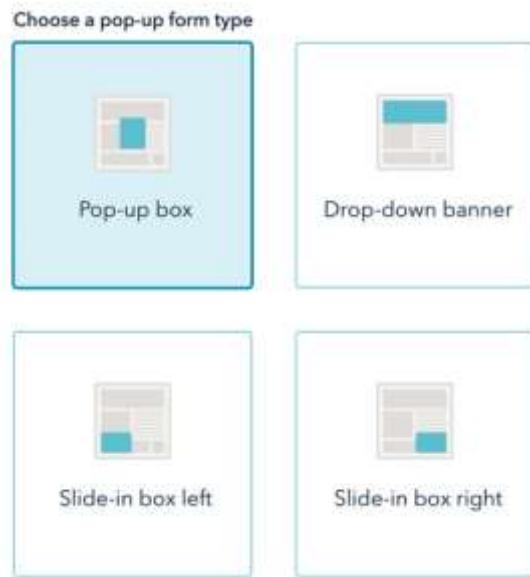


Figure 2.8 – Choosing a pop-up form type

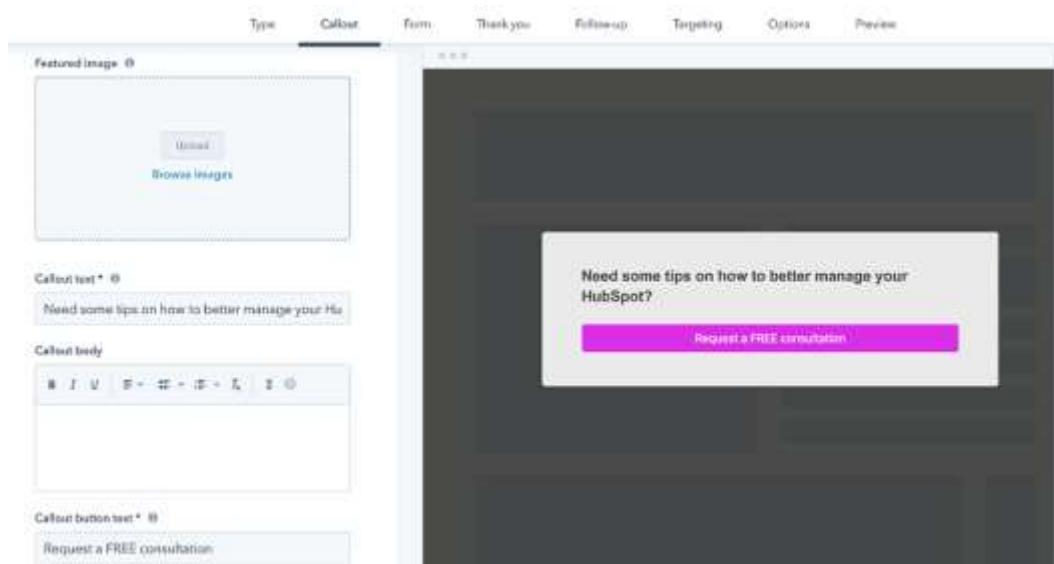


Figure 2.9 – Completing the CTA

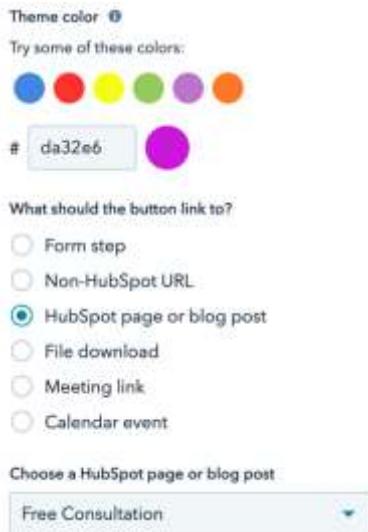


Figure 2.10 – Customizing the CTA and choosing the next action

This screenshot shows the "SHOW POP-UP" rule configuration. It includes a "WHEN" condition set to "Website URL" and "is all pages". There are buttons for "+ Add rule" and "+ Add exclusion rule".

Visitor information and behavior (Optional)

Have more control over who sees your pop-up by adding optional filters based on information about your visitors.

This screenshot shows the visitor information and behavior configuration. It includes a "SHOW POP-UP" rule with a "Select filter" condition and an "(Optional)" note. It also includes a "HIDE POP-UP" rule with a "Segmented lists" condition, listing "customers", "All Customers", and "Opportunities". There are buttons for "+ Add rule" and "+ Add exclusion rule".

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

Unpublished

Scheduling

Don't schedule Schedule for later

Small screen sizes ⓘ

Turn off pop-up form on small screen sizes

Show dismissed pop-up form again after:

Three days

When contacts are captured, send email notifications to:

resa@cacaomedia.co X joe@cacaomedia.co X

Push new contacts to your email provider (optional)

You don't have an email provider enabled.

Manage in settings

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

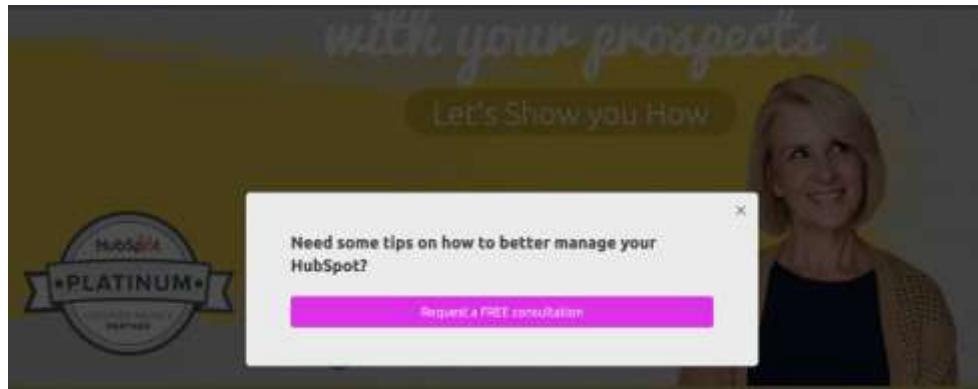


Figure 2.13 – Setting the popup as live on your website

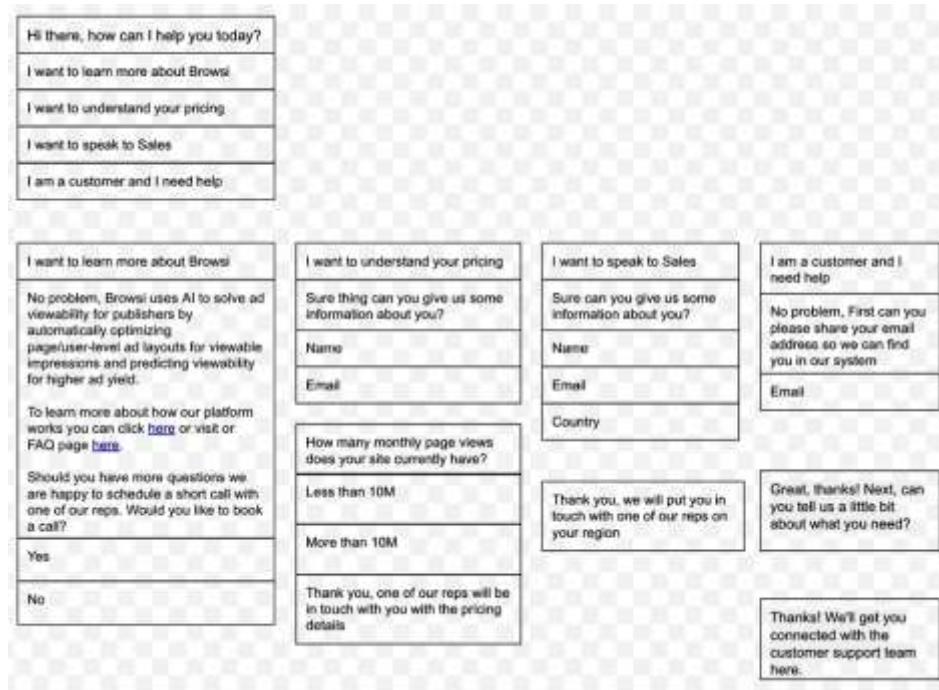


Figure 2.14 – Chatbot map

Where would you like to add this chatflow?

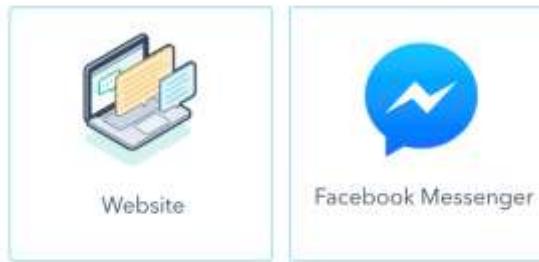
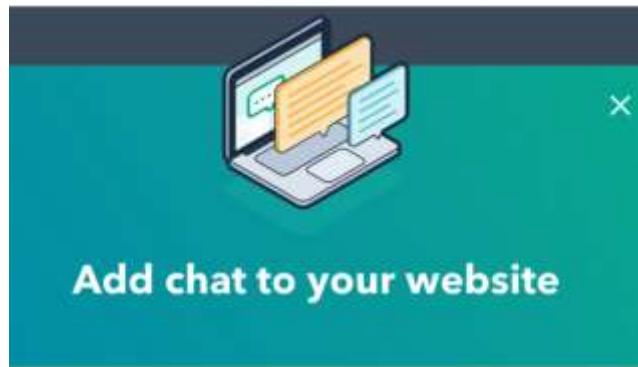


Figure 2.15 – Choosing a website



To get started with chatflows, you'll need to add live chat to your website.

Add live chat

Maybe later

Figure 2.16 – Creating a live chat

Customize chat

Customize what visitors will see when they open your chat window.

Choose an accent color



3288e6



Chat heading



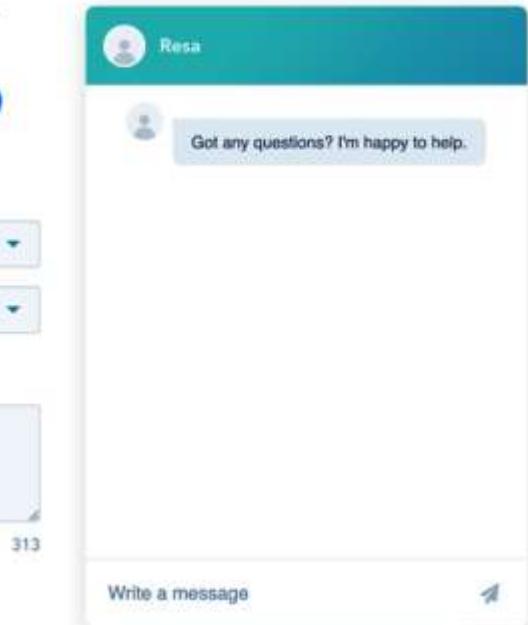
Specific users and teams

Resa Gooding X

Write a welcome message



Got any questions? I'm happy to help.



Automatically assign conversations

Automatically assign conversations to specific team

313

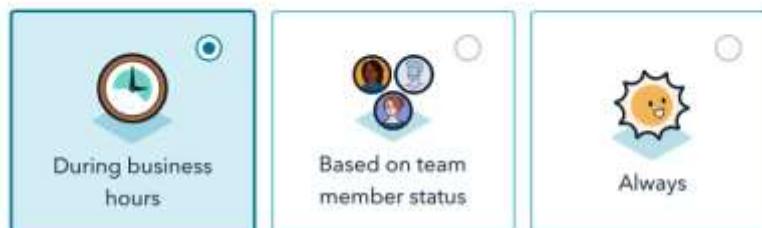
Write a message



Figure 2.17 – Selecting the user and writing a custom message

Chat availability

Select when your team should appear available to chat with visitors. [Learn more](#)



Team business hours

ⓘ Your time zone is US/Eastern

Set team office hours and reply times.

Mon - Fri	from	9:00 AM	to	5:00 PM	
-----------	------	---------	----	---------	--

[+ Add hours](#)

Availability behavior

Your visitors are more engaged when they know your team's availability. Set clear expectations here:

Available	Away	Outside business hours
-----------	------	------------------------

During business hours, let your visitors know when they can expect a reply.

[Show typical reply time](#)

Typically replies in a few minutes	
------------------------------------	--

Figure 2.18 – Choosing availability

Target

Set rules to decide which web pages your chatflow shows up on. You can also choose to show your chatflow only to specific visitors based on their identity or actions.

Website URL

Target your visitors by choosing the web pages where you'd like your chatflow to appear ⓘ

SHOW CHAT

WHEN	Website URL	is	www.cacaomedia.co
+ Add rule + Add exclusion rule			

Visitor information and behavior (Optional)

Have more control over who sees your chatflow by adding rules based on your visitors' identity or behavior

SHOW CHAT

WHEN	Visitor	is unknown	Delete
+ Add rule			

HIDE CHAT

WHEN	Segmented lists	All Customers	Delete
+ Add exclusion rule			

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

Chat display behavior

Control how the chat widget looks when visitors first access your website. ⓘ

Desktop Mobile

Pop open the welcome message as a prompt
 Only show the chat launcher
 Open the chat widget

Chat display triggers

Decide when the chat welcome message should show to your targeted visitors.

On exit intent ⓘ

Time on page in seconds =

Percentage of the page scrolled =

Want to customize your chat widget?

Manage the accent color, chat placement and more under [Inbox settings ⓘ](#).

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

Start a live chat



Live chat
Welcome visitors and send them directly to your live team.



Knowledge base search & live chat
Give your website visitors the choice to search for answers from your knowledge base or start a live chat. ⓘ

Figure 2.21 – Setting the chat as "live"

Start a live chat



Live chat

Welcome visitors and send them directly to your live team.



Knowledge base search & live chat

Give your website visitors the choice to search for answers from your knowledge base or start a live chat. 

Build a bot



Qualify leads bot

Find out if visitors are qualified before sending them to a sales rep



Book meetings bot

Let visitors book meetings using a Meetings link



Support bot

Show knowledge articles to visitors or let them create a ticket 

Figure 2.22 – Choosing Qualify leads bot



Figure 2.23 – Building out the chatbot

ChatBot for new visitors

Build Target Display Options

Target

Choose which pages the chat widget should appear on, and who it should appear for. Learn more about targeting ⓘ

Website URL

Target your visitors by choosing the web pages where you'd like your chatflow to appear ⓘ

SHOW CHAT

WHEN Website URL is www.cacaomedia.co

OR Website URL is https://www.cacaomedia.co/how-it

+ Add rule

HIDE CHAT

WHEN Website URL begins with info.cacaomedia.co

+ Add exclusion rule

This screenshot shows the 'Target' tab of a chatbot configuration interface. It includes sections for 'SHOW CHAT' and 'HIDE CHAT'. Under 'SHOW CHAT', there are two rules: one for 'Website URL' being 'www.cacaomedia.co' and another for 'Website URL' being 'https://www.cacaomedia.co/how-it'. Under 'HIDE CHAT', there is one rule for 'Website URL' beginning with 'info.cacaomedia.co'. There are also buttons to '+ Add rule' and '+ Add exclusion rule'.

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

Back to chatflows

Display

Customize the chat heading, chat display behavior, and timing controls. Manage the accent color, chat placement and more under inbox settings ⓘ.

> Choose chat avatar

< Chat display behavior ⓘ

Customize how the chatflow will appear to targeted visitors for desktop, tablet and mobile. Learn more ⓘ

Desktop Mobile

Pop open the welcome message as a prompt

Only show the chat launcher

This screenshot shows the 'Display' tab of a chatbot configuration interface. It includes sections for 'Choose chat avatar' and 'Chat display behavior'. Under 'Chat display behavior', there are options for 'Desktop' and 'Mobile'. A red box highlights the 'Mobile' button. Below these are two radio button options: 'Pop open the welcome message as a prompt' (selected) and 'Only show the chat launcher'.

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

Options

General

Typing delay between messages ⓘ

Delay based on length of message

Session timeout ⓘ

Reset after 30 minutes

Generic error message ⓘ

Sorry, we are currently experiencing technical difficulties. Please try sending your message again shortly.

A 🌐 🚙 Contact token

+ Add message bubble

Language

Select a language

English

Learn about our [supported languages](#) ⓘ

Availability

Decide when this chatflow should display based on your [team's availability](#).

Show always



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

The screenshot shows a list of messages in the HubSpot inbox:

- Esther**: Thanks. We've passed along this information. A member of our team will be in touch soon.
- Mark**: Thanks. We've passed along this information. A member of our team will be in touch soon.
- Robert**: Thanks. We've passed along this information. A member of our team will be in touch soon.
- Dwight**: Thanks. We've passed along this information. A member of our team will be in touch soon.

A specific conversation with **Robert** is expanded:

Robert: So exactly how can we help?

Robert: Hi,
Could you please provide me with a list of what you can offer when it comes to setting up/implementing Hubspot including automation with inbound leads, sequences etc.

Robert: It would be nice to already understand your pricing.

Robert: Thanks,
Robert

Robert: Sure no problem. Before I connect you with one of our experts, what's your name please?

Figure 2.28 – Chatbot conversations in your HubSpot inbox

Ebook- The Complete Guide to Sales Prospecting ↗

Publish

Form Follow-up Options Style & preview Share Actions

First name *

Last name *

Business Email *

protected by reCAPTCHA Privacy Terms

Submit

Queued progressive fields (1)

Replace a user's previously captured fields on your form with a new set of fields. They appear at the bottom of your form and in the order shown below; you can reorder by dragging them.

Do you currently use HubSpot?

Yes Progressive field
 No

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

The screenshot shows the 'Configure' tab selected in the top navigation bar of a Salesforce interface. On the left, a sidebar lists various setup categories like Account Setup, Data Management, and Objects. Under 'Objects', 'Deals' is highlighted. The main content area displays a table of deal stages with columns for Stage Name and Win Probability.

STAGE NAME	WIN PROBABILITY
Appointment scheduled	20%
Qualified to buy	40%
Presentation scheduled	60%
Decision maker bought-in	80%
Contract sent	90%
Closed won	Won
Closed lost	Lost

Figure 3.1 – Updating Deals stages

STAGE NAME	WIN PROBABILITY	UPDATE STAGE PROPERTIES
Discovery Call Booked	20%	
Defining POC	40%	
POC In Progress	60%	
Proposal Sent	70%	
Negotiation	80%	
Final Contract Sent	90%	
Closed Won	Won	
Closed lost	Lost	

Save **Cancel**

Figure 3.2 – Updating Deals stages and probabilities

Negotiation	80%			
Final Contract Sent	</>	Delete	90%	Edit properties
Closed Won	Won			

Figure 3.3 – Edit properties in deal stages

Update deal stage properties

Search properties

Deal information

SELECTED PROPERTY	REQUIRED
Amount	<input checked="" type="checkbox"/>

Amount
 Close date
 Closed lost reason
 Closed won reason
 Create date
 Deal Description

Next **Cancel** **Remove all properties**

Figure 3.4 – Setting mandatory fields for your deal stages

Integrations

Tracking & Analytics

Privacy & Consent

Data Management

Properties

Objects

Contacts & Companies

Deals

Tickets

Products & Quotes

Forecast

Activities

POC In Progress	60%	
Proposal Sent	70%	
Negotiation	80%	
Final Contract Sent	90%	Amount *
Closed Won	Won	
Closed lost	Lost	

Save **Cancel**

Figure 3.5 – Saving your settings

The screenshot shows the 'Properties' section of the HubSpot 'Your Preferences' menu. The left sidebar lists various categories like General, Notifications, Security, etc., with 'Properties' selected. The main area is titled 'Contact properties' and shows a table of properties. A search bar at the top right contains 'Search properties: Q' and a red 'Create property' button. The table has columns for 'NAME', 'GROUP', 'CREATED BY', and 'USED IN'. One row is highlighted with a teal background, showing 'Deal properties'.

NAME	GROUP	CREATED BY	USED IN
Contact properties	Contact information	HubSpot	0
Deal properties	Contact information	HubSpot	0
Product properties	Contact information	HubSpot	0
Ticket properties	Contact information	HubSpot	0
Average page views Number field	Web analytics history	HubSpot	0
Became a customer date Date picker	Contact information	HubSpot	0
Became a lead date Date picker	Contact information	HubSpot	0

Figure 3.6 – Going to Deal properties

The screenshot shows the 'Properties' section of the HubSpot 'Your Preferences' menu. The left sidebar lists various categories like General, Notifications, Security, etc., with 'Properties' selected. The main area is titled 'Deal properties' and shows a table of properties. A search bar at the top right contains 'reason X' and a red 'Create property' button. The table has columns for 'NAME', 'GROUP', 'CREATED BY', and 'USED IN'. Two rows are visible: 'Closed lost reason' and 'Closed won reason', both categorized under 'Deal information'.

NAME	GROUP	CREATED BY	USED IN
Closed lost reason Multi-line text	Deal information	HubSpot	0
Closed won reason Multi-line text	Deal information	HubSpot	0

Figure 3.7 – Finding the Closed lost reason property

Edit property

Name

 </>

Assign Users & Teams ?

Basic info Field type Used in (0)

Single-line text

Multi-line text

Choosing options

Single checkbox

Multiple checkboxes

Dropdown select

Radio select

Date picker

Figure 3.8 – Changing the field type to Dropdown select

LABEL	INTERNAL VALUE	WITH VALUE
Champion Left	Champion Left	0
Chose Competitor	Chose Competitor	0
Missing feature	Missing feature	0
Non-responsive	Non-responsive	0
Price	Price	0
Project postponed	Project postponed	0
POC not conclusive	POC not conclusive	0
Product too complex	Product too complex	0
Other	Other	0

Save Cancel

Figure 3.9 – Adding the reasons for losing a deal

The screenshot shows the 'Data Management' interface with the 'Deals' tab selected. On the left, there's a sidebar with 'Data Management', 'Properties', 'Objects', 'Contacts & Companies', and 'Deals'. The 'Deals' section has a dropdown menu with 'Closed lost' selected. In the main area, there's a search bar with 'Closed lost', a 'Delete' button, a dropdown menu set to 'Lost', and a 'Edit properties' button. Below this, there's a link '+ Add a deal stage'.

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

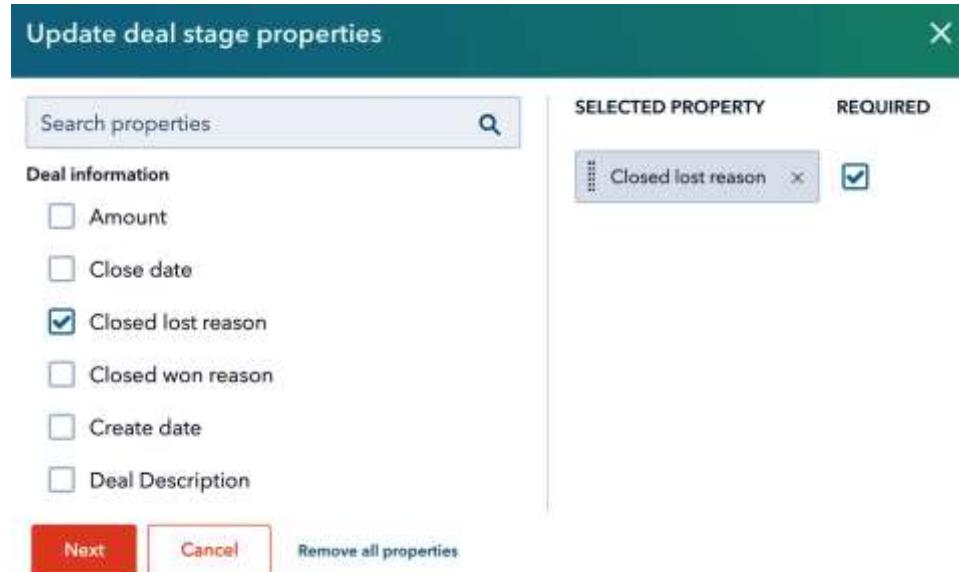


Figure 3.11 – Making the Closed lost reason feature mandatory

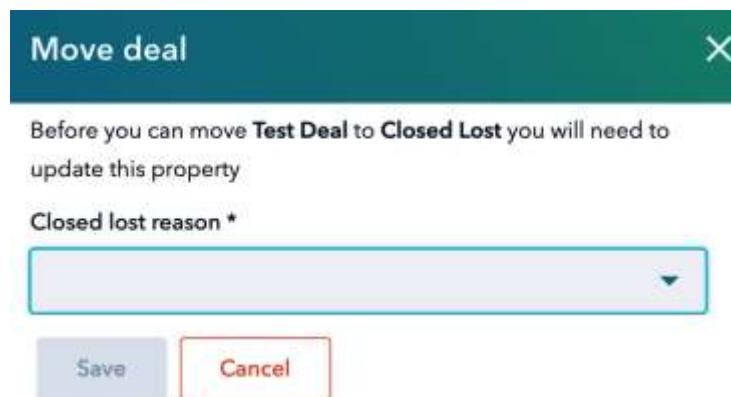


Figure 3.12 – Notification pop-up box for choosing the Closed lost reason



Figure 3.13 – Creating a second pipeline

Add another pipeline

Pipeline name *

Create **Cancel**

Figure 3.14 – Naming your pipeline

Select a pipeline to modify

2nd Pipeline </>

STAGE NAME	WIN PROBABILITY	UPDATE STAGE PROPERTIES
Appointment scheduled	20%	
Qualified to buy	40%	
Presentation scheduled	60%	
Decision Maker Bought-In	80%	
Contract sent	90%	
Closed won	Won	
Closed lost	Lost	

The screenshot shows a user interface for modifying pipeline stages. At the top, a dropdown menu "2nd Pipeline" is selected. Below it, a list of pipelines includes "Sales Pipeline" and "2nd Pipeline", with "2nd Pipeline" currently highlighted. The main area displays a table of stages with their corresponding win probability and update properties. The stages listed are: Appointment scheduled (20%), Qualified to buy (40%), Presentation scheduled (60%), Decision Maker Bought-In (80%), Contract sent (90%), Closed won (Won), and Closed lost (Lost). Each stage has a dropdown arrow next to its probability value.

Figure 3.15 – Customizing the stages in the second pipeline

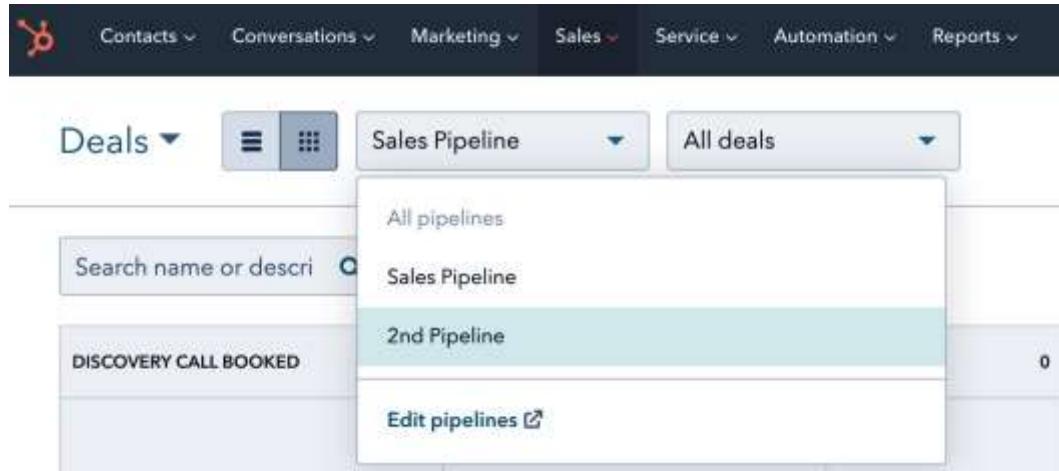


Figure 3.16 – Creating deals in your new pipeline

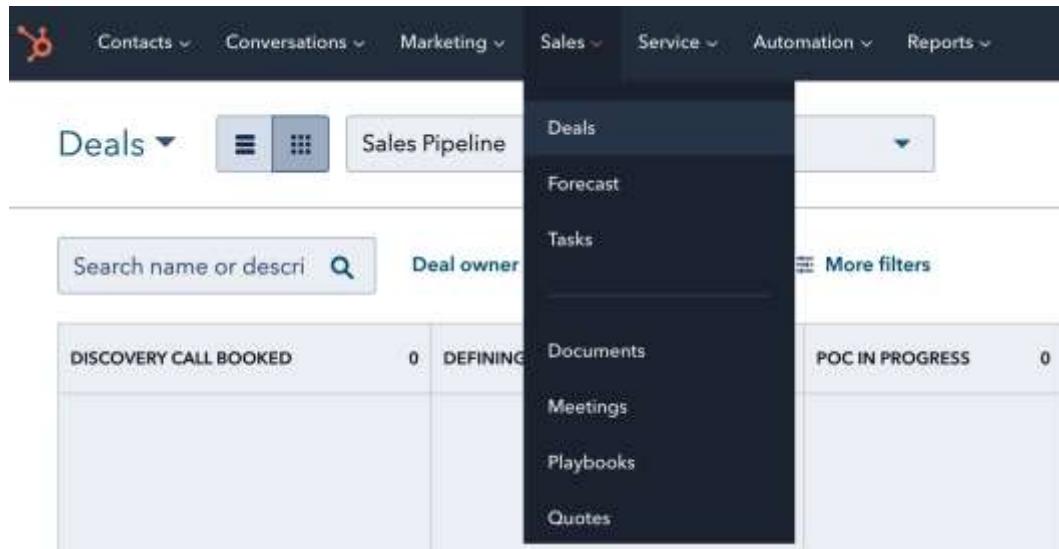


Figure 3.17 – Navigating to Deals

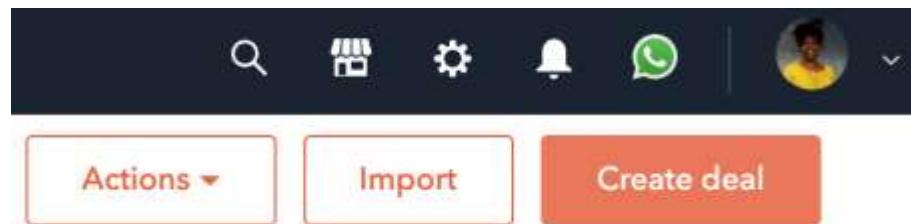


Figure 3.18 – Creating a deal

The screenshot shows a modal window titled "Create deal". The window has a dark green header bar with the title and a close button. The main area contains the following fields:

- Deal name ***: A text input field containing "g."
- Pipeline ***: A dropdown menu set to "Sales Pipeline".
- Deal stage ***: A dropdown menu set to "Discovery Call Booked".
- Amount**: An empty text input field.
- Close date**: A date picker set to "04/30/2021".
- Deal owner**: A dropdown menu set to "Resa Gooding".
- Deal type**: A dropdown menu with a visible option "New Client".

At the bottom of the modal are three buttons: "Create" (red), "Create and add another" (light blue), and "Cancel" (white).

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

Associate deal with

Company

Search companies

Contact

Search contacts

Add line item Quantity

Add a line item

You can customize the properties  your team sees here.

Create Create and add another Cancel

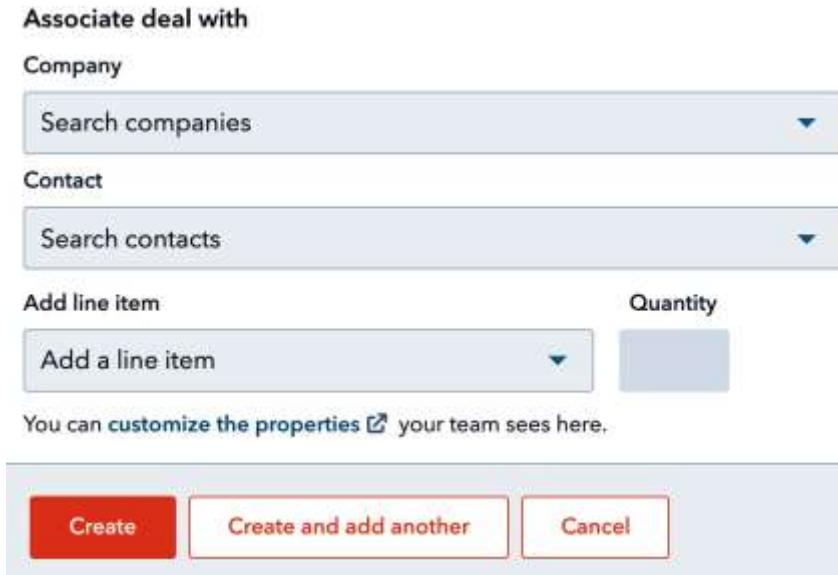


Figure 3.20 – Associate contacts and companies to the deal

Deals

Set the properties your team sees on deal records.
Choose the properties that will be displayed on all deal records for all users in your CRM. [Go to properties](#)

Set the properties your team sees when creating deals.
Choose the properties that will be displayed when any user in your CRM creates a deal, and which of those properties are required in order to create a deal. [Manage](#) 

Set the default deal amount that should represent a deal.
Choose the deal amount that should reflect the deal record when users add products to their deals. [ACV +](#)

Sync lifecycle stages to associated contacts and companies.
When a deal is created, change the lifecycle stage of associated contacts and companies to Opportunity. When a deal is won, change the lifecycle stage of associated contacts and companies to Customer.

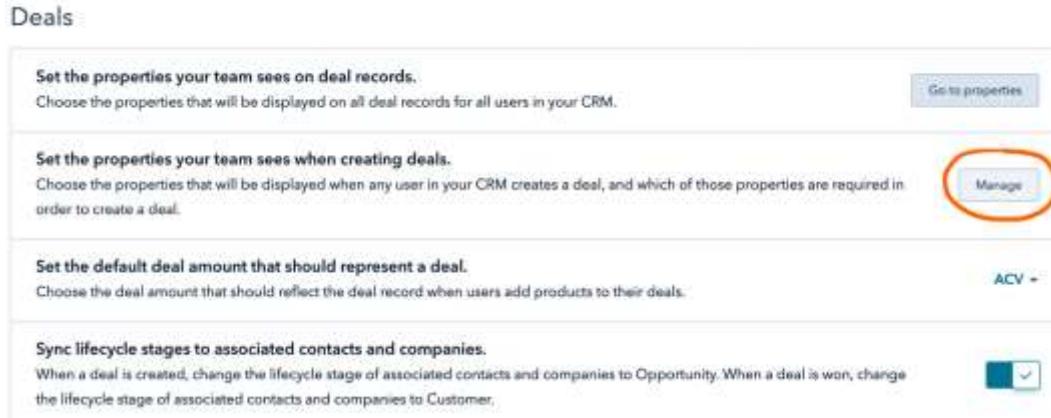


Figure 3.21 – Set the properties your team sees when creating deals

Let's set up the properties your team sees when they create deals.

Would you like to start with your account's default properties, or would you like to start from scratch?

[Start from default properties](#)

[Start from scratch](#)

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

Deal creator properties X

Search properties 🔍

Deal information

Amount
 Close date
 Closed lost reason
 Closed won reason
 Create date
 Deal Description

SELECTED PROPERTIES (7) REQUIRED

Deal name	<input checked="" type="checkbox"/>
Pipeline	<input checked="" type="checkbox"/>
Deal stage	<input checked="" type="checkbox"/>
Amount	<input checked="" type="checkbox"/>
Close date	<input type="checkbox"/>
Deal owner	<input type="checkbox"/>

Buttons: Save (red), Cancel, Remove all properties

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

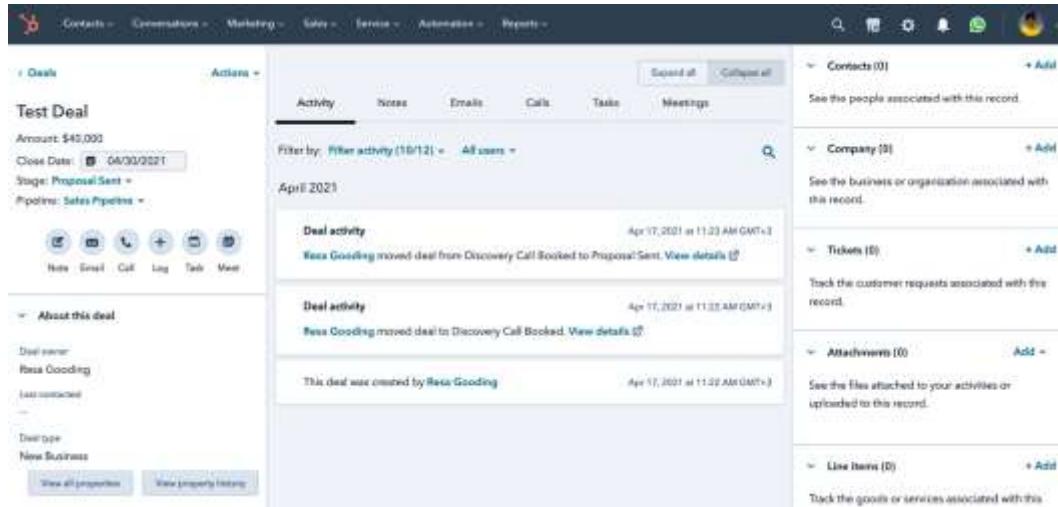


Figure 3.24 – Contact record

Deals

Set the properties your team sees on deal records.
Choose the properties that will be displayed on all deal records for all users in your CRM.

Set the properties your team sees when creating deals.
Choose the properties that will be displayed when any user in your CRM creates a deal, and which of those properties are required in order to create a deal.

Set the default deal amount that should represent a deal.
Choose the deal amount that should reflect the deal record when users add products to their deals.

Sync lifecycle stages to associated contacts and companies.
When a deal is created, change the lifecycle stage of associated contacts and companies to Opportunity. When a deal is won, change the lifecycle stage of associated contacts and companies to Customer.

ACV

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

The screenshot shows the Microsoft Dynamics 365 Sales interface. On the left, a sidebar displays a deal summary for "Test Deal" with an amount of \$40,000, a close date of 04/30/2021, and stages "Proposal Sent" and "Sales Pipeline". Below this are buttons for Note, Email, Call, Log, Task, and Meet. A section titled "About this deal" shows the deal owner as Resa Gooding and the last contact date. It also indicates the deal type is "New Business". At the bottom of this sidebar is a "View all properties" button, which is circled in red.

The main area is titled "Activity" and shows a timeline of events for April 2021. The first event is "Deal activity" on April 17, 2021, at 11:23 AM GMT+3, where Resa Gooding moved the deal from "Discovery Call Booked" to "Proposal Sent". The second event is another "Deal activity" on the same day, where Resa Gooding moved the deal to "Discovery Call Booked". The third event is a note stating "This deal was created by Resa Gooding" on the same day.

Figure 3.26 – View all properties

The screenshot shows the "All properties" view for the same deal. On the left, a sidebar provides deal details: \$40,000 Test Deal, close date 04/30/2021, stage Proposal Sent, and pipeline Sales Pipeline. Below this is an "About" section with a note about default properties and a "Reset to account defaults" button.

The main area is titled "All properties" and includes a "Manage properties" button. It features a search bar and a checkbox for "Hide blank properties". The properties are categorized under "Deal activity" and "Deal information". Under "Deal activity", there is one entry: "Last modified date" on 04/17/2021 11:23 AM GMT+3. Under "Deal information", there are 33 properties listed, including "Amount" (\$40,000.00), "Amount in company currency" (\$40,000.00), and "Annual contract value". The "Add to your view" button for the "Amount" property is circled in red.

Figure 3.27 – Adding the respective property to your view

The screenshot shows the 'Account Defaults' section of a software interface. On the left, a sidebar lists 'Settings' and various account management options like 'General', 'Notifications', 'Security', 'Account Setup', and 'Account Defaults'. The 'Account Defaults' option is currently selected. At the top right, there are tabs for 'General', 'Security', 'Branding', 'User Defaults', and 'Currency', with 'Currency' being the active tab and circled in red. Below these tabs, a message states: 'These defaults will be used for deals and properties.' A 'Currencies' section follows, featuring a 'Use more currencies...' link, a 'Learn more' button, and a red 'Add Currency' button circled in red. A table displays currency settings: NAME, EXCHANGE RATE, and FORMAT. One entry is shown: 'US dollars \$' with 'Company Currency' and '\$123,456.78'.

Figure 3.28 – Adding another currency

This is a modal dialog titled 'Add currency'. It contains a 'Currency' field with a help icon, a dropdown menu labeled 'Select a currency', and an 'Exchange rate' input field. At the bottom are 'Save' and 'Cancel' buttons.

Figure 3.29 – Selecting a currency

Add currency X

Currency ⓘ

British Pound Sterling (GBP) £

Exchange rate

1.38

The exchange rate from British pounds sterling £ to US dollars \$

Save **Cancel**

Figure 3.30 – Inserting the exchange rate for the selected currency

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

The screenshot shows the Zoho Contacts interface. On the left, there's a navigation bar with links like 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. Below the navigation is a search bar and a filter section. The main area displays a list of contacts with columns for 'NAME', 'JOB TITLE', 'LEAD STATUS', 'LEAD SOURCE', and 'CREATE DATE (GMT+1)'. A filter 'Last activity date' is set to 'All time'. A modal window titled 'All filters' is open on the right, showing various filter options. One option, 'Last activity date' with the value 'Today', is highlighted with a yellow border.

Figure 3.32 – Creating views using filters in Contacts

This screenshot shows the same Zoho Contacts interface as Figure 3.32, but with more filters applied. The 'Last activity date' filter is now set to 'This week'. The 'Lead status' filter is set to 'All others (3)'. The contact list has been updated to show only relevant records. The 'All filters' modal window is still open on the right side of the screen.

Figure 3.33 – Adding more filters to see relevant contacts

In this screenshot, a 'Read-only view' overlay is displayed over the contact list. The overlay contains text explaining that it's a read-only view created by someone else, and it includes 'Save' and 'Reset' buttons. The contact list below remains the same as in the previous screenshots.

Figure 3.34 – Saving the view of chosen contacts

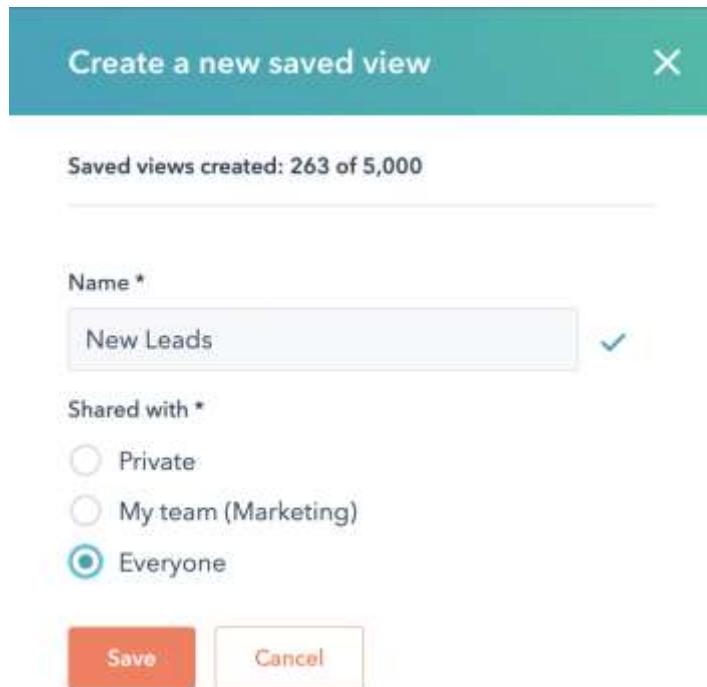
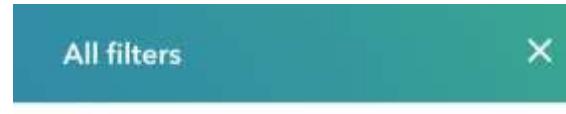


Figure 3.35 – Saving the view for everyone to have visibility of these lists of contacts

The screenshot shows a contact list titled 'New Leads'. The top navigation bar includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. The main interface features a search bar ('Search name, phone:'), filters ('Contact owner', 'Create type', 'Last activity date', 'Lead source', 'All filters (3)'), and buttons ('Add view (2/3)', 'All views', 'Table actions', 'Save view'). The contact list table has columns: NAME, JOB TITLE, LEAD STATUS, LEAD SOURCE, CREATE DATE (MM/DD/YY), and ORIGIN SOURCE. The table lists seven contacts: Reid, Max, Andrea, Sebastian, Bryan, Thomas, and Philippe. The contact list includes pagination controls ('< New >', '25 per page') at the bottom.

NAME	JOB TITLE	LEAD STATUS	LEAD SOURCE	CREATE DATE (MM/DD/YY)	ORIGIN SOURCE
Reid	Sales Account Specialist, Data Cen...	New	Website (Find)	Tuesday at 7:07 AM	Paid social
Max	Machine Learning Engineer	New	Website (Find)	Tuesday at 8:02 PM	Paid social
Andrea	Head of Risk Analytics	New	Website (Find)	Tuesday at 8:02 PM	Paid social
Sebastian	Consultant	New	Website (Find)	Yesterday at 3:11 PM	Paid social
Bryan	CTO Digital Native (Strategic Account)	New	Website (Find)	Yesterday at 10:49 AM	Paid social
Thomas	Software Engineer	New	Sales Outreach	Yesterday at 10:21 AM	Other campaigns
Philippe	Co-founder & Chief Technology Off...	New	Website (Find)	Yesterday at 9:14 AM	Paid social

Figure 3.36 – New Leads view



Showing 245 out of 35,884 records

Last contacted is Last month

and

Lead status is any of Open, Attempting to Contact, Connected, Qualified, or Handover to Sales

and

Job title doesn't contain exactly teacher, student, or tester

AND

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

All contacts							New Leads		Follow Up Needed			+ Add view (3/18)		All views
Name	Job Title	Contact source	Create date	Last activity date	(1) Lead status	Search	Lead source	Lead source	Created date	Table actions	All views	Print	Create report	
Amy	Engineer	Attempting to Connect	2022-01-01	2022-01-01	Organic search	Website (Organic)	2022	2022	2022-01-01	Table actions	All views	Print	Create report	
Willy	Sales	Attempting to Connect	2022-01-01	2022-01-01	Organic search	Website (Organic)	2022	2022	2022-01-01	Table actions	All views	Print	Create report	
Maria	HR	Attempting to Connect	2022-01-01	2022-01-01	Organic search	Website (Organic)	2022	2022	2022-01-01	Table actions	All views	Print	Create report	
Uma	Data scientist	Attempting to Connect	2022-01-01	2022-01-01	Organic search	Website (Organic)	2022	2022	2022-01-01	Table actions	All views	Print	Create report	
Robert	Developer	Attempting to Connect	2022-01-01	2022-01-01	Organic search	Website (Organic)	2022	2022	2022-01-01	Table actions	All views	Print	Create report	
Victor	Founder	Attempting to Connect	2022-01-01	2022-01-01	Organic search	Website (Organic)	2022	2022	2022-01-01	Table actions	All views	Print	Create report	
Jane	Specialist	Attempting to Connect	2022-01-01	2022-01-01	Organic search	Website (Organic)	2022	2022	2022-01-01	Table actions	All views	Print	Create report	
Giovanni	Analyst	Connected	2022-01-01	2022-01-01	Organic search	Website (Organic)	2022	2022	2022-01-01	Table actions	All views	Print	Create report	

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

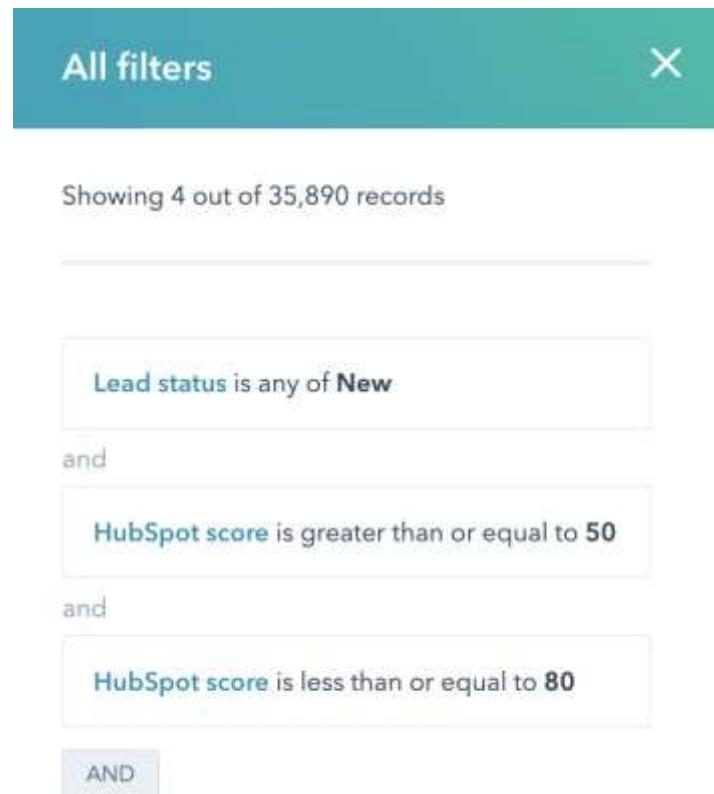


Figure 3.40 – Filters for setting up views for contacts that are not such a high priority

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

The screenshot shows the HubSpot Target Accounts dashboard. On the left, there's a sidebar with filters: 'Target accounts' (set to 'All'), 'No open tasks', 'No logged calls', 'No meetings', 'No open deals', 'No decision maker', 'Blockers', 'Find target accounts', 'Recommendations' (with a help icon), and 'Prospects' (which is highlighted with a red box). At the top, there are several dropdown menus: 'All owners', 'Select teams', 'Ideal Customer Profile Tier', 'Industry', and 'Lifecycle stage'. Below these are summary statistics: 'TARGET ACCOUNTS' (21), 'ACCOUNTS WITH OPEN DEALS' (0), 'OPEN DEAL VALUE' (₹0), and 'MISSING ANY BUYING ROLE' (13). A search bar says 'Search target account' with a magnifying glass icon. The main area displays a table with columns: COMPANY, CONTACTS, OPEN DEALS, OPEN DEAL VALUE, and LAST TOUCH. Three rows of data are shown, each with a greyed-out company name and a redacted contact count.

COMPANY	CONTACTS	OPEN DEALS	OPEN DEAL VALUE	LAST TOUCH
[REDACTED]	4	0	₹0	5 months ago Reza Gooding h...
[REDACTED]	3	0	₹0	6 months ago Reza Gooding s...
[REDACTED]	2	0	₹0	6 months ago Reza Gooding s...

Figure 4.2 – Navigation bar to the prospects tool

NAME		NUMBER OF VISITORS	NUMBER OF PAGE VIEWS
rostkredo.com.ua	<button>Preview</button> +	2	3
Net One Systems Co., Ltd.	<button>Preview</button> +	1	2
Econet Editora	<button>Preview</button> +	2	2
xgate.co.kr	<button>Preview</button> +	37	109

Figure 4.3 – Prospects tool

The screenshot shows the 'Templates' section in HubSpot. At the top, it says 'Templates' and '4 of 5 created'. There are buttons for 'New folder' and 'New template'. A red banner at the top states 'Your team has created 4 out of 5 templates. Unlock more templates with Sales Hub Starter.' with a 'Upgrade' button. Below this is a search bar and a table with four rows of template data.

NAME	OWNER	DATE CREATED	DATE MODIFIED
<input type="checkbox"/> Breakup email - Sample Template	Naama Eshed	2 years ago	2 years ago
<input type="checkbox"/> Come to T&T Carnival	Naama Eshed	2 years ago	2 years ago
<input type="checkbox"/> Join connection	Resa Gooding	a month ago	a month ago
<input type="checkbox"/> Share Helpful Resource	Naama Eshed	2 years ago	2 years ago

Figure 4.4 – Templates in HubSpot

Edit template X

Name: Inbound Lead from Content 2 Owner: Resa Gooding

Subject: Did you find a solution to prevent cyberattacks? Shared with everyone Select a Folder

Hi Contact: First name,

You recently visited our website and I was wondering if you found what you were looking for.

Did you drop by just to learn more about deep learning? Or, are you looking for a cost-effective solution to effectively detect and prevent cyber threats?

I actually did some research on Company: Name and have the following tips. Applying deep learning to your cybersecurity efforts will help you

- Analyze any type of data to give you more accurate and intuitive results.
- Save considerable costs and resources so you no longer have to contend with collateral damage from a cyber attack.

B I U T More S Personalize Insert

A Your signature will be included when you use this template. Edit signature Edit

Update existing template Save as new template Cancel 1 Content suggestions

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

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

TOTAL ENROLLED	OPEN RATE	CLICK RATE	REPLY RATE	MEETING RATE	UNSUBSCRIBE RATE	BOUNCE RATE
23	61%	22%	17%	0%	0%	0%
EMAIL	TOTAL ENROLLED	OPEN RATE	CLICK RATE	REPLY RATE	MEETING RATE	
Email 1	23	43%	22%	13%	0%	
Email 2	18	33%	0%	0%	0%	
Email 3	0	0%	0%	0%	0%	

Figure 4.7 – Analytics of a sequence

Inboxes

Current view: Inbox You're only modifying this view. Actions ▾

Channels SLAs NEW Access

Channels

NAME	STATUS
You haven't connected any channels	
Manage all your conversations in one place by connecting your email, forms, chat, and Facebook Messenger.	
Connect a channel	

Figure 4.8 – Connecting a shared inbox

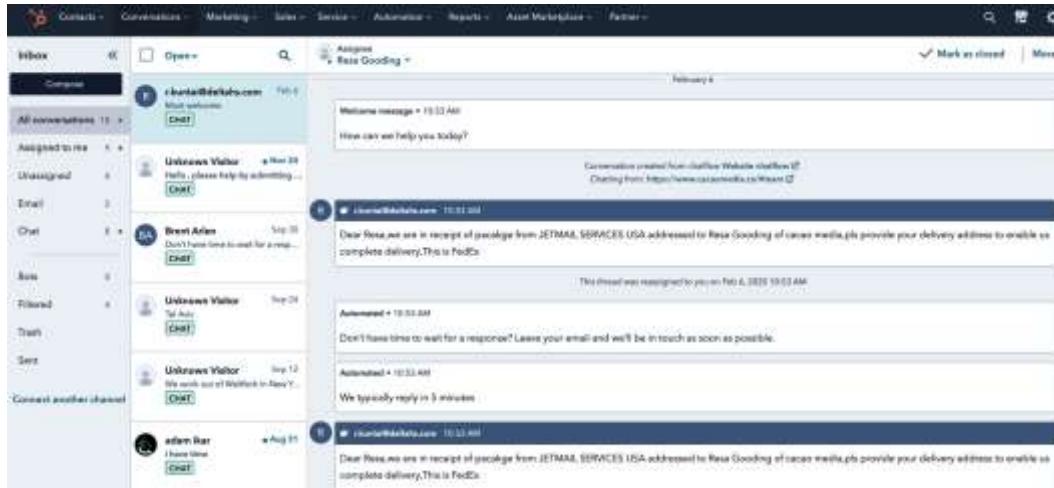


Figure 4.9 – Conversations inbox

General

Profile Email Calling Calendar Tasks

These preferences only apply to you. For account level email management, go to [email logging settings](#).

Email

Connect your personal email accounts to HubSpot to log, track, send, and receive emails in the HubSpot CRM. To manage any team emails, go to [inbox settings](#).

[Connect personal email](#)

EMAIL	STATUS	INBOX AUTOMATION
 resa@cacaomedia.co Inbox type: G Suite	Enabled	<input checked="" type="checkbox"/>

Figure 4.10 – Difference between shared inbox and personal inbox

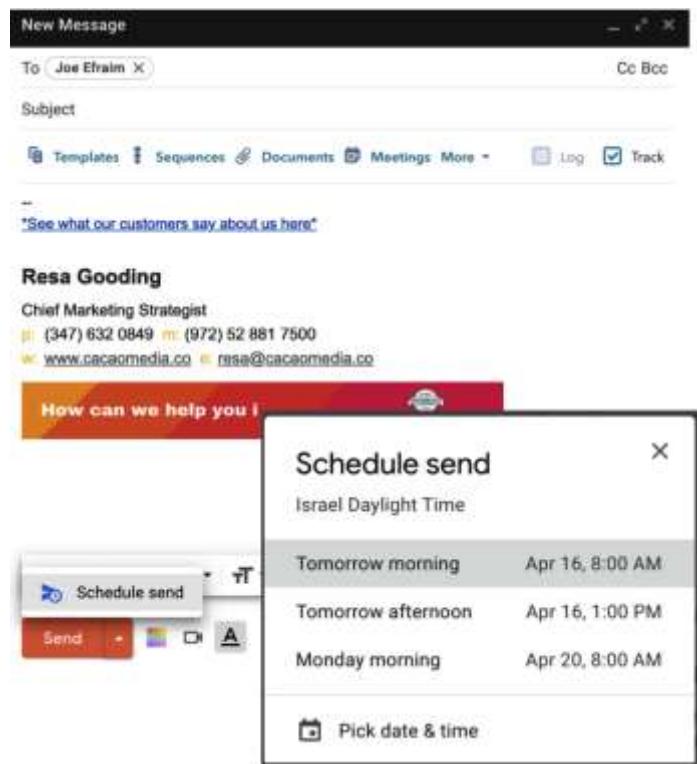


Figure 4.11 – Email scheduling feature

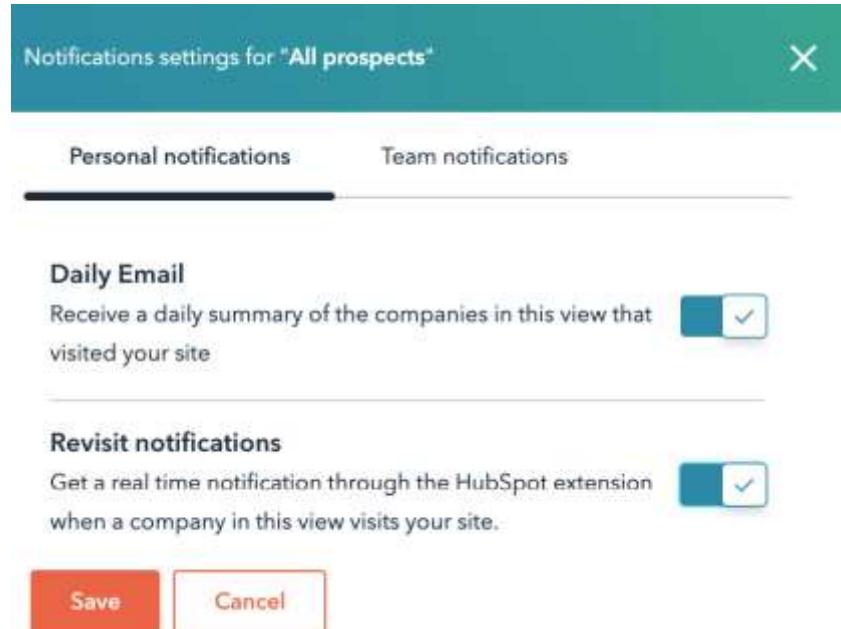


Figure 4.12 – Notifications tool

HubSpot Calling

HubSpot Sales Calling Enabled Disconnect

Calling connects you to contacts in your CRM through your browser or your own phone. [Learn more.](#)

Enable recording By default, recording is turned on for any contact who is not in one of the two-party consent states. Turn this setting off if you want to disable recording across an entire portal.

Usage this month Minutes, individual (0 of 2,000 used)

PHONE NUMBERS

★ +972-5-288 [REDACTED]	Delete
+ Add phone number	

Figure 4.13 – Calling tool

Meetings

Book meetings without the hassle

Stop wasting time with endless "What time works for you?" back-and-forth emails.

Empower prospects and customers to book meetings on your calendar to save you time from sending unnecessary emails.

Activate Meetings inside your HubSpot Sales account by connecting your calendar:

G Connect your Google calendar

I Connect your Office 365 calendar

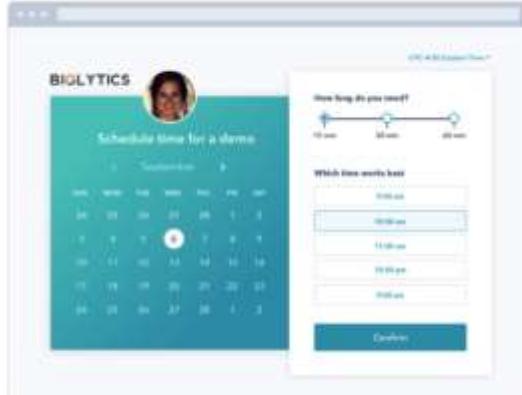
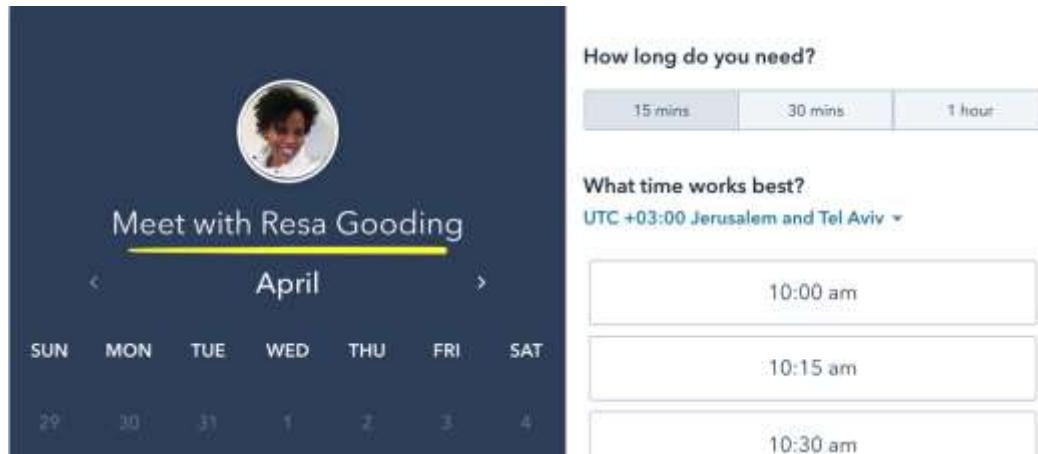


Figure 4.14 – Connecting your calendar to HubSpot



The screenshot shows the HubSpot Meetings tool. On the left, there's a dark sidebar with a user profile picture and the text "Meet with Resa Gooding". Below that is a calendar for April, showing dates from 29 to 4. On the right, there's a form for scheduling a meeting. At the top, it asks "How long do you need?" with options for 15 mins, 30 mins, or 1 hour. Below that, it asks "What time works best?" with a dropdown set to "UTC +03:00 Jerusalem and Tel Aviv". Three time slots are listed in boxes: "10:00 am", "10:15 am", and "10:30 am".

Figure 4.15 – The headline feature in the meetings tool

DETAILS

CONFIGURATION

AVAILABILITY

FORM QUESTIONS

Details

Meeting headline ?

Meet with Resa Gooding

Change photo

Meeting name * ?

15 Minute Demo

Meeting link * ?

<https://meetings.hubspot.com/resa7/> 15 min

Duration *

00 hrs 00 mins

+ Another duration

The screenshot shows the 'Details' tab of the HubSpot Meetings tool. At the top, there are four tabs: 'DETAILS' (highlighted with a red circle), 'CONFIGURATION', 'AVAILABILITY', and 'FORM QUESTIONS'. Below the tabs, the word 'Details' is centered. On the left, there is a placeholder profile picture with the text 'Change photo'. To its right, the 'Meeting headline' field contains 'Meet with Resa Gooding'. Underneath it, the 'Meeting name' field is filled with '15 Minute Demo'. The 'Meeting link' field shows a URL 'https://meetings.hubspot.com/resa7/' followed by a duration of '15 min'. Below these, the 'Duration' section has '00' in both the 'hrs' and 'mins' input fields. A link '+ Another duration' is visible at the bottom of this section.

Figure 4.16 – Adding your details to the meetings tool

DETAILS CONFIGURATION AVAILABILITY FORM QUESTIONS

Configuration

Location ⓘ

Where will this meeting take place

Add videoconference link ▾ Remove

Invite subject ⓘ ⓘ Contact token ⓘ Company token

The subject displayed in the calendar invite

Invite description ⓘ

Enter description

Booking page language ⓘ

Default to visitor's browser settings

Date and time format ⓘ

Default to visitor's browser settings

The country or area you choose affects how dates and times appear on your booking page

Email notifications

Send confirmation emails to prospects and customers immediately after they book meetings through this link.

Send test email Test email will be sent to resa@cacaonmedia.co

Send pre-meeting reminder emails to prospects and customers who book meetings through this link.

Figure 4.17 – Configuring the meetings tool

DETAILS ✓

CONFIGURATION ✓

AVAILABILITY ○

FORM QUESTIONS ○

Availability

When are you available to take meetings?

Choose the times of day you'll accept meetings (for example 9:00 AM to 12:00 PM and 1:00 PM to 5:00 PM).

Time zone

UTC -04:00 Eastern Time

Available times

Monday	from	9:00 AM	to	5:00 PM	✗
Tuesday	from	9:00 AM	to	5:00 PM	✗
Wednesday	from	9:00 AM	to	5:00 PM	✗
Thursday	from	9:00 AM	to	5:00 PM	✗
Friday	from	9:00 AM	to	5:00 PM	✗

+ Add hours

When a meeting can be scheduled

Over a period of rolling weeks

Custom date range

This week and next week

Set a period of rolling weeks, or a custom date range, people can book in your calendar

Minimum notice time

15 minutes

Minimum amount of time before a meeting can be booked

Figure 4.18 – Choosing your availability in the meetings tool

Friday	from	9:00 AM	to	11:00 AM	✗
Friday	from	5:00 PM	to	9:00 PM	✗

Figure 4.19 – Selecting multiple time ranges on the same day

Minimum notice time

1 day

Minimum amount of time before a meeting can be booked

Buffer time

30 minutes

Padding around your meetings you can't be booked for

Start time increment

15 minutes

Set the frequency of your meetings start times.

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

Form Questions

Ask prospects and customers a few qualifying questions as they are booking meetings with you.

First Name	<input checked="" type="checkbox"/> Required
Last Name	<input checked="" type="checkbox"/> Required
Email	<input checked="" type="checkbox"/> Required

Enter custom question

What feature would you like to know most about our platform? G

Save Cancel

+ Contact property + Custom question

What should happen after a prospect or customer submits this form ?

Display default confirmation page Redirect to another page NEW

Pre-populate fields with known values

Control whether or not forms pre-populate with known information when a contact returns to your site.

Auto-submit form when all fields are pre-populated ?

Control whether or not your contacts will see this form when all fields are pre-populated. [Learn more](#) ?

Privacy and consent (GDPR) ?

Add consent checkboxes and text to your form to follow privacy laws and regulations.

Figure 4.21 – Adding questions to your meeting link

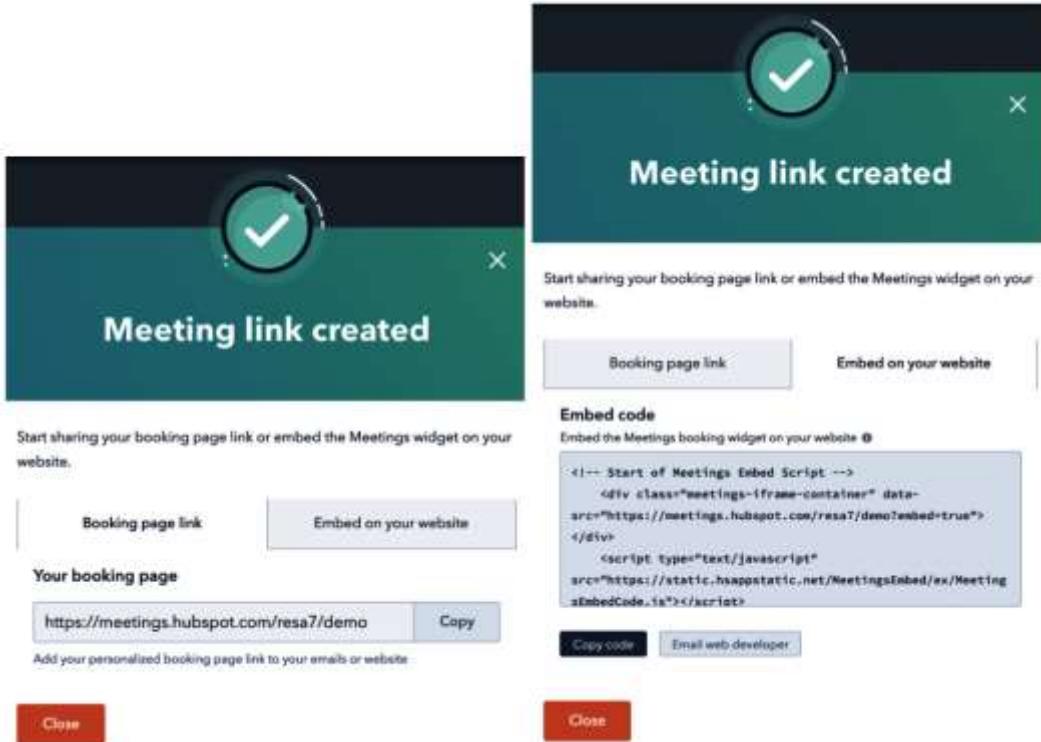


Figure 4.22 – Meeting link

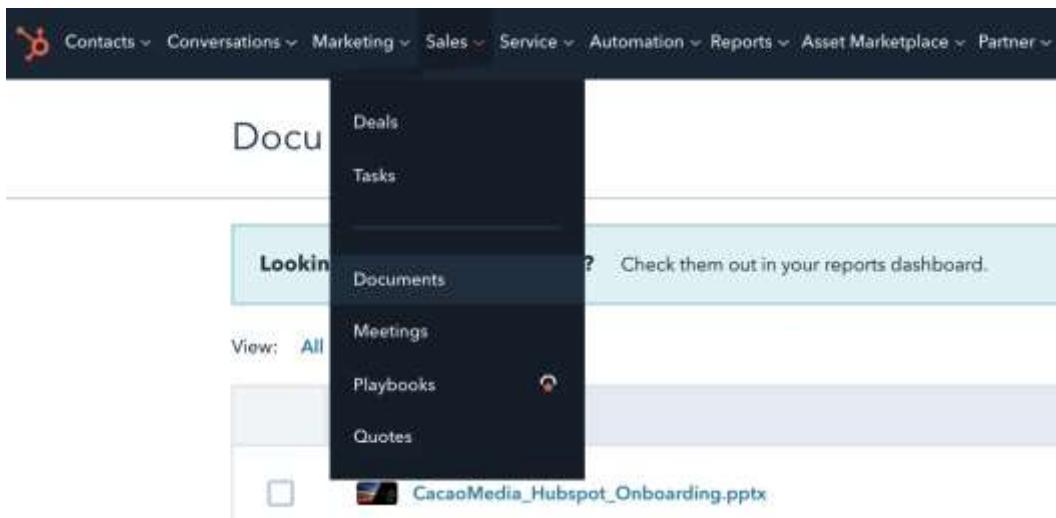


Figure 4.23 – Navigation bar to the documents feature

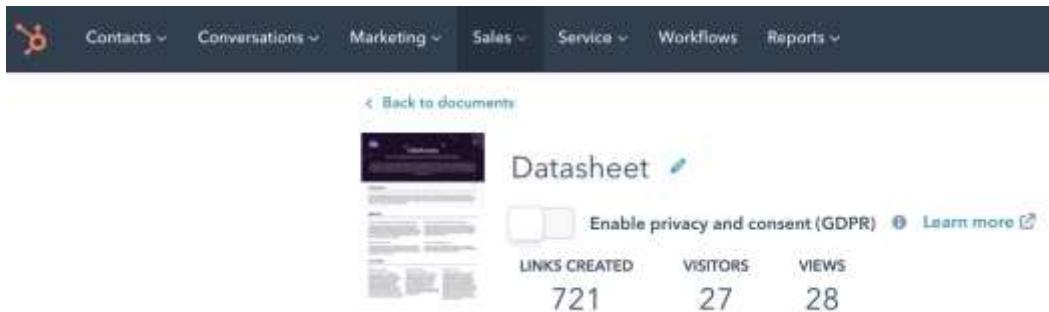


Figure 4.24 – Analytics from documents

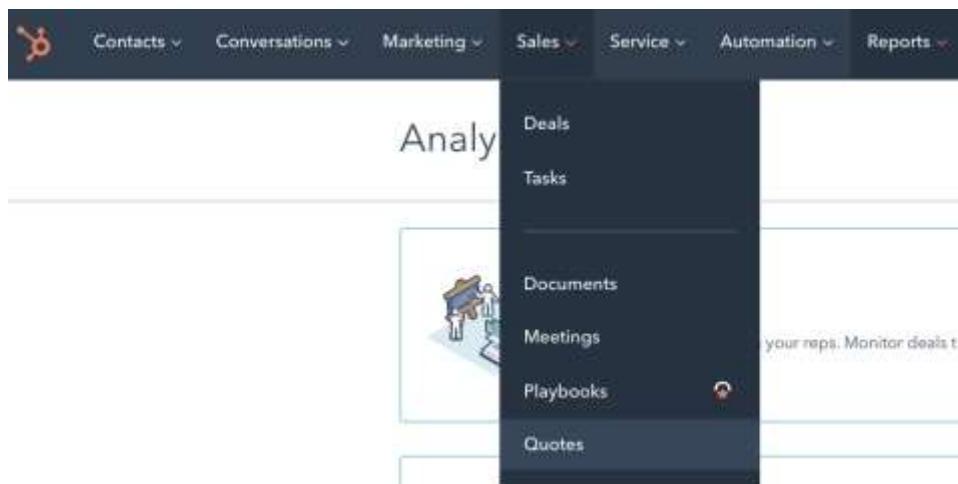


Figure 4.25 – Navigation bar to the quotes tool

The screenshot shows the 'Edit a quote' wizard, Step 1 of 7. The top navigation bar shows steps: DEAL, DETAILS, BUYER INFO, YOUR INFO, LINE ITEMS, SIGNATURE & PAYMENT, REVIEW. The 'DEAL' step is highlighted with a red circle. The main content area is titled 'Quote details' and includes a dropdown for 'Associate with a deal' set to 'HubSpot Onboarding'. A note below states: 'Once a deal is associated with a quote in this wizard, any changes you make will affect the properties of the selected deal.' To the right, a modal window titled 'HubSpot Onboarding' displays customer information: Name (John Doe), Email (john.doe@example.com), Address (123 Main St, Anytown, USA), Date created (Jun 2, 2021), and Last updated (Jun 2, 2021). The modal also shows a table of line items with one item: 'HubSpot Onboarding' at a quantity of 1, unit price of \$1,000.00, and total price of \$1,000.00. Buttons for 'Next' and 'Previous' are at the bottom of the modal.

Figure 4.26 – Quote details

The screenshot shows the 'Edit a quote' interface in HubSpot. The top navigation bar includes tabs for DEAL, DETAILS, BUYER INFO, YOUR INFO, LINE ITEM, SIGNATURE & PAYMENT, and REVIEW, with 'Step 2 of 7' indicated. The main form is titled 'Quote Details'. It contains fields for 'Quote template *' (set to 'Standard: Basic'), 'Quote name *' (entered as 'HubSpot Onboarding'), and 'Expiration date *' (set to 'In 90 days (September 19, 2022)'). Below these are sections for 'Comments to buyer' and 'Purchase terms', both with placeholder text. To the right, a preview window titled 'HubSpot Onboarding' shows a sample quote document with a recipient named 'Tina Turner' and a table of items. At the bottom are 'Save' and 'Next >' buttons.

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

The screenshot shows the 'Edit a quote' interface in HubSpot, specifically the 'Buyer Information' section, which is part of 'Step 3 of 7'. The top navigation bar includes tabs for DEAL, DETAILS, BUYER INFO, YOUR INFO, LINE ITEM, SIGNATURE & PAYMENT, and REVIEW. The main form shows 'Buyer Information' selected. It displays a contact card for 'Tina Turner, CMO, tina.turner@hubspot.com' with a checked checkbox. Below it is a button to '+ Add another contact' and another button to '+ Add company'. To the right, a preview window titled 'HubSpot Onboarding' shows a sample quote document with the same contact information. At the bottom are 'Save' and 'Next >' buttons.

Figure 4.28 – Buyer's information

Your Information

Check the information about you and your company that will appear on the quote.

Rosa Gedding
No title
No phone number

Year company information

No company name

HubSpot Onboarding

Total: \$3,500.00

Product	Quantity	Unit Price	Total Price
HubSpot Marketing Onboarding	1	\$3,500	\$3,500

Last saved on June 21, 2022

Save Next >

Figure 4.29 – Seller's information

Review Products

Review the products you want shown in your quote.

NAME	TERM	UNIT PRICE	QUANTITY	TOTAL PRICE
HubSpot Marketing Onboarding	3 months	\$3,500	1	\$3,500 Margin \$3,500

Add from library Add product

Totals

One-time subtotal	\$3,500.00
Subtotal	\$3,500.00
+ Add discount + Add fee + Add tax	
Total	\$3,500.00

Figure 4.30 – Review products

Signature and Payment

Signature options:

- No signature
- Include space for a written signature
- Use e-signature

Countersignature:

Payment options:

- No payment
- HubSpot Payments
- Stripe

HubSpot Onboarding

Document created by [Sally Drury](#)

Line Item	Description	Unit	Quantity	Amount
HubSpot Onboarding	For 1 month(s)	USD	1	\$1,000.00
Total:				\$1,000.00

Signatures:

Signer: _____ Date: _____

Signer: _____ Date: _____

Last updated on June 21, 2023 [Save](#) [Print quote](#)

Figure 4.31 – Signature and Payment with space for signature

Review

Quote Details:

- Client Name: Sally Drury
- Location: United States

HubSpot Onboarding

Document created by [Sally Drury](#)

Line Item	Description	Unit	Quantity	Amount
HubSpot Onboarding	For 1 month(s)	USD	1	\$1,000.00
Total:				\$1,000.00

Signatures:

Signer: _____ Date: _____

Signer: _____ Date: _____

Last updated on June 21, 2023 [Save](#) [Print quote](#)

Figure 4.32 – Final review of the quote

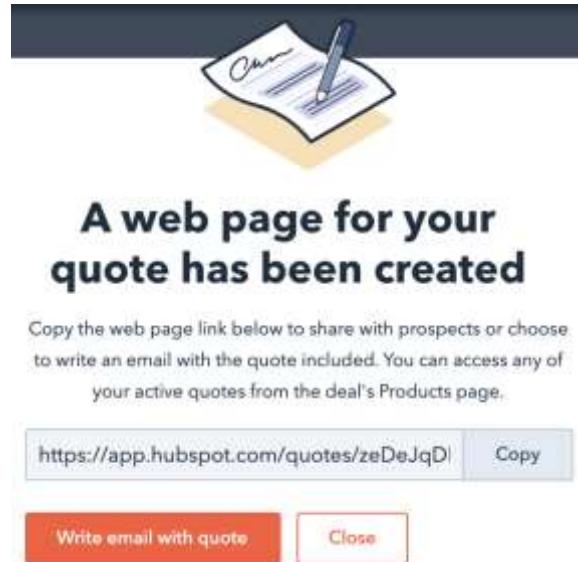


Figure 4.33 – Link for the quote

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

Featured image

Enabled featured image

Choose or upload an image to be used when sharing your post on social media or on your listing page.

ON

Upload

Browse images



Image alt text

The fundamentals of building an Effective SEO Content Strategy in HubSpot

Figure 5.1 – Alt text for images

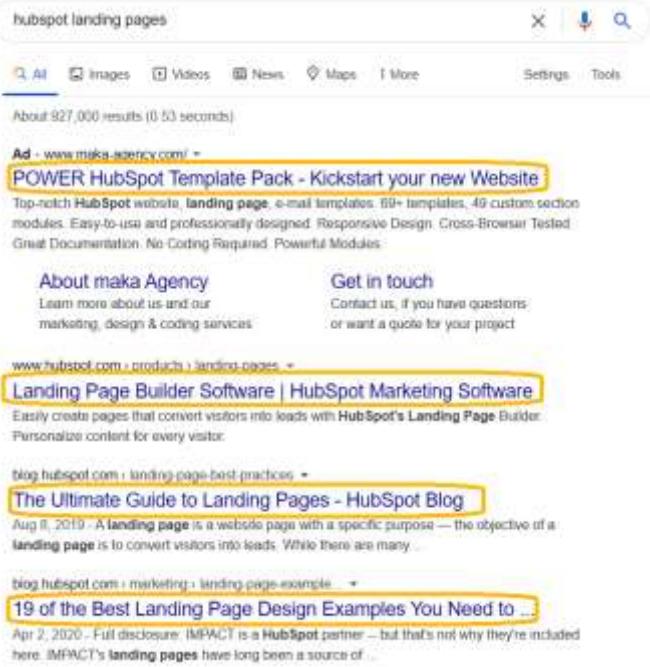


Figure 5.2 – Title tags in Google search engine

Meta description * ⓘ

Tomer Harel, CEO, Key Scouts, an SEO focused HubSpot agency covered the fundamentals of building an effective SEO Content Strategy in this workshop

G

Great! You're within the limit. 8 characters remaining.

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

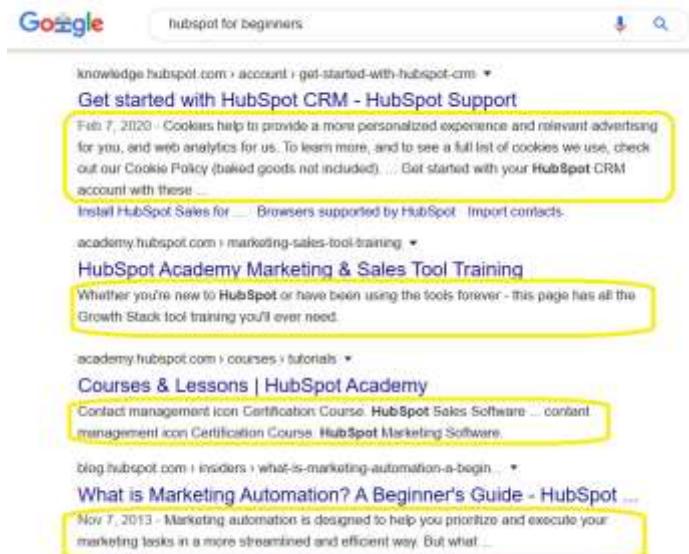


Figure 5.4 – Meta descriptions in Google search engine

The screenshot shows the Yoast SEO plugin interface for a blog post titled "Session #17: Scaling NLP Pipelines at IHS Markit". The audit report is fully optimized, with all green status indicators:

- Page has a title**: Title appears in search results, will help search engines learn what your page is about.
- Title is 70 characters or less**: A title that's 70 characters or less is more likely to get cut off in search results. Your page title is 33 characters.
- Title and domain name are unique**: Repeating the domain name in your title makes this comment look less trustworthy to search engines and visitors.
- Mobile friendliness**: The page has a properly configured viewport meta tag.
- Crawling and indexing**: Search engines can display the page in search results.
- Meta description**: Page has a meta description. Your meta description appears under the page title in search results. It gives search engines and visitors information about what

The "Optimize" tab is selected, showing the following configuration for the "Watch On Demand" section:

- Page URL**: [Watch On Demand](#)
- Page Title**: Watch On Demand
- Page Description**: Session #17: Scaling NLP Pipelines at IHS Markit
- Image URL**: [watch-on-demand-16x9.jpg](#)
- Summary**: No summary. You agree to receive communications from IHS Markit. You can unsubscribe at any time. If you have any questions, please refer to the [privacy statement](#).

WATCH NOW button

Presented By

- Yannick Heitz**: Co-Founder and CTO, Iguzzio
- Yannick Heitz**: Co-Founder and CTO, Iguzzio

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.

- META DESCRIPTION**
 - ✓ **Page has a meta description**

Your meta description appears under the page title in search results. It gives search engines and readers information about what your page is about.
 - ✓ **Meta description and title are unique**

Your meta description will appear under the title in search results. No need to repeat it.
 - ✓ **Meta description is 155 characters or less**

A meta description that's less than 155 characters is less likely to get cut off in search results. Your meta description is 141 characters.
- IMAGES**
 - ✓ **All images have alt text**

Alt text helps search engines and visually impaired users understand what your image is about. [Learn more about alt text](#)
- HEADER**
 - ✓ **Page has a single H1 tag**

A single H1 tag makes it easier for search engines and readers to understand your content. Your page has 1 H1 tag(s). [Learn more about H1 tags](#)

Figure 5.6 – Elements of a fully optimized SEO page

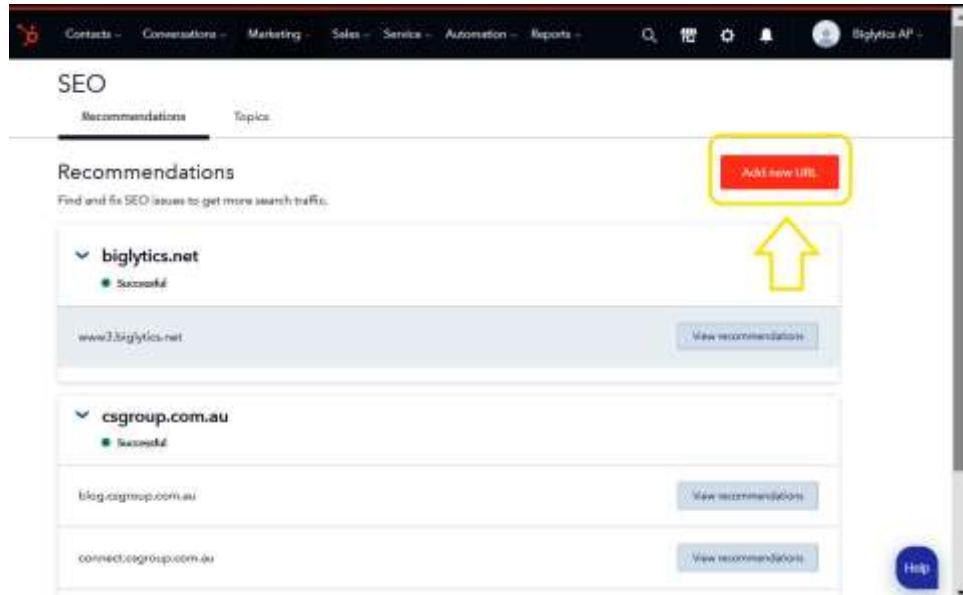


Figure 5.7 – Add your website to HubSpot's SEO tool

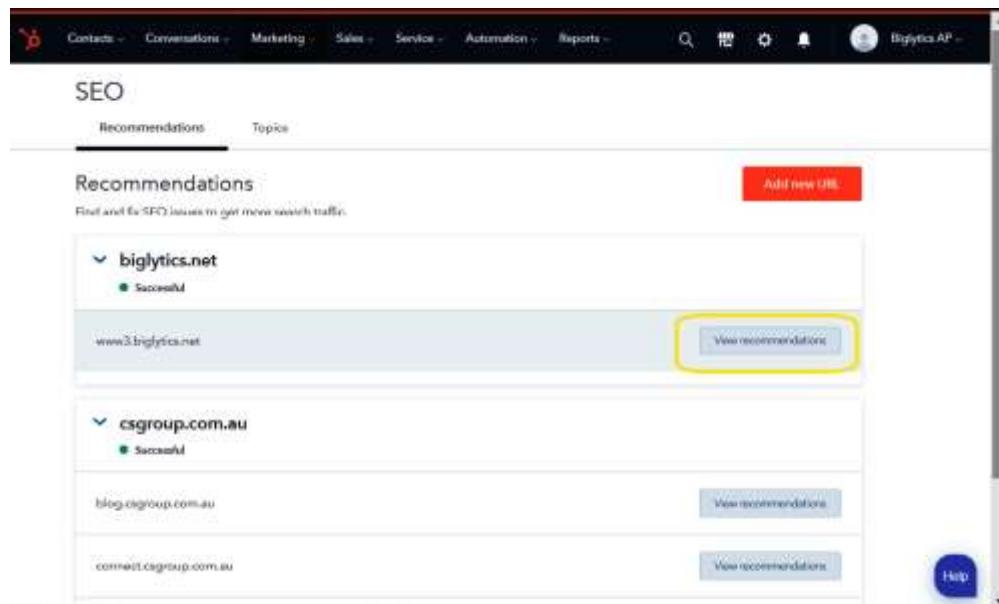


Figure 5.8 – Accessing the SEO recommendations from HubSpot

Recommendations Topics

[Back to domains](#)

[Scan for recommendations](#)

Recommendations

Find and fix SEO issues to get more search traffic.

[www3.bigtlytca.net](#)

RECOMMENDATIONS	PAGES AFFECTED	IMPACT	REASON
Address pages with duplicate content	View pages	5 ● High	Pages are duplicates of each other if at least 86% of their content is the same. Duplicate pages compete for the same search terms. This may result in less visibility for either page. Sometimes, duplicate content can also result in a penalty from search engines. Create more variation between your pages, or combine them.
Increase word count	View pages	17 ● High	Top content is an in-depth answer to someone's question. Aim for more than 300 words to make sure you've completely covered your topic.
Add meta description	View pages	15 ● Medium	Your meta description gives search engines and readers information about what your content is about. Be sure to add it to all your pages to help increase the chance that your post sparks interest and gets clicked.
Address pages with duplicate title tags	View pages	5 ● Medium	Title tags give visitors a first impression of a page. Make sure every title tag on your website is unique.
Remove title from meta description	View pages	4 ● Medium	Your meta description will appear under your title in the search results. No need to repeat it.
Make sure each page has exactly one H1 tag	View pages	20+ ● Low	A single H1 tag makes it easier for search engines and readers to understand your content. Some of your pages are missing an H1 tag or have too many.

Figure 5.9 – Viewing the SEO recommendations

SEO

Recommendations Topics

[Back to SEO recommendations](#)

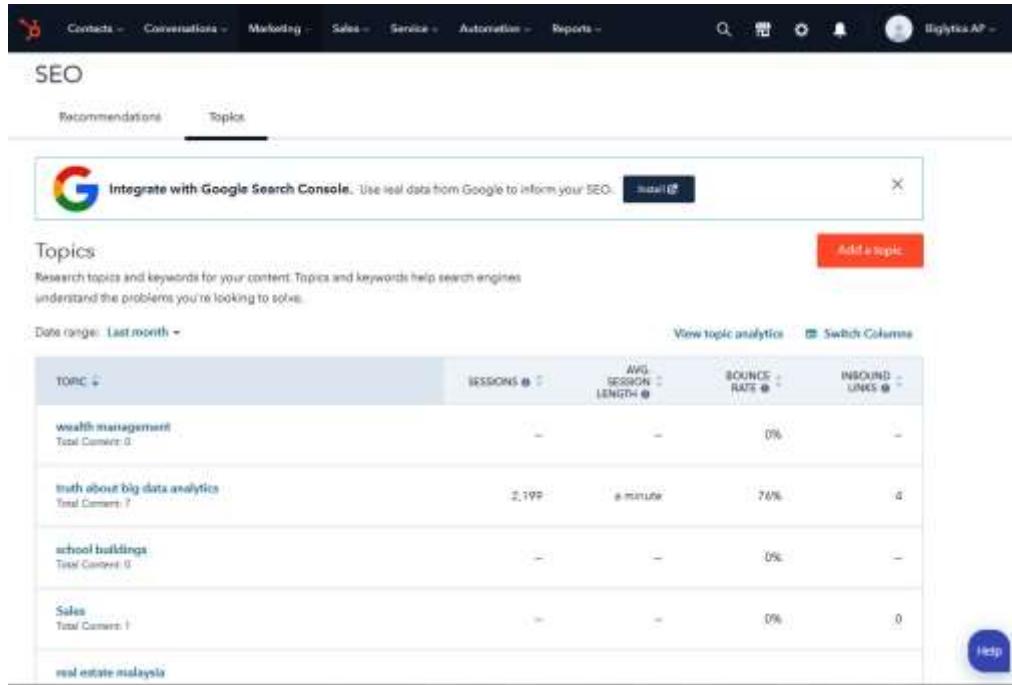
Increase word count

Top content is an in-depth answer to someone's question. Aim for more than 300 words to make sure you've completely covered your topic.

blog.cacaomedia.co

PAGE NAME	WORD COUNT	VIEWS
Content Isreal 2020 https://blog.cacaomedia.co/blog/content-isreal-2020	56	2
Optimize Selling Time Through Organizational Alignment https://blog.cacaomedia.co/blog/optimize-selling-time-through-organizational-alignment	67	2
Marketing Activities Your Company Can Do During Slow Periods https://blog.cacaomedia.co/blog/marketing-activities-your-company-can-do-during-slow-periods	99	1
How to Scale your Online Events Using Marketing Automation https://blog.cacaomedia.co/blog/how-to-scale-your-online-events-using-marketing-automation	101	1

Figure 5.10 – Fixing the SEO recommendations



The screenshot shows the HubSpot SEO dashboard. At the top, there is a navigation bar with links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, and a search bar. Below the navigation is a header with the word "SEO". Under the header, there are two tabs: "Recommendations" and "Topics", with "Topics" being the active tab. A modal window titled "Integrate with Google Search Console" is open, prompting the user to "Use real data from Google to inform your SEO" with a "Install" button and a close "X" button. The main content area is titled "Topics" and contains a sub-section "Research topics and keywords for your content. Topics and keywords help search engines understand the problems you're looking to solve." It includes a date range selector set to "Last month" and buttons for "View topic analytics" and "Switch Columns". A table lists five topics with columns for "TOPIC", "SESSIONS", "AVG SESSION LENGTH", "BOUNCE RATE", and "INBOUND LINKS". The topics listed are: "wealth management" (Total Content: 0), "truth about big data analytics" (Total Content: 7), "school buildings" (Total Content: 0), "Sales" (Total Content: 1), and "real estate malaysian" (Total Content: 0). A "Help" button is located in the bottom right corner of the table area.

TOPIC	SESSIONS	AVG SESSION LENGTH	BOUNCE RATE	INBOUND LINKS
wealth management	—	—	0%	—
truth about big data analytics	2,199	8 minute	76%	4
school buildings	—	—	0%	—
Sales	—	—	0%	0
real estate malaysian	—	—	—	—

Figure 5.11 – Defining your topics in HubSpot

The screenshot shows the HubSpot SEO tool's 'Topics' section. At the top, there are navigation links for 'Recommendations' and 'Topics'. A prominent Google Search Console integration box is displayed, featuring a 'Install' button. Below this, the 'Topics' heading is shown with a sub-instruction: 'Research topics and keywords for your content. Topics and keywords help search engines understand the problems you're looking to solve.' A date range selector shows 'Last month'. On the right, there are buttons for 'View topic analytics' and 'Switch Columns'. A red box highlights the 'Add a topic' button. The main table lists one topic: 'wealth management' with a total content count of 0.

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

This screenshot shows the 'Add a topic' page. At the top, there is a 'Back to SEO' link and a 'Country' dropdown set to 'United States'. The main question is 'What is one of the main challenges that you help your customers overcome?'. Below it, a note says: 'Answering this question will help you start to think about what topics your buyers care about. Based on your existing website and what we know about your industry, the below suggestions might be likely topics to write about. Choose one.' A search bar contains the text 'Data Science Platform', and an 'Add' button is highlighted with a yellow box. Below the search bar, there are filters for 'TOPIC', 'MONTHLY SEARCH VOLUME', and 'DIFFICULTY'. A placeholder text 'Add some potential topic phrases' is present. The bottom section is titled 'Recommended Topics'.

Figure 5.13 – Adding the topic to the HubSpot SEO tool

Back to SEO

Add a topic

Country United States

Search

ain challenges that you help your customers overcome?

You start to think about what topics your buyers care about. Based on your existing website and what we know about your industry, the below suggestions might be likely topics to write about. Choose one.

United Kingdom

United States

Uruguay

Venezuela

Vietnam

Add

TOPIC MONTHLY SEARCH VOLUME ⚡ DIFFICULTY ⚡

Add some potential topic phrases

Recommended Topics

TOPIC	MONTHLY SEARCH VOLUME ⚡	DIFFICULTY ⚡
<input type="radio"/> social media	110,000	86.15
<input type="radio"/> marketers	90,500	75.67

Figure 5.14 – Adding countries to your SEO search

What is one of the main challenges that you help your customers overcome?

Answering this question will help you start to think about what topics your buyers care about. Based on your existing website and what we know about your industry, the below suggestions might be likely topics to write about. Choose one.

Data Science Platform

TOPIC MONTHLY SEARCH VOLUME ⚡ DIFFICULTY ⚡

Data Science Platform 320 58.03

Recommended Topics

TOPIC	MONTHLY SEARCH VOLUME ⚡	DIFFICULTY ⚡
<input type="radio"/> table win-win survival strategies	0	0
<input type="radio"/> holistic world view	0	0

1 **2**

Create Topic Cancel You're adding the topic "Data Science Platform".

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

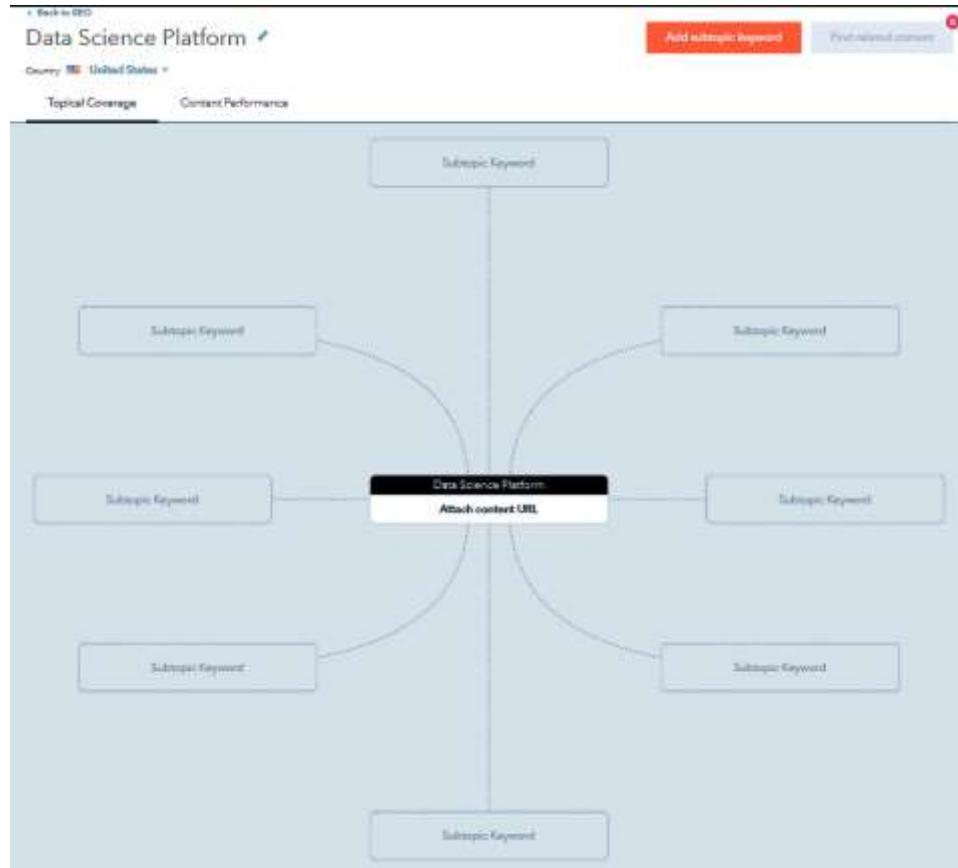


Figure 5.16 – Pillar page in HubSpot



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



Figure 5.18 – Defining your subtopics in HubSpot

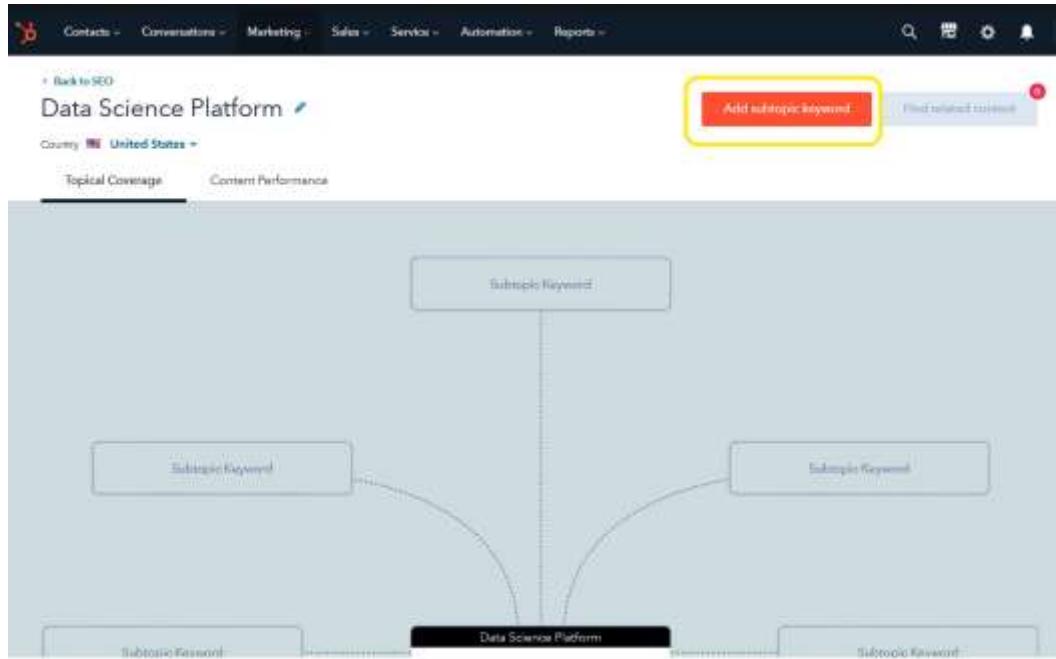


Figure 5.19 – Researching your subtopic keyword

The screenshot shows the "Add Subtopic Keyword" modal window. At the top, there is a search input field containing "enterprise data science". Below the search field is a small explanatory text: "Enterprise is a great subtopic keyword for HubSpot's intended marketing topic, might be 'benefits of inbound marketing'." Underneath this text is a black button labeled "Research Subtopic Keywords". A yellow rectangular box highlights this button. Below the button is a table with five rows, each representing a keyword and its monthly search volume. The table has two columns: "KEYWORD" and "MONTHLY SEARCHES".

KEYWORD	MONTHLY SEARCHES
enterprise data science	20
hewlett packard enterprise data science institute	70
data science enterprise architecture	10
enterprise data science ibm	10
enterprise data science platform	10

Figure 5.20 – Understanding the relevance of your subtopic/keywords

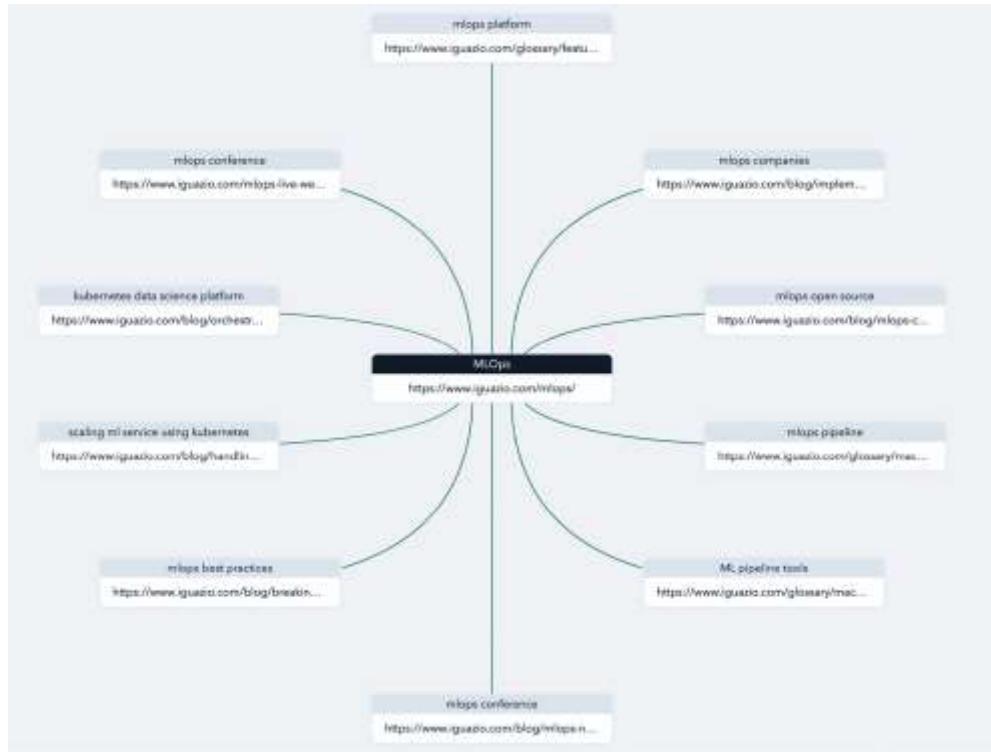


Figure 5.21 – A topic cluster built in HubSpot

The screenshot shows the HubSpot SEO interface for a pillar page titled "truth about big data analytics". The top navigation bar includes "Contacts", "Conversations", "Marketing", "Sales", "Service", "Automation", and "Reports". The main content area displays the pillar page's SEO metrics and performance data.

SEO Metrics:

- Country: United States
- Date range: Last month
- Topical Coverage: Content Performance
- Switch Columns

Pillar Page:

Your Blog Post Title Here...

Status: Draft

TIME PER PAGE VIEW	INBOUND LINKS	BOUNCE RATE
a few seconds	0	—

Figure 5.22 – Analyzing the pillar page's overall performance

Pillar Page

Your Blog Post Title Here... [Edit](#)

Draft

TIME PER PAGE VIEW	INBOUND LINKS	BOUNCE RATE
-	0	-

Subtopic content

CONTENT	SUBTOPIC KEYWORD	TIME PER PAGE VIEW	INBOUND LINKS	BOUNCE RATE	LINK TO PILLAR PAGE
How Big Data Works (in Less Than 1,000 Words) Guide ● Published	How Big Data Works	a few seconds	1	74%	Check link
https://www3.bigtlytics.net/knowledge/what-is-big-data ● Published	Big Data	-	0	-	Check link
[Data] Webinar: Big Data Algorithms ● Published	Big Data Algorithms	a few seconds	1	77%	Check link

Figure 5.23 – Understanding the results of the subtopic keywords

<https://towardsdatascience.com/kubernetes-the-open-and-scalable-approach-to-ml-pip...> scaling ml service usi... [Check link](#)

● Non Canonical URL

<https://www.iguazio.com/blog/orchestrating-ml-pipelines-scale-kubeflow/> kubernetes data scie... 3 minutes [8 Linked](#)

● Published

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

The screenshot shows the HubSpot SEO Topics page. At the top, there's a navigation bar with links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. Below the navigation is a search bar and a gear icon. The main title is "SEO" with a sub-section "Topics". A banner at the top says "Integrate with Google Search Console. Use real data from Google to inform your SEO." with a "Install" button. Below the banner, there's a section titled "Topics" with a sub-instruction: "Research topics and keywords for your content. Topics and keywords help search engines understand the problems you're looking to solve." A red "Add a topic" button is visible. The main content area displays a table of topics. The columns are: TOPIC, SESSIONS, AVG. SESSION LENGTH, BOUNCE RATE, and INBOUND LINKS. The first row shows "wealth management" with 0 sessions, 0 avg. session length, 0% bounce rate, and 0 inbound links. The second row shows "truth about big data analytics" with 2,199 sessions, a few seconds avg. session length, 76% bounce rate, and 4 inbound links. A yellow box highlights the "View topic analytics" button next to the "SESSIONS" column header.

TOPIC	SESSIONS	Avg. SESSION LENGTH	BOUNCE RATE	INBOUND LINKS
wealth management Total Content: 0	0	—	0%	—
truth about big data analytics Total Content: 7	2,199	a few seconds	76%	4

Figure 5.25 – Accessing the top analytics in HubSpot

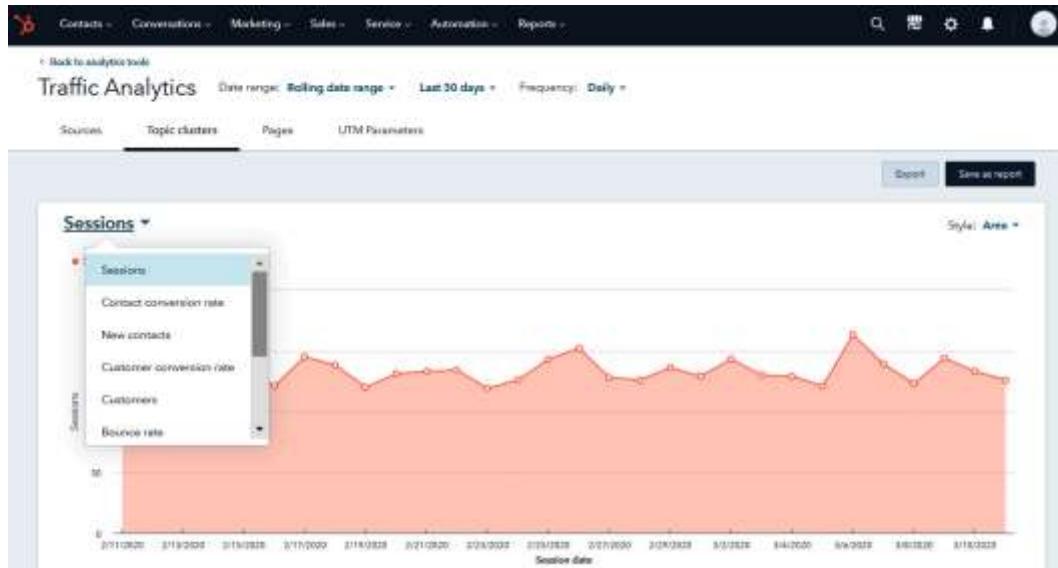


Figure 5.26 – Graph showing the analytics of the subtopics

All topic clusters >

TOPIC CLUSTER	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
<input type="checkbox"/> truth about big data analytics	2,269	0.44%	10	0%	0	77.13%	1 second
<input type="checkbox"/> inbound marketing	1,519	0.07%	1	0%	0	75.58%	1 second
<input type="checkbox"/> 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 >

TOPIC CLUSTER	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
<input type="checkbox"/> truth about big data analytics	2,269	0.44%	10	0%	0	77.13%	1 second
<input type="checkbox"/> inbound marketing	1,519	0.07%	1	0%	0	75.58%	1 second
<input type="checkbox"/> 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

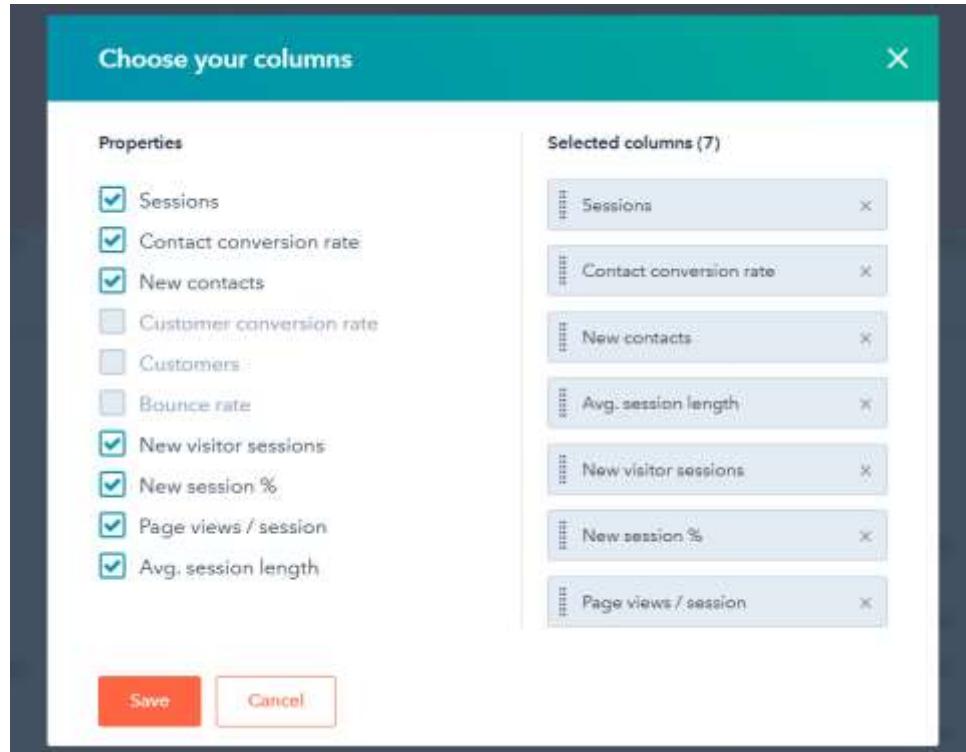
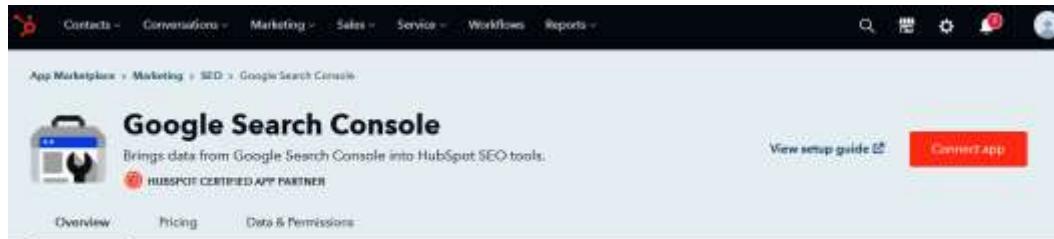


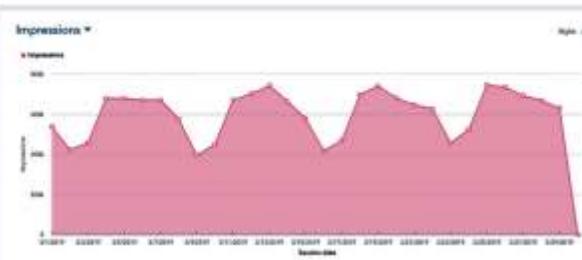
Figure 5.29 – Selecting the columns you wish to add to your report

The screenshot shows the HubSpot App Marketplace. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Workflows, Reports, and a search bar. Below the header, there's a section titled "HubSpot App Marketplace" with a sub-instruction "Connect your favorite tools to HubSpot". A "Manage apps" and "Build apps" button are located in the top right. On the left, a sidebar titled "Discover" contains a "All collections" section with links for Popular apps, New apps, Free apps, For marketing teams, For sales teams, For customer success teams, and Apps for startups. The main content area displays a grid of app cards. One card for "Google Search Console" by HubSpot is highlighted with a light blue background. Other cards shown include "G-Accio" by G-Accio, "TopClicks" by TopClicks, and "GrayMetrics" by GrayMetrics. A sidebar on the right shows a list of apps starting with "pier".

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



Google Search Console Integration Overview



Details

Provider
HubSpot

Total installs

10,000+

Category

SEO

Features

Keyword Analysis Rank Tracking Reporting
Website Analytics Integration

Requirements

Figure 5.31 – Adding Google Search Console to HubSpot

Topics

Add a topic

Research topics and keywords for your content. Topics and keywords help search engines understand the problems you're looking to solve.

Date range: All time ▾

View topic analytics

Switch Columns

TOPIC ▾	SESSIONS ▾	AVG. SESSION LENGTH ▾	BOUNCE RATE ▾
MLOps Total Content: 5	914	a few seconds	79%
data science Total Content: 0	—	—	0%

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

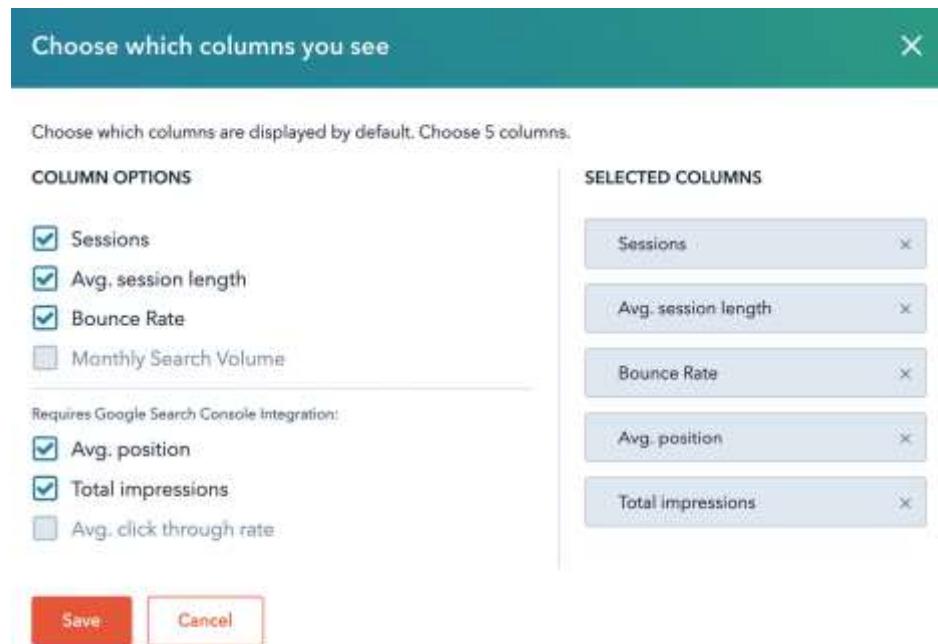


Figure 5.33 – Adding Google Search Console analytics to your reports

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

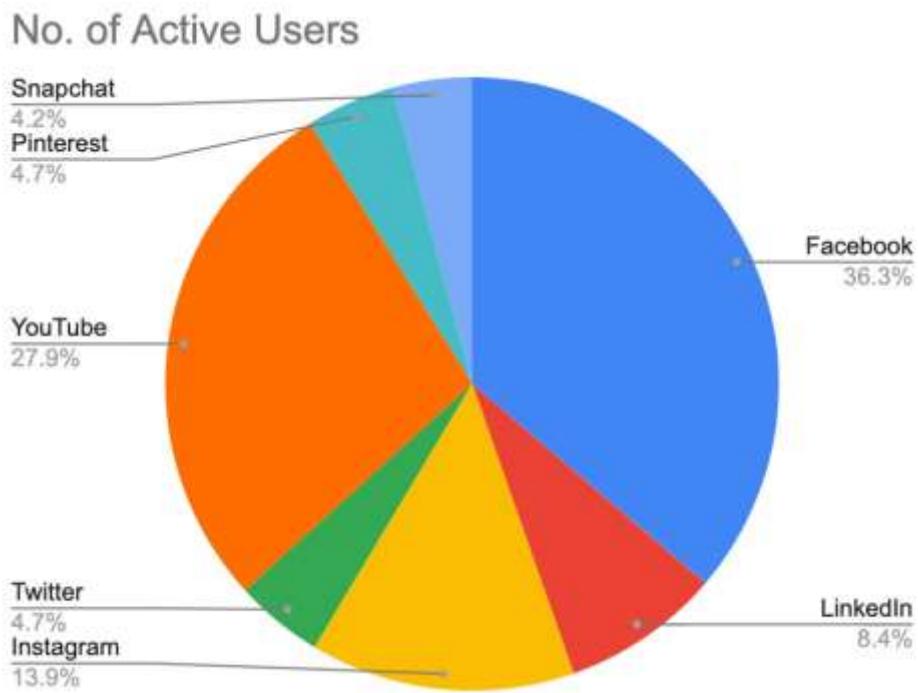


Figure 6.1 – Percentage of active users per social media channel



Figure 6.2 – Connecting your social media accounts to HubSpot

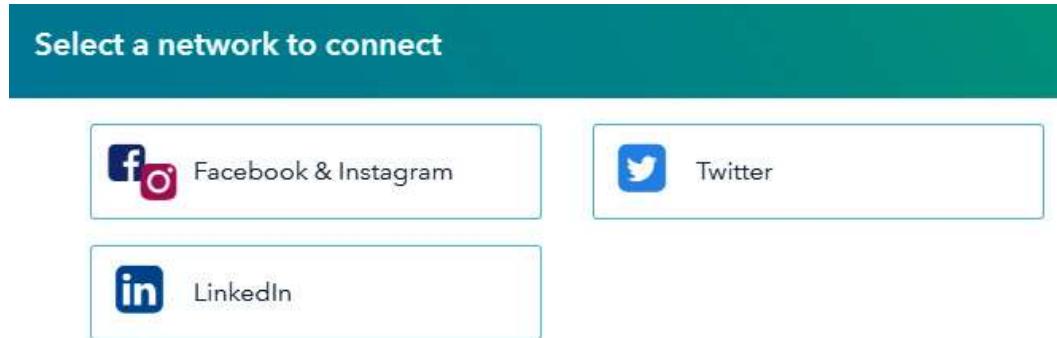


Figure 6.3 – Choosing your platforms

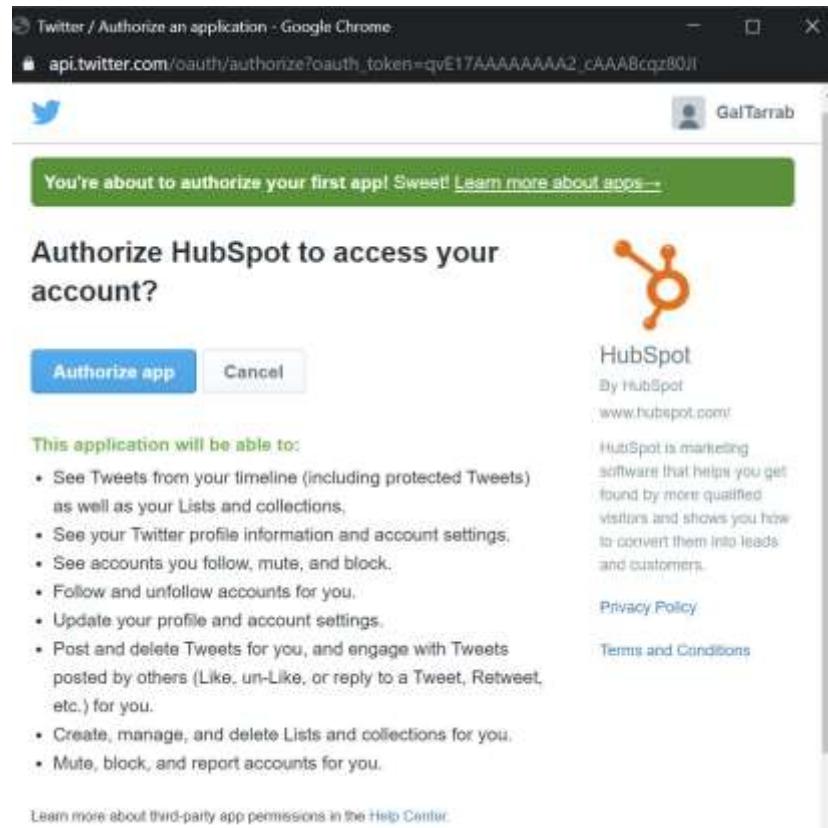


Figure 6.4 – Authorizing HubSpot to connect to your social media apps

Social

Accounts	Publishing	Email Notifications	Follow Me			
Schedule						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
11:00 AM 2:00 PM 4:45 PM						

Figure 6.5 – Choosing your designated times for publishing posts

Social

Accounts	Publishing	Email Notifications	Follow Me			
Schedule						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
11:00 AM 2:00 PM 4:45 PM	11:00 AM 2:00 PM  4:45 PM	11:00 AM 2:00 PM 4:45 PM				

Figure 6.6 – Adding or deleting additional times

Publish now by default	
Publish like a human	<input checked="" type="checkbox"/>
Make your publishing schedule appear natural and spontaneous. Your posts will publish at various times within 10 minutes of the time you select.	
Next post delay	3 days 
When scheduling multiple posts to the same network, choose how much default time you'd like between posts.	
Publish with custom short links	
Bity account connected: o_5t46oiith40	
Publish from your browser	

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

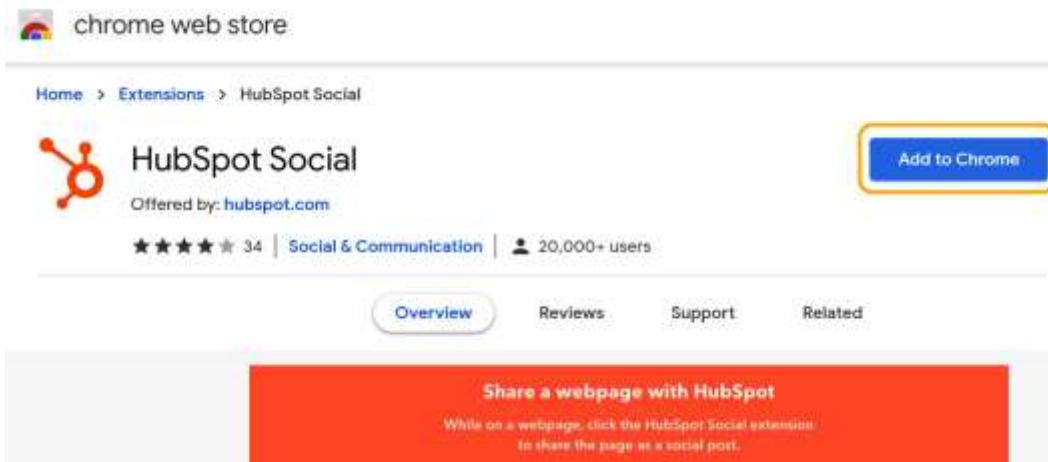


Figure 6.8 – Installing the Chrome extension to post web articles directly to HubSpot

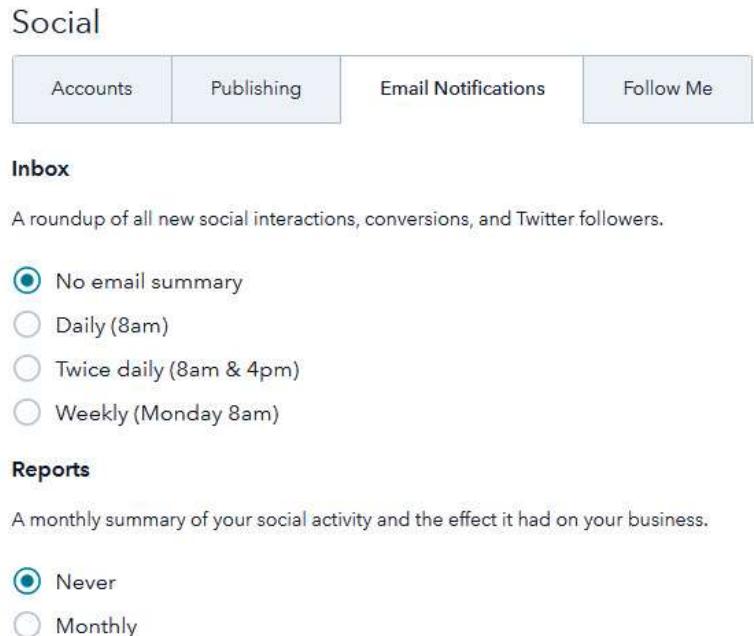


Figure 6.9 – Setting your notifications

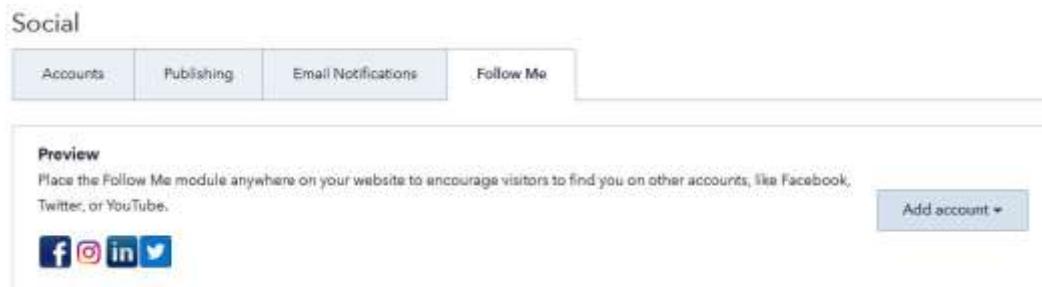


Figure 6.10 – Setting up your Follow Me buttons

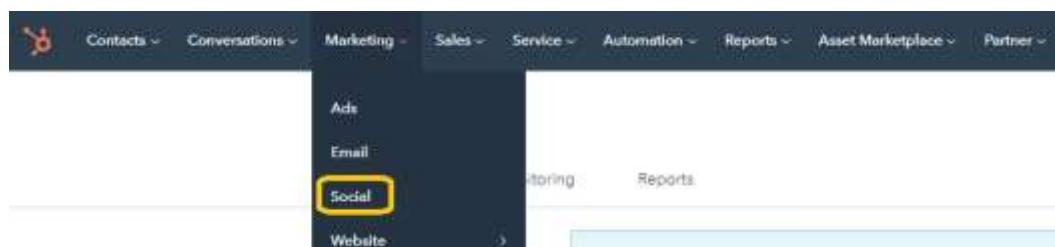


Figure 6.11 – Accessing the Social tool in HubSpot

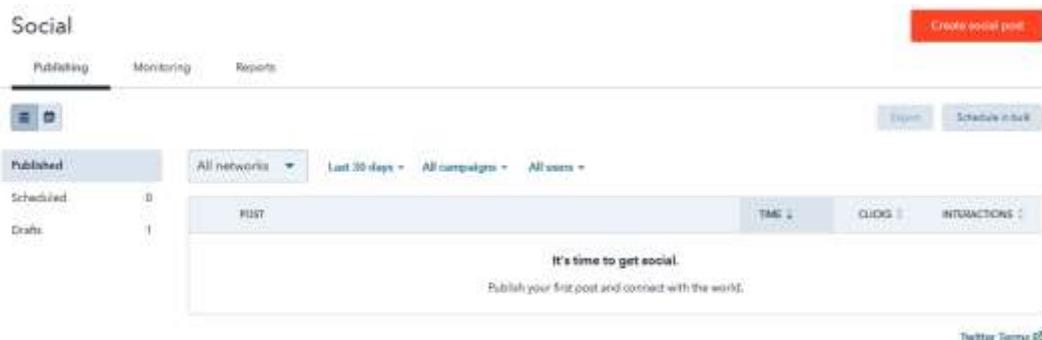


Figure 6.12 – Creating your social posts

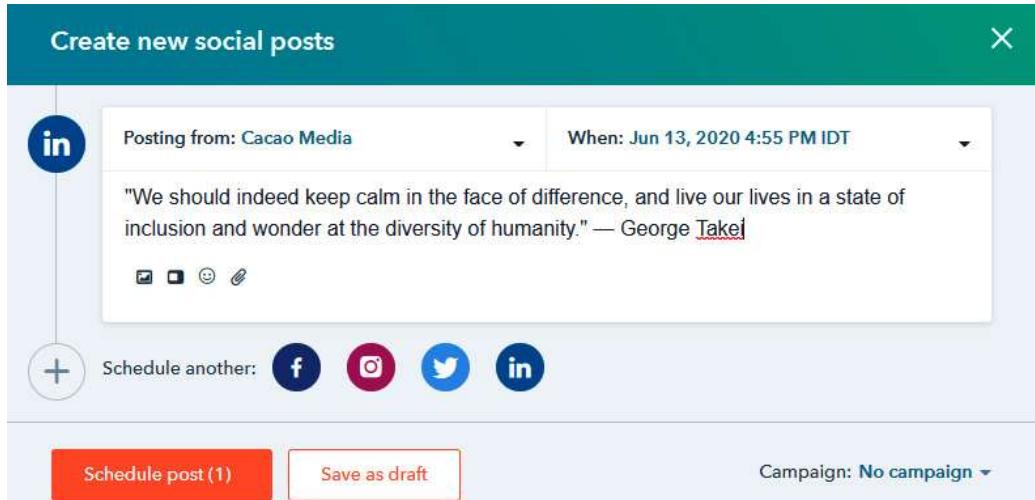


Figure 6.13 – Scheduling another post

TIME	CLICKS	INTERACTIONS
Jun 12, 2020 Fri 11:08 AM	1	1
Jun 12, 2020 Fri 11:08 AM	4	2
Jun 12, 2020 Fri 11:08 AM	0	0
Jun 11, 2020 Thu 11:08 AM	2	2
Jun 11, 2020		

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

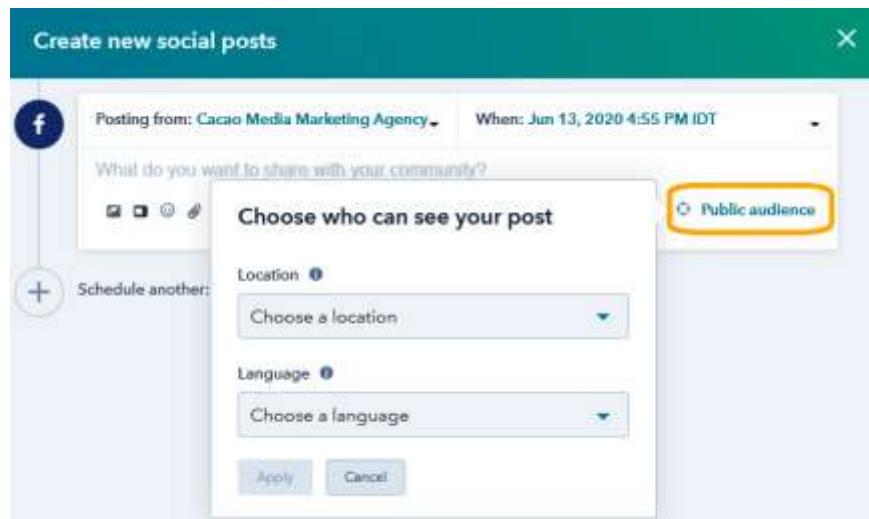


Figure 6.15 – Creating a public audience

A screenshot of the Social Publishing dashboard. At the top, there are tabs for 'Social', 'Publishing' (which is selected), 'Monitoring', and 'Reports'. On the right, there are buttons for 'Create social post', 'Export', and 'Schedule in bulk'. The main area shows a list of posts. The first post is selected, and its details are shown in a preview window. To the right of the preview, there is a 'Actions' dropdown menu with options: 'Clone', 'Delete', 'View on Facebook', 'Create ad', and 'Edit preview'. An orange box highlights the 'Actions' button. The list of posts includes:

Published	All networks	Last 30 days	All campaigns	All users
Scheduled	1			
Drafts	1			

The first scheduled post is a link to an article about AI transforming content production for marketing. The first draft is also a link to the same article. The second draft is a link to an article about content marketing and AI.

Figure 6.16 – Accessing more actions for your posts

Social

Publishing Monitoring Reports

All networks All campaigns All users All post types Show Drafts

Month Week Day Today June 2020

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1 Cacao Media - 11:01 AM Cacao Media Marketing Cacao Media Marketing	2 Cacao Media - 11:06 AM Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	3 Cacao Media Marketing Cacao Media - 11:19 AM Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	4	5 Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	6	
7	8 Cacao Media - 11:10 AM Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	9 Cacao Media Marketing Cacao Media - 11:02 AM Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	10 Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	11 Cacao Media Marketing Cacao Media - 11:06 AM Cacao Media Marketing Cacao Media Marketing	12 Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	13
14 Cacao Media Marketing	15	16	17	18	19	20

2 more

2 more

Create social post

This screenshot shows the Social publishing calendar for June 2020. The interface includes tabs for Publishing, Monitoring, and Reports, and buttons for All networks, All campaigns, All users, All post types, and Show Drafts. The date range is set to June 2020. The calendar grid displays posts scheduled for each day of the month. Posts are represented by small icons followed by the post title and time. For example, on June 1st, there are four posts from 'Cacao Media' and one from 'Cacao Media Marketing'. On June 13th, there are three posts from 'Cacao Media Marketing'. A red box highlights the 'Day' button in the navigation bar.

Figure 6.17 – Viewing the calendar tool

Social

Publishing Monitoring Reports

All networks All campaigns All users All post types Show Drafts

Month Week Day Today June 2020

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1 Cacao Media - 11:00 AM Cacao Media Marketing Cacao Media Marketing	2 Cacao Media - 11:08 AM Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	3 Cacao Media Marketing Cacao Media - 11:19 AM Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	4	5 Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	6	
7	8 Cacao Media - 11:10 AM Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	9 Cacao Media Marketing Cacao Media - 11:02 AM Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	10 Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	11 Cacao Media Marketing Cacao Media - 11:08 AM Cacao Media Marketing Cacao Media Marketing	12 Cacao Media Marketing Cacao Media Marketing Cacao Media Marketing	13
14	15	16	17	18	19	20

2 more

2 more

Create social post

This screenshot shows the same Social publishing calendar interface as Figure 6.17, but with a specific date range selected: June 2020. The 'Day' button in the navigation bar is highlighted with a red box. The calendar grid displays posts scheduled for each day within this period. The posts are identical to those shown in Figure 6.17, with four posts on June 1st and three posts on June 13th. A red box highlights the 'Day' button in the navigation bar.

Figure 6.18 – Viewing the calendar tool within a specific period

Social

Publishing Monitoring Reports

Create social post

Inbox Streams All networks New only Archive all

All Activity 60 Conversations 22 Interactions 35 New Followers 3

Facebook Comments 3 days ago

Cacao Media Marketing Agency The recent deaths of George Floyd, Ahmaud Arbery, Tony McDade, and Breonna Taylor have made headlines and rightly so since they showed the glaring systemic racism that is in the USA and generally in the world. As Cacao we cannot stay silent on the matter. This situation hits home... 3 days ago

View post

Twitter Streams Create stream example Members of BumacomedMarketing HubSpot Examiner SoleGance Reactions of BumacomedMarketing

LinkedIn Comments 3 days ago

Cacao Media The recent deaths of George Floyd, Ahmaud Arbery, Tony McDade, and Breonna Taylor have made headlines and rightly so since they showed the glaring systemic racism that is in the USA and generally in the world. As Cacao we cannot stay silent on the matter. This situation hits home... 3 days ago

View post

6 comments See comments

Figure 6.19 – How to view all posts that have comments

Comments

Cacao Media
SEO can be complicated and in many cases, overcomplicated. How many ranking factors are involved in generating strong organic search results? It is easy to get lost down an algorithmic rabbit hole. Join us for the training workshop with Tomer Harel CEO KeyScouts and Resa Gooding our CMS on June 2nd, 2020 where they'll show you how to drive more organic traffic to your website by building an effective SEO content strategy using the pillar-cluster model and not just keywords.

Register Now: <https://info.cacaomedia.co/en/building-an-effective-seo-content-strategy-in-hubspot>
fbclid=IwAR0qbmHNI_DpMJ7Eh95GXqB9Hv9Eb9WrePc-DlIs_mE4b_JU1VUupmraPk
#seo #marketingautomation #seostrategy #hubspot
#hubspottraining #seocontentstrategy #contentmarketing

Karin Tamir
Director of Marketing at Safe-T Data
will you be recording the session? I really want to attend but can not... 19 days ago

Cacao Media
It was recorded. Let me know if you got the link.

Figure 6.20 – Responding to comments on social media posts

The screenshot shows the Social Monitoring interface with the 'Monitoring' tab selected. On the left, a sidebar lists 'Inbox Streams' with categories like 'All Activity' (40), 'Conversations' (22), 'Interactions' (35), and 'New Followers' (3). Below this is a 'Twitter Streams' section with a 'Create stream' example and mentions of '@cacaomediamktg'. The main area displays two LinkedIn post interactions from 'Cacao Media'. The first post, titled 'LINKEDIN LIKES', discusses alignment between sales and marketing. The second post, also titled 'LINKEDIN LIKES', promotes a HubSpot workshop. Both posts have 5 likes and are from 8 days ago.

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

The screenshot shows the Social Monitoring interface with the 'Monitoring' tab selected. The sidebar shows 'Inbox Streams' with 'New Followers' highlighted (3). The main area displays a profile for 'Rock Christopher' (@RockChristopher) who is a new Twitter follower. The bio includes hashtags like #SuccessCENTER, #SuccessTRAIN, #Leadership, #Community, #We, #ThriveTOGETHER, #SocialMedia, #Brand, #Community, #Builder, #RockC, #inCOURAGEments, #JoYTrain, and #RockC. The website is listed as <https://t.co/nTnHHA9xqB>. The location is Georgia, USA. Following is 173,506 and tweets are 528,605. A 'Follow' button with the handle '@cacaomediamktg' is visible. Below the profile, there is a message box from 'Cacao Media Marketing Agency' (@cacaomediamktg) encouraging the new follower to let them know they care.

Figure 6.22 – Viewing all new followers from Twitter

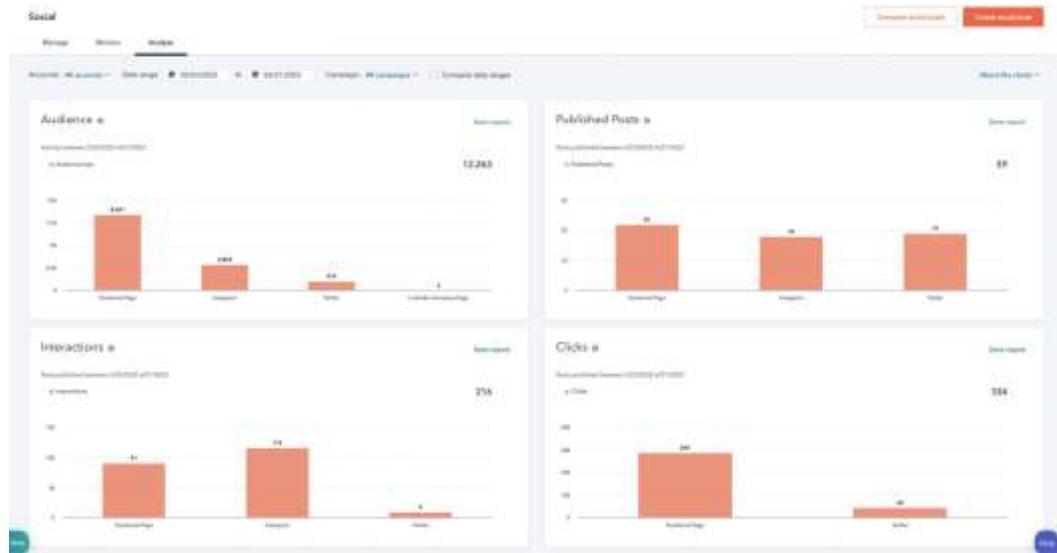


Figure 6.23 – View of all the reports for social media

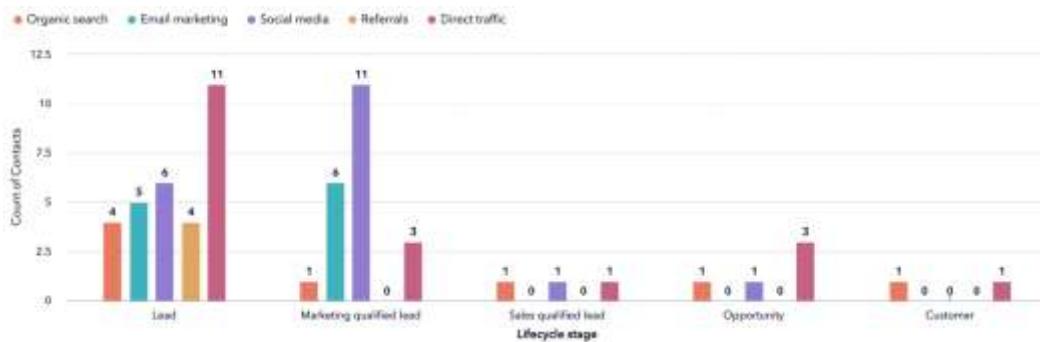


Figure 6.24 – Visit-to-lead conversion report based on life cycle stages



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

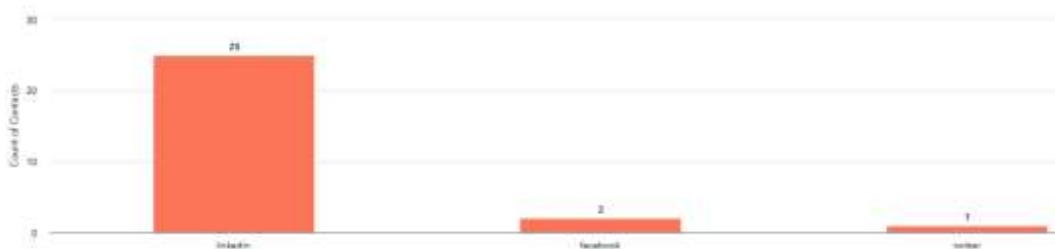


Figure 6.26 – Viewing a combined report of all social media platforms' performance

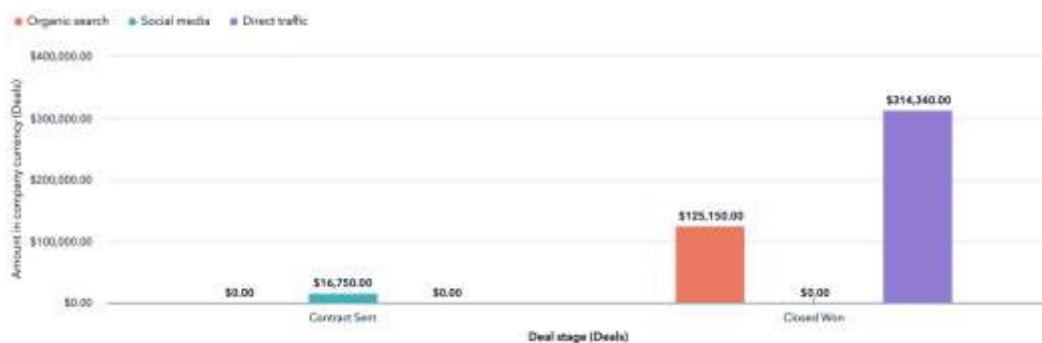


Figure 6.27 – Lead-source-to-deal conversion

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

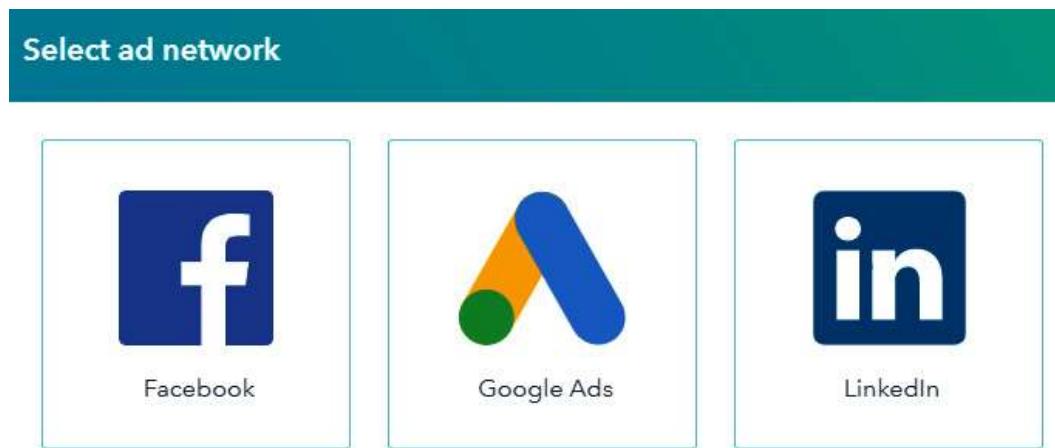


Figure 7.2 – Ads platforms to connect in HubSpot



Figure 7.3 – LinkedIn connection

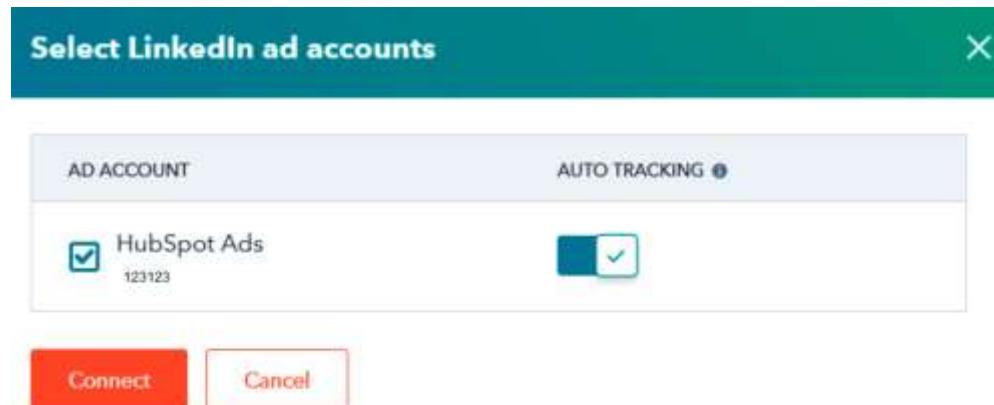


Figure 7.4 – HubSpot Ads autotracking switch on

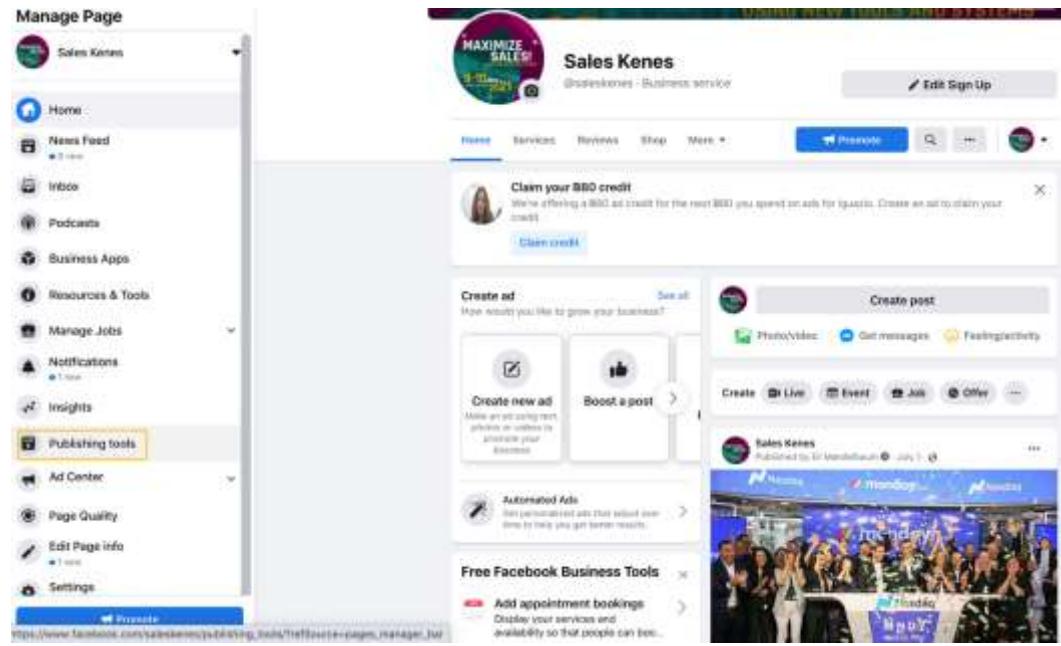


Figure 7.5 – Facebook company page publishing tool

The screenshot shows the Facebook Sales KPIs interface. On the left, there's a sidebar with various publishing tools like Stories, Posts, Videos, Tools, Branded Content, Lead Ads Forms, and a Shop section. The 'Leads setup' link is highlighted with a yellow box. The main content area is titled 'Leads Setup' and contains instructions on setting up a CRM for lead delivery. It includes a search bar for CRM providers and three steps for connecting: Step 1: Find Your CRM, Step 2: Connect to Your CRM, and Step 3: Manage Your Leads.

Figure 7.6 – Lead setup page on Facebook

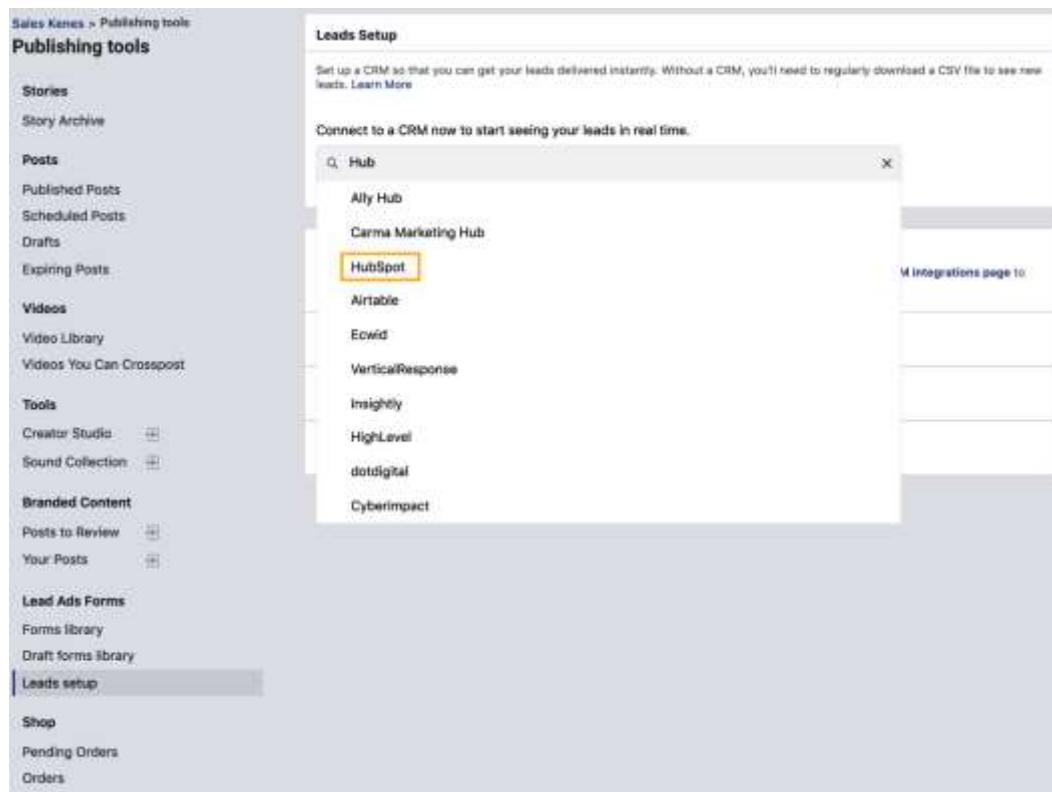


Figure 7.7 – Searching for HubSpot

Leads Setup

Set up a CRM so that you can get your leads delivered instantly. Without a CRM, you'll need to regularly download a CSV file to see new leads. [Learn More](#)

Connect to a CRM now to start seeing your leads in real time.

HubSpot - Connect from website  X

Connecting to a CRM

You need an existing CRM account to connect a CRM to your lead ads. If you aren't using a CRM, visit the [CRM integrations page](#) to see some of the CRMs that are currently supported, or visit the [Help Center](#).

› Step 1: Find Your CRM

› Step 2: Connect to Your CRM

› Step 3: Manage Your Leads

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

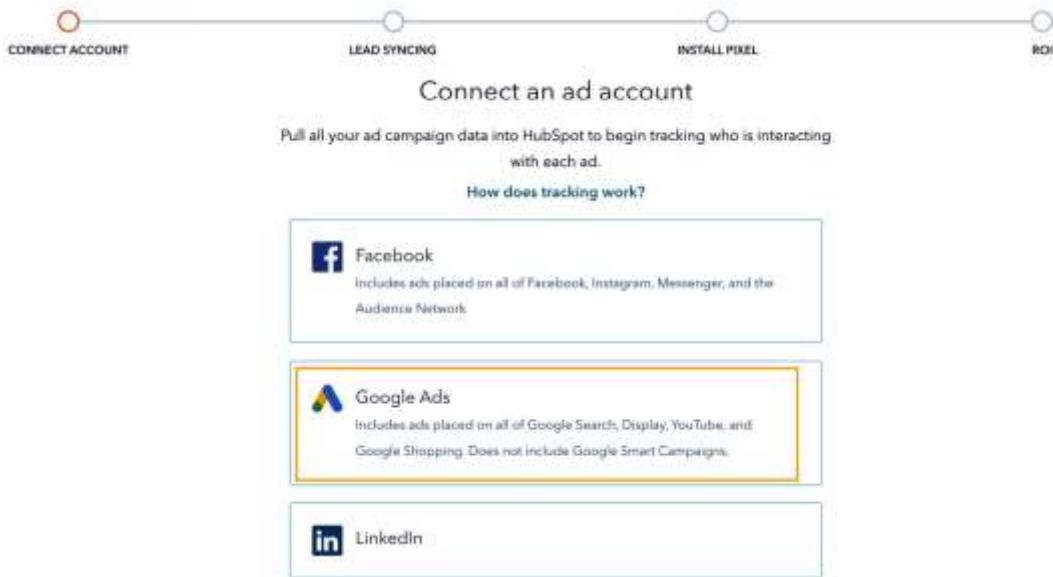


Figure 7.11 – Connecting a Google Ads account to HubSpot

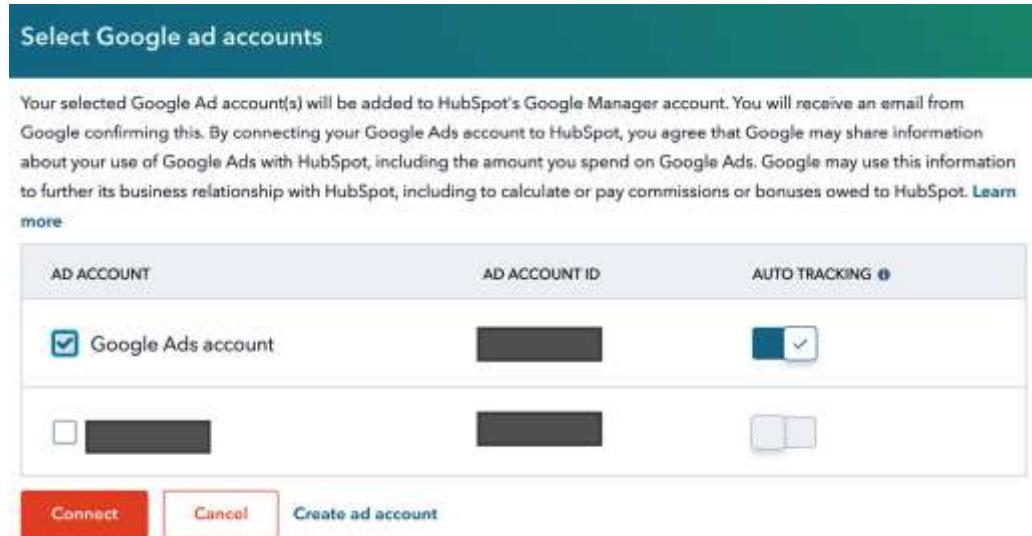


Figure 7.12 – Selecting the relevant Google Ads account



Figure 7.13 – Google pixel tracking code

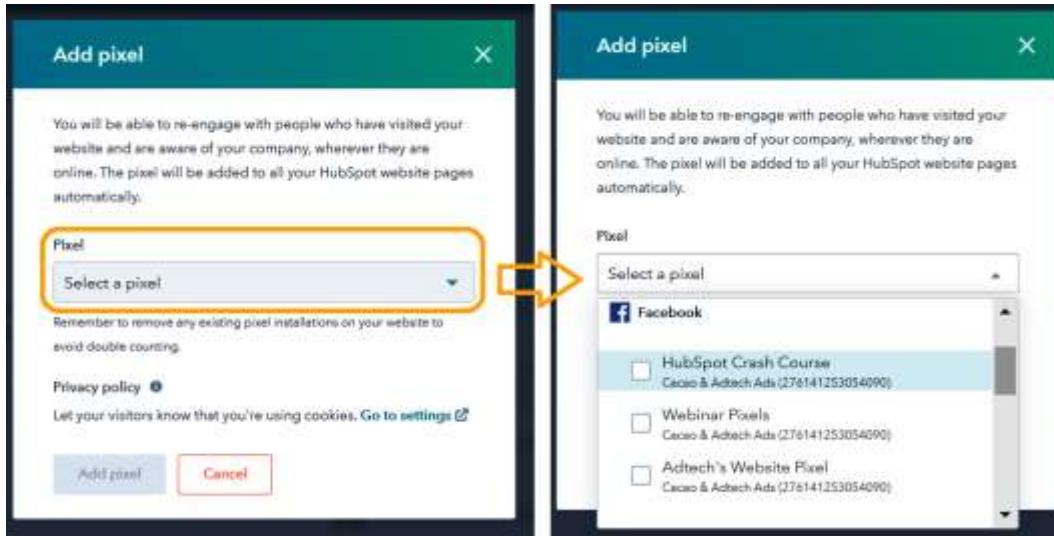


Figure 7.14 – Selecting pixel code from HubSpot



Figure 7.15 – Creating an audience for ads on HubSpot

Create audience

Website visitors 

Nurture the people who've been to your site. Create an audience from your visitors and re-engage with them wherever they are online.

Contact list 

Make the most of your contacts. Create an audience from your contact list in HubSpot CRM to re-engage with them wherever they are online.

Company list 

Engage with people who work at specific companies. Changes to your list will automatically sync to your audience in real time.

Lookalike 

Create a lookalike audience based on your ideal customer and expand your reach to people who are more likely to convert.

Figure 7.16 – Creating an ad audience by website visitors

Create website traffic audience

Source pixel

Select a pixel ▾

People who visited

All pages ▾

+ Add rule

Visited in the last ⓘ

60 days ▾

Name

Figure 7.17 – Create website traffic audience

Create audience

Website visitors 

Nurture the people who've been to your site. Create an audience from your visitors and re-engage with them wherever they are online.

Contact list 

Make the most of your contacts. Create an audience from your contact list in HubSpot CRM to re-engage with them wherever they are online.

Company list 

Engage with people who work at specific companies. Changes to your list will automatically sync to your audience in real time.

Lookalike 

Create a lookalike audience based on your ideal customer and expand your reach to people who are more likely to convert.

Figure 7.18 – Creating a website audience based on contact

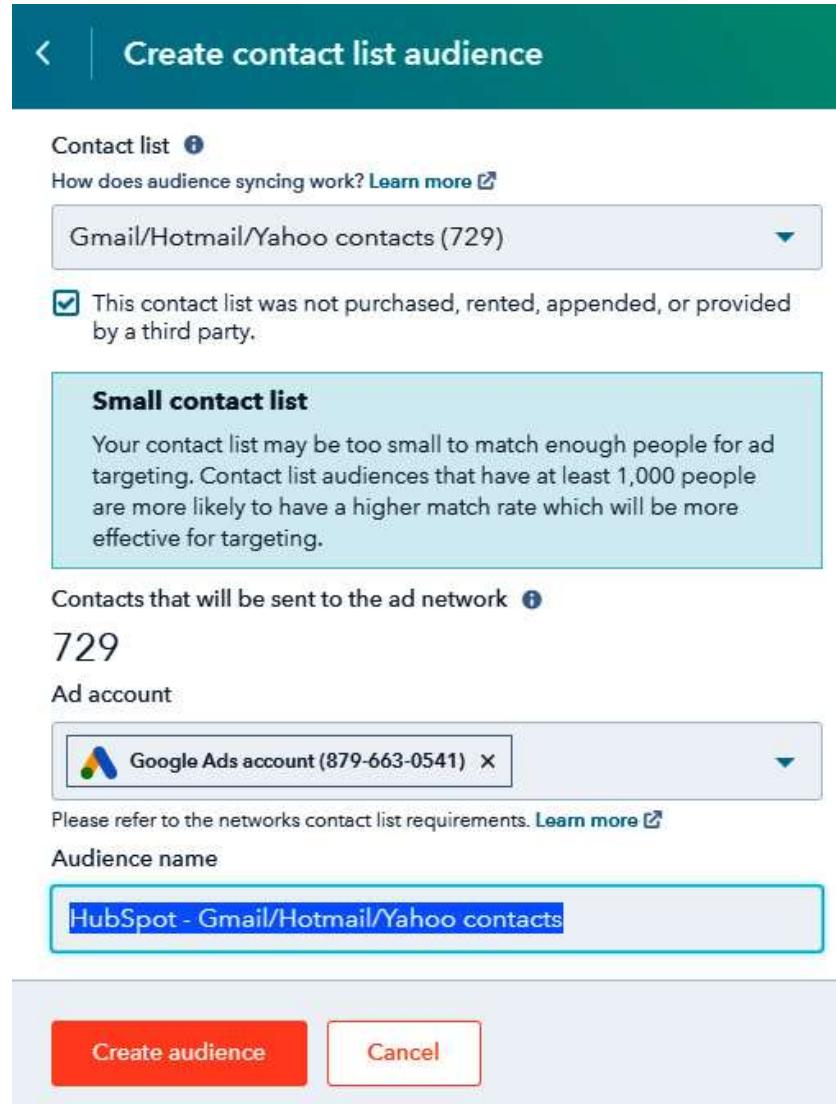


Figure 7.19 – Creating a contacts list

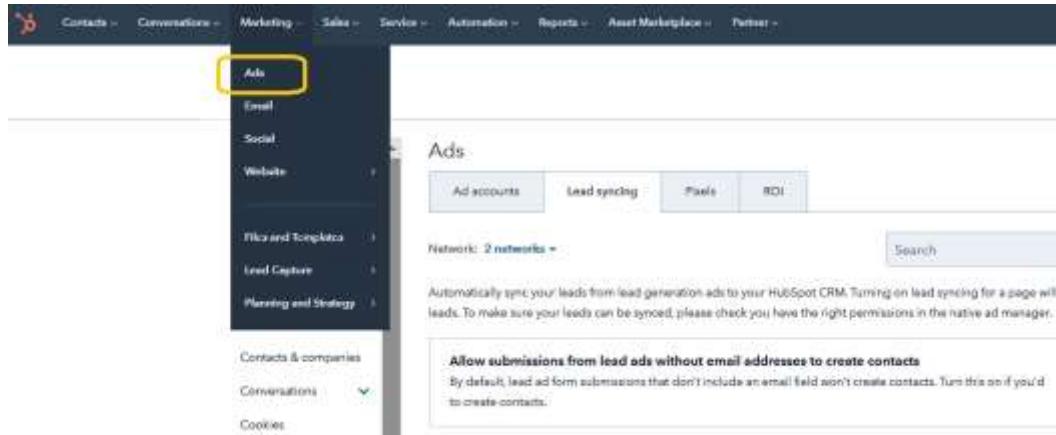


Figure 7.20 – Ads option in HubSpot

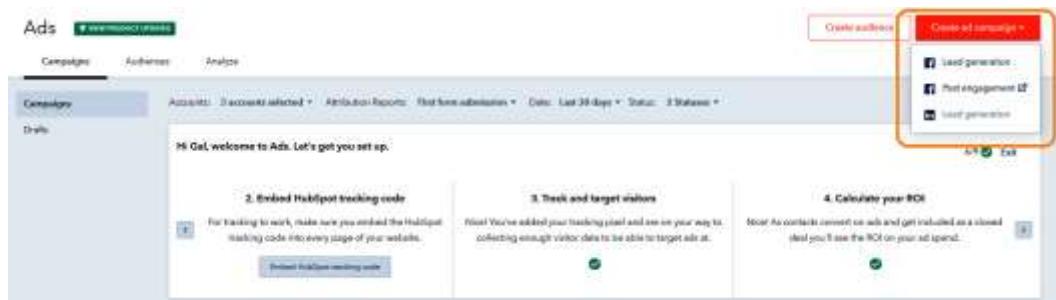


Figure 7.21 – Create ad campaign

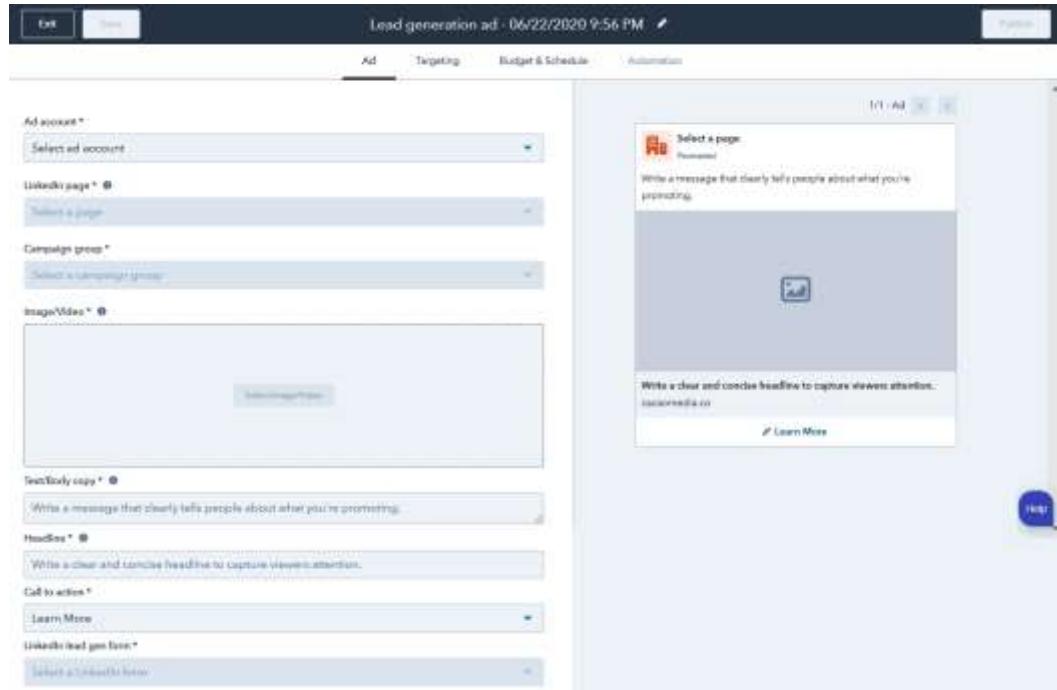


Figure 7.22 – Ad creation page in HubSpot

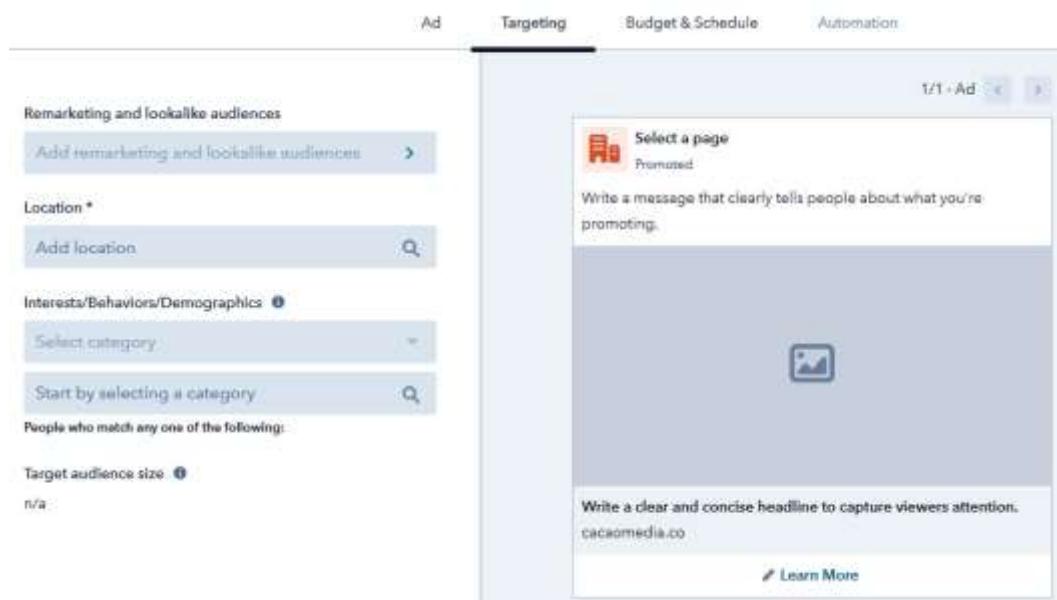


Figure 7.23 – Targeting section in ad creation

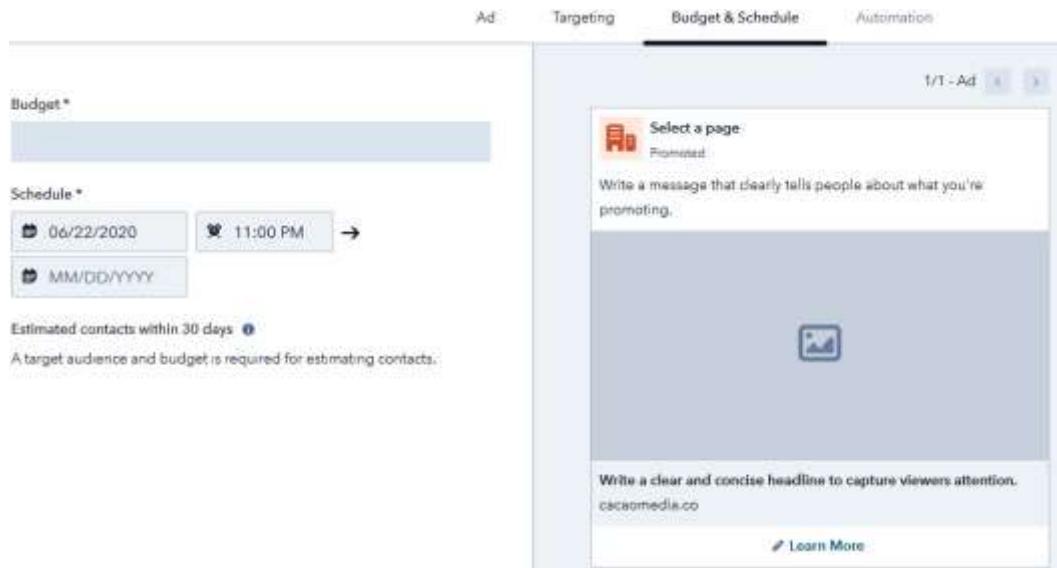


Figure 7.24 – Budget & Schedule section in ad creation

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

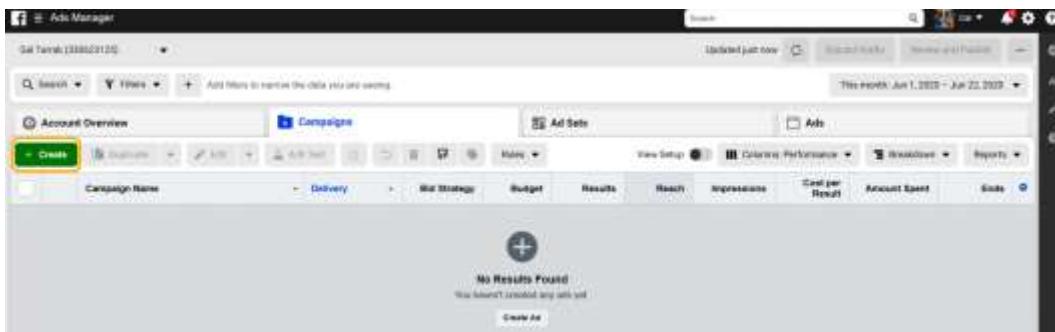


Figure 7.27 – Ad creation on Facebook



Figure 7.28 – Ad analysis

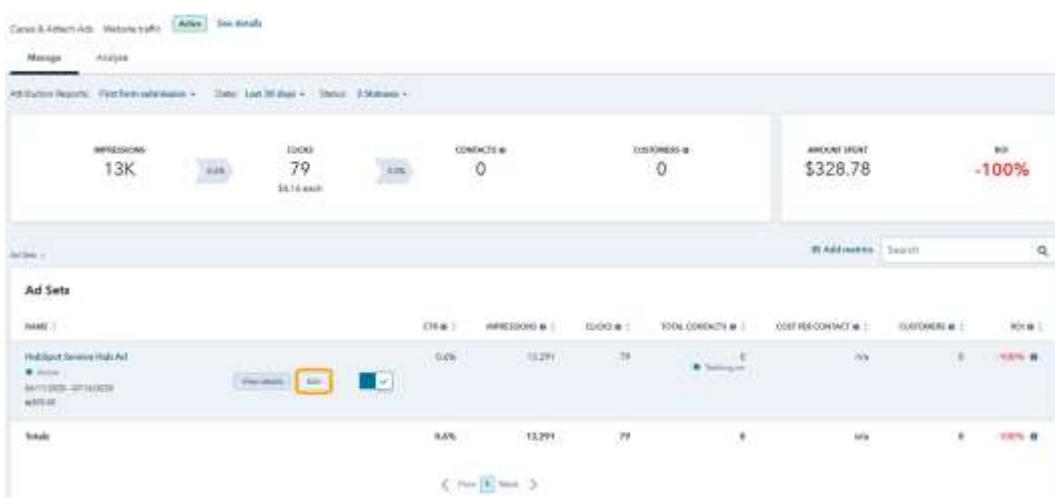


Figure 7.29 – Editing ad sets

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

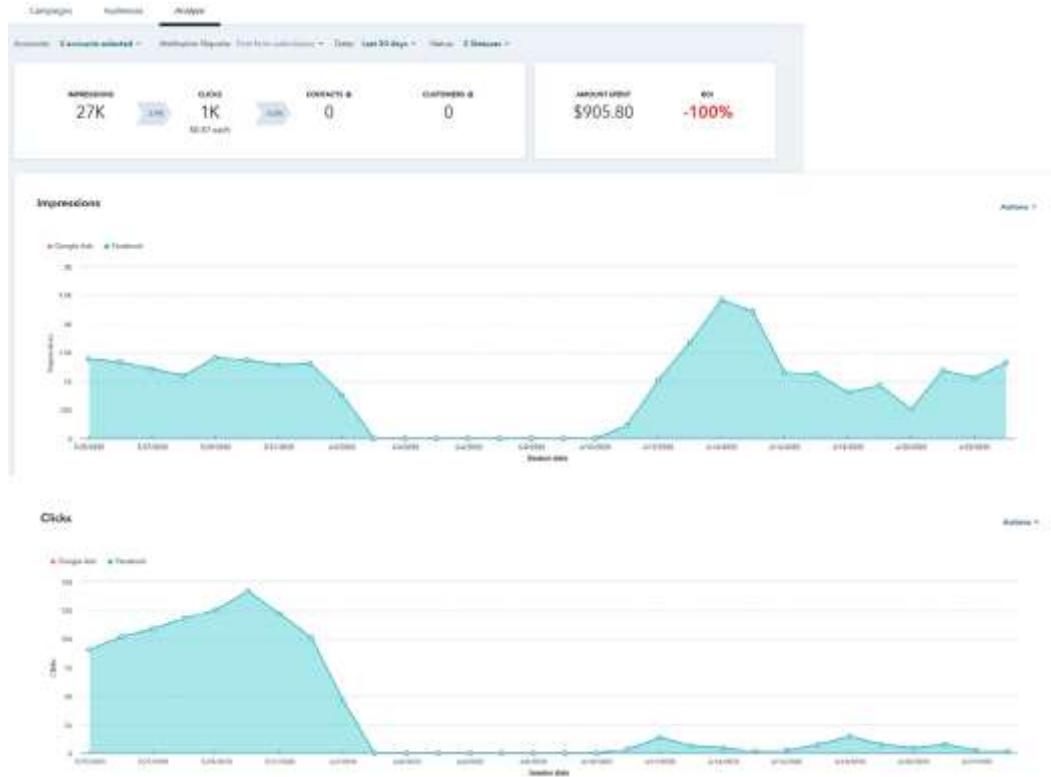


Figure 7.31 – Ad campaign reports

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

The screenshot shows the 'Settings' section of the HubSpot interface. On the left, a sidebar lists various settings categories like General, Notifications, Security, Account Setup, and Marketing. Under Marketing, 'Website' is expanded, and 'Domains & URLs' is selected, highlighted with a yellow box. The main content area displays domain connection status:

- Primary domains:**
 - Blog: blog.cacaomedia.co (Connected)
 - Landing page: info.cacaomedia.co (Connected)
- Secondary domains:**
 - Landing page: events.cacaomedia.co (Connected)
- Redirected domains:** A placeholder box with a 'Connect a redirected domain' button.
- Email sending domains (DKIM):**
 - Email (sending): cacaomedia.co (Not connected)

A red box highlights the 'Connected' status for the primary domain 'Blog'.

Figure 8.1 – Connecting your domains to HubSpot



Figure 8.2 – Traffic analytics report

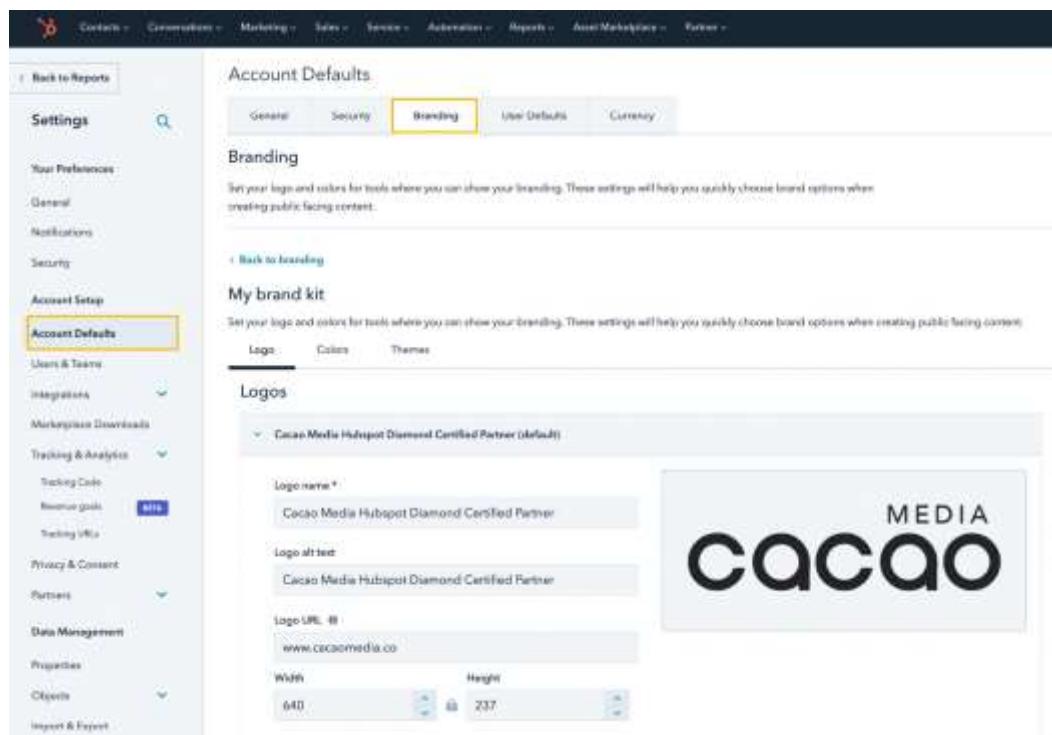


Figure 8.3 – Setting up your brand assets for public-facing content

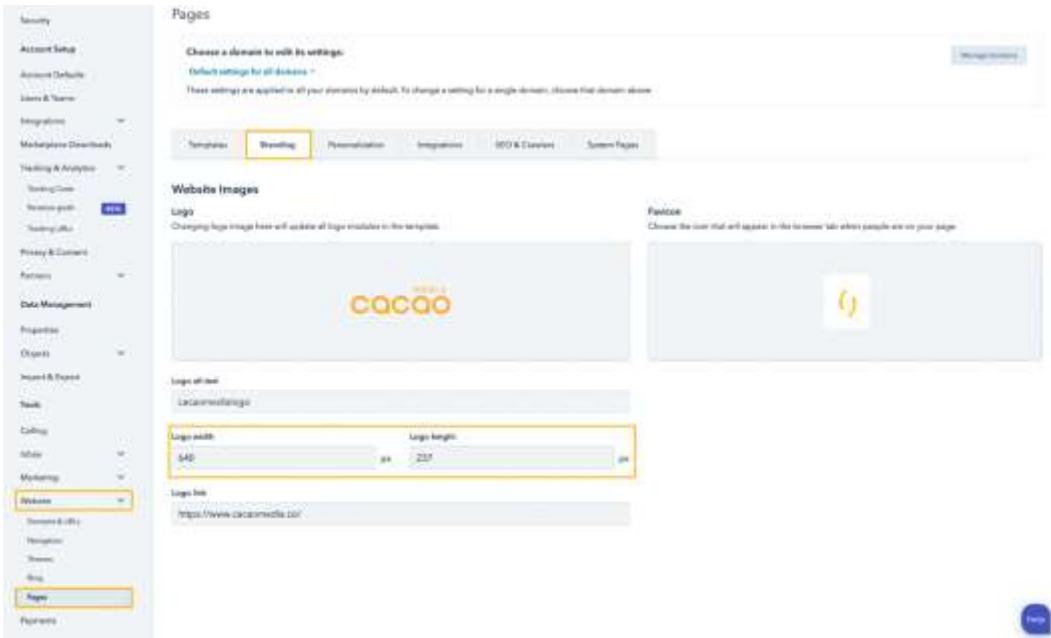


Figure 8.4 – Setting up brand assets for pages in HubSpot

The screenshot shows the 'Email' section of the HubSpot interface. On the left, a sidebar lists various settings categories like 'User Preferences', 'Marketing', and 'Tools'. Under 'Marketing', 'Email' is selected and highlighted with a yellow box. The main content area is titled 'Email' and has tabs for 'Configuration', 'Subscriptions' (which is active and highlighted with a yellow box), 'Subscription Types', 'Tracking', and 'Drip'. Below these tabs, there are several configuration options:

- Subscription page preference page:** Set to 'Web Email Subscription Preferences (in HostSystem/Pages/Web/Subscription_Pages)'.
- Subscription update confirmation page:** Set to 'Email Subscriptions Confirmation Page (in CacaoMedia_June2019_Theme/System/Pages/Email...'.
- Unknown content subscription preferences:** Set to 'Email Backup Unsubscribe Page (in CacaoMedia_June2019_Theme/System/Pages/Email...'.
- Don't send to unengaged contacts:** A checkbox labeled 'Improve your email marketing quality and user...' is set to 'OFF'.
- Resubscription email:** A checkbox labeled 'Let unsubscribed contacts know how they can opt-in again back into your emails. Publish email...' is set to 'OFF'.
- Compliance copy email:** A checkbox labeled 'Automatically BCC all outgoing messages where they can be reviewed for compliance later...' is set to 'OFF'.
- Double opt-in:** A checkbox labeled 'Enable double opt-in (Set up an opt-in request email, confirmation page, and, optionally a follow-up email - Publish opt-in email...) is set to 'OFF'.

Figure 8.5 – Subscription pages in HubSpot

The screenshot shows the 'SOCIAL' section of the HubSpot interface. On the left, a sidebar lists various settings categories like 'User Preferences', 'Marketing', and 'Tools'. Under 'Marketing', 'Social' is selected and highlighted with a yellow box. The main content area is titled 'SOCIAL' and has tabs for 'Accounts' (which is active and highlighted with a yellow box), 'Publishing', 'Local Notifications', and 'Notification'. There is a prominent red warning message at the top: 'LinkedIn accounts expire at least every year. And since these are all of LinkedIn's accounts, it looks like some of your LinkedIn company & personal pages were disconnected on 09/23/2020. Some of the posts may not be published. If the accounts aren't reconnected soon, LinkedIn requires us to delete posts and interaction data from accounts that are disconnected. We'll delete this data if the accounts are not reconnected before 03/30/2021. To reconnect them, see our guide on social settings.' Below this message, there is a table titled 'All accounts' showing three LinkedIn accounts:

Account	ID	Access Token	Post Frequency	Share	Details
Neel Goeling Edited by Neel Goeling	1234567890	Access Token	44 posts	<input type="checkbox"/>	<input type="checkbox"/>
Cacao Media - 1 account disconnected	1234567890	Access Token	44 posts	<input type="checkbox"/>	<input type="checkbox"/>
Neel Goeling - 1 account disconnected	1234567890	Access Token	44 posts	<input type="checkbox"/>	<input type="checkbox"/>

Figure 8.6 – Reconnecting your social media channels

The screenshot shows a software interface for managing contacts. At the top, there are navigation links: Contacts, Conversations, and Marketing. Below this, a title "Invalid Contacts" is displayed with a pencil icon. A status bar indicates "Active list" and "Estimated size: 898 contacts". A "Filters" button and a "Test" button are also present.

The main area is titled "All filters" and contains four filter groups, each enclosed in a box:

- Group 1:** Actions dropdown. Filter: Email is unknown. Operators: AND, + Add filter.
- OR**
- Group 2:** Actions dropdown. Filter: Email hard bounce reason is known. Operators: AND, + Add filter.
- OR**
- Group 3:** Actions dropdown. Filter: Unsubscribed from all email is equal to True. Operators: AND, + Add filter.
- OR**
- Group 4:** Actions dropdown. Filter: Opted out of email marketing information is known. Operators: AND, + Add filter.

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	67.60%	2.6 minutes
Organic search	8,316	0.82%	68	11.76%	8	81.29%	49 seconds
Paid social	7,369	8.47%	628	0.16%	1	79.12%	26 seconds
Referrals	1,760	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

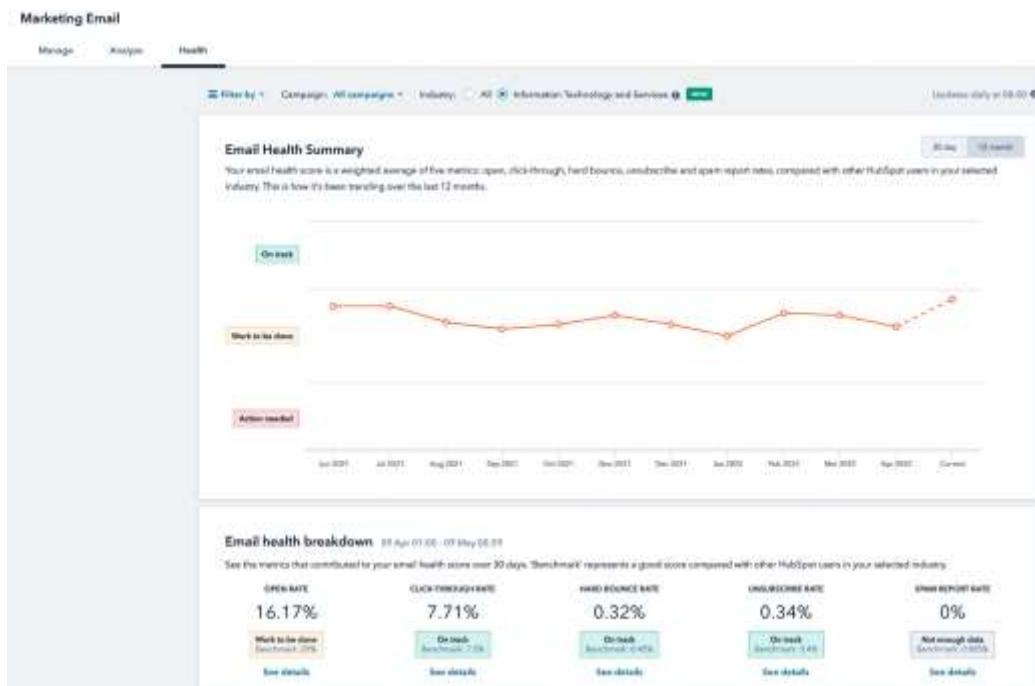


Figure 8.9 – Email health summary

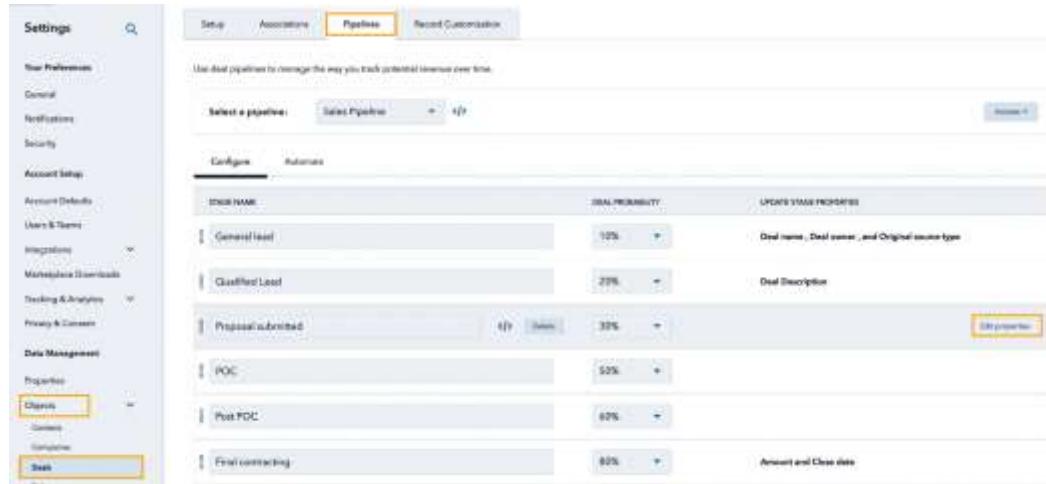


Figure 8.10 – Edit properties

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

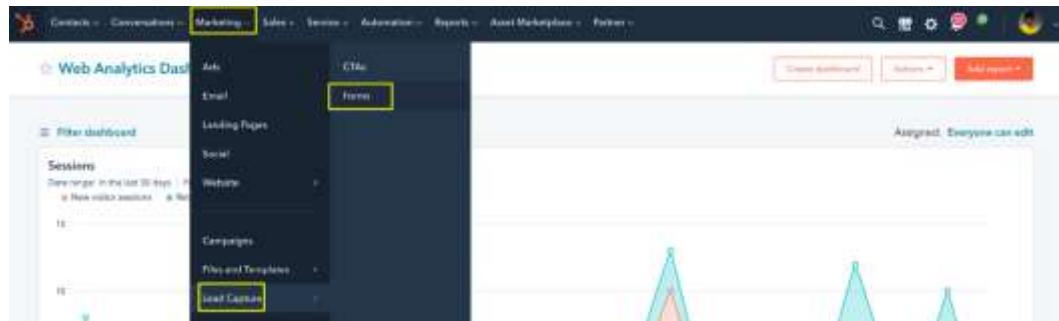


Figure 9.1 – Accessing the Forms tool in HubSpot

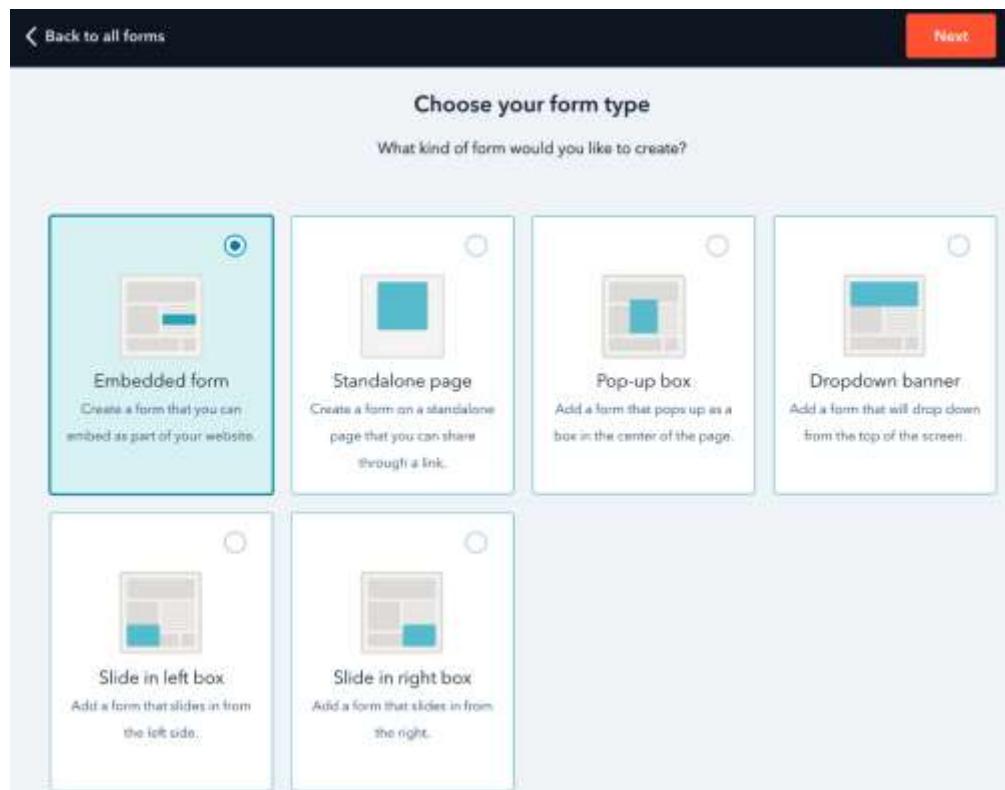


Figure 9.2 – Types of forms in HubSpot

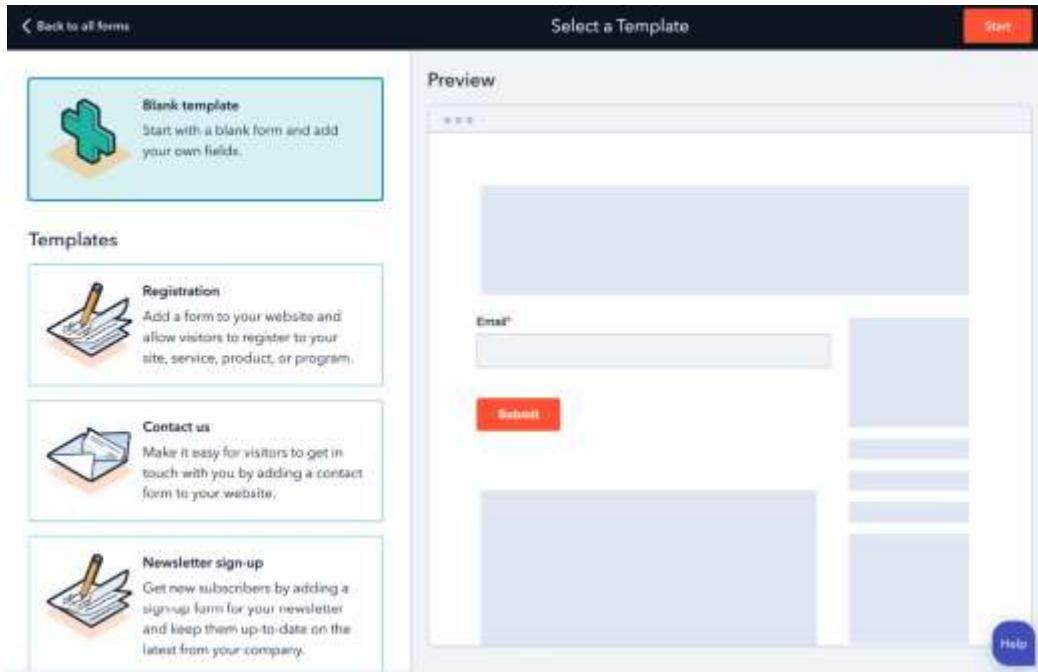


Figure 9.3 – Selecting a template for your forms

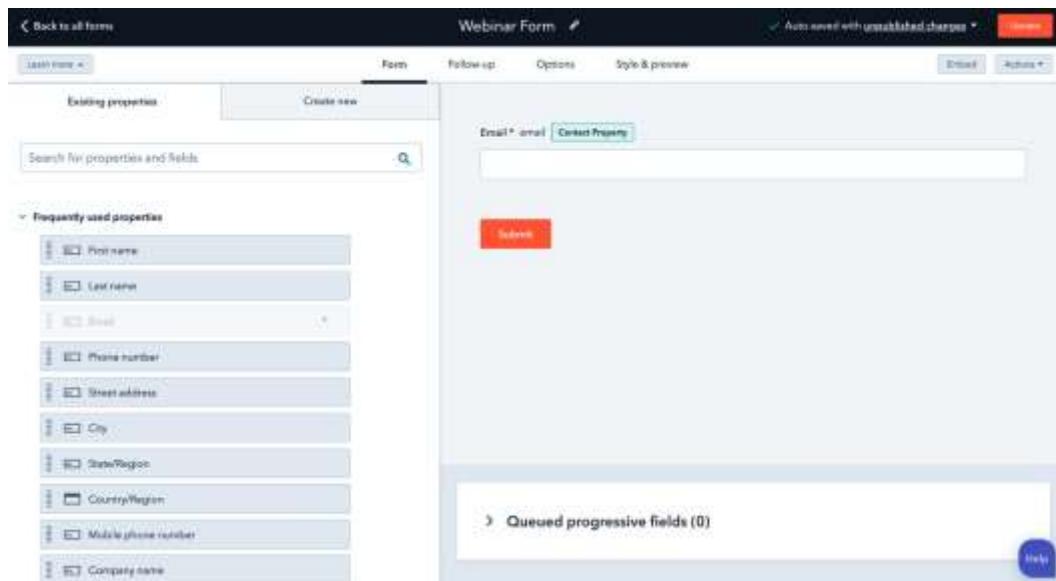


Figure 9.4 – Understanding form fields

The screenshot shows the 'Webinar Form' builder interface. On the left, there's a sidebar with 'Existing properties' and a 'Create new' button. Below this are sections for 'Contact Properties (2)' and 'Contact Information (2)', each with a 'Create' button. A 'First name' field is visible under 'Contact Properties'. The main area shows a 'First name' input field with a placeholder 'First name' and a 'Contact Property' button next to it. Below it is an 'Email * Email' input field with a 'Contact Property' button. A red 'Submit' button is at the bottom. A message bar at the bottom says 'Don't see what you're looking for? Create a new field'.

Figure 9.5 – Building fields in a form

This screenshot shows the 'Webinar Form' builder with the 'Create new' button highlighted. The left sidebar has a 'Form Fields' section with icons for Single-line text, Number, Single checkbox, Checkboxes, Dropdown, Multiselect, Radio, Date, and File. The main area contains fields for 'First name' and 'Last name' with 'Contact Property' buttons. An 'Email * Email' field with a 'Contact Property' button is also present. A dropdown menu labeled 'Country/Region: country' with 'Please Select' is shown. A note at the bottom states: 'Cacao Media needs the contact information you provide to us to contact you about our products and services. You may unsubscribe from these communications at any time. For information on how to unsubscribe, as well as our privacy practices and commitment to protecting your privacy, please review our Privacy Policy.' A red 'Submit' button is at the bottom.

Figure 9.6 – Creating additional fields

The screenshot shows the 'Webinar Form' builder interface. On the left, there's a sidebar with various content blocks: Single-line Text, Number, Single Linearea, Chained, Dropdown, Multiline Text, Radio, Date, File, and Header Text (which is highlighted with a green border). The main area displays a 'This is a sample header' section. It contains fields for First name, Last name, Email*, and Country/Region, each with a 'Contact Property' button. Below these is a dropdown menu labeled 'Please Select' with a 'Clear dependent fields (1)' link. A note at the bottom states: 'Cast Media needs the contact information you provide to us to contact you about our products and services. You may unsubscribe from these communications at any time. For information on how to unsubscribe, as well as our privacy practices and commitment to protecting your privacy, please review our Privacy Policy.' At the bottom right are 'Submit' and 'Help' buttons.

Figure 9.7 – Adding header text

This screenshot shows the same 'Webinar Form' builder interface after editing. The 'Header Text' block now contains the text 'Register for the upcoming webinar here'. The rich text editor toolbar is visible above the text area. The rest of the form structure, including fields for First name, Last name, Email*, and Country/Region, remains the same as in Figure 9.7.

Figure 9.8 – Editing the header text

The screenshot shows a completed registration form titled "Register for the upcoming webinar here". The form includes fields for First name, Last name, Email, and Country/Region. A note at the bottom states: "Gated Media needs the contact information you provide to us to contact you about our products and services. You may unsubscribe from these communications at any time. For information on how to unsubscribe, as well as our privacy practices and commitment to protecting your privacy, please review our Privacy Policy." A "Submit" button is visible at the bottom.

Figure 9.9 – Completed form

The screenshot shows a configuration screen for blocking free email providers. It includes fields for Placeholder text, Default value, and Email domains to block. A checkbox is checked for "Block free email providers (see list)".

Figure 9.10 – Blocking free email providers

Webinar Form

Edit contact property

Contact property name: Country

Field Type: **Logic**

First name: Firstname [Contact Property]

Last name: Lastname [Contact Property]

Email * email [Contact Property]

Country/Region: country [Contact Property]

Please Select

Figure 9.11 – Building logic into fields

Webinar Form

Edit contact property

If country: contains any of United States (1)

then show: State/Region (2) (3)

First name: Firstname [Contact Property]

Last name: Lastname [Contact Property]

Email * email [Contact Property]

Country/Region: country [Contact Property]

Please Select

Figure 9.12 – Building dependent fields in a form

The screenshot shows the 'Webinar Form' builder interface. On the left, there's a sidebar with sections like 'Recent items', 'Existing properties', and 'Create new'. The main area is titled 'Edit contact property' and shows a 'Form' tab selected. A 'Dependent fields' section contains a rule: 'If Country/Region contains any of United States then...'. This rule has dropdowns for 'If country' set to 'contains any of' and 'United States'. Below this, there's a 'then show' section with a dropdown for 'State/Region'. At the bottom of this panel are 'Add' and 'Cancel' buttons. To the right, there are input fields for 'First name' (with placeholder 'Contact Property') and 'Last name' (placeholder 'Contact Property'). Below these is an 'Email' field (placeholder 'Contact Property'). Further down is a 'Country/Region - country' field with a dropdown placeholder 'Please Select'. A red box highlights the 'Open dependent fields (1)' button next to it. At the bottom right of this panel are 'Save' and 'Help' buttons.

Figure 9.13 – Dependent field in a form

This screenshot shows the same 'Webinar Form' builder interface after changes. The 'Existing properties' sidebar now includes fields like 'Phone number', 'Email Address', 'City', 'State/Region', 'Mobile phone number', and 'Comments'. The main form area now features three progressive fields: 'First name' (placeholder 'Contact Property'), 'Last name' (placeholder 'Contact Property'), and 'Email' (placeholder 'Contact Property'). Below these is a 'Country/Region - country' field with a dropdown placeholder 'Please Select'. A red box highlights the 'Open dependent fields (1)' button next to it. At the bottom right of this panel are 'Save' and 'Help' buttons. A new section titled 'Queued progressive fields (2)' is visible on the right, containing a note about progressive fields and two radio buttons: 'No' and 'Progressive field'. The 'Progressive field' option is selected.

Figure 9.14 – Successfully adding progressive fields to a form

The screenshot shows the 'Webinar Form' configuration page. On the left, there's a sidebar with sections like 'Learn more', 'Form', 'Follow-up', 'Options', and 'Style & preview'. The main area is titled 'Form' and contains several input fields: 'Email * email' (with 'Contact Property' button), 'Country/Region - country' (with 'Contact Property' button), and 'Mobile phone number' (with 'Contact Property' button). Below these are sections for 'Other form elements (Captcha, GDPR and more)'. Under 'Captcha (spam prevention)', a checkbox is checked, and a blue 'Select' button is highlighted with an orange arrow. Under 'GDPR options', a dropdown menu is open, showing 'None' and 'Legitimate interest'. A note below says 'Consent checkboxes for communications and processing' with links to 'How consent to communication' and 'How consent to process is given'. On the right side of the form, there's a large 'protected by reCAPTCHA' button with the reCAPTCHA logo and a 'Select' button.

Figure 9.15 – Adding reCAPTCHA

This screenshot shows the same 'Webinar Form' configuration interface as Figure 9.15. The left sidebar and form structure are identical. However, the 'Other form elements' section now includes a note about 'GDPR notices': 'Cacao Media needs the contact information you provide to us to contact you about our products and services. You may unsubscribe from these communications at any time. For information on how to unsubscribe, as well as our privacy practices and commitment to protecting your privacy, please review our Privacy Policy.' Below this note is a 'protected by reCAPTCHA' button with the reCAPTCHA logo and a 'Select' button. The 'Help' button is visible in the bottom right corner of the form area.

Figure 9.16 – Adding GDPR notices

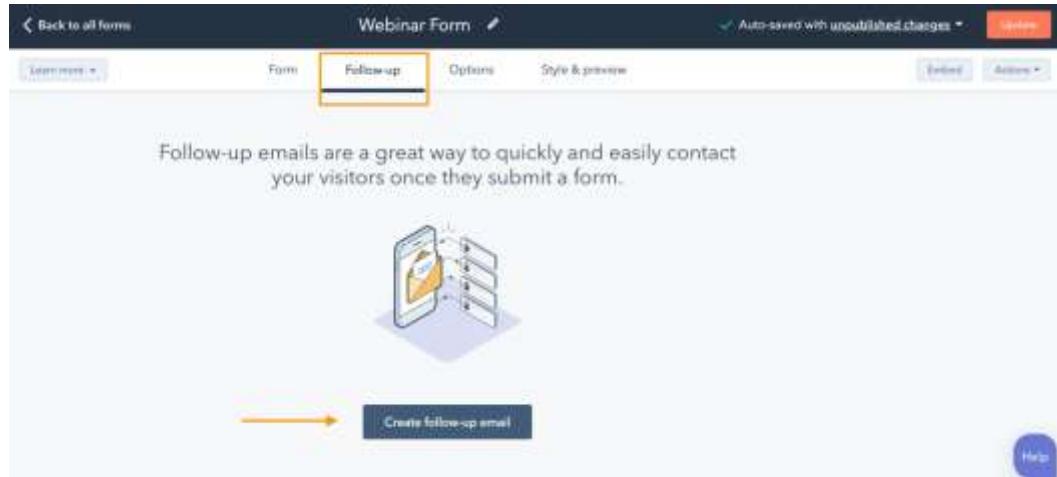


Figure 9.17 – Accessing follow-up emails

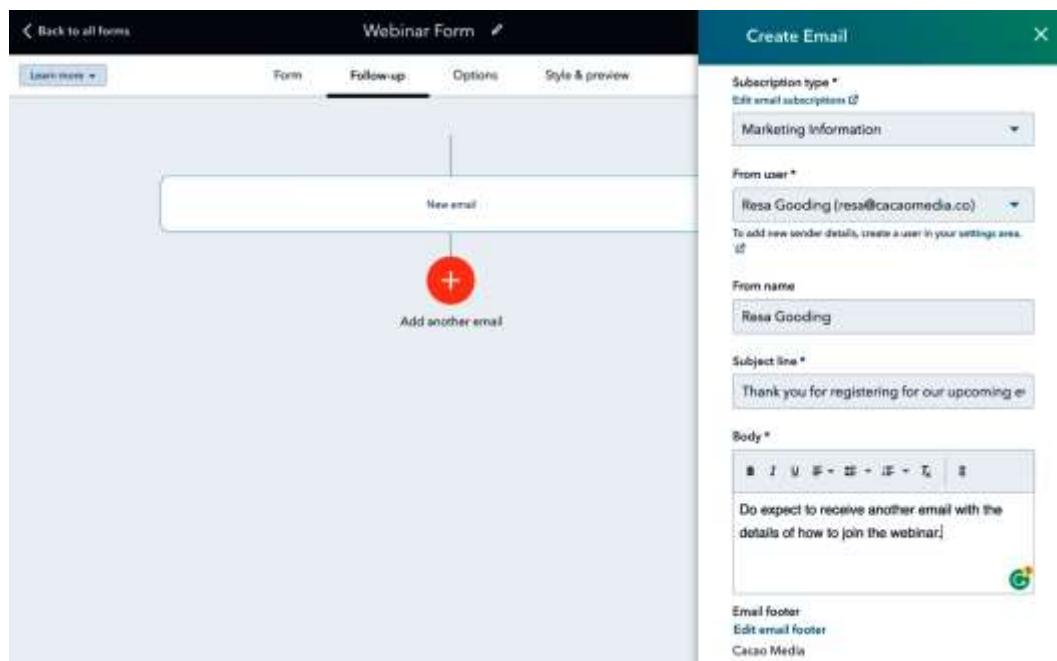


Figure 9.18 – Building a follow-up email

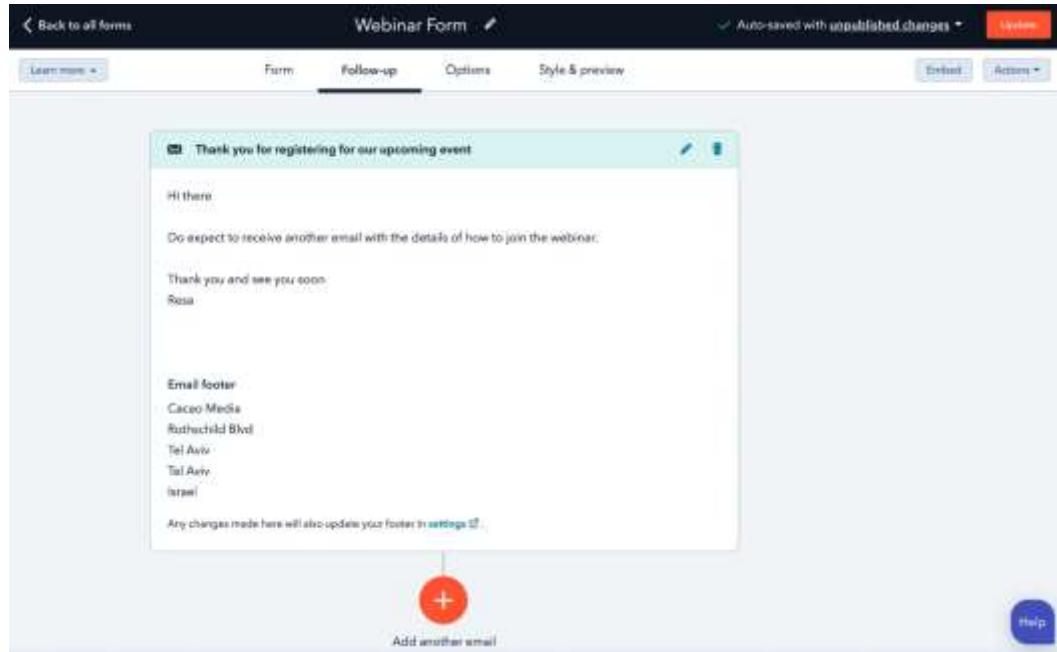


Figure 9.19 – Example of a follow-up email

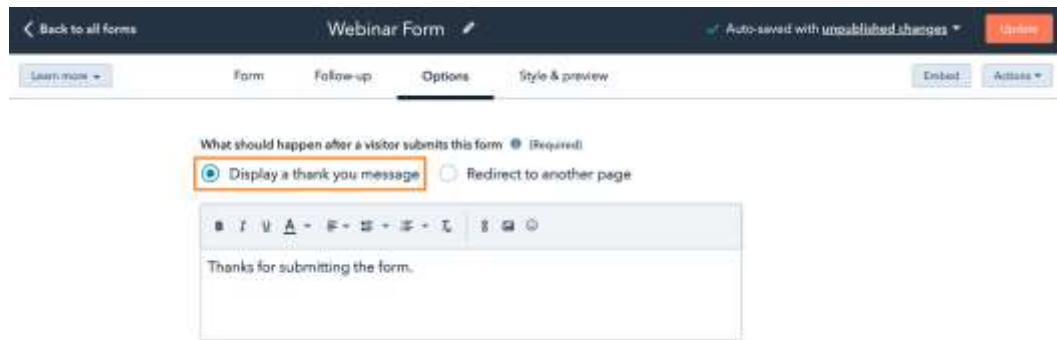


Figure 9.20 – Setting up a thank-you message after a contact submits a form

The screenshot shows the 'Webinar Form' settings page. Under the 'Options' tab, there is a section titled 'What should happen after a visitor submits this form?'. Two radio buttons are present: 'Display a thank you message' (unchecked) and 'Redirect to another page' (checked). Below this, a dropdown menu is set to 'HubSpot Workshop TY for Confirming (https://info.cacaomedia.co/thank...)'.

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

The screenshot shows the 'Webinar Form' settings page. Under the 'Options' tab, there is a section titled 'Follow-up options'. A checkbox labeled 'Send submission email notifications to the contact's owner. Learn more' is checked. Below this, there is a section titled 'Send submission notifications to' with an input field containing 'info@cacaomedia.co'.

Figure 9.22 – Setting up notifications for form submissions

The screenshot shows the 'Webinar Form' settings page. Under the 'Style & preview' tab, there is a section titled 'Input options'. It includes a note about how the theme affects the form's appearance when embedded or viewed on a mobile device. It also notes that styling won't be applied if added to a HubSpot CMS page. Below this, there are four examples of different input styles: 'Default' (light gray background), 'Linear' (light blue background), 'Round' (light green background), and 'Sharp' (light pink background). To the right, a 'Preview' section shows a sample form with fields for 'First name', 'Last name', 'Email', and 'Country/Region' (with a 'Please Select' placeholder). At the bottom of the preview, there is a 'Privacy Policy' link and a 'Submit' button.

Figure 9.23 – Styling forms

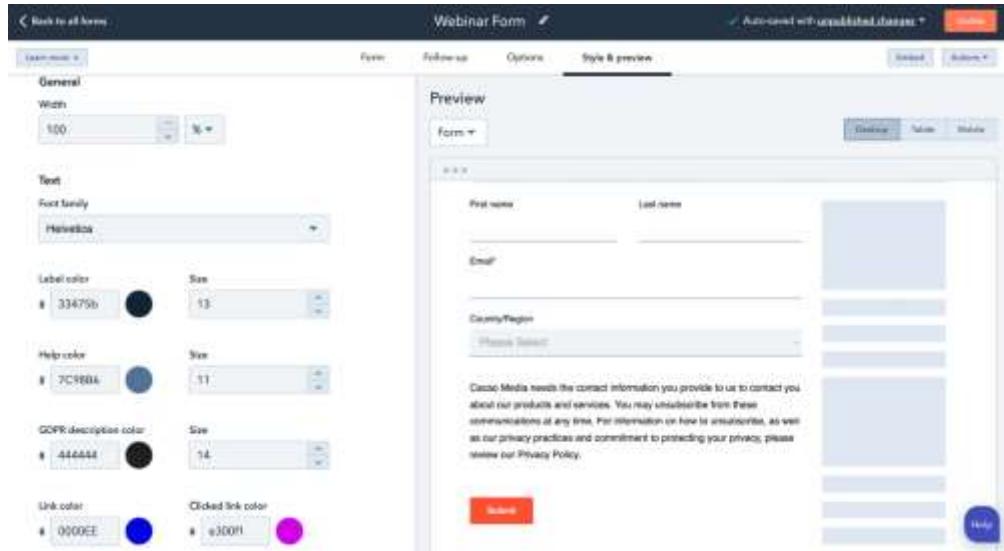


Figure 9.24 – Changing the font and size of form fields

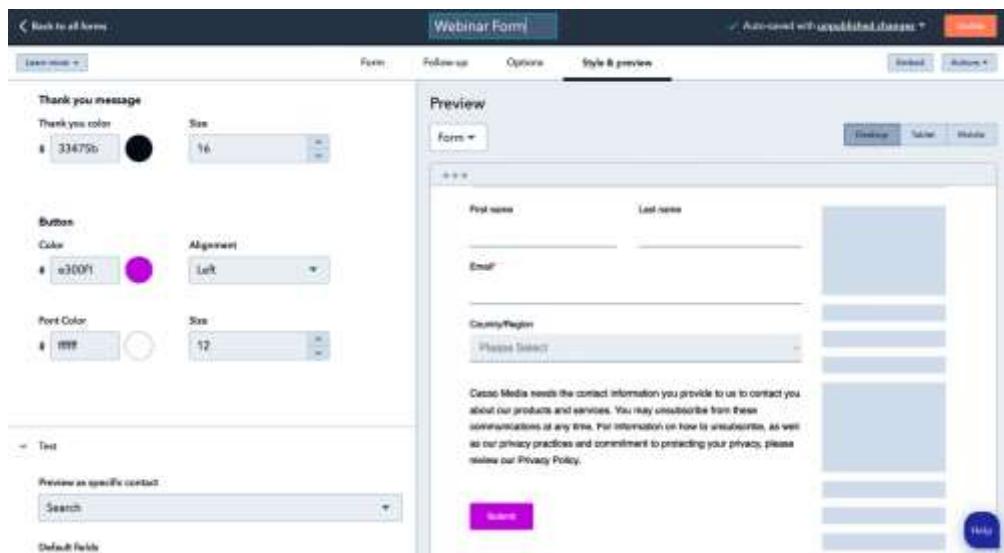


Figure 9.25 – Changing the thank-you message and button design

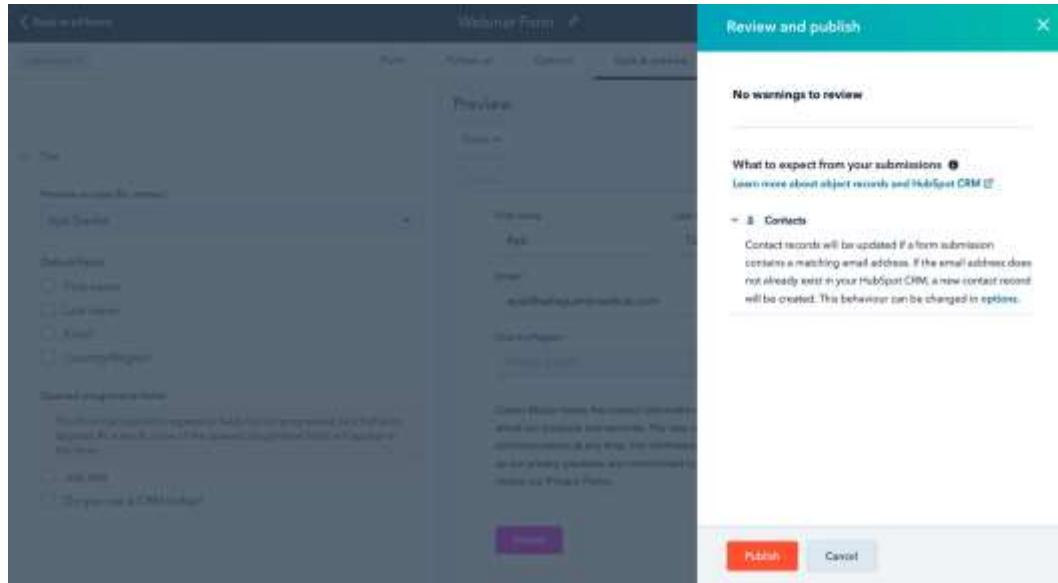


Figure 9.26 – Publishing a form



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

The screenshot shows the HubSpot Marketing section with the "Landing Pages" tab selected. On the left, there's a sidebar with "Website" and "Domain" sections, and a "All landing pages" filter with options for Draft, Scheduled, Published, and Archived. The main area displays a list of landing pages with columns for Name, Publish Status, Test Env, and Updated Date. Two entries are visible: "Test of Training (Lead Scoring)" (Draft, No test, Jan 30, 2022) and "Legal Recording (English)" (Published, No test, Jan 24, 2022).

Figure 9.28 – Accessing Landing Pages



Figure 9.29 – Choosing Landing page

A screenshot of a 'Create a page' dialog box. At the top, it says 'Create a page' with a close button 'X'. Below that is a 'Website *' dropdown menu containing 'events.cacaomedia.co'. Underneath is a 'Page name *' input field containing 'Webinar 20th October'. At the bottom are two buttons: a red 'Create page.' button and a white 'Cancel' button.

Website *	events.cacaomedia.co
Page name *	Webinar 20th October
Create page.	Cancel

Figure 9.30 – Choosing a subdomain and a page name

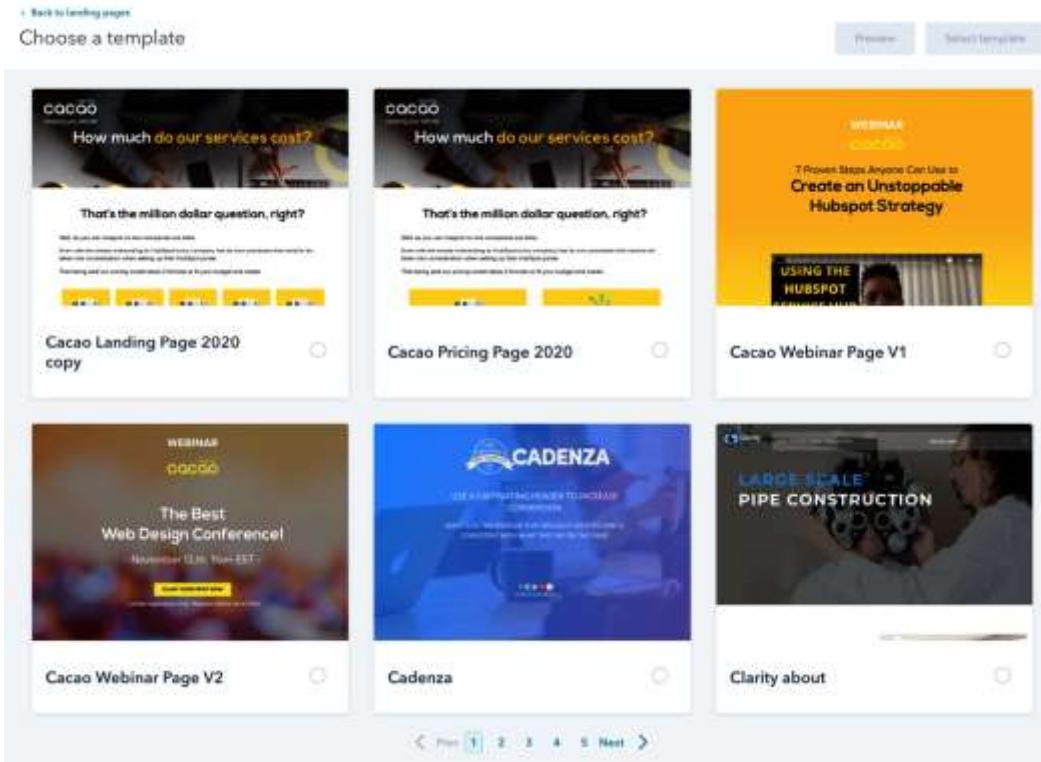


Figure 9.31 – Select a landing page template

Figure 9.32 – Editing the text on the landing page



Figure 9.33 – Adding the form on the landing page

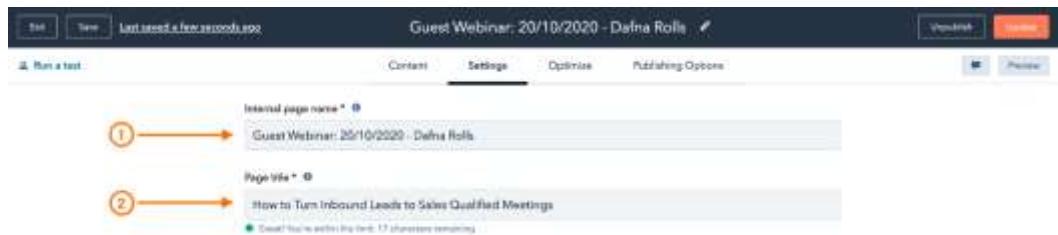


Figure 9.34 – Choosing a page name and title

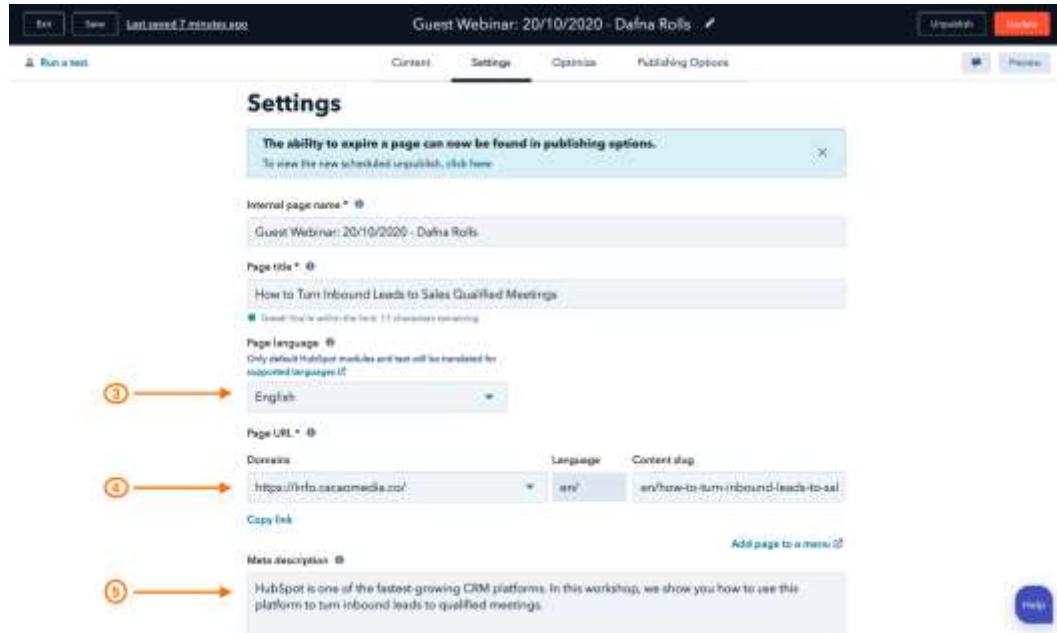


Figure 9.35 – Choosing a page name and title (continued)

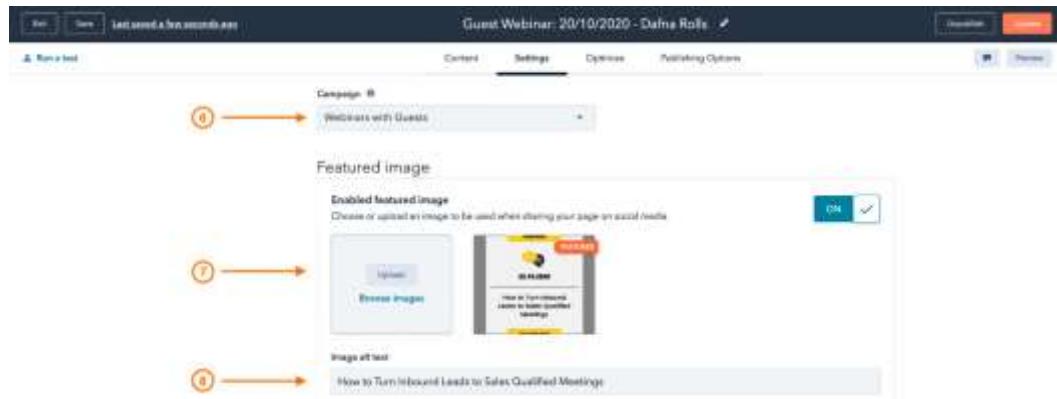


Figure 9.36 – Adding campaigns and featured images



Figure 9.37 – Optimizing the page for SEO

Figure 9.38 – Connecting Zoom or GoTo Webinar to HubSpot

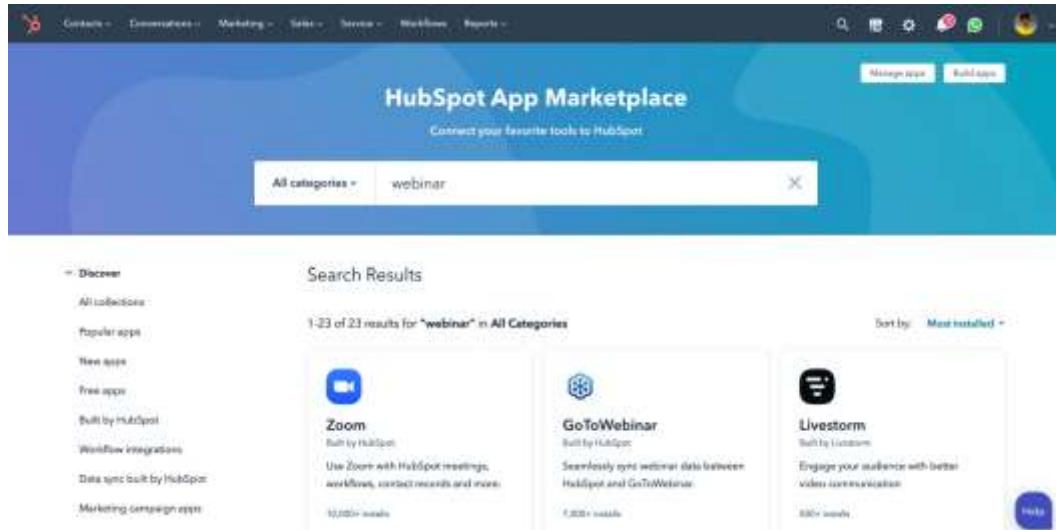


Figure 9.39 – HubSpot’s App Marketplace

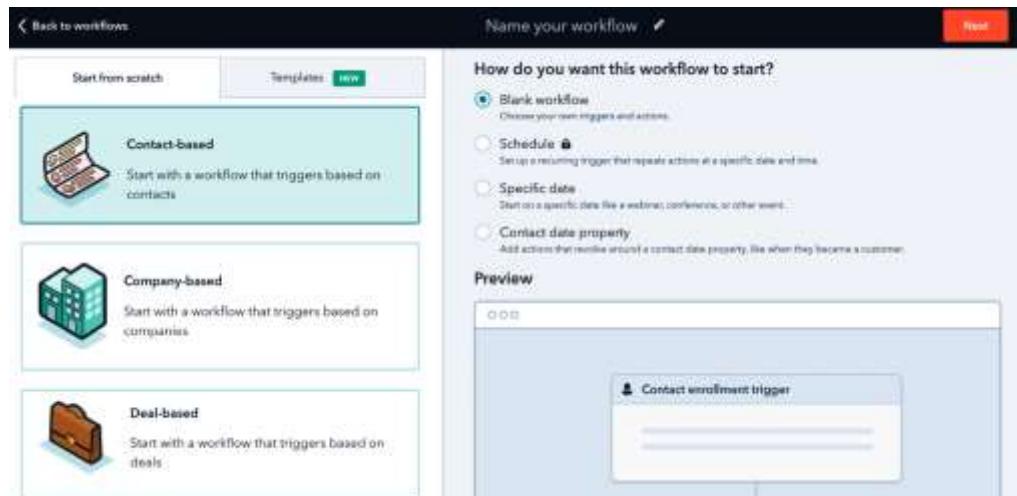


Figure 9.40 – Types of workflows

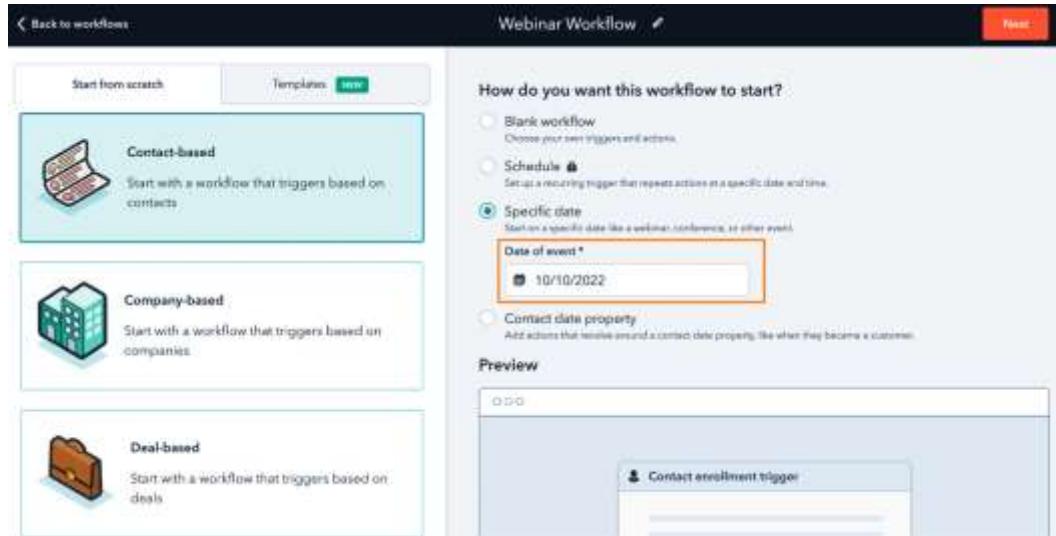


Figure 9.41 – Building a specific date workflow

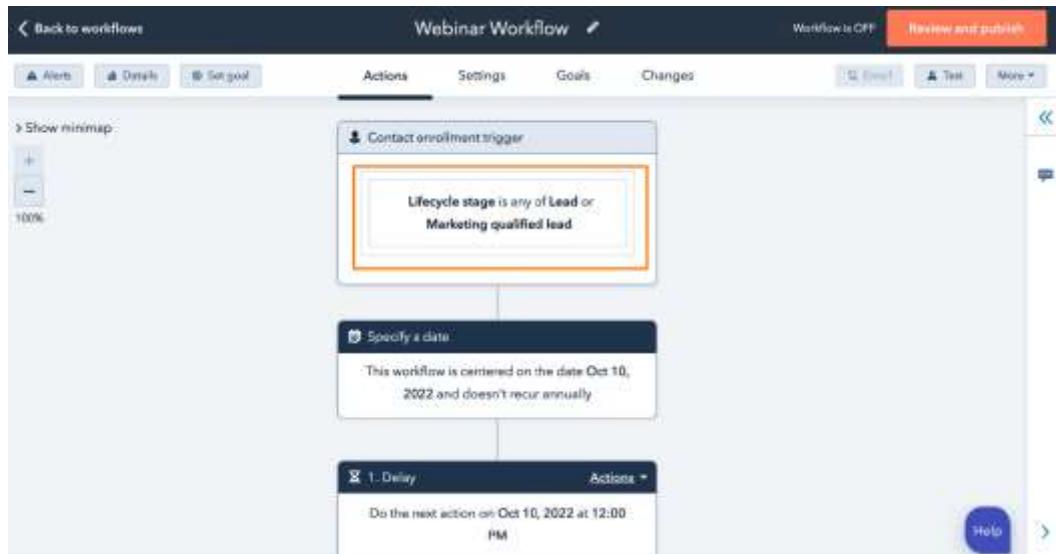


Figure 9.42 – Adding a list of contacts to receive invitation emails

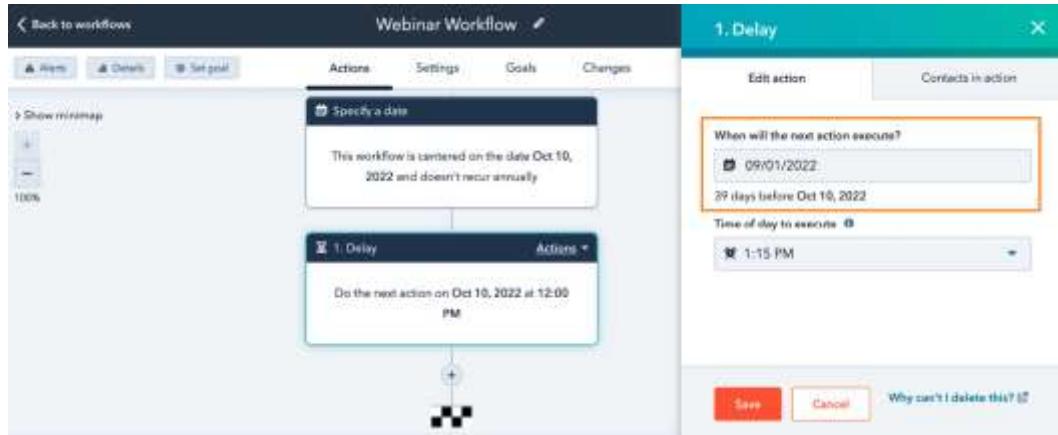


Figure 9.43 – Selecting a date and time you would like contacts to receive the first email

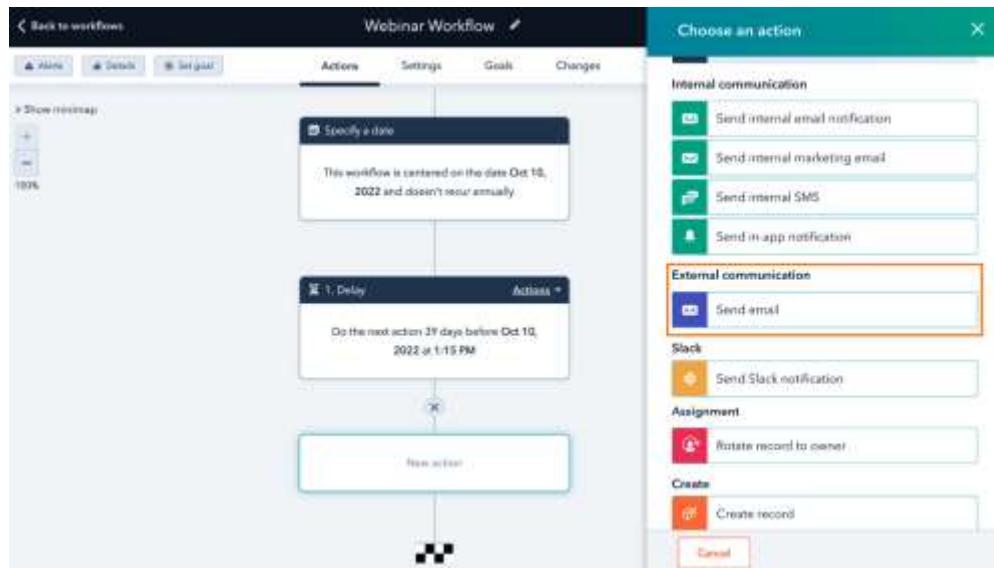


Figure 9.44 – Choosing the Send email option for external communication to send out an email invitation

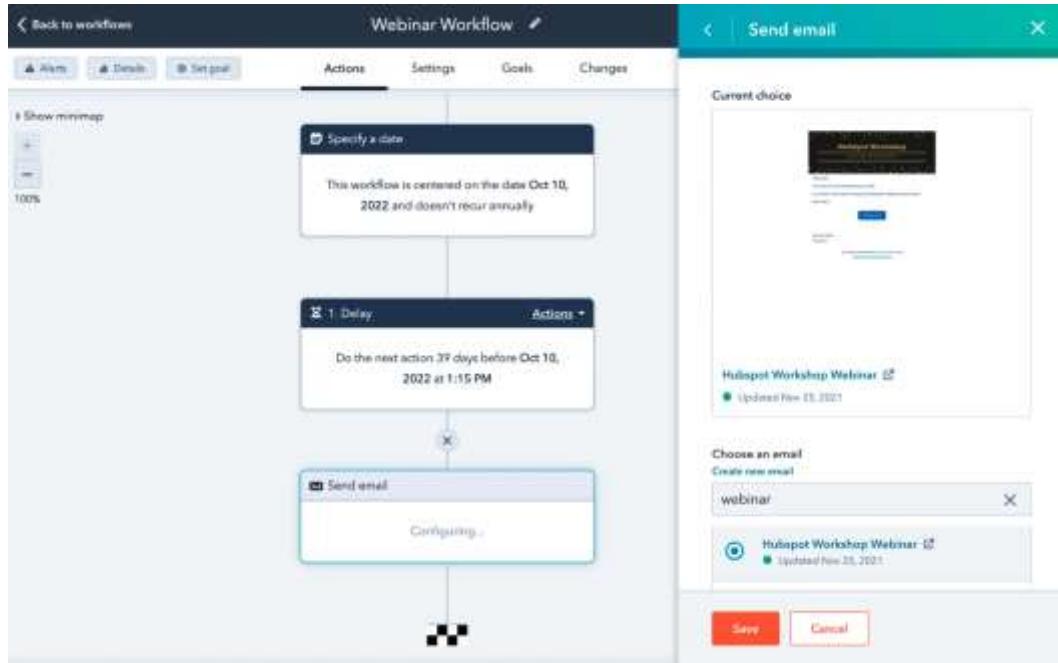


Figure 9.45 – Choosing an automated email from the list

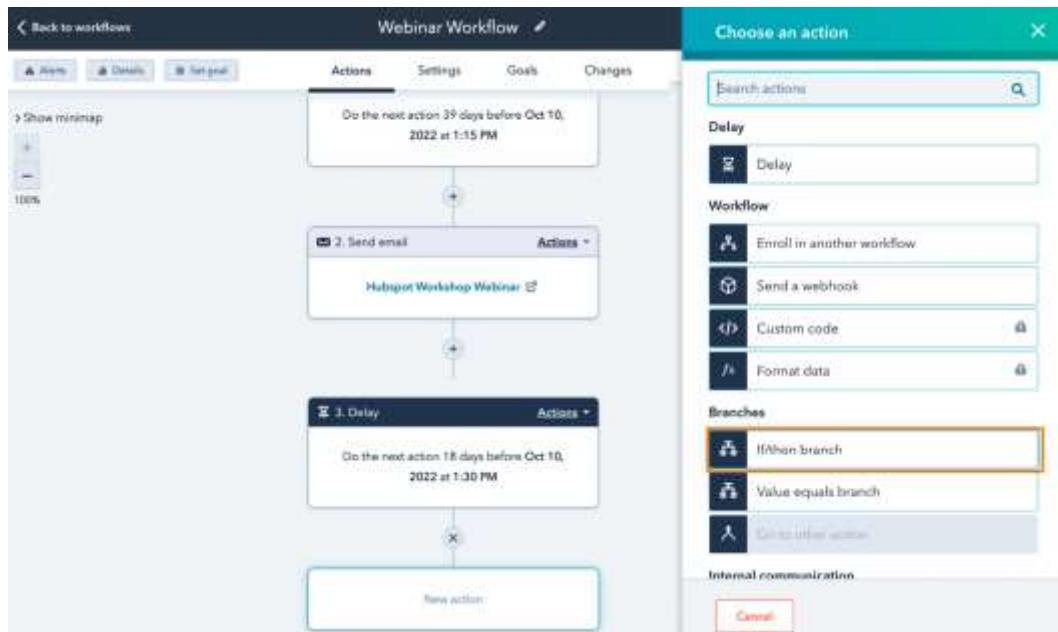


Figure 9.46 – Selecting If/then branch

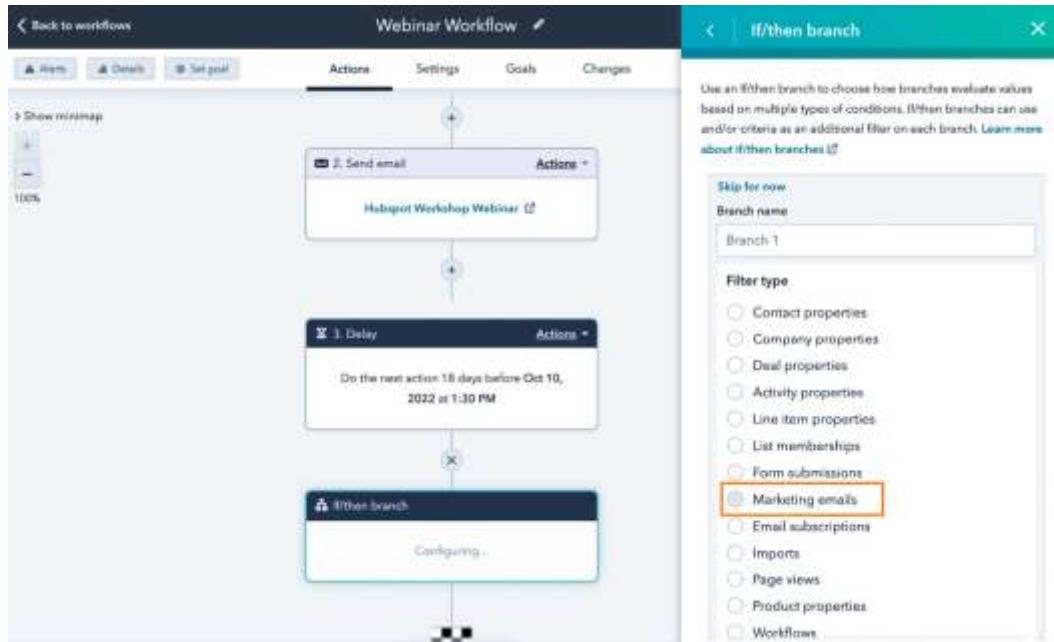


Figure 9.47 – Selecting the Marketing emails filter type

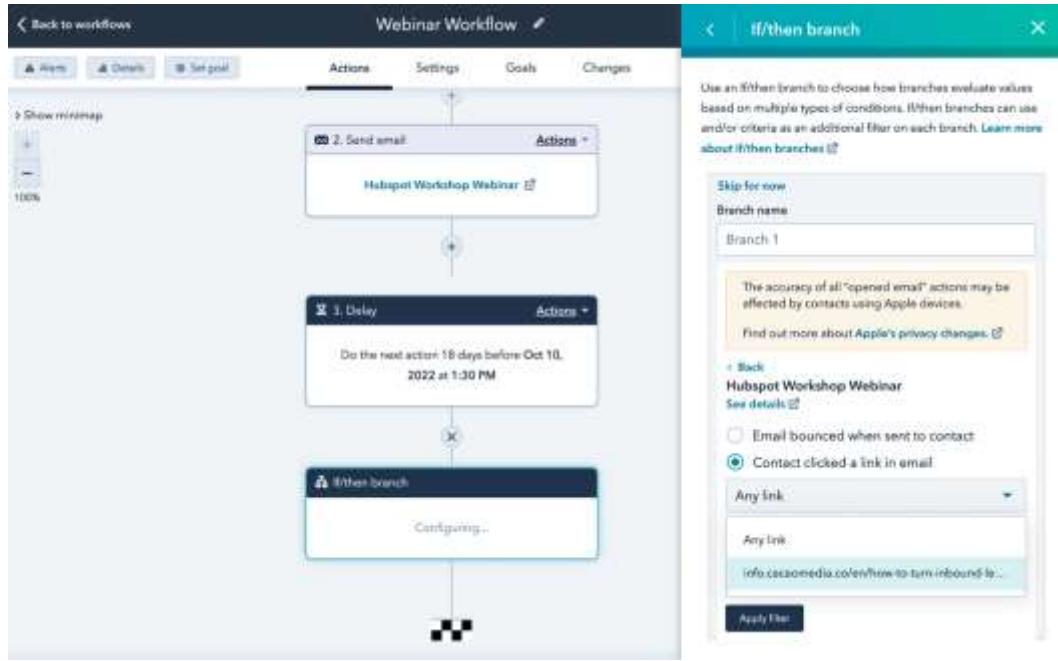


Figure 9.48 – Selecting a link that contacts should click to join the webinar

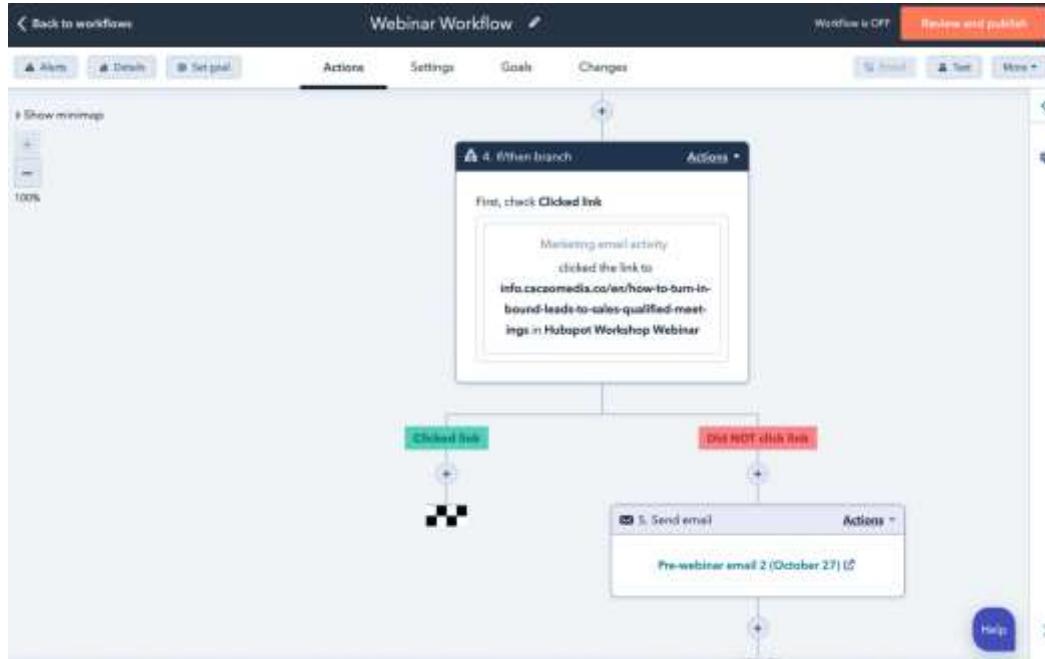


Figure 9.49 – Adding a second email to the relevant branch

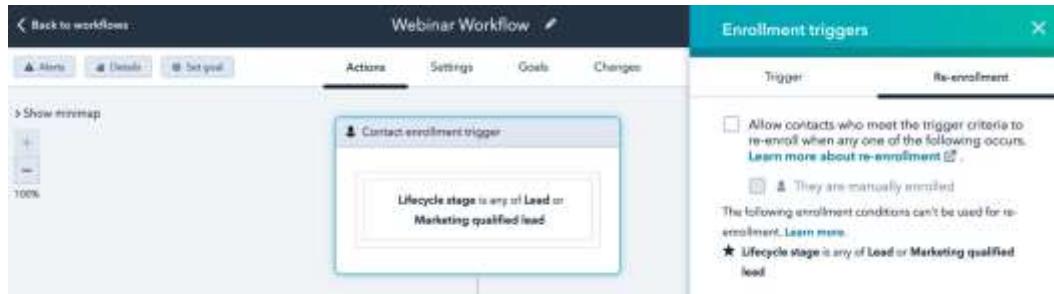


Figure 9.50 – Re-enrollment function of workflows

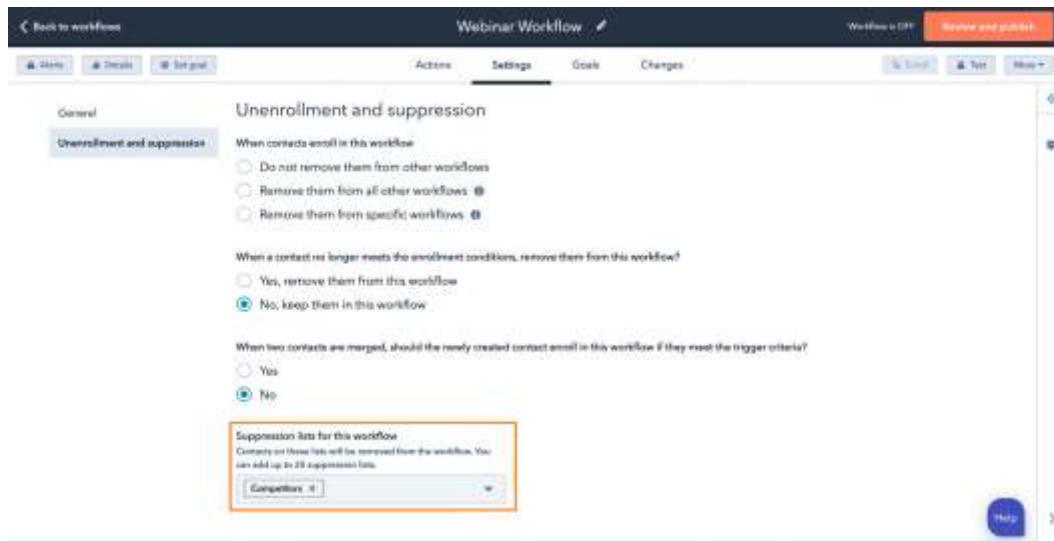


Figure 9.51 – Suppression function of workflows

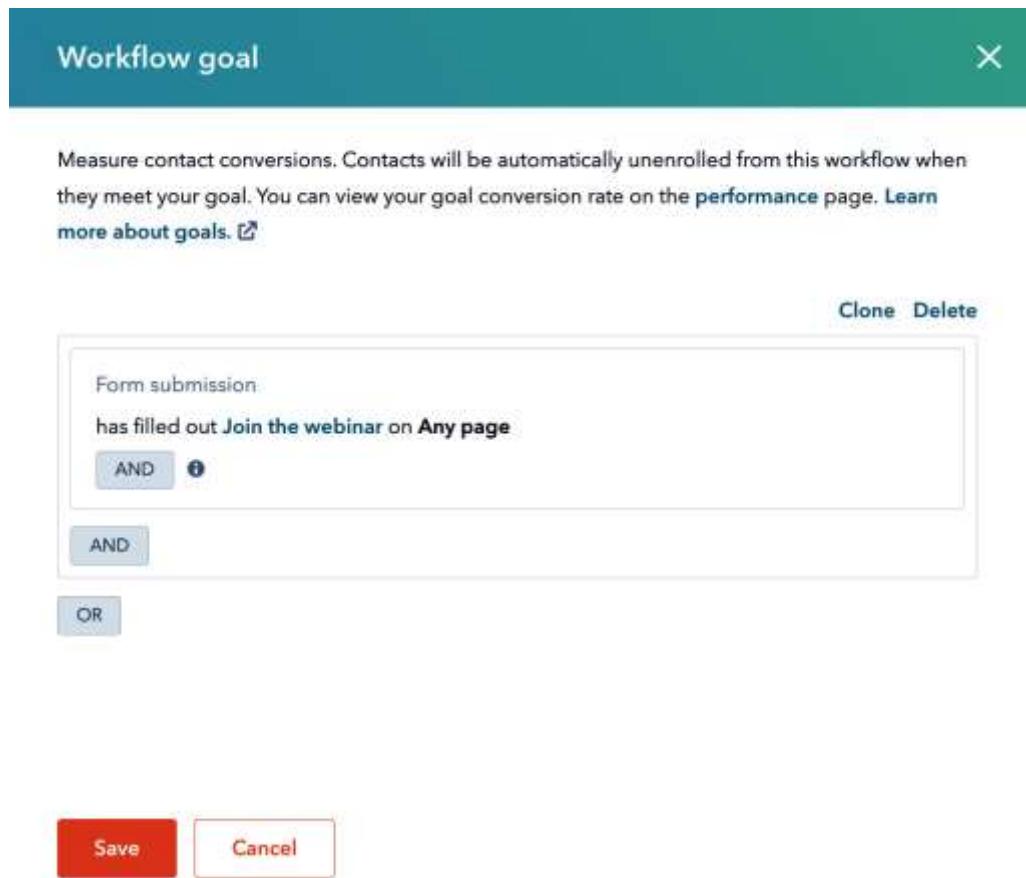


Figure 9.52 – Setting goals in workflows

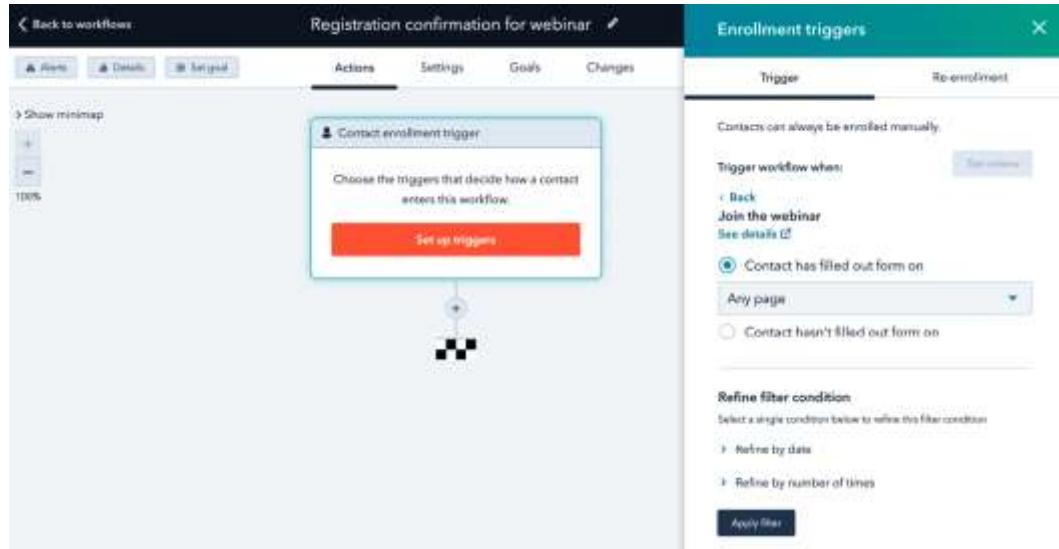


Figure 9.53 – Selecting a form as the enrollment trigger

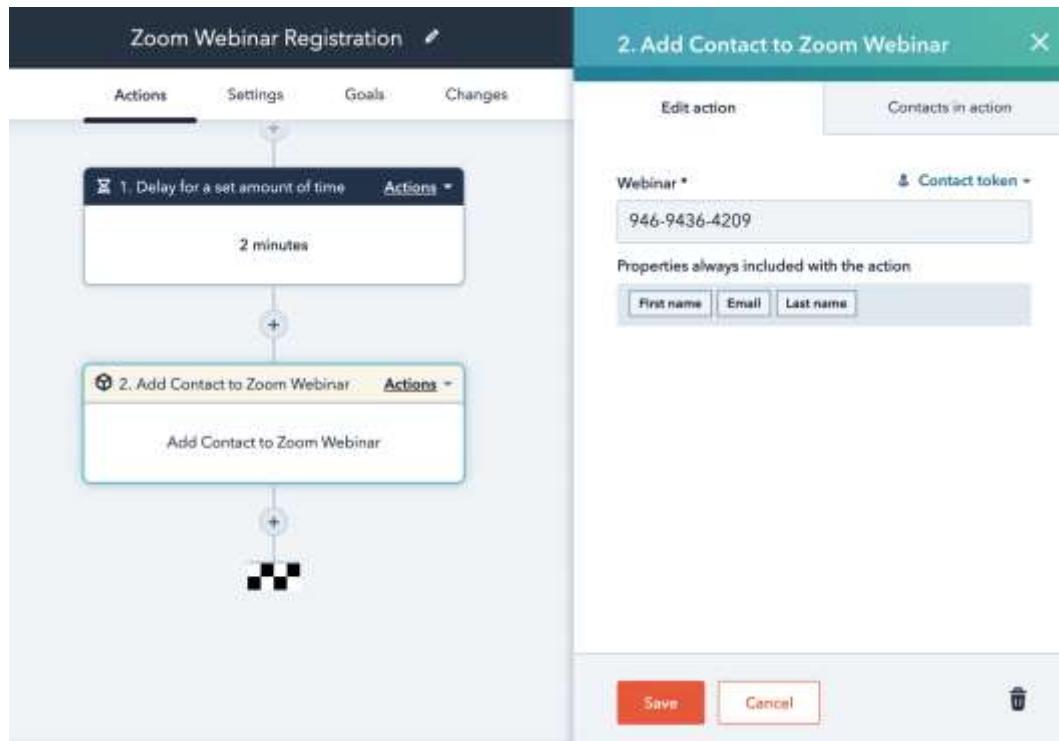


Figure 9.54 – Zoom webinar registration

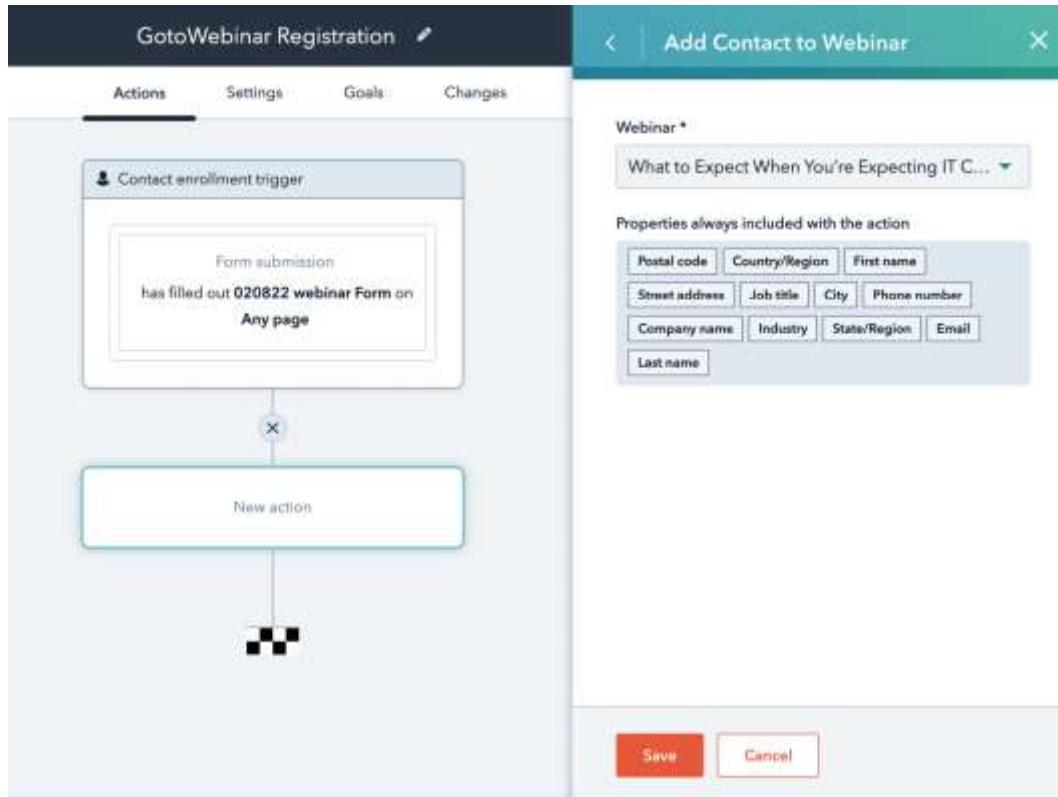


Figure 9.55 – GoTo Webinar registration

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

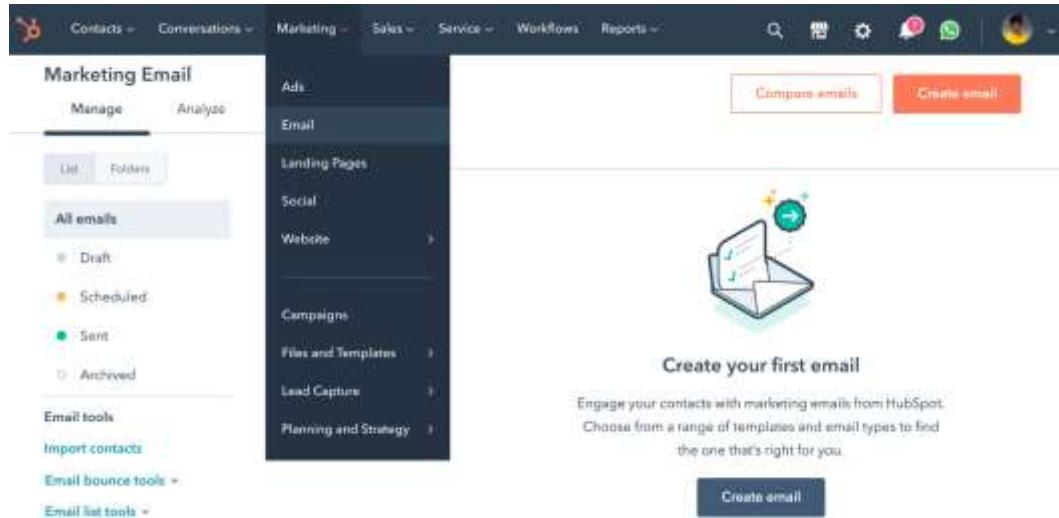


Figure 10.1 – Creating your email

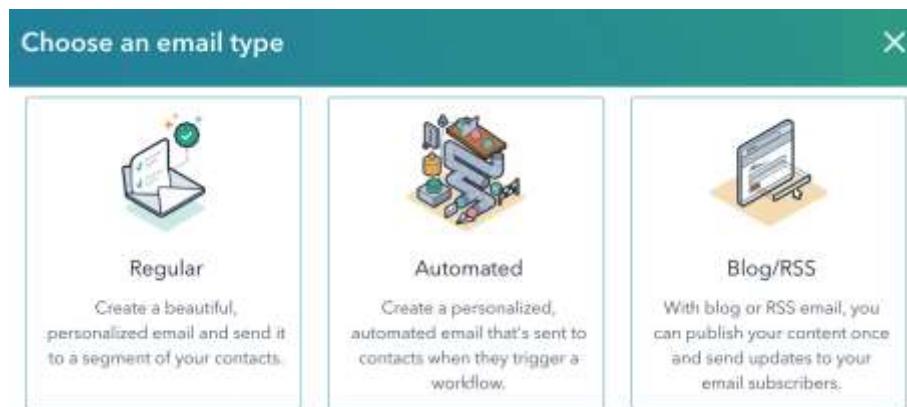


Figure 10.2 – Different types of emails in HubSpot

[Back to emails](#)

Select a template

Drag and drop Custom

Search email templates

[Manage saved templates](#) [Create new template](#)

Basic

Welcome
Send an email to your new customers to welcome them to your product.

Simple
Start with a simple template if you like to have or to begin with minimal formatting in your emails.

Promotion
Sell your products and services and promote your latest deals.

Plain email
Create an email with little formatting that will look and feel like a personal email to your readers.

Newsletter
Keep your contacts engaged with your brand by sharing content that you both care about.

More

We have news!

You're invited

The Valley
Get the latest news from The Valley.

Thank you

Business promotional

Figure 10.3 – Selecting a template

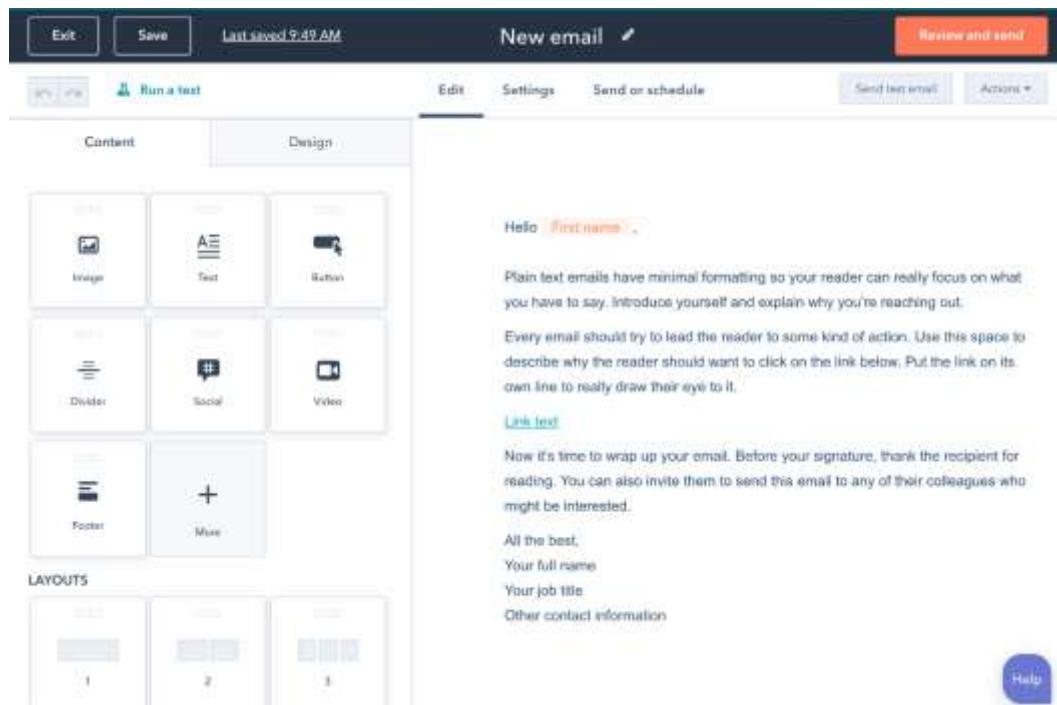


Figure 10.4 – The email template

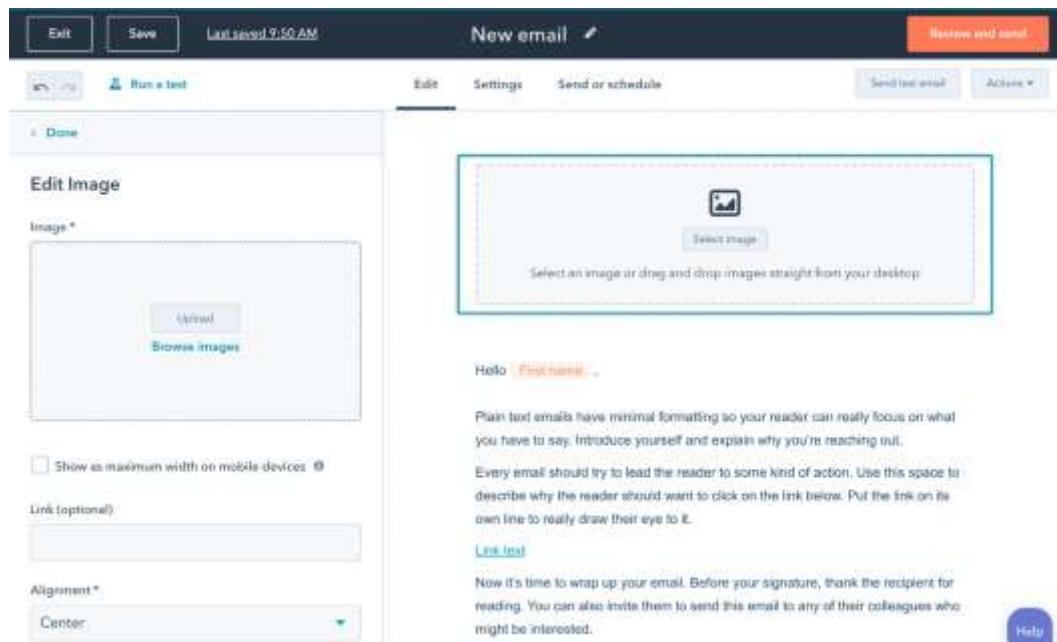


Figure 10.5 – Adding an image module to your email

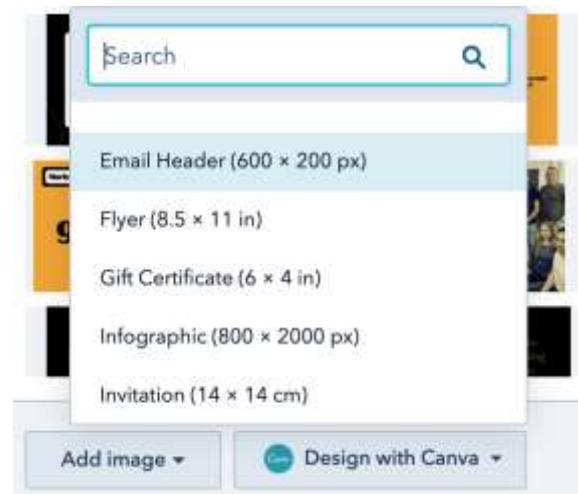


Figure 10.6 – Accessing Canva to create images within your email

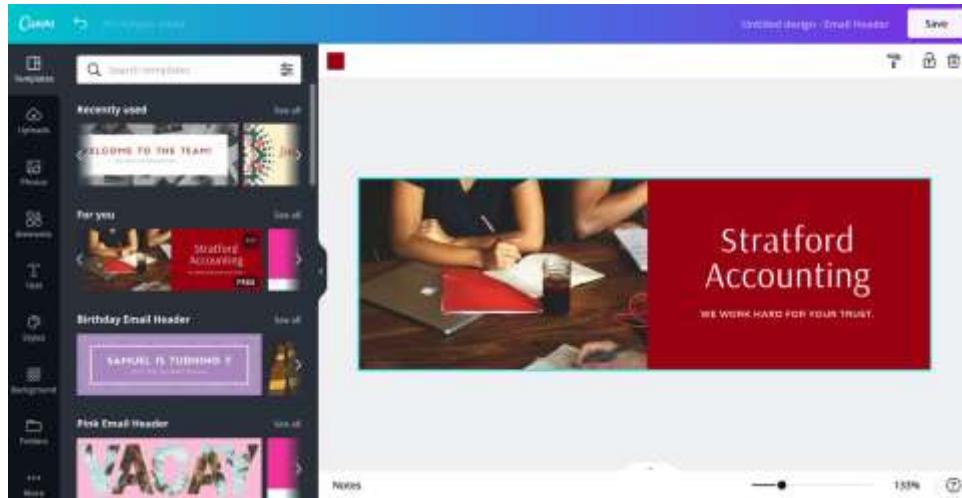


Figure 10.7 – Choosing an email header template

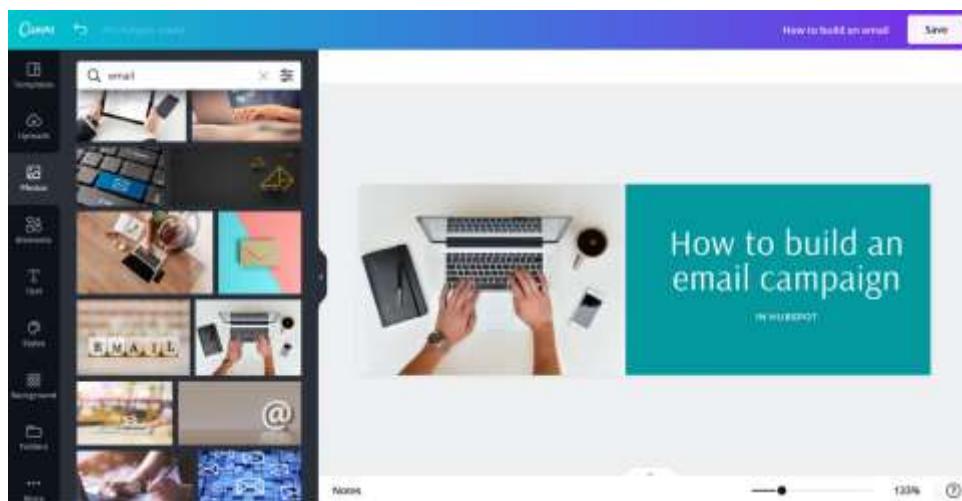


Figure 10.8 – Designing your email header in Canva

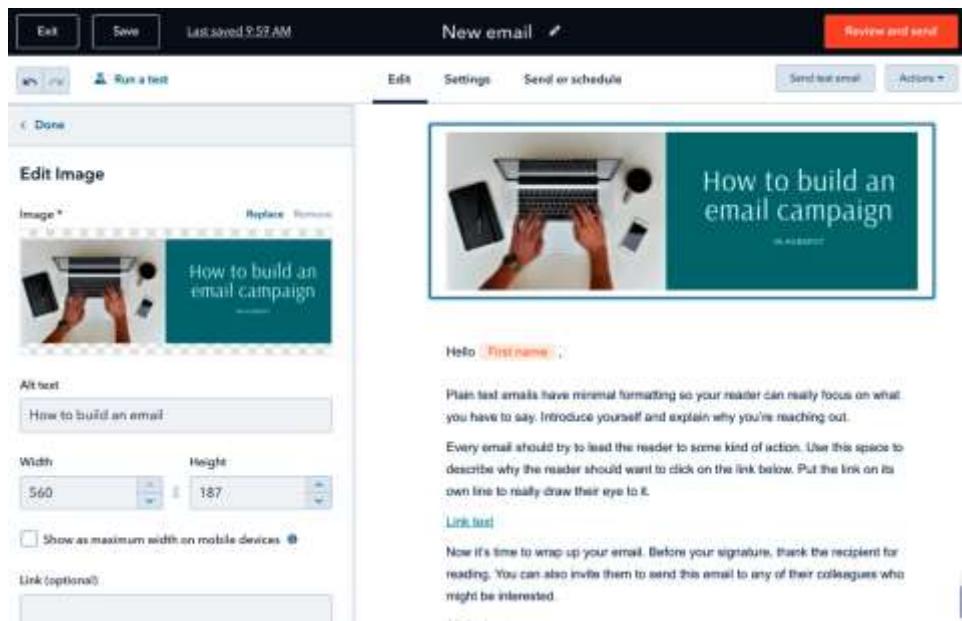


Figure 10.9 – Adding the email header to your HubSpot email



Figure 10.10 – Filling out the Alt text and Link sections

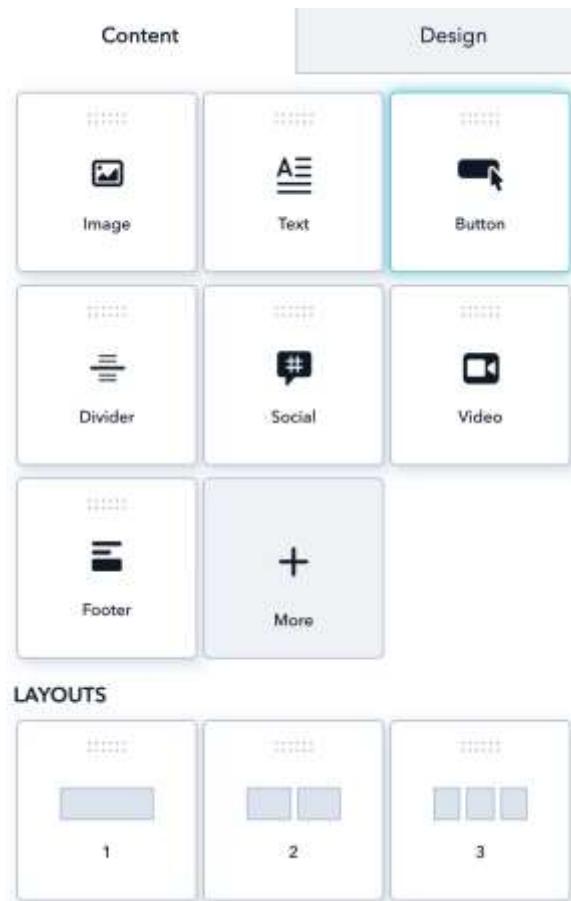


Figure 10.11 – Adding the CTA modules to your email

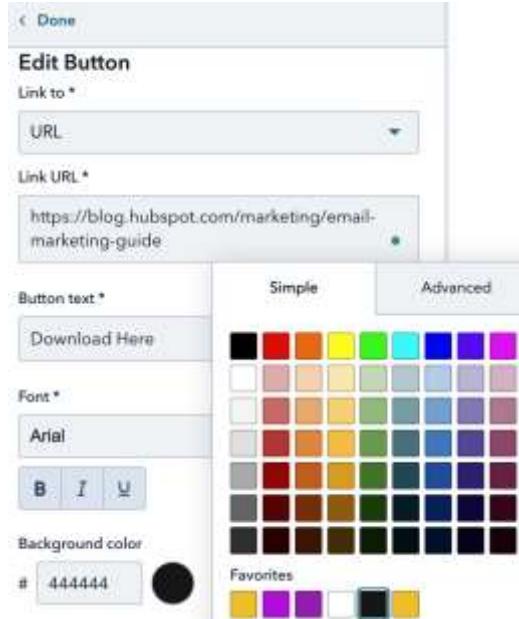


Figure 10.12 – Customizing your CTA



Figure 10.13 – Adding your CTA to the email

Manage Footer

Company Name *

Cacao Media

Address *

Rothschild Blvd

Address Line 2

City *

Tel Aviv

State *

Tel Aviv

Zip Code

Country

Israel

Phone

Save Changes

Figure 10.14 – Editing the footer of your emails

< Done

Edit Footer

Office location

Footer module will be updated in email

Cacao Media, Tel Aviv, Nairobi, New York Edit

Unsubscribe link type *

Both

Unsubscribe

Manage preferences

Both

LINK font *

Helvetica ▼ 12px ^ ▼

B *I* U

Align *

Figure 10.15 – Selecting your subscription type

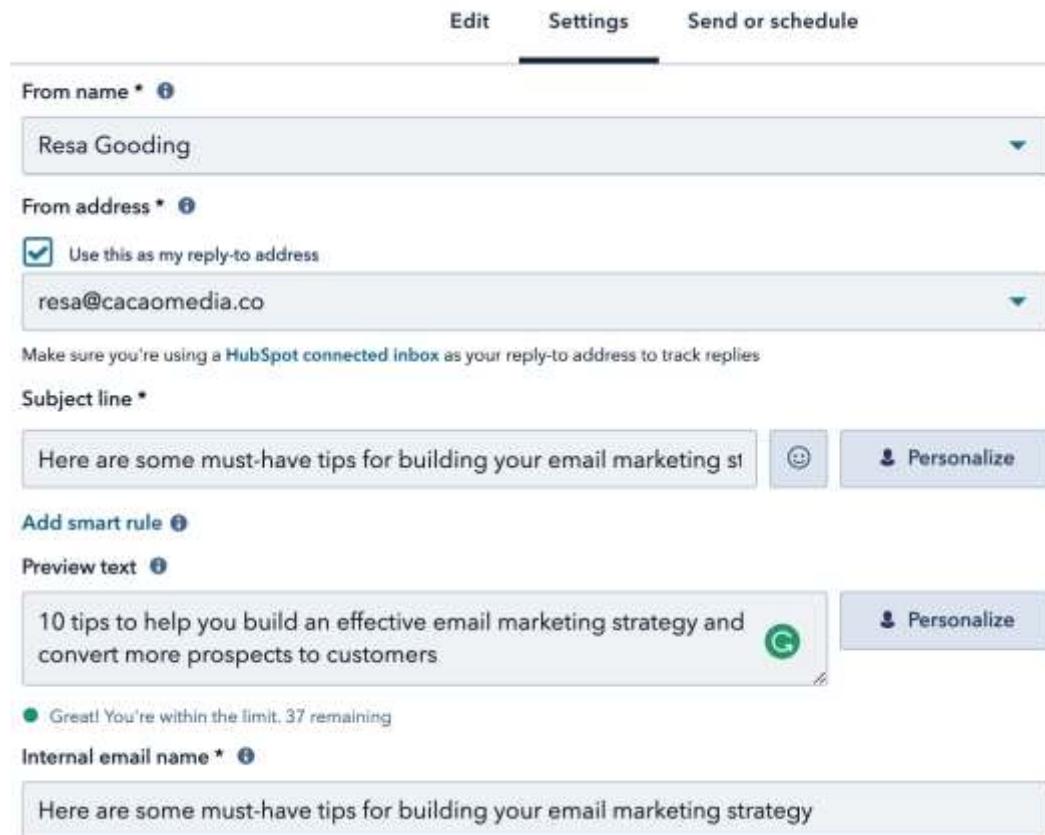


Figure 10.16 – Setting the sender's name and email, subject line, and previewing the text

Recipients

Send to* ⓘ

Select recipients

Don't send to ⓘ

Select lists or contacts

Don't send to unengaged contacts (398) ⓘ

Figure 10.17 – Selecting recipients for the email

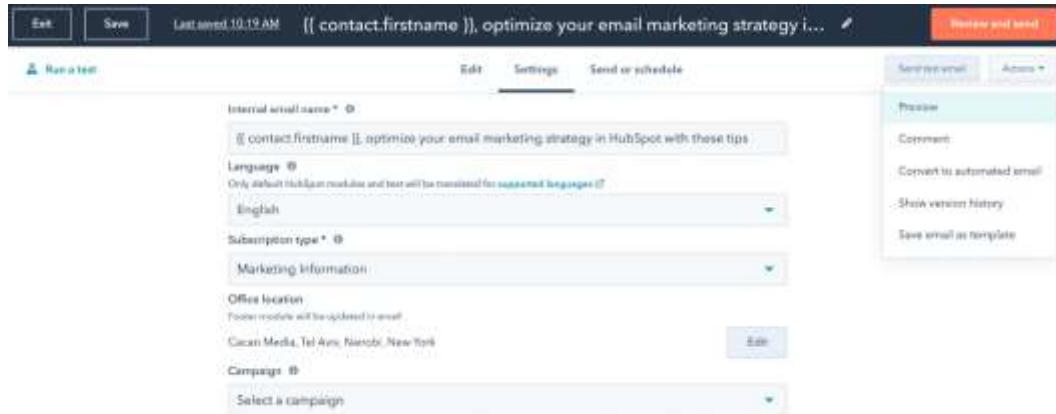


Figure 10.18 – Previewing your email on a desktop and mobile

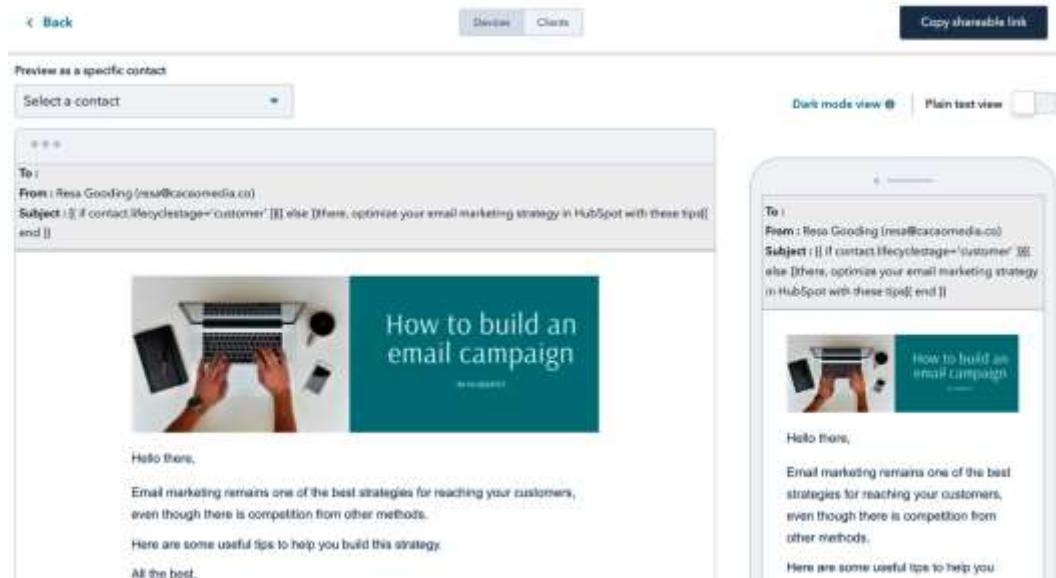


Figure 10.19 – The desktop and mobile preview of the email content

< Back

Device Client Cancel test in progress Test my email now

Email clients

Preview as a specific contact

Select a contact:

Search

Search clients

9 clients selected

Popular email clients

- Outlook 2016 (Windows 10) Gmail (Chrome)
- Samsung Mail (Android 6.0) Outlook.com (Chrome)
- Gmail App (iOS 14.2) Gmail App (Android 6.0)
- iPhone 8 (iOS 12.0) Office 365 (Chrome)
- iPad Pro (10.5 inch) (iOS 13.1)

Dark mode ⓘ

Figure 10.20 – Testing your email on different email clients

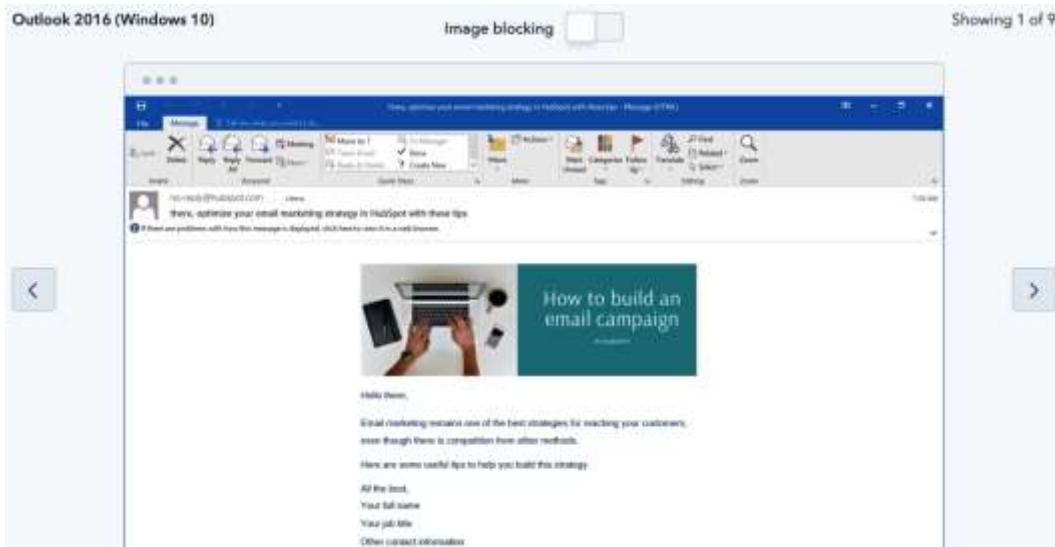


Figure 10.21 – The Microsoft Outlook email preview

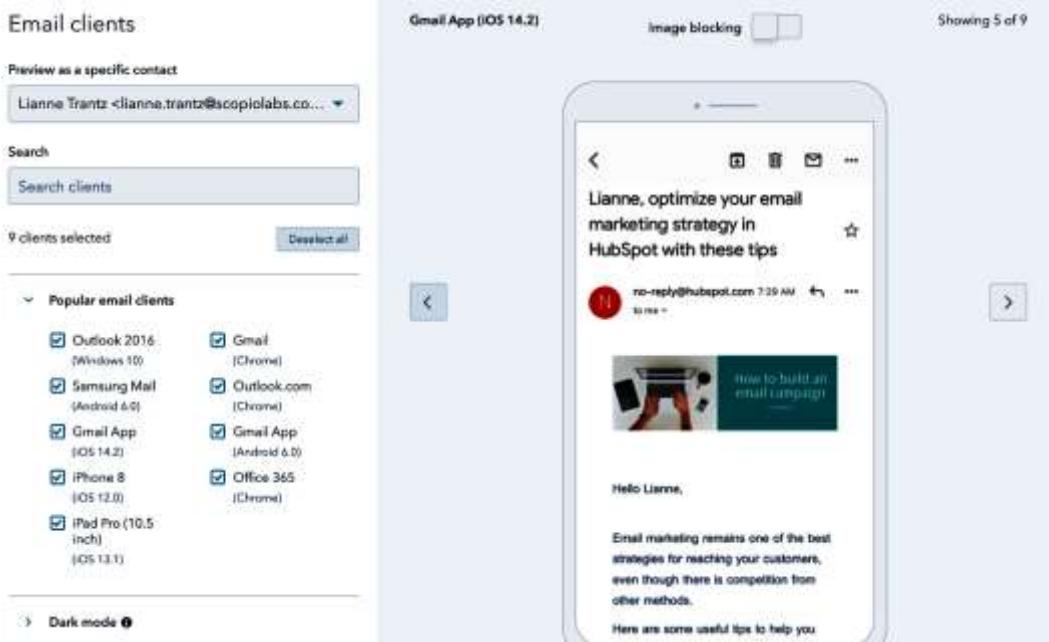


Figure 10.22 – Gmail App on the iPhone email preview

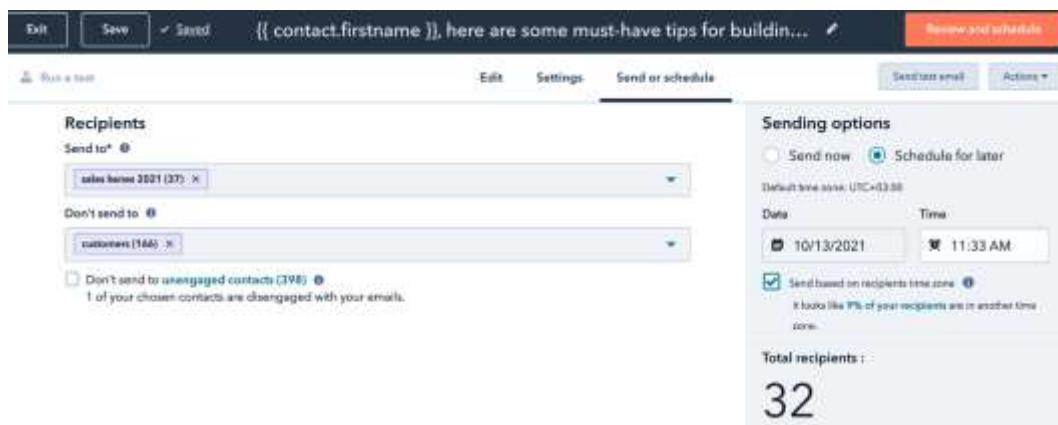


Figure 10.23 – Sending or scheduling your email



Figure 10.24 – The overall performance rate of the email

Delivery

SUCCESSFUL DELIVERIES	BOUNCES	UNSUBSCRIBES	SPAM REPORTS
147	0	2	0
100%	0%	1.36%	0%

Figure 10.25 – Delivery rates

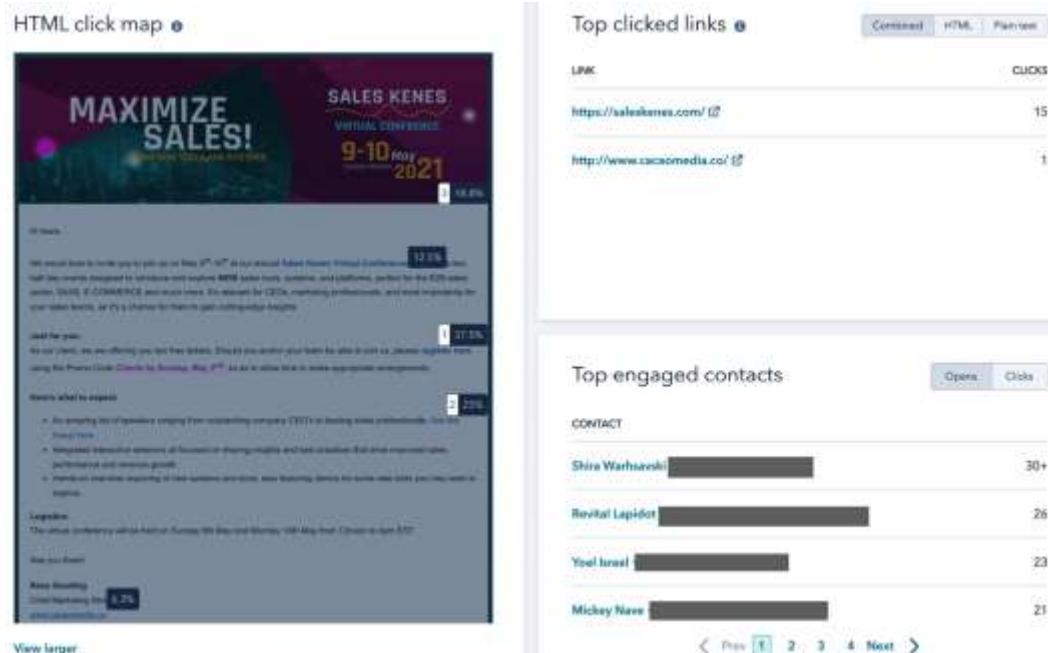


Figure 10.26 – Heat map for email engagement



Figure 10.27 – Time spent viewing the email

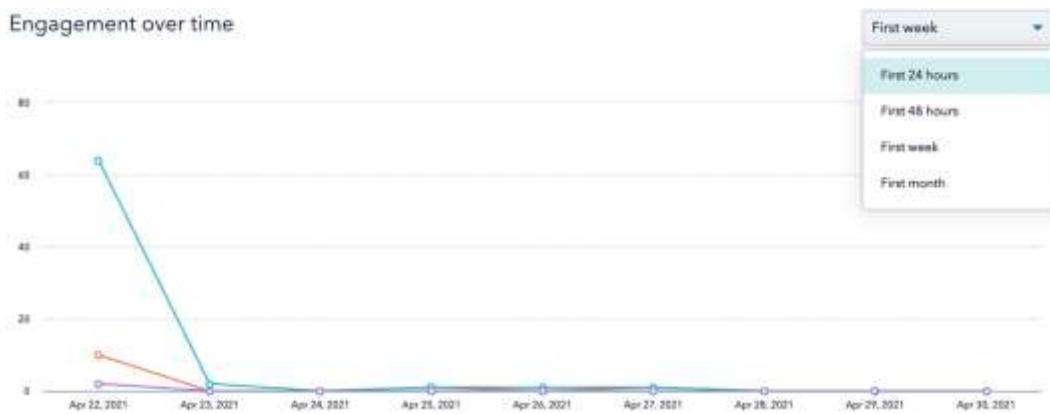


Figure 10.28 – Engagement over time



Figure 10.29 – The number of opens by email client

Performance		Recipients	
Sent	147	Search for a contact	
Delivered	147	Filter by:	All opens
Opened	69	Opened 69	
Clicked	12	RECIPIENT	ACTION
Replied	2	> Richard Williamson [REDACTED]	Opened
Bounced	0	> Silvia Fainaro [REDACTED]	Opened
Unsubscribed	2	> Ori Mankai [REDACTED]	Opened
Spam reports	0	> Rachael Toohey [REDACTED]	Opened
Not sent	9	> Daniel Zadok [REDACTED]	Opened
		> John Duff [REDACTED]	Opened

Figure 10.30 – The open rates of the email

Run a test

Edit Settings Send or schedule Send test email

Content Design

Image Text Button
Divider Social Video
Footer More

How to build an email campaign

Hello .

Email marketing remains one of the best strategies for reaching your customers, even though there is competition from other methods.

Here are some useful tips to help you build this strategy.

All the best,
Your full name
Your job title
Other contact information

LAYOUTS

1 2 3

This screenshot shows a user interface for creating and editing an email campaign. At the top, there are buttons for 'Run a test', 'Edit', 'Settings', 'Send or schedule', and 'Send test email'. Below these are tabs for 'Content' and 'Design'. The 'Content' tab is active, displaying a grid of icons for 'Image', 'Text', 'Button', 'Divider', 'Social', 'Video', 'Footer', and 'More'. To the right of the grid is a preview window showing a hand typing on a laptop keyboard. The preview has a teal sidebar with the text 'How to build an email campaign' and a small 'IN INSPIRE!' link. Below the preview, there's a greeting 'Hello .' followed by a paragraph about the benefits of email marketing and some tips. At the bottom left, there's a section titled 'LAYOUTS' with three numbered options (1, 2, 3) represented by small grid icons.

Figure 10.31 – Running an A/B test

Create A/B test

Choose a name for version A *

`{{ contact.firstname }}`, here are some must-have tips for

Choose a name for version B *

Improve your email marketing strategy using these tips

These names should help you differentiate version A from version B. For example "Plain version" and "Styled version"

A/B distribution ⓘ

A 25%	B 25%	Winning version 50%
----------	----------	------------------------

Winning metric ⓘ

Open rate

Open rate
Subject line, from name, preview text and from address

Click rate

Email content - copy, placement and styling

Click through rate

Subject line, from name, preview text, from address and email-
content - copy, placement and styling

Create test Cancel

The screenshot shows a 'Create A/B test' form. At the top, there's a field for 'Choose a name for version A *' containing placeholder text: `{{ contact.firstname }}` followed by a tip: 'here are some must-have tips for'. Below it is a field for 'Choose a name for version B *' with placeholder text: 'Improve your email marketing strategy using these tips'. A note below these fields says: 'These names should help you differentiate version A from version B. For example "Plain version" and "Styled version"'.

The 'A/B distribution' section features a horizontal slider with three segments: 'A 25%', 'B 25%', and 'Winning version 50%'.

The 'Winning metric' section has a dropdown set to 'Open rate', with other options like 'Click rate' and 'Click through rate' listed below it, each with their own descriptions.

At the bottom are two buttons: a red 'Create test' button and a white 'Cancel' button.

Figure 10.32 – Setting up an A/B test



Figure 10.33 – Setting up two versions of the email

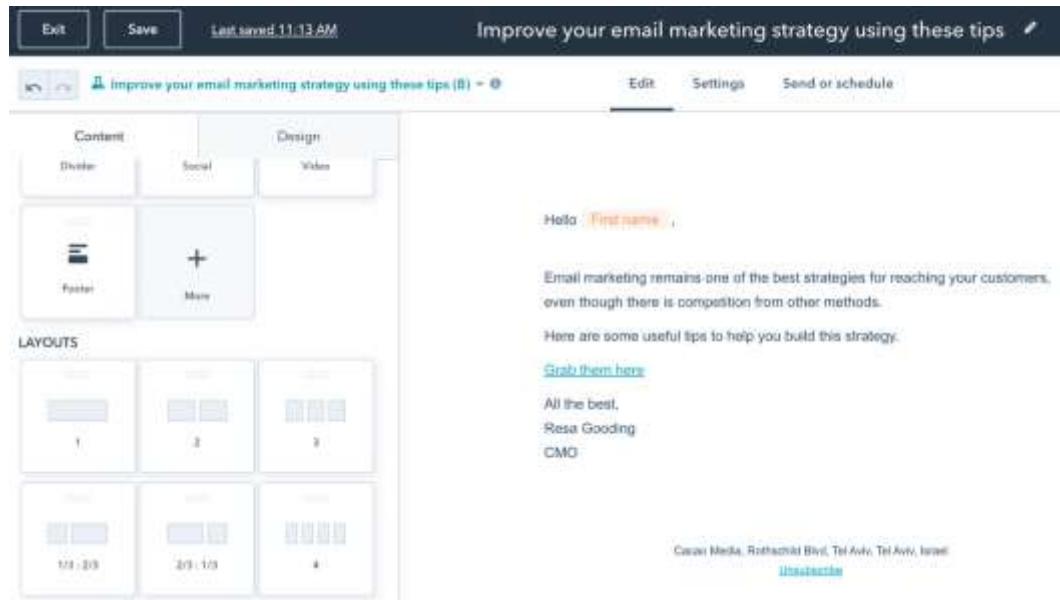


Figure 10.34 – A plain text email as version B

A/B Test Results

Inconclusive result. Inconclusive result. It looks like there was no clear winner for this send. Version A slightly outperformed version B, but not statistically so. Next time, try testing bolder changes , test with a larger sample size, set a longer duration, or create an even-split test.

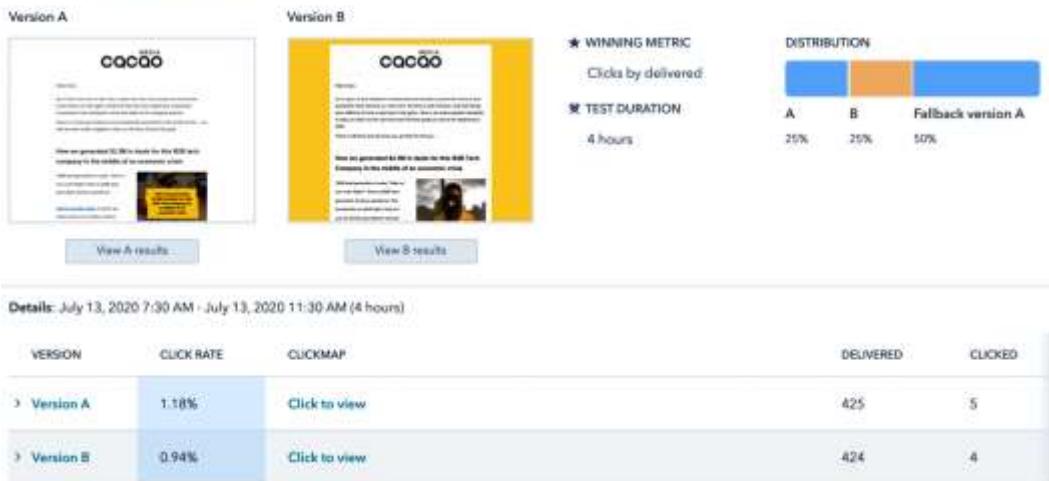


Figure 10.35 – The A/B test results

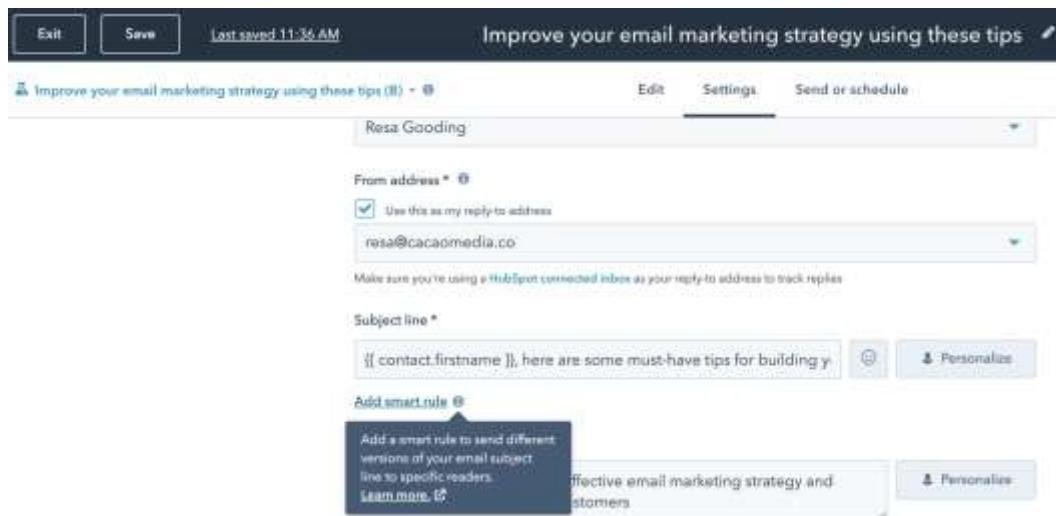


Figure 10.36 – Adding a smart module

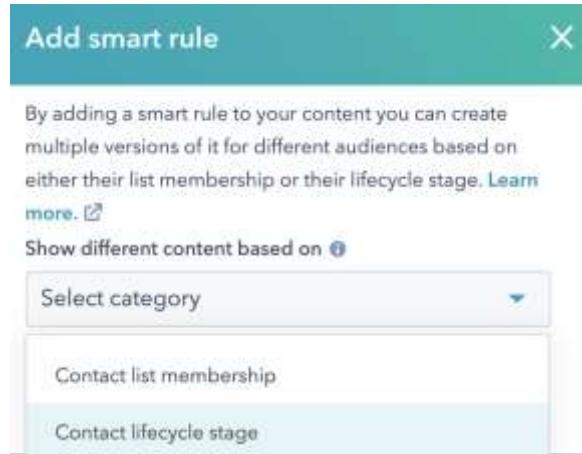


Figure 10.37 – Choosing a category

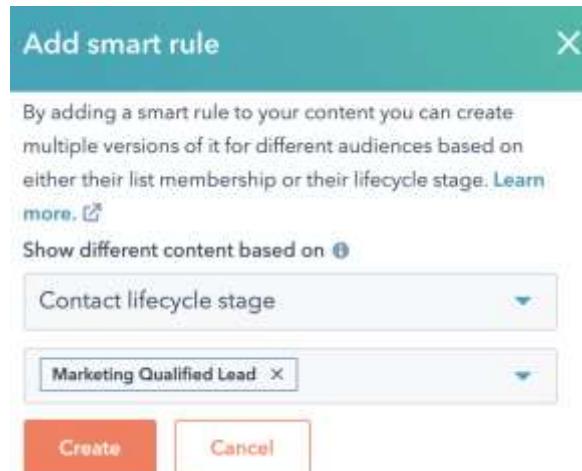


Figure 10.38 – Choosing the sub-category

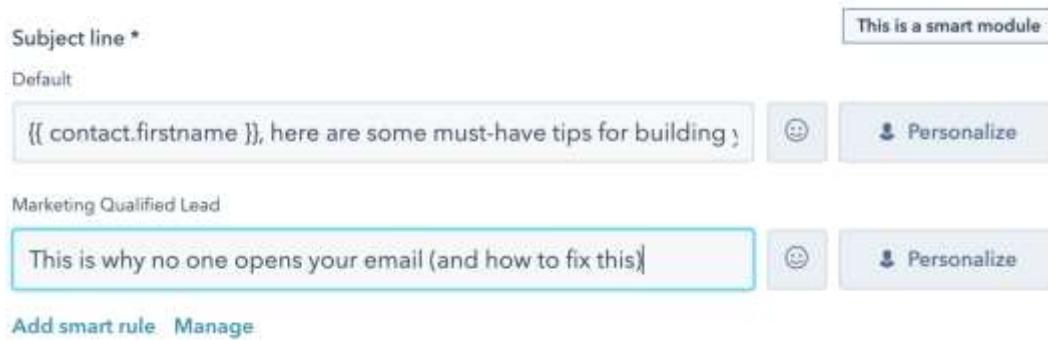


Figure 10.39 – Entering the subject line that the separate segment of contacts can receive

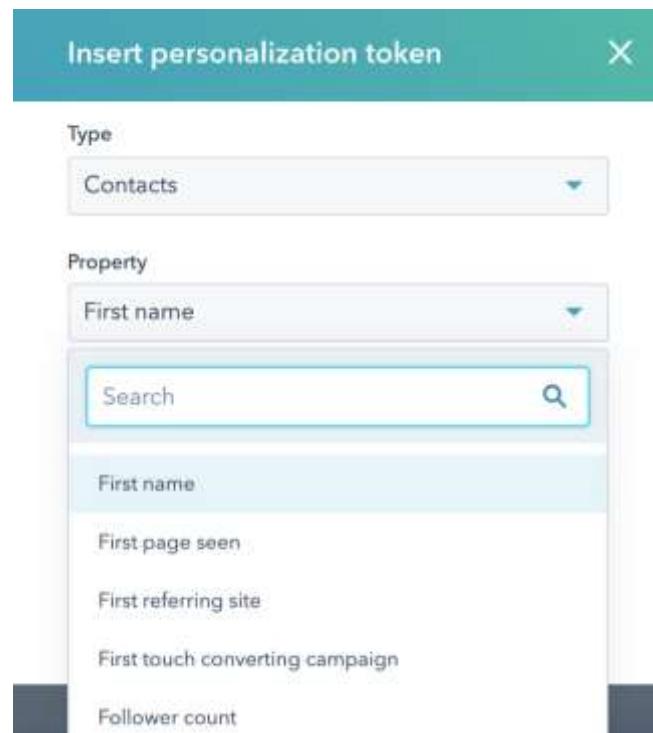


Figure 10.40 – Setting up a personalization token



Figure 10.41 – Email personalization tokens

Set default values for contact properties

first name	First name
First name	Default value there
Save	Cancel

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

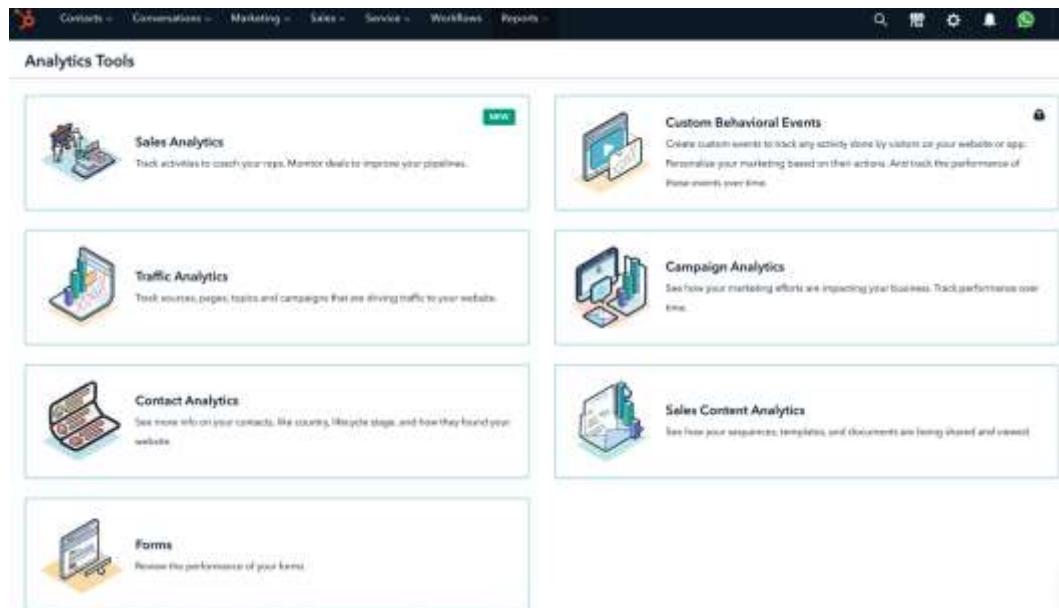


Figure 11.1 – Analytics tool

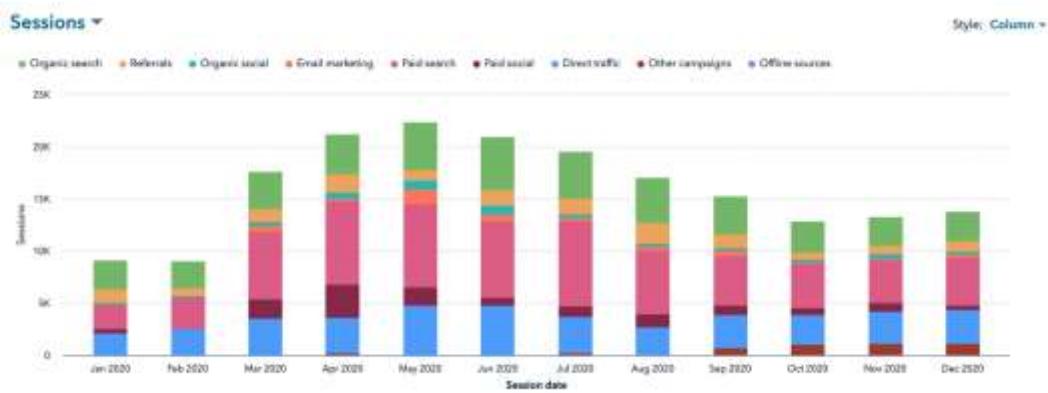


Figure 11.2 – Graph of traffic sources

<input checked="" type="checkbox"/>	SOURCE	SESSIONS	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
<input checked="" type="checkbox"/>	Paid search	66,763	2.28%	1,527	0.39%	8	82.67%	36 seconds
<input checked="" type="checkbox"/>	Organic search	43,251	1.17%	504	6.15%	31	71.72%	87 seconds
<input checked="" type="checkbox"/>	Direct traffic	39,794	2.03%	809	5.19%	42	65.94%	122 seconds
<input checked="" type="checkbox"/>	Referrals	15,060	0.72%	109	4.59%	5	88.61%	36 seconds
<input checked="" type="checkbox"/>	Paid social	13,002	24.08%	3,131	0.72%	23	79%	43 seconds
<input checked="" type="checkbox"/>	Other campaigns	4,946	5.8%	287	3.48%	10	91.23%	12 seconds
<input checked="" type="checkbox"/>	Email marketing	4,896	11.79%	577	0.52%	3	60.29%	61 seconds
<input checked="" type="checkbox"/>	Organic social	4,654	6.92%	322	5.9%	19	71.7%	56 seconds
<input checked="" type="checkbox"/>	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



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

<input type="checkbox"/>	COUNTRY	SESSIONS	% NEW SESSION	SESSION TO CONTACT RATE	NEW CONTACTS	CONTACT TO CUSTOMER RATE	CUSTOMERS	BOUNCE RATE	SESSION LENGTH
<input type="checkbox"/>	United States	68,281	78.01%	2.65%	1,811	2.82%	51	60.21%	49 seconds
<input type="checkbox"/>	Israel	36,961	51.81%	1.52%	543	1.93%	11	69.32%	96 seconds
<input type="checkbox"/>	United Kingdom	14,315	78.23%	3.45%	494	1.01%	5	79.24%	47 seconds
<input type="checkbox"/>	Germany	12,436	82.94%	3.82%	475	2.11%	18	60.9%	42 seconds
<input type="checkbox"/>	India	11,238	70.24%	2.76%	310	5.81%	18	73.05%	88 seconds
<input type="checkbox"/>	Singapore	10,824	64.98%	3.17%	343	0.87%	3	77.99%	50 seconds
<input type="checkbox"/>	Canada	4,922	73.73%	4.82%	237	4.64%	11	74.46%	63 seconds
<input type="checkbox"/>	France	2,091	73.27%	2.01%	42	4.76%	2	71.45%	91 seconds
<input type="checkbox"/>	Netherlands	1,758	74.18%	1.93%	34	8.82%	3	71.62%	59 seconds
<input type="checkbox"/>	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

Analytics Tools

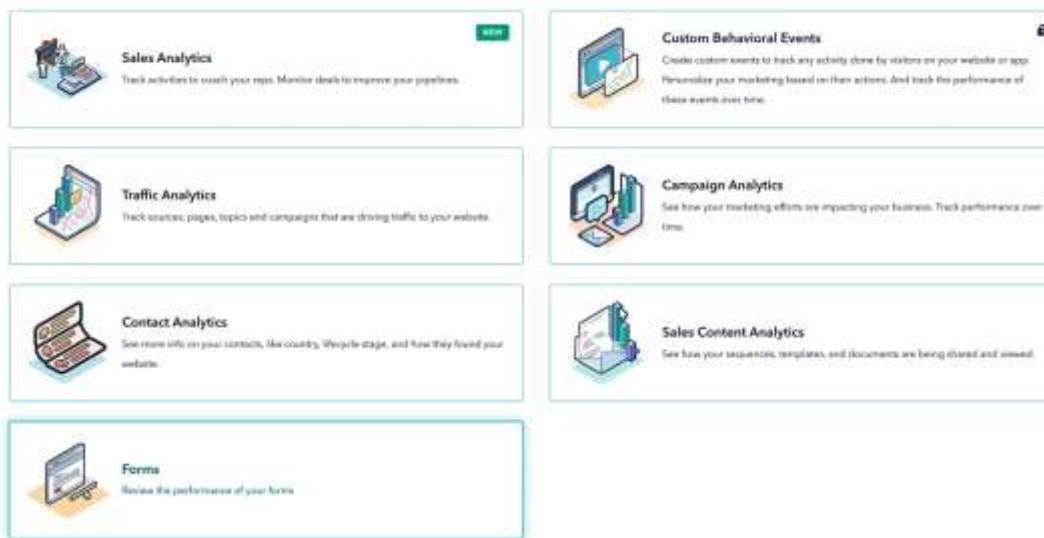


Figure 11.8 – Analytics Tools – Forms



Performance

VIEW	CONVERSION RATE	SUBMISSIONS
12,576 ▲ 1,975.25%	6.77% ▼ 55.91%	851 ▲ 815.05%

Figure 11.9 – Forms analytics

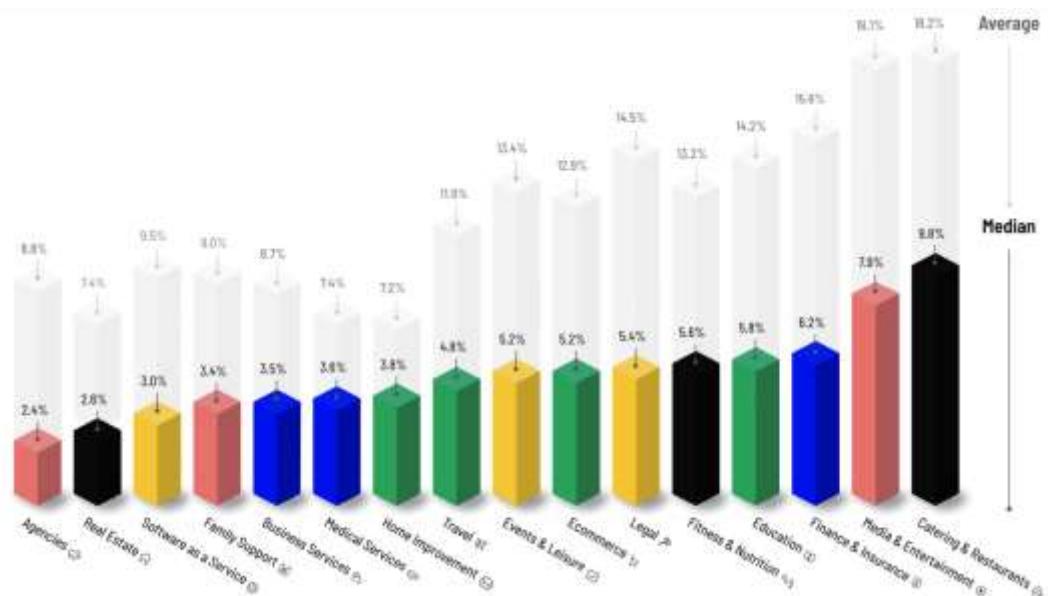


Figure 11.10 – Conversion rates by industry (source: Unbounce)

Analytics Tools

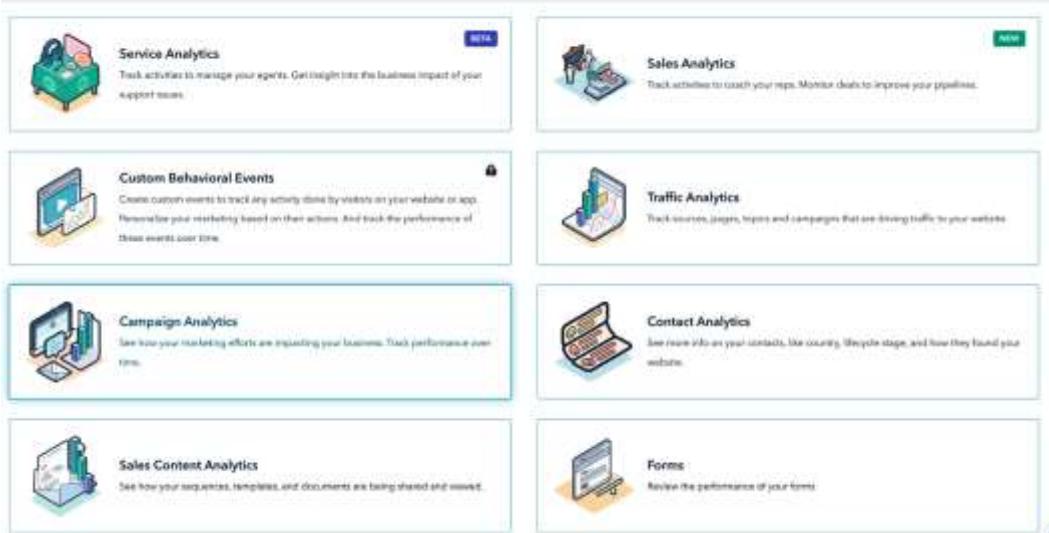


Figure 11.11 – Campaign Analytics

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

The screenshot shows the Reports section of a CRM interface. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, Asian Marketspace, and Partner.

The main area displays a table of reports:

My reports	63	Search reports	Dashboard: Any	Owned By: Anyone	Last Update: MM/DD/YYYY	To: MM/DD/YYYY
Favorites	0					
Custom reports	15					
Saved from library	48					
On Dashboards	45					
Not on Dashboards	38					

The table rows provide details for each report, including Name, Dashboard, Owned By, Last Updated, and To date.

Figure 11.13 – Accessing the report library

The screenshot shows the 'Report content' sidebar on the left with various report categories like Accounts, Cells, Companies, etc. The main area displays two funnel reports:

- Contact lifecycle stage funnel with contact totals and conversion**: Shows contacts moving through stages. Data table:

Lifecycle stage	Count of Contacts	Next step conversion	Cumulative conversion
All interested	11	82.78%	82.78%
Marketing	0	0%	0%
Gathering	0	0%	0%

- Deal stage funnel with deal totals and conversion rates**: Shows deals moving through stages. Data table:

Deal stage	Count of Deals	Next step conversion	Cumulative conversion
All created	0	0%	0%
Promote	0	0%	0%
Follow up	0	0%	0%
Further Eng.	0	0%	0%
Connect Sales	0	0%	0%
Negotiations	0	0%	0%
Process Deal	0	0%	0%
Closed Won	0	0%	0%
Closed Lost	0	0%	0%

Figure 11.14 – Accessing the funnel reports

The screenshot shows two customized funnel reports side-by-side:

- Contact lifecycle stage funnel with contact totals and conversion**: Similar to Figure 11.14, but with different data. Data table:

Lifecycle stage	Count of Contacts	Next step conversion	Cumulative conversion
All ...	331	82.78%	82.78%
Ms...	433	0.71%	0.59%
Cus...	3		

- Deal stage funnel with deal totals and conversion rates**: Similar to Figure 11.14, but with different data. Data table:

Deal stage	Count of Deals	Next step conversion	Cumulative conversion
All ...	23	50%	50%
Sta...	11	72.73%	36.36%
Dis...	8	0%	0%
Qu...	0	0%	0%
Sco...	0	0%	0%
Act...	0	0%	0%
Ne...	0	0%	0%
Co...	0	0%	0%

Figure 11.15 – Customizing the funnel reports

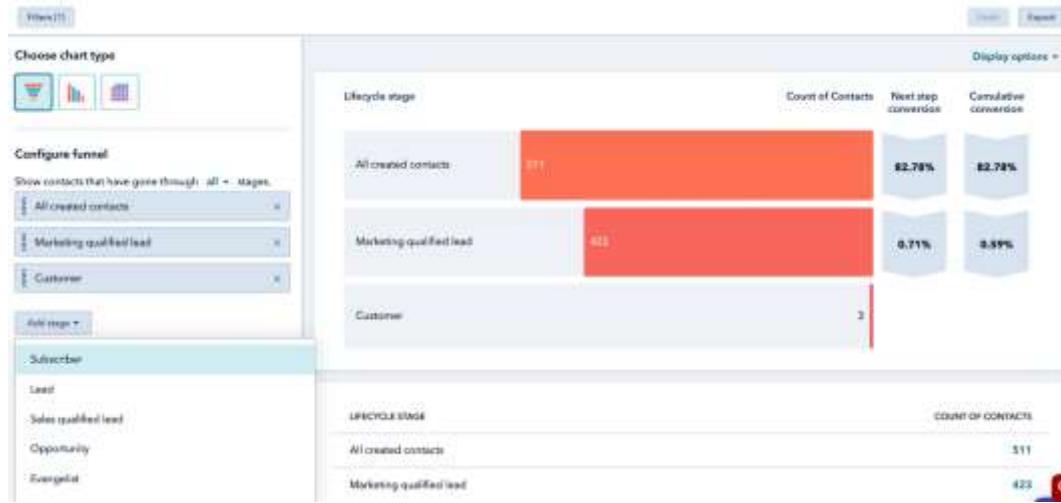


Figure 11.16 – Adding the life cycle stages to the reports



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

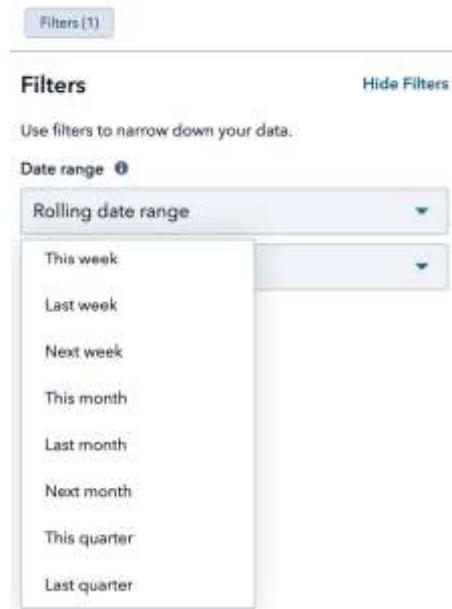


Figure 11.18 – Choosing a date range for your funnel report

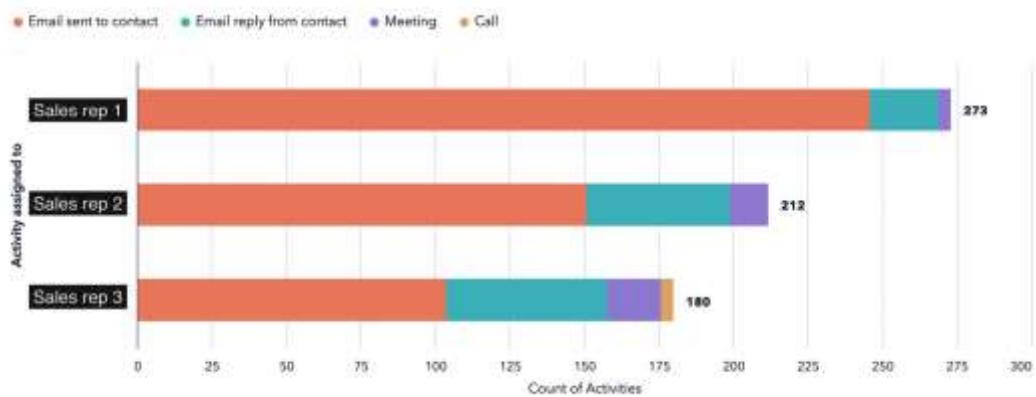


Figure 11.19 – Activity leaderboard – Sales representatives

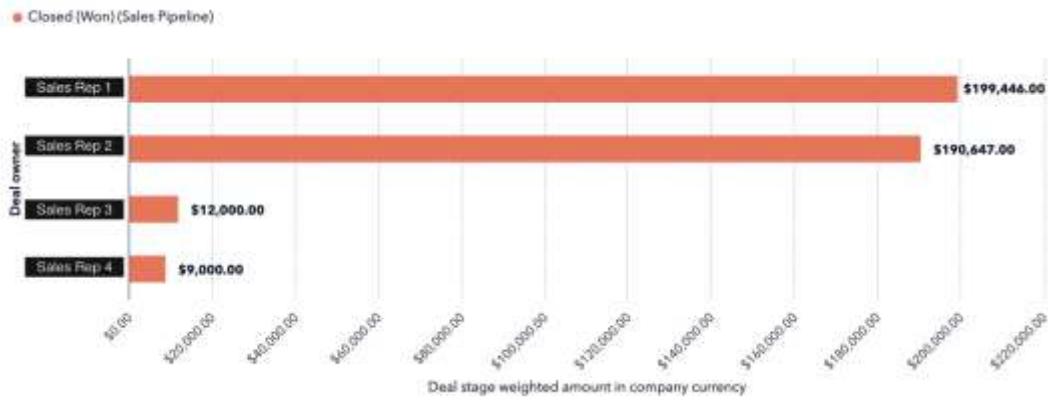


Figure 11.20 – Deal leaderboard – Sales representatives

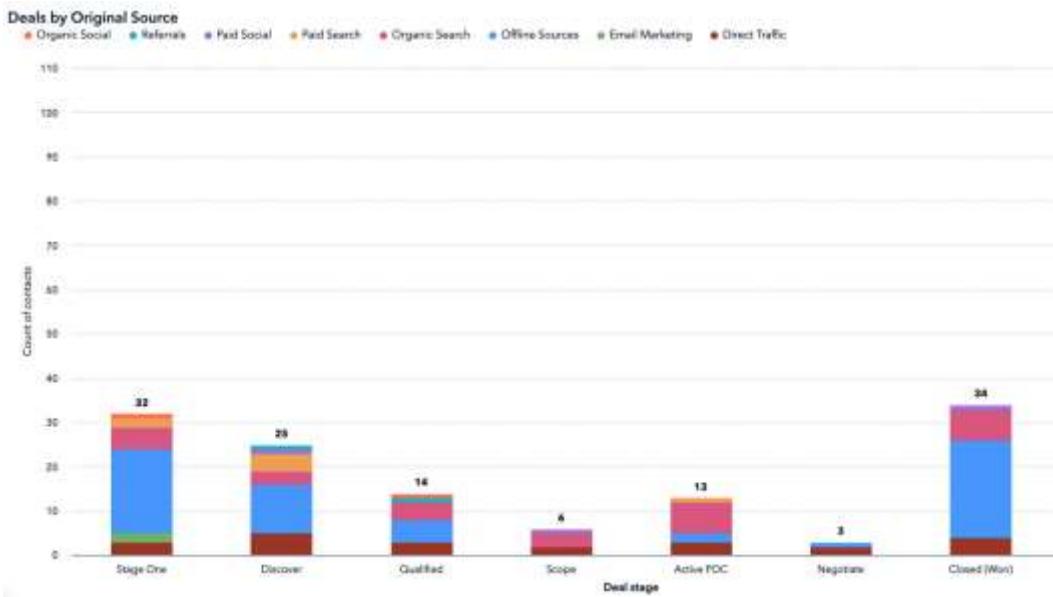


Figure 11.21 – Deals by Original Source

Deals won by source

⋮ ⋮

Date range: All time

Recent deal amount



Figure 11.22 – Deals won by source

Closed Lost Reasons

Date range: All time

- Count of Deals

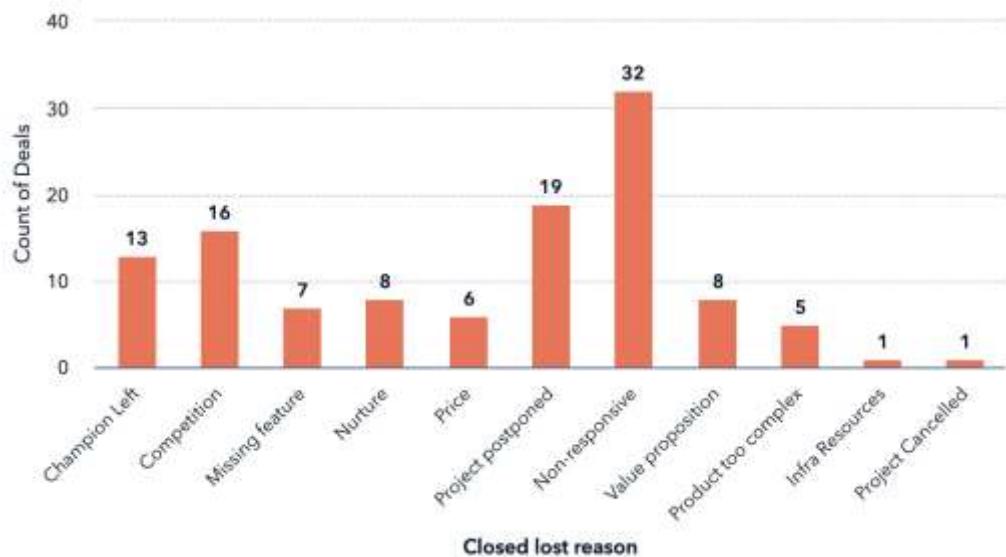


Figure 11.23 – Closed Lost Reasons

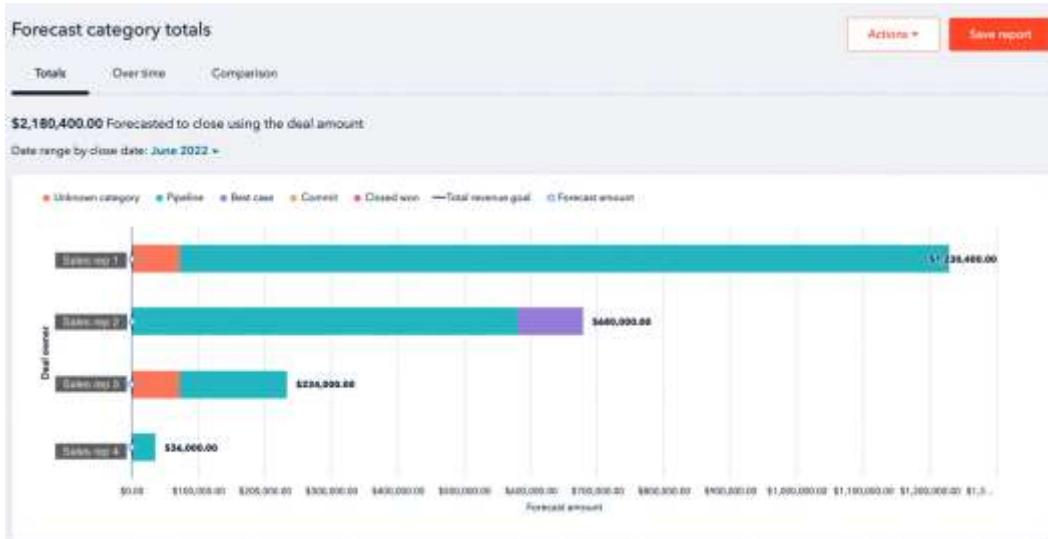


Figure 11.24 – Forecast revenue

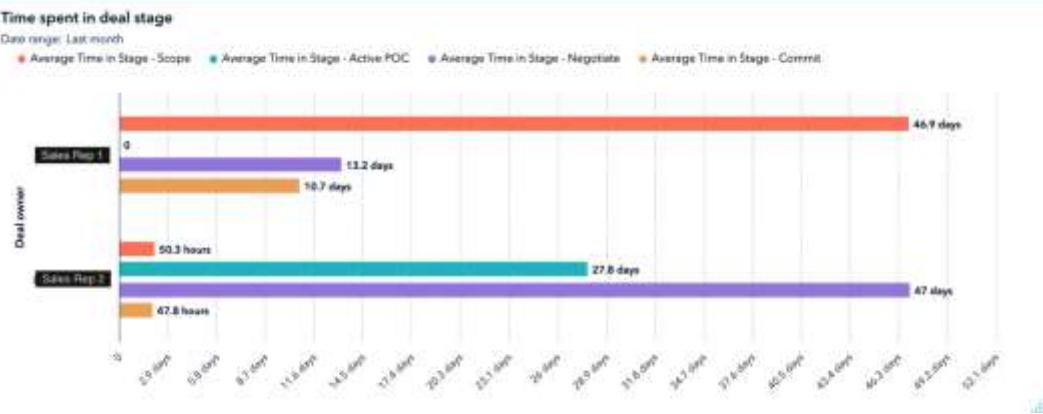


Figure 11.25 – Time spent in deal stage

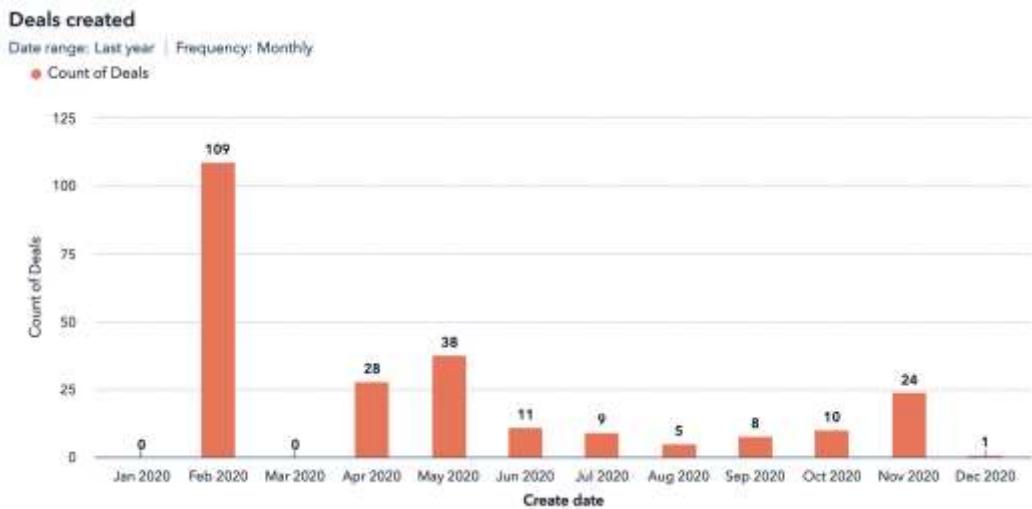


Figure 11.26 – Number of opportunities created in 2020

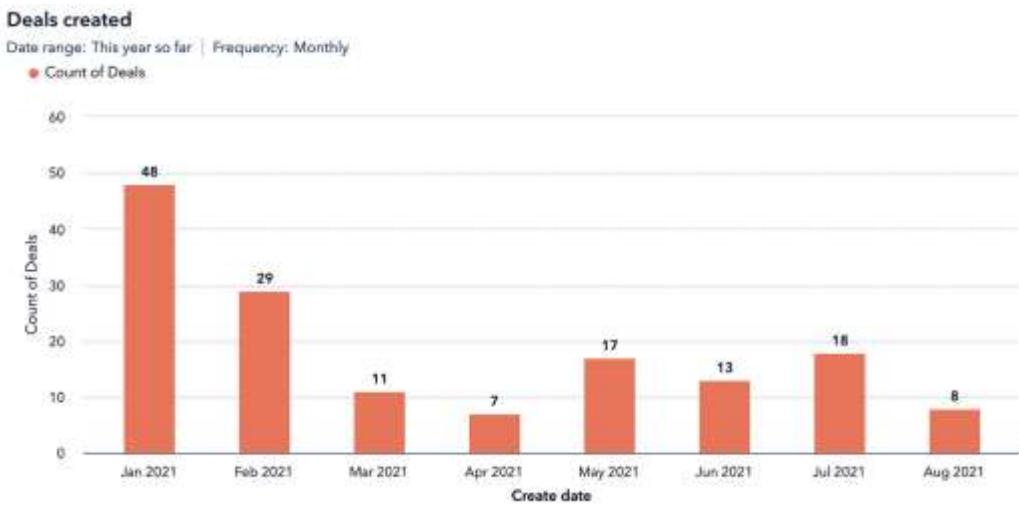


Figure 11.27 – Number of opportunities created in 2021 to date



Figure 11.28 – Deal Velocity

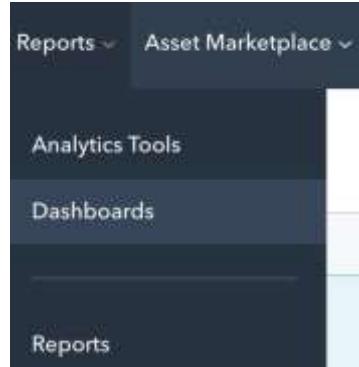


Figure 11.29 – Accessing the reporting dashboards



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	88.15%	26 seconds
✓	Organic search	39,399	1.16%	438	6.55%	30	70.05%	87 seconds
✓	Direct traffic	30,495	1.21%	369	3.79%	14	81.4%	140 seconds
✓	Paid search	30,876	1.07%	329	3.04%	10	85.05%	30 seconds
✓	Referrals	36,940	0.3%	110	1.62%	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	11,093	0.35%	39	7.67%	3	98.7%	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:

- 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-hubspot>
- *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

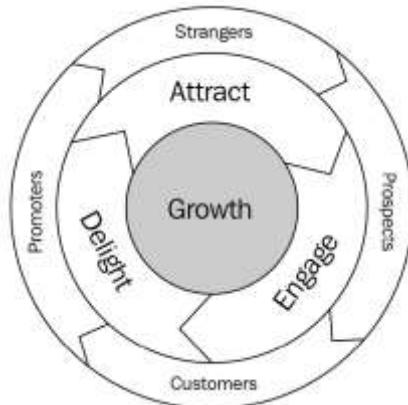


Figure 12.1 – The flywheel

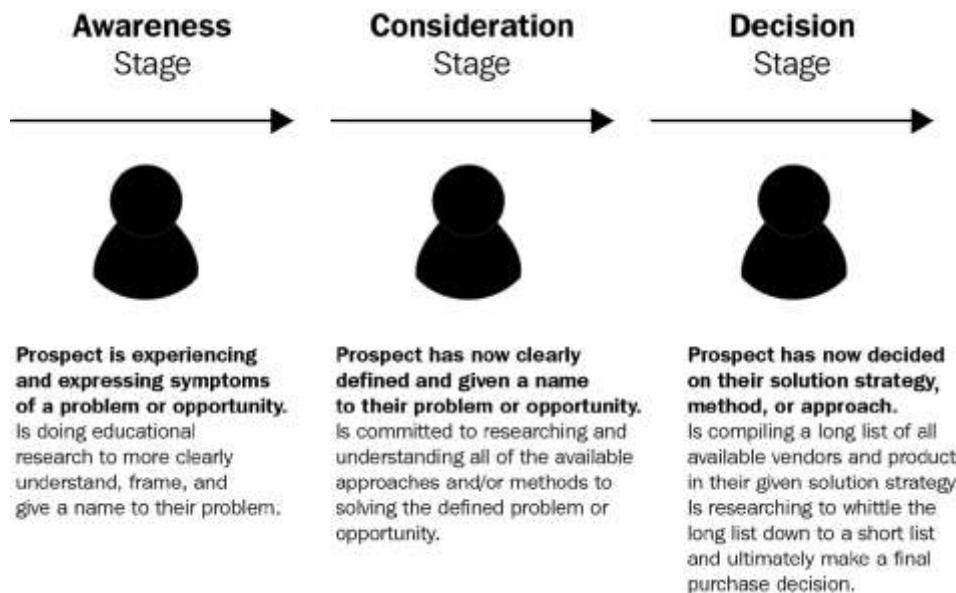


Figure 12.2 – The buyer's journey

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

The screenshot shows the HubSpot customer lifecycle view for a contact named Aya. The interface is divided into several sections:

- Contact Overview:** Shows Aya's profile picture, name (Aya), title (Marketing Manager at Perpetr Medical), and a summary of recent activity.
- Activity Stream:** Displays a timeline of interactions:
 - An email from Resa Goedeling on April 29, 2021, with status "Open" (6 days ago).
 - An email from Resa Goedeling on April 28, 2021, with status "Open" (7 days ago).
 - An email from Resa Goedeling on April 27, 2021, with status "Open" (7 days ago).
- Companies:** Lists the company Perpetr Medical with details like address, phone number, and website.
- Deals:** Shows a deal titled "Perpetr - Ongoing Support" with status "Closed won" (1 day ago).
- Tickets:** Shows a ticket titled "Setting up a new pipeline" with status "Waiting on me" (7 minutes ago).

Figure 13.1 – HubSpot customer lifecycle view per contact

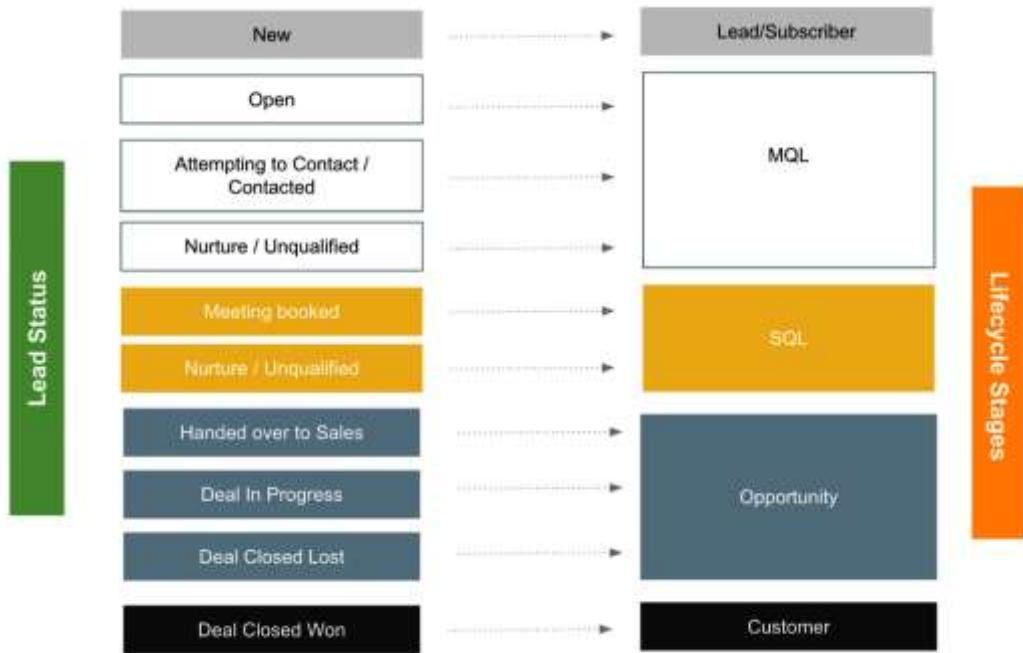


Figure 13.2 – Aligning lead status to lifecycle stages

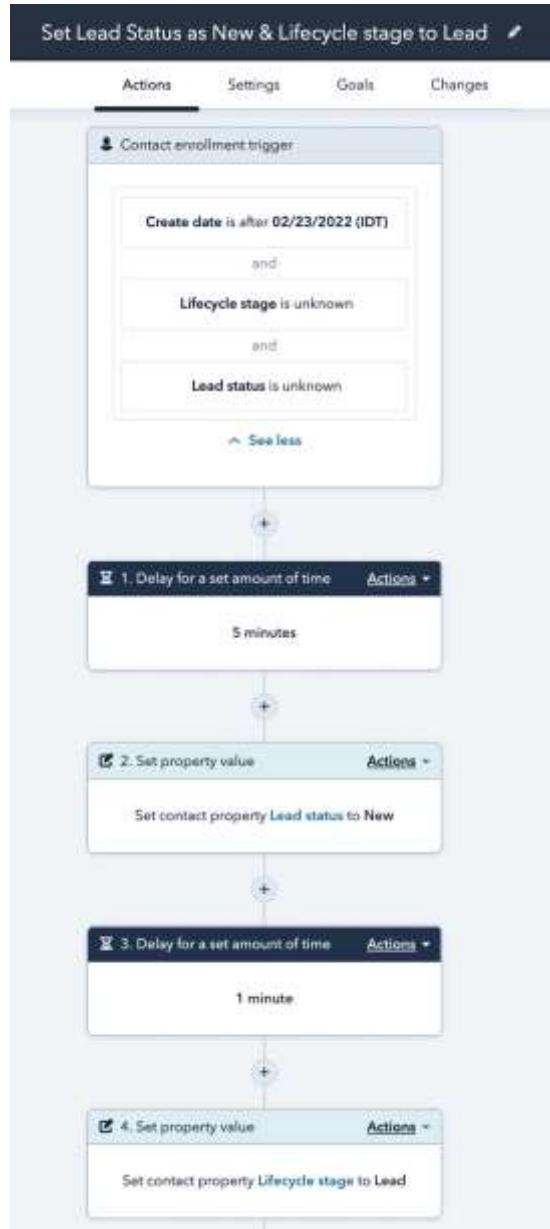


Figure 13.3 – Enrollment triggers for workflow when setting contacts as New

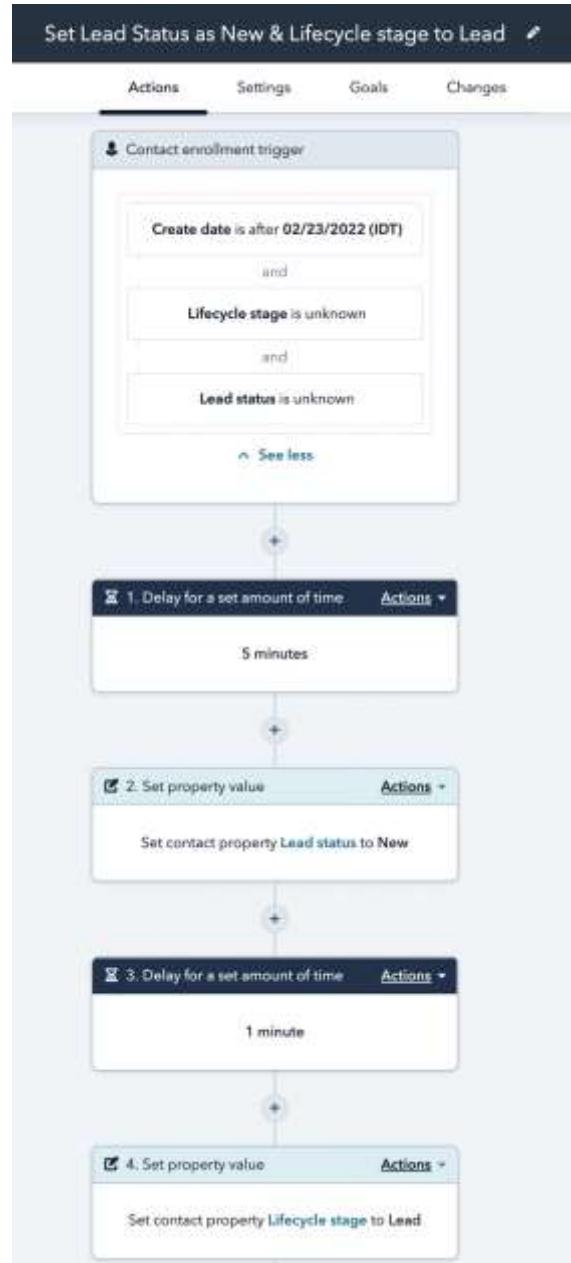


Figure 13.4 – Setting property values in workflows

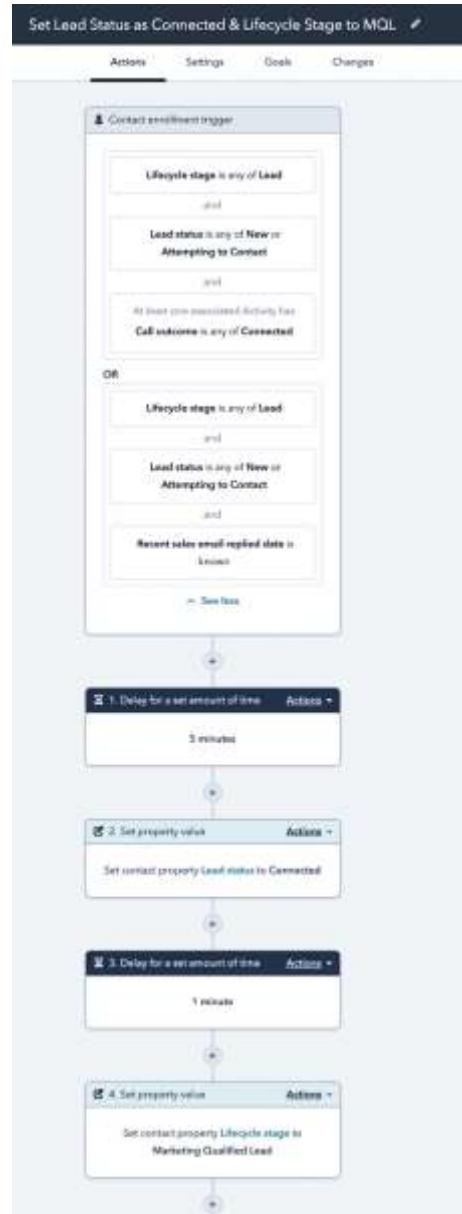


Figure 13.5 – Enrollment triggers for a workflow updating lead status to Connected



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

Different lifecycle stages and their qualification criteria

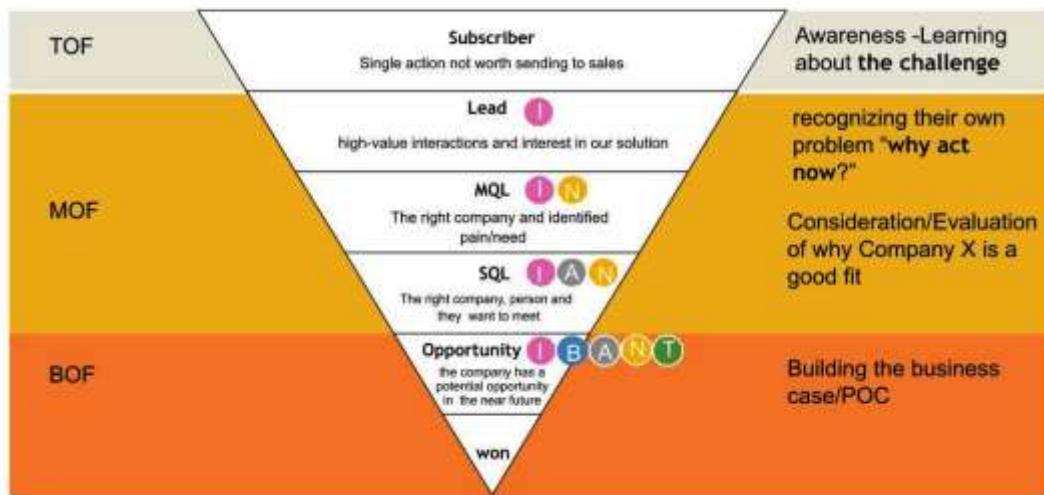


Figure 13.7 – Lifecycle stages mapped to the IBANT methodology

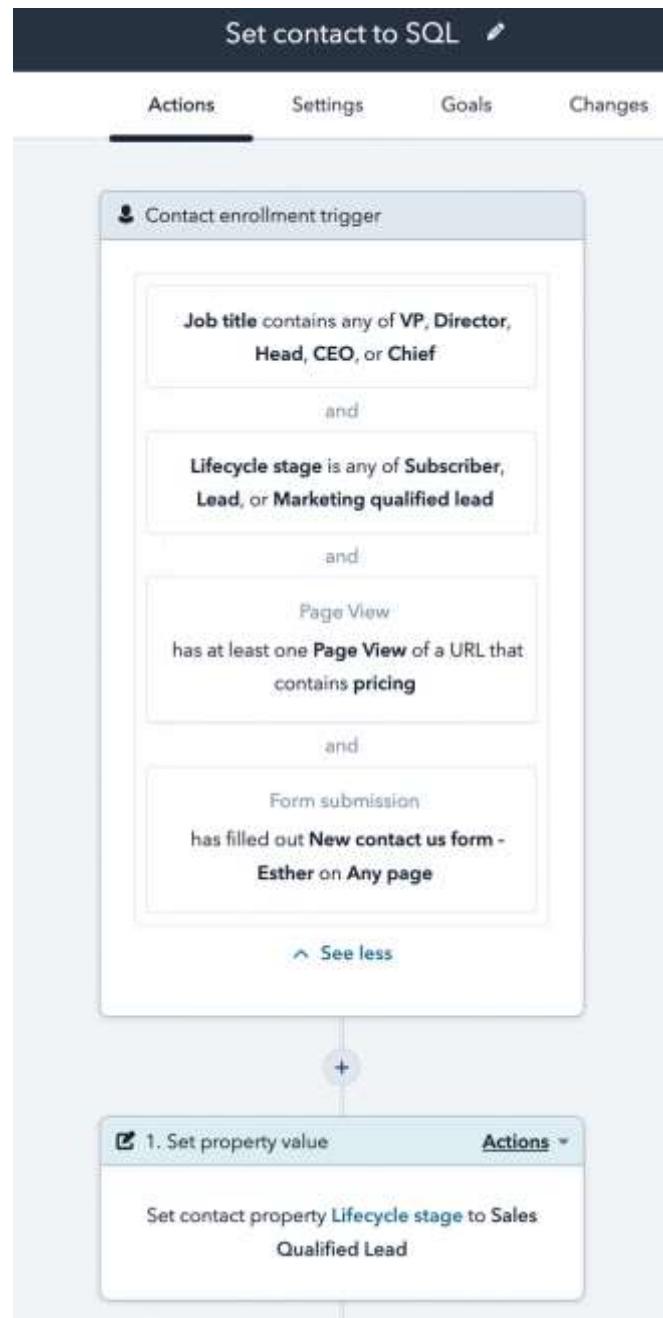


Figure 13.8 – Workflow for updating a contact to Sales Qualified Lead using a buyer-focused approach

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

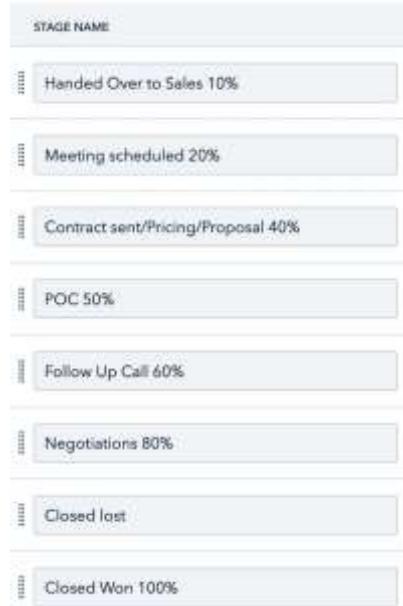


Figure 14.1 – HubSpot pipeline

STAGE NAME	DEAL PROBABILITY	UPDATE STAGE PROPERTIES
Handed Over to Sales 10%	10%	Edit properties
Meeting scheduled 20%	20%	NDA Signed
Contract sent/Pricing/Proposal 40%	40%	# of locations needed , Price Agreed , and Contract ...
POC 50%	50%	Contract Status , POC Stage , and POC Status
Follow Up Call 60%	60%	Meeting 1 , Meeting 2 , and Meeting 3
Negotiations 80%	80%	
Closed lost	Lost	Close date and Closed Lost Reason New
Closed Won 100%	Won	Close date and Type of Contract Signed

Figure 14.2 – HubSpot pipeline with conditions

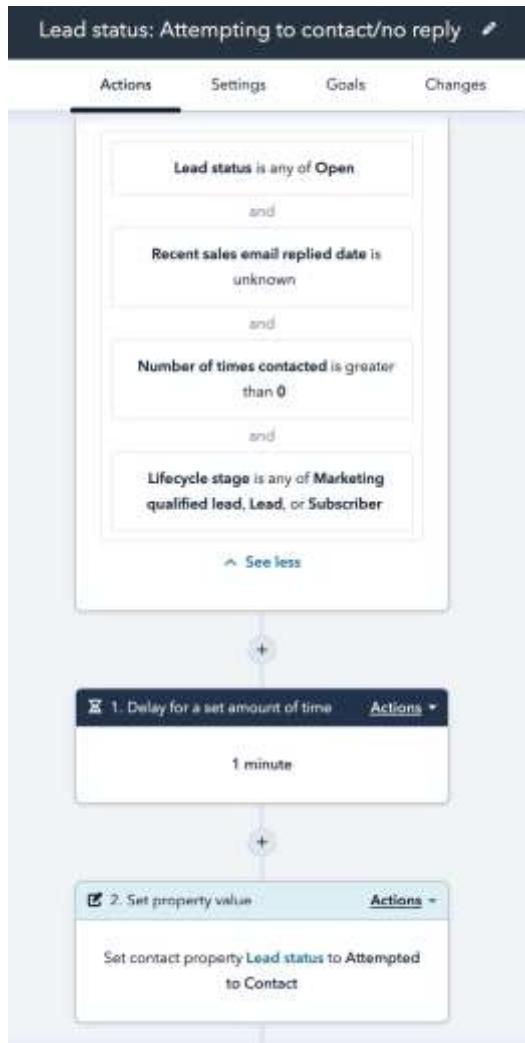


Figure 14.3 – Building a workflow to update lead status

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

Tickets

Setup Associations BETA Pipelines Record Customization

Use ticket pipelines to manage the way you track customer interactions as they progress over time.

Select a pipeline: Onboarding Pipeline </>

Configure Automate

STATUS NAME	OPEN OR CLOSED
Handover from sales	Open
Kickoff meeting with customer booked	Open
Customer training Completed	Open
Mid-Feedback review booked	Open
Customer fully onboarded	Closed

Figure 14.5 – Customer success pipeline in HubSpot Service Hub

Tickets

Setup Associations **Pipelines** Record Customization

Use ticket pipelines to manage the way you track customer interactions as they progress over time.

Select a pipeline: Support Pipeline </>

Configure Automate

STATUS NAME	OPEN OR CLOSED
New	Open
Escalated	Open
Waiting on contact	Open
Waiting on us	Open
Waiting on bug fix	Open
Closed	Closed

Figure 14.6 – Customer support pipeline in HubSpot Service Hub

Tickets ▾ (Data) Support Pipeline My open tickets

Search ID, name, or sl. (1) Ticket owner Create date Last activity date Priority More filters Clear All

NEW	A 1	WAITING ON CONTACT	O 0	WAITING ON US	A 0	CLOSED	A 0
		Problem with integration to zoom Open for a few seconds Ticket owner: Ross Gooding ● Medium					

Figure 14.7 – HubSpot's ticketing pipeline

The screenshot shows the HubSpot Knowledge Base interface. At the top, there are tabs for 'Knowledge Base' (selected), 'View list', 'Customize template', 'Organize categories', and 'Create article'. Below the header, there are sections for 'Article Health' and 'Article List'. The 'Article List' section displays a table with the following data:

ARTICLE	VIEWS	Avg. TIME ON ARTICLE	HELPFUL RATING	UNHELPFUL RATING
Installing the Outlook Add-in - instructions for individuals	628	4.4 minutes	7 (green)	0
Whitelisting the Gmail Plug-in	356	2.5 minutes	4 (green)	0
Why am I seeing a message that my browser zoom level is...	315	4 minutes	3 (green)	4 (red)
Getting Started Guide	213	2.6 minutes	2 (green)	0
Installing the Gmail Plug-in	186	3.2 minutes	4 (green)	0

Figure 14.8 – An example knowledge base setup and statistics

The screenshot shows the HubSpot App Marketplace. The search bar at the top has 'All categories' and 'e-commerce' selected. The main area is titled 'Search Results' with the sub-titler '1-45 of 47 results for "ecommerce" in All Categories'. On the left, there is a sidebar with 'Discover' and 'Categories' sections. The 'Discover' section includes links for 'All collections', 'Popular apps', 'New apps', 'Free apps', and various app categories. The 'Categories' section includes 'All categories' (selected) and 'Top rated Apps by G2 Leaders'. The main content area displays a grid of app cards:

App	Description	Installs
WooCommerce by MakeWebBetter	Integrate WooCommerce with HubSpot CRM, abandoned cart and automation.	10,000+ installs
Shopify	Sync, analyze, and segment Shopify data for campaigns in HubSpot.	10,000+ installs
Shopify Sync by Unific	Sync, analyze, and segment Shopify data for campaigns in HubSpot.	1,000+ installs
Outgrow	Boost your marketing and engagement with highly interactive content.	1,000+ installs
Magento HubSpot Integration	Up-sell existing customers, recover abandoned Magento carts.	100+ installs
Postcards	Drag & Drop Email Templates Builder.	100+ installs

Figure 14.9 – HubSpot Marketplace – e-commerce integrations

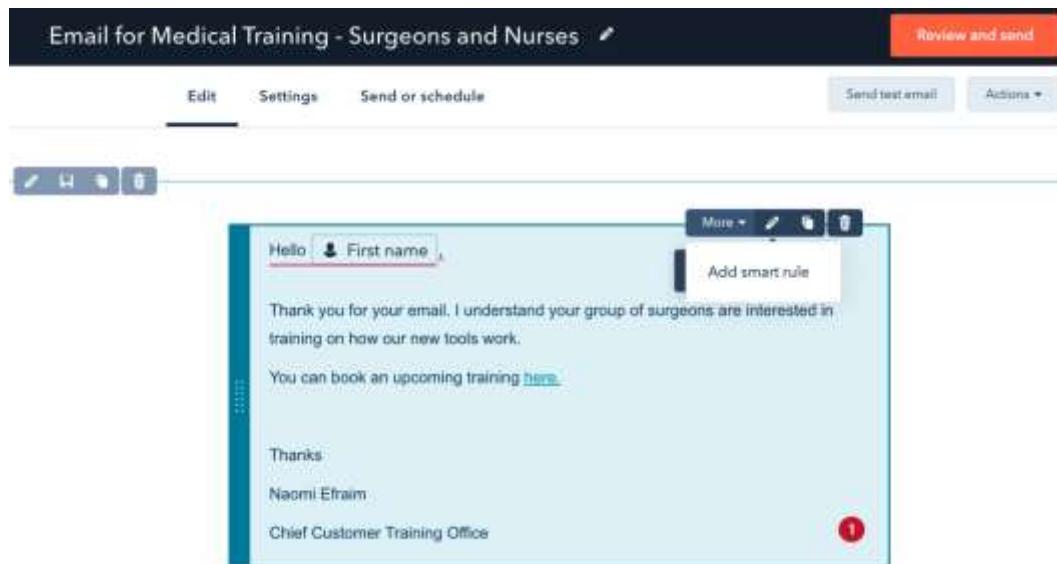


Figure 14.10 – Add smart rule

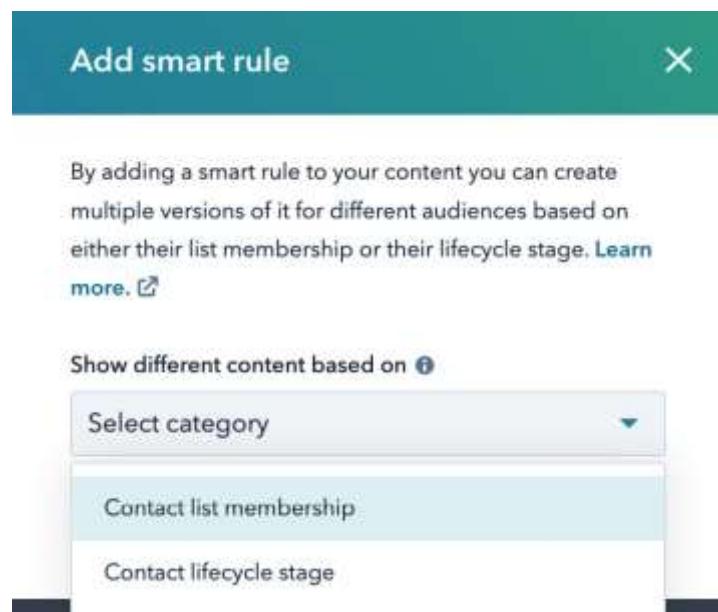


Figure 14.11 – Selecting a category for smart content

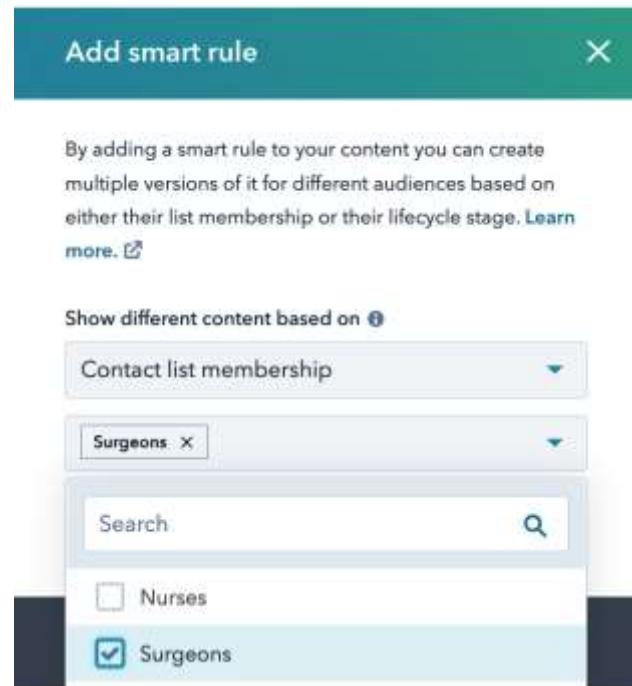


Figure 14.12 – Choosing a segmentation

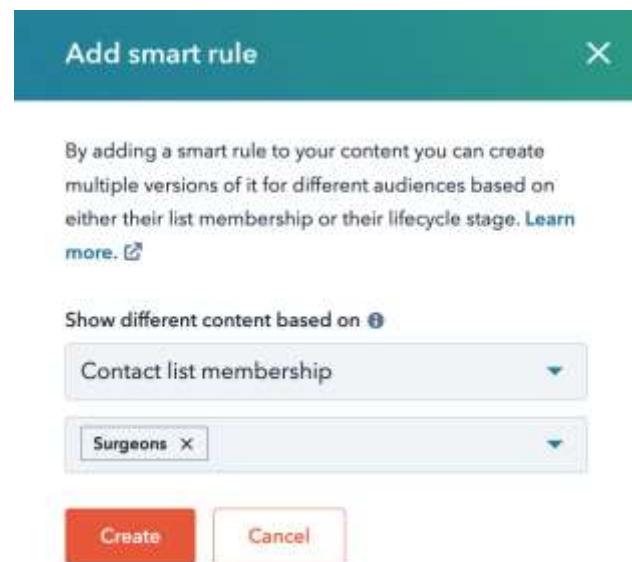


Figure 14.13 – Saving the chosen segmentation

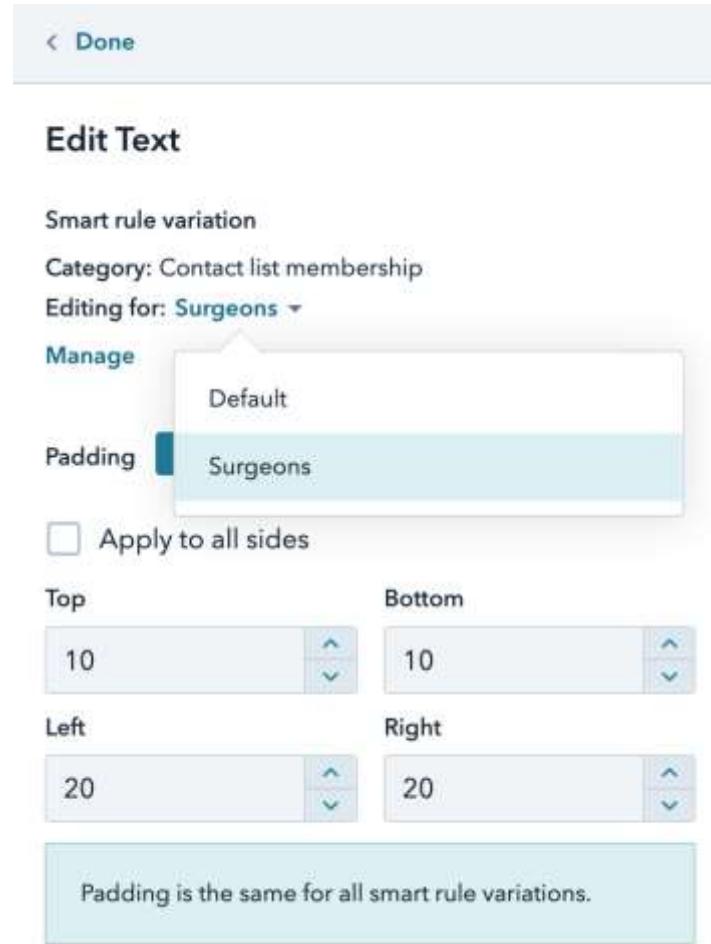


Figure 14.14 – Selecting the relevant category to edit text

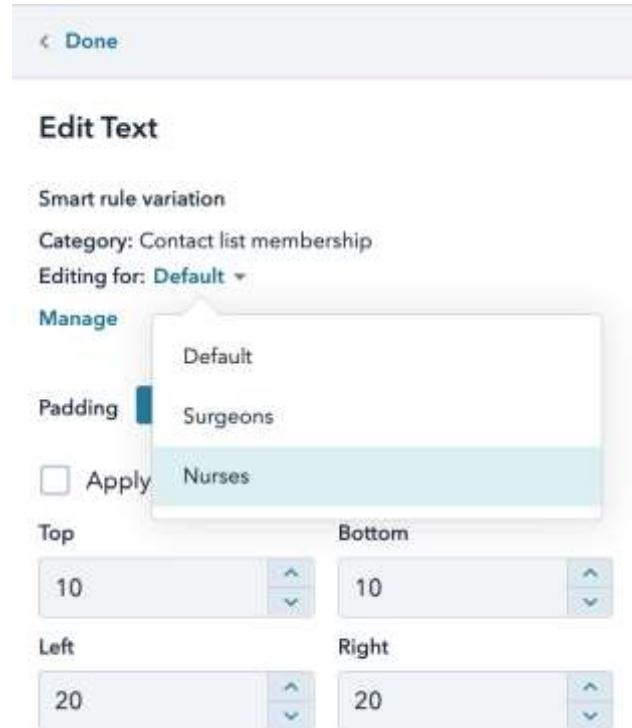


Figure 14.15 – Adding additional segmentations

This screenshot shows the MailChimp campaign editor for an email titled 'Email for Medical Training - Surgeons and Nurses'. The top navigation bar includes 'Edit', 'Settings', 'Send or schedule', and 'Review and send' buttons. On the left, there's a sidebar with 'Edit Text' and a 'Padding' section. The main content area contains the email message body. The message starts with a 'Hello' field containing '[First name]'. The body text reads: 'Thank you for your email. I understand your group of surgeons are interested in training on how our new tools work.' It also mentions 'You can book an upcoming training [link]'. Below the message, there's a signature for 'Naomi Ohana' from 'Client Customer Training Office'. At the bottom, small text indicates the location 'Eitan-Meir, Ramat-Hod Blvd, Tel Aviv, Tel Aviv, Israel' and the company 'Unbounce, Unbounce.com'. A red notification badge with the number '1' is visible in the top right corner of the message area.

Figure 14.16 – Editing text for surgeons

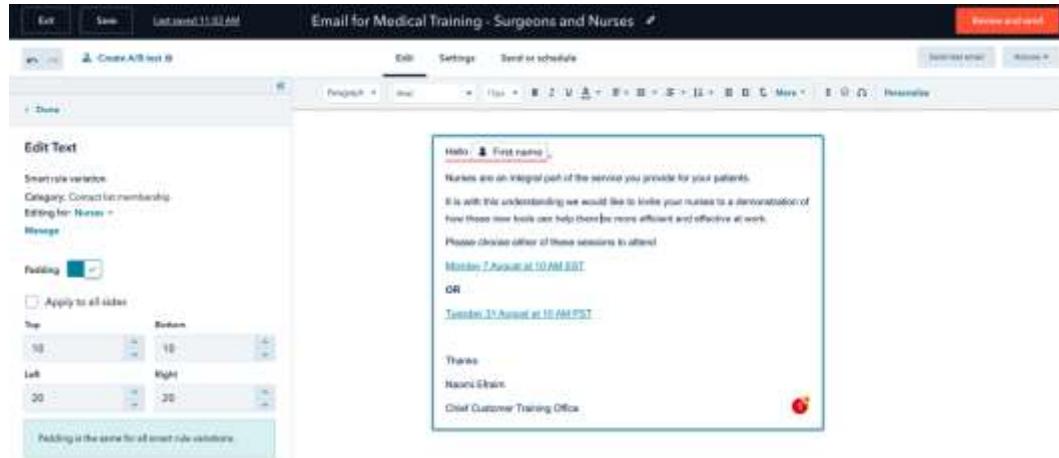


Figure 14.17 – Editing the text for Nurses

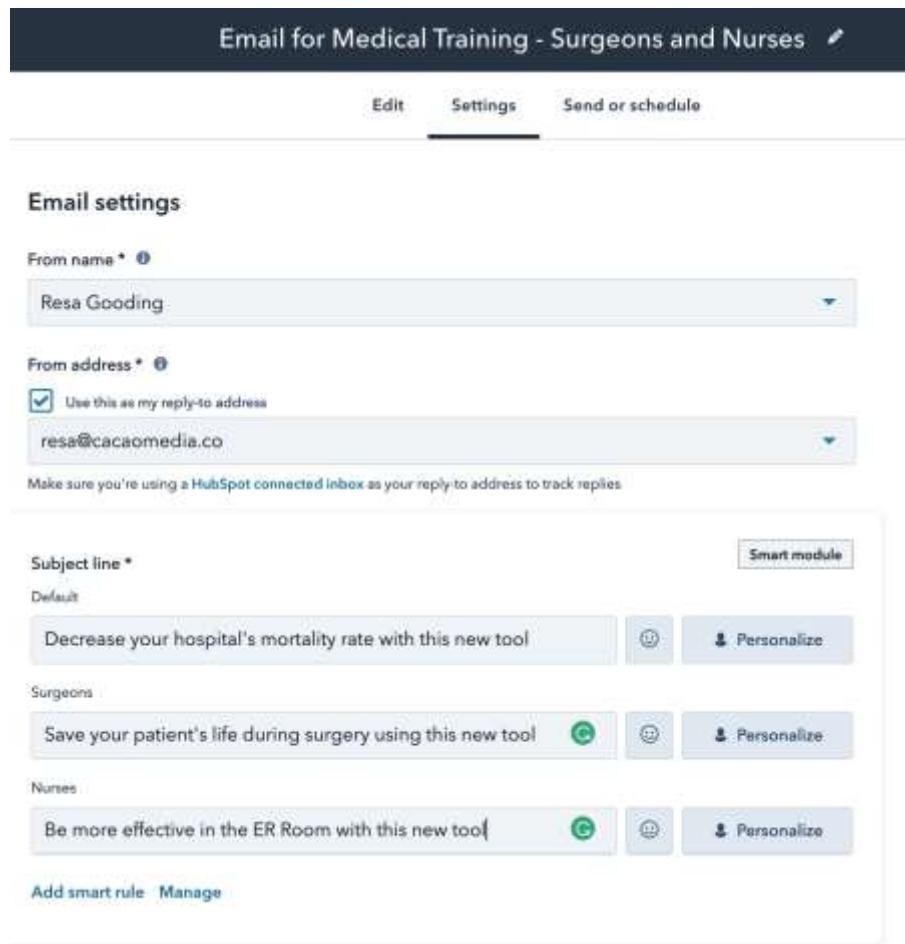


Figure 14.18 – Creating subject lines for each segmentation

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>

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