



The Ultimate Beginner's Guide

CATALYST.



What is HubSpot?

HubSpot is a lot of things: an inbound sales and marketing platform, your best friend and your worst enemy. It's an extremely powerful customer relationship management (CRM) platform that's comprised of a whole host of awesome tools that help businesses the world over drive leads, close deals and retain customers.

HubSpot's there to cradle your efforts in a loving embrace. Your job is to teach it exactly how to do this, as without your carefully considered input, you won't reap the full benefits of HubSpot.

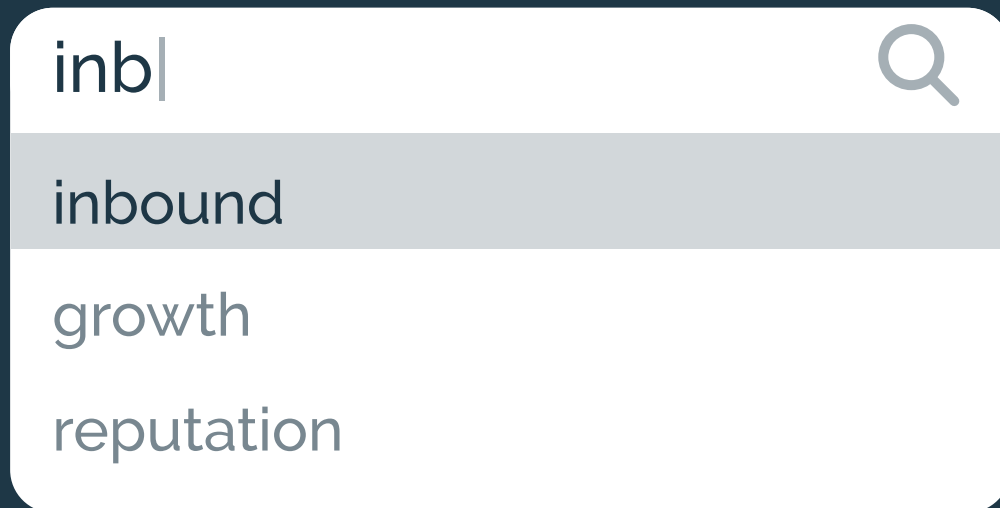
Sounds like a lot of work, right?

Well, yes. But as with everything in life, the more you put in, the more you get out. Many businesses get swept up in HubSpot fever, thinking that it will magically alleviate all of their sales, marketing and management woes, which simply isn't the case. HubSpot is designed to take your inputs and multiply their efficacy.

Consider HubSpot as the seasoning on your dinner – it's going to amplify your work and make it far, far more delicious. You wouldn't eat paprika on its own now, would you?

Getting started with HubSpot can be daunting. We get it, it's huge. Like, REALLY big, and there's all sorts of jargon to wrap your head around. As a HubSpot Platinum agency, we've got years of experience with the platform under our belt. That's why we've put together this guide to help you on your way to HubSpot mastery. Throughout this guide we'll cover everything you need to know to get the ball rolling.

Let's get started!



Why do you need HubSpot?

You're sure to have heard the term 'inbound' before, but what exactly does it mean?

It encompasses a whole heap of different business ideologies, all focused on growth. Your inbound marketing should be based on establishing solid relationships with your prospective and current customer base. The overarching goal is to build your reputation and gently encourage sales over time.

Modern marketing relies on a veritable mountain of software to help you keep track of everything that you're doing. Simply cold calling doesn't quite cut it in today's age (you might be pleased to hear this).

Many very successful organisations thrive by providing valuable content and experiences to their customers/clients. This is achieved across teams and can involve all sorts of different tools. You run the risk of crossing wires and making a bit of a mess if you're not careful.

HubSpot swoops in like Batman's utility belt here, that your sales, marketing, service, management and operations teams need. By bringing everything together all under one little massive roof, inter-team projects and management is made a whole lot easier.

Who is HubSpot good for?

It's always a good idea to get everyone in your business at least a little familiar with HubSpot, as once you've got it integrated, you'll find yourself using it more and more. However, there are specific roles who'll be taking bigger bites of the pie.



HubSpot for marketers

If you work in marketing, then you're well aware that there's an awful lot for you to keep track of on a daily basis. Unless you're omniscient, it's almost impossible to do this without the help of specialist software.

HubSpot provides the groundwork for you to do everything you need to (and more, if you fancy it). The Marketing Hub removes the need for overly complicated software and is designed to save you valuable time in all of your efforts. The idea being that the less time you have to spend faffing around with your tools, the more time you can spend building genuine, positive relationships with your prospects. We'll go into detail on all of the Hubs later on in the guide!



HubSpot for salespeople

Sales is stressful at the best of times, we get it. You've got a lot on your plate, with the admin being the bane of your life, and the last thing you need to battle with is a messy interface or clunky organisational tools.

The Sales Hub is designed to be a clear space for you to manage your sales pipeline. We all know the feeling of 'I'm sure there's someone I'm meant to call today', or 'I can't find that bloody email!' Bringing it all into one central piece of software gives you the ability to jump into every day certain that you're not missing anything. Less admin, more sales. Afterall, we've never met a good salesperson who is good at admin so this will be the dream.

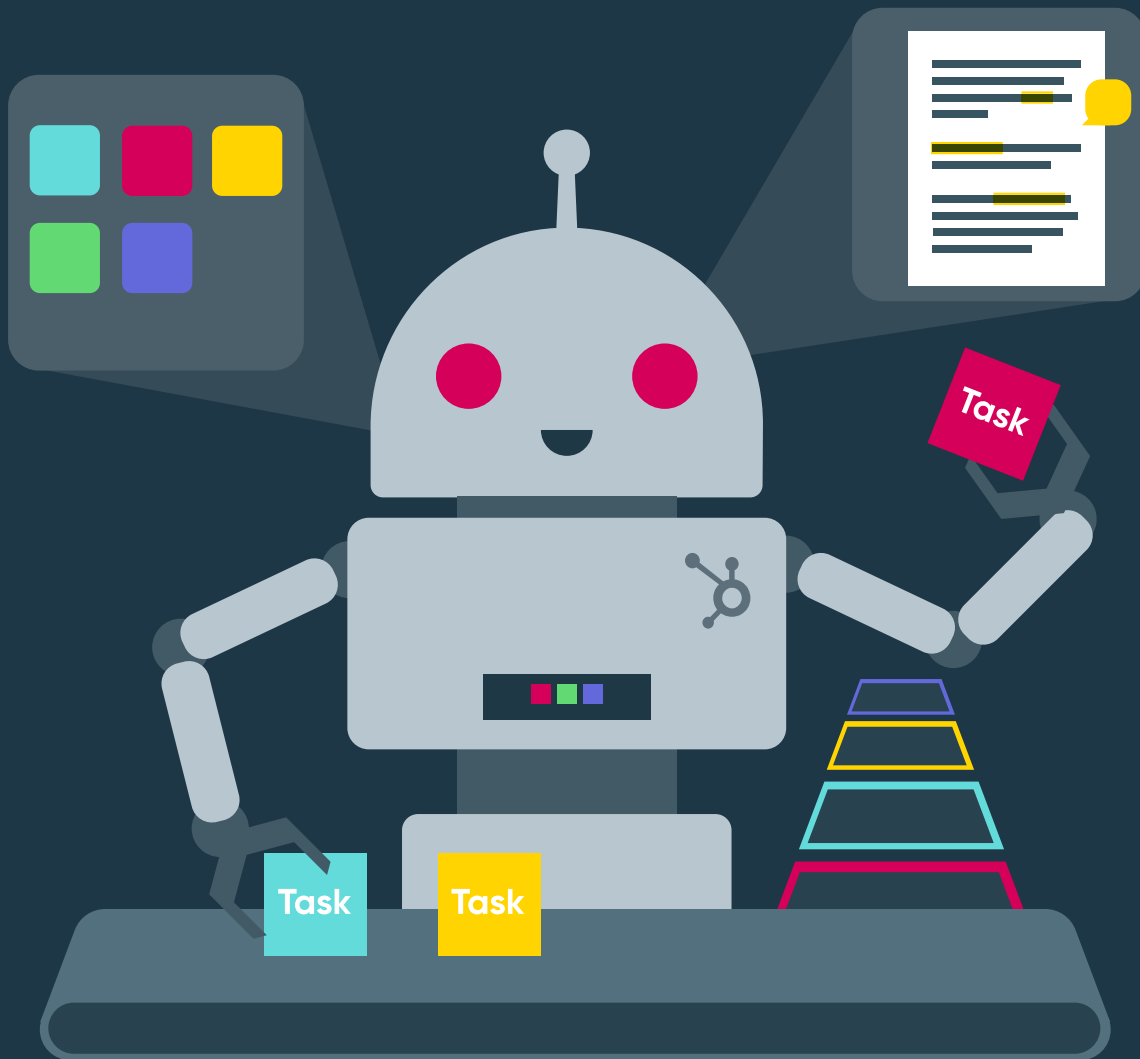


HubSpot for service teams

When providing a stellar customer service, time is often against you. If you take a little too long to respond to a Mithered Marty, you'll very quickly find yourself with a Furious Frank on your hands (and he never stops shouting).

HubSpot allows you to scale your support functionality, helping to manage a whole host of different features. Whether you're responding to tickets, engaging in a live chat or managing a long-term conversation, having a tool to streamline this process helps everyone to keep a cool head.





HubSpot for operations

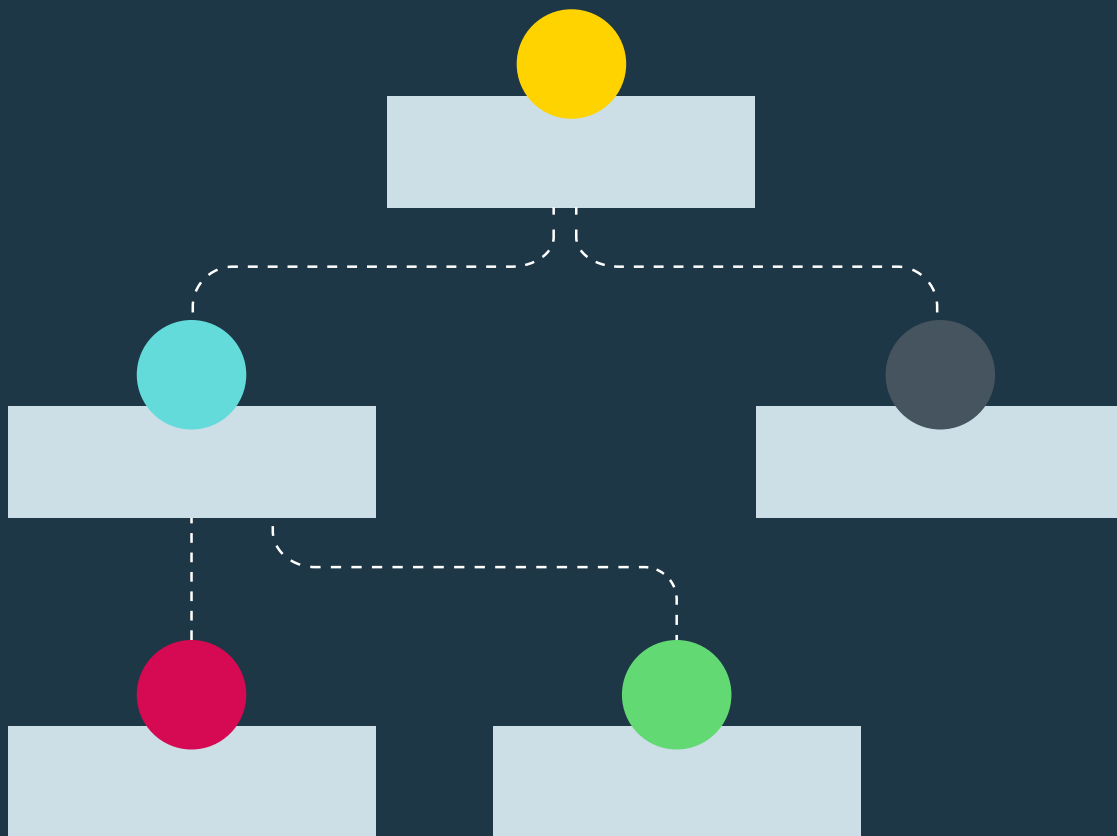
In business paradise, everything works at all times, nothing goes wrong, and the kettle is always boiled. Unfortunately, business paradise doesn't exist – things do go wrong.

If given the right tools, operations teams can proactively prevent issues from getting out of hand. HubSpot provides an environment where teams can connect apps, clean customer data and automate key business processes. Any issues can be accurately addressed, resulting in a more efficient, harmonious business. Lovely.

Managing your business with HubSpot

Without consistent, time consuming communication, it's easy to become out-of-touch with your team on the day-to-day.

Using HubSpot's CRM, you'll never have to manually update a report again! Managers can automatically generate dashboards, detailed reports and managed pipelines all with a click of the fingers (literally clicking your fingers might not actually work). This allows managers to monitor quotas and KPIs without getting in the way of their teams



Flywheel, Funnel

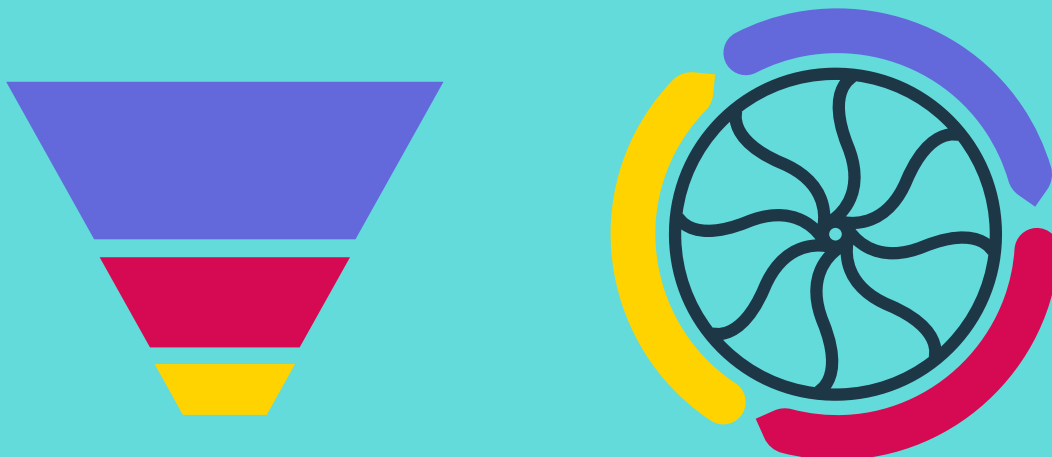
– what's it all mean?

At the end of the day, they all boil down to the same thing. You can build out your flywheel and funnel as much as you like. No matter what happens, there's a process your customers follow that's unique to your business.

This marketing mumbo-jumbo is referring to your buyer journey – the path that they take from a complete unknown, to eventually becoming advocates of your brand.

Essentially, it comes down to a single (extremely important) thing: keeping your customers happy. If you provide a brilliant product and superb service, then your customers will (with the exception of a few unscrupulous sorts) be delighted.

For years businesses have viewed 'good' marketing as a funnel, with customers sliding into purchasing with you like a flushing toilet, swept away in bold promises and grandiose claims that suck them down into the u-bend of dissatisfaction. The problem with the funnel model is that it doesn't consider the power that consumers have. The majority of sales are made on recommendation; if you've already slipped into post-purchase regret, then you're way less likely to suggest a service to your pals or colleagues.



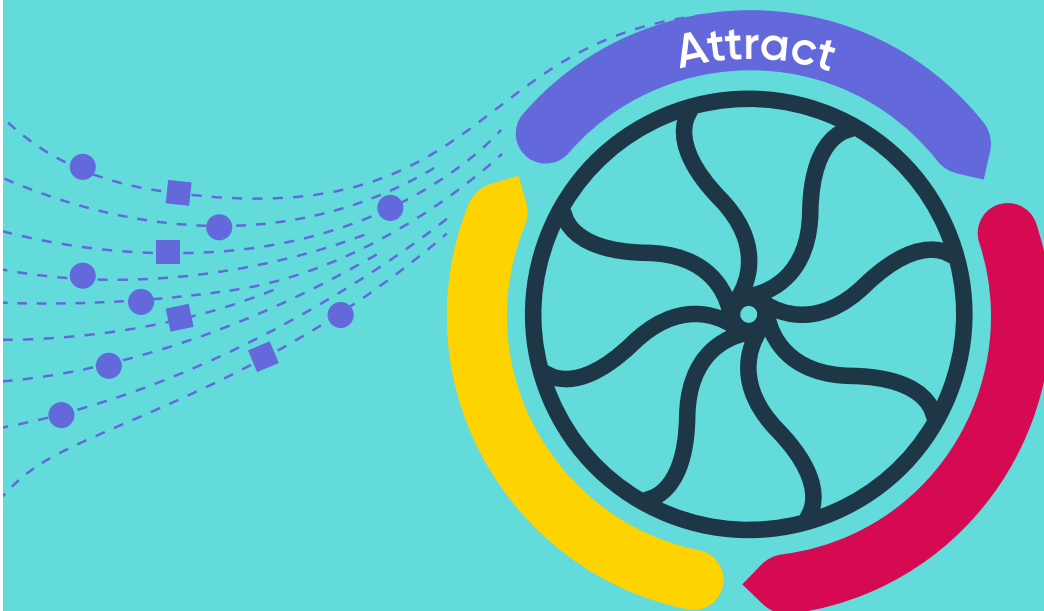
That's where the magical flywheel comes in. it's designed to encourage positive promotion of your brand, and can be broken down into distinct parts:

Attract

The attract stage is marketing 101: shout about your brand from the rooftops and hope that someone looks up.

In the real world, this is achieved by producing insightful content – blogs, vlogs, engaging with relevant people on social media and proving yourself in various other ways, depending on your industry. The idea is that, over time, your marketing staff will be joined by current customers, or promoters.

Your promoters are the customers that really, really, love what you do. They're going to join you up on the roof and help you to earn people's attention. Before you know it, there's a whole choir of people shouting about how brilliant you are. And if you've never heard a choir on a roof, it's quite the racket – you can't help but take notice.





Engage

Now that passers-by have heard all about your brand from the roof, it's planted in their consciousness.

Awareness is an incredibly powerful thing. If your sales team call someone and they've actually heard of you, they're far more likely to give you the time of day.

The engage phase is all about ease of access with a sprinkling of the personal touch. You're not trying to force anyone to buy, or apply any pressure. Gentle encouragement, personalised emails and a spot-on user experience will do wonders for your sales figures. This is the point where your sales teams can have low-key chats with prospective customers and explain the benefits of your services. It's important to open relationships and convey just how good your business is.



Delight

Now you've got the customer on-board, they're using your product/service and they're loving it. Nice!

Normally, this is where the funnel ends; you've vacuumed the customer in and provided your end of the deal. With the flywheel, there's a little more to it.

Things won't always go right, that's perfectly natural. The delight phase is all about how you respond to those tricky situations. Whether you have a friendly, professional customer service team on hand or not, having the right processes in place at all times is important, as resolving issues quickly means that consumer opinion isn't given the chance to sour.

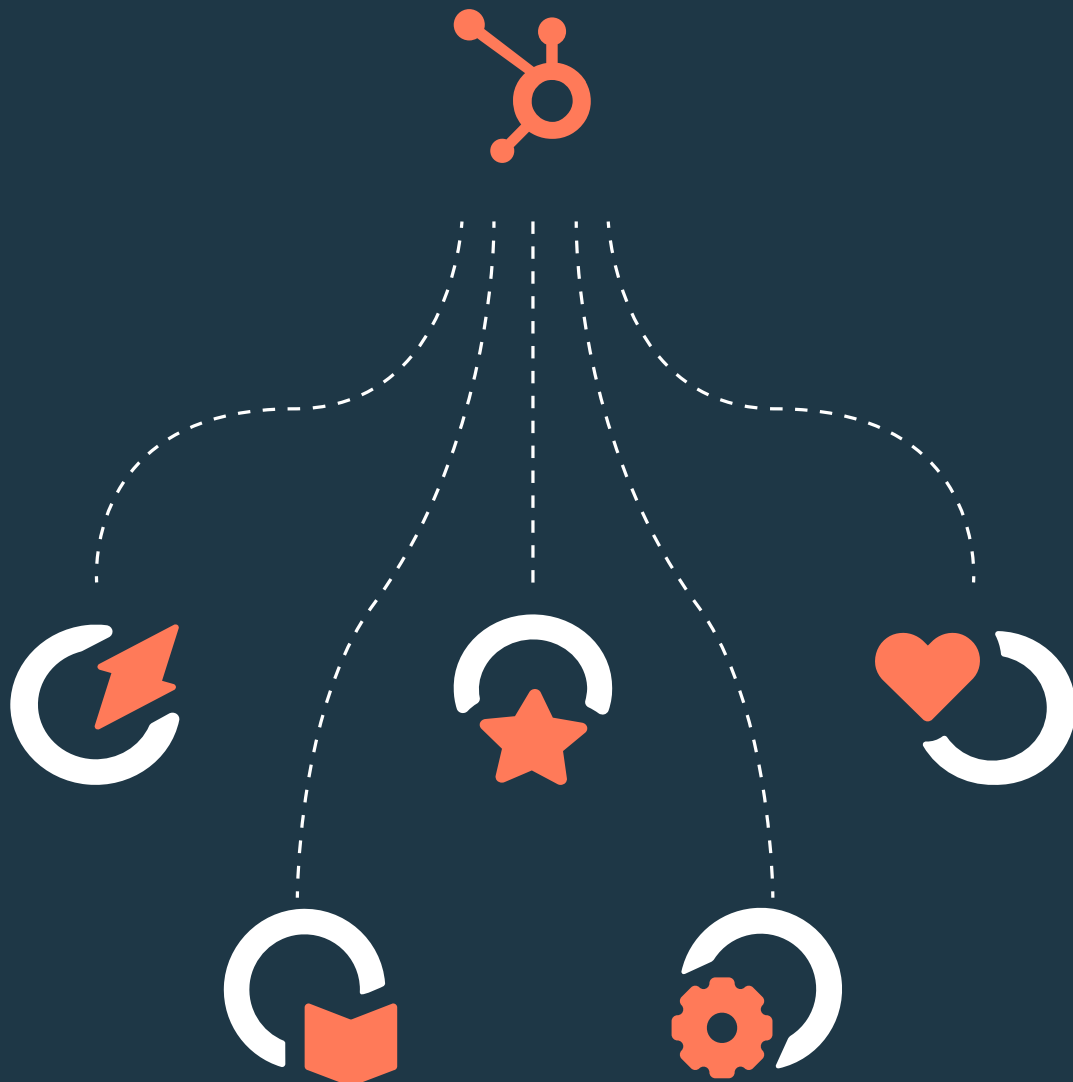
By continuously delighting your client with your stellar service, they will eventually turn into promoters, and then they'll join you back on the roof ready to bring in more fresh faces.

Investing in your current clientele is the key component of the flywheel model; it's a fancy way of reminding you to really pay attention to people who've already bought into your product. This is why it's super important to have a good CRM, as it gives you the best chance to resolve issues ASAP and keep that flywheel spinning.

The HubStack

– breaking down the Hubs

HubSpot is broken down into a variety of Hubs (hence the name). Yet HubSpot is also constantly evolving and innovating, but with so much already there it can be difficult to know where to start. So, here's some of our favourite features that we use on the daily.

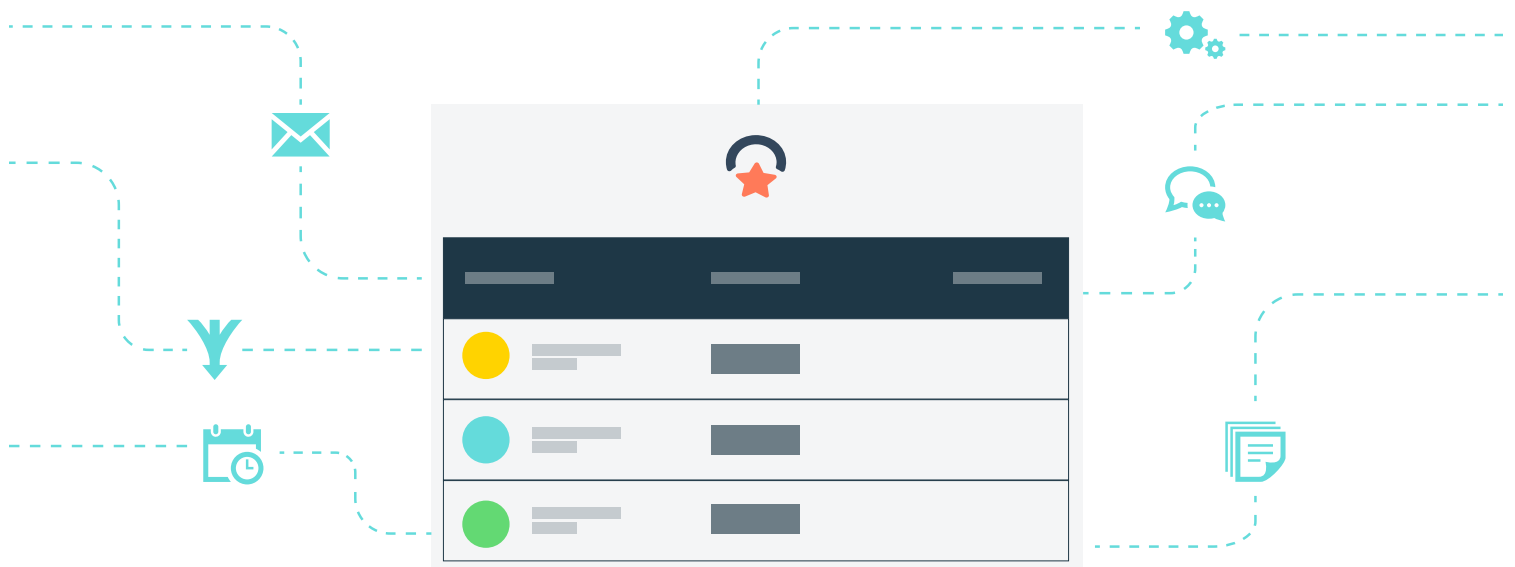




Sales Hub

The Sales Hub is designed to eliminate friction from as many processes as possible. As with everything HubSpot, the sales CRM brings everything together in one place, allowing salespeople to focus on relationship building.

- Email templates & tracking – knowing when someone's opened your email is powerful information, allowing you to tailor your response at the right time.
- Document management – having a shared library of useful sales bits and bobs will pay dividends down the line, saving your team valuable time on a daily basis.
- Contact & customer profiles give you powerful context about the people you're talking to.
- Meeting scheduler allows you to keep nice and organised (and it'll automatically sync with Google or Office 365).
- Automate sales with a series of personalised emails.
- Live chat links on your landing pages give you a direct avenue to people actively browsing your website.
- Actively manage your pipeline and review analytics quickly and easily.

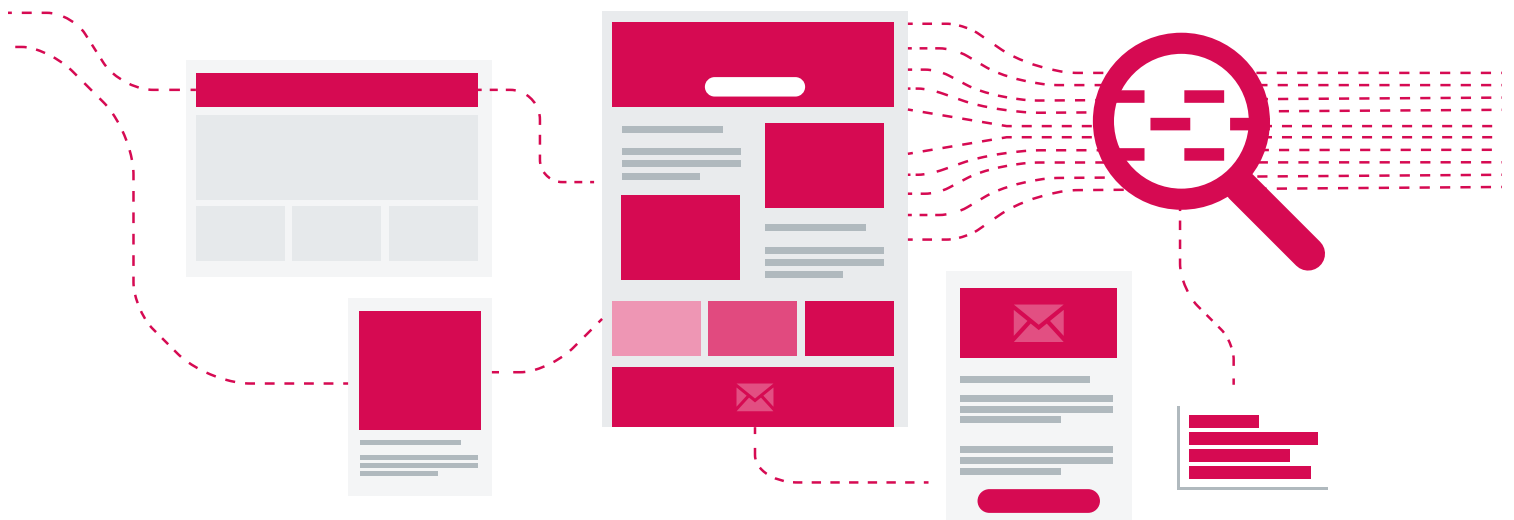




Marketing Hub

If you're ready to optimise, hoo-boy, are you going to love the Marketing Hub. Created to help attract attention and convert more leads, before reporting, improving and doing it all again, the Marketing Hub is your marketers one-stop-shop for spreading the word.

- SEO – the big one, the bruiser of marketing. Manage your blogs, vlogs and more to build up your website's search authority with relevant, insightful content and distinct calls-to-action.
- Ad tracking to help you justify all that money you're spending – detailed analytics break down what's working, and what's not.
- Social media management – tools that link to all your key socials to ensure that you don't miss important interactions.
- Tailor your landing page with proven templates, or easy-to-use tools.
- Automation & email marketing – design campaigns and automatically distribute them.
- Track your leads – seeing everything that your lead has been exposed to allows you to nurture them properly.
- Powerful reporting tools let you identify areas you've nailed, and areas you've flopped. Adjusting has never been easier!





Service Hub

It's time to chew bubble-gum and delight some customers, and we're all outta bubble-gum. The Service Hub is where some real magic happens. Personalised customer service and scalable support with automation features and organisational tools, what's not to like?

- Help desk and ticket automation automatically sorts your data, meaning that you can prioritise critical tickets before things get too bad.
- Add a useful FAQs section to your website to reduce support requests.
- Live chat – some customers will visit the website for help; a live chat can be the perfect way for them to get quick answers for their issues.
- Collaborate with your team using shared inboxes and team management tools.
- Use a variety of handy feedback surveys to get a direct line to your customers' thoughts.
- Reporting dashboards give you actionable data to address frequent issues.



CRM Platform

The customer relationship platform does exactly what it says on the tin.

Designed predominantly to help you organise and streamline your business processes, HubSpot's CRM is the mainstay for all of your teams' workflows.





CMS Hub

While the acronym is rather similar, the CMS is very different to the CRM.

Your content management system (CMS) lets you personalise your website with a drag-and-drop editor, using website themes and other tools to help make your life a little easier.

If you've dabbled in development before, the CMS Hub also includes a variety of features suitable for those with more experience, such as code alerts, developer documents, leverage tools and dynamic content features, all under one roof. There's also security functionalities and other IT features for advanced users and IT teams – what more could you want?





Starter



Professional



Enterprise

HubSpot Levels

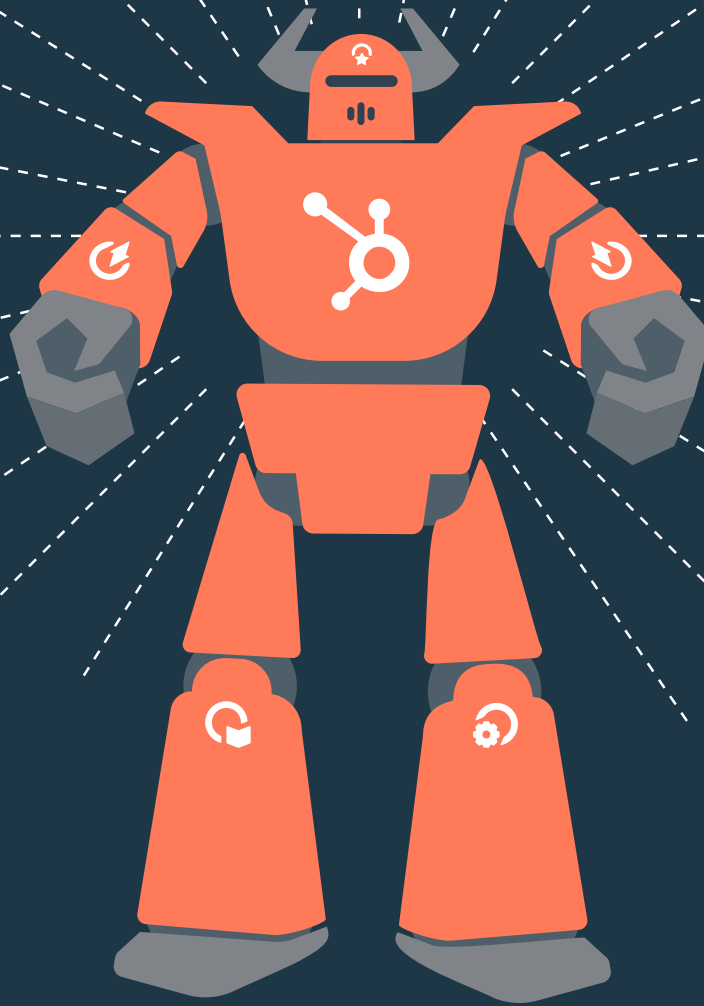
The pricing system can be a little confusing, and it's difficult to nail down exactly what package you want, what tools you want to include, and what you'd like for dinner.

There are three tiers all varying in complexity: Starter, Professional and Enterprise. You can either purchase individual Hubs, or opt to go all in on the CRM suite and gain access to everything that HubSpot has to offer.

Starter is you dipping your toes in and getting a feel for HubSpot. It incorporates a lot of the key components of HubSpot, but leaves out many quality-of-life, automation and reporting integrations. Many organisations move over to Professional rather quickly after using Starter.

Speaking of which, the Professional level has a dizzying list of features that's almost impossible to cover in its entirety. It's the most popular level, and provides pretty much everything for businesses ranging from small to medium-sized who are looking to leverage automation and personalisation tools to help drive their growth.

The Enterprise level is the whole hog, trimmings included. Reserved usually for massive corporations, and fully adjustable to fit any number of users, this level is the real deal, providing everything that HubSpot has to offer. Businesses looking to grow exponentially and implement advanced reporting tools should consider the Enterprise level.



The HubSpot Growth Stack

Right now, you might be screaming 'good Jiminy, that's a lot of information!' and you'd be right, it is a whole lot of information, but we've only got one more key term to run through: the Growth Stack!

The Growth Stack is the culmination of everything HubSpot. Each of the individual Hubs is a powerful tool, and can function perfectly well on its own, but if you combine all of the Hubs together into one mega-Hub, you'll find yourself with the supremely powerful Growth Stack. Sold at a 25% discount, the Growth Stack is one of the best, most affordable ways to get the full shebang.

Premium Partners – Catalyst

Phew, you made it! There's a lot to digest there (and this is only scratching the surface).

At **Catalyst**, we work closely with **HubSpot** to help businesses like yours to integrate and use HubSpot in the best way possible. As a result of our expertise, we're a HubSpot Platinum agency, meaning that we've got the knowledge and knowhow to help you to get the most out of the tools.

We use HubSpot every day. We know how to match the out-of-the-box tool to your bespoke business needs/processes. Whether you're looking to get started with HubSpot, or you're already using it, but want to get a little more bang for your buck, we're here to help.

If you're interested in finding out more

GET IN TOUCH

We offer free consultations to anyone looking for advice on how best to incorporate HubSpot into their processes.

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www.wearecatalyst.co.uk

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