

My Hubspot needs help!

Webinar November 5, 2020





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flywheel O
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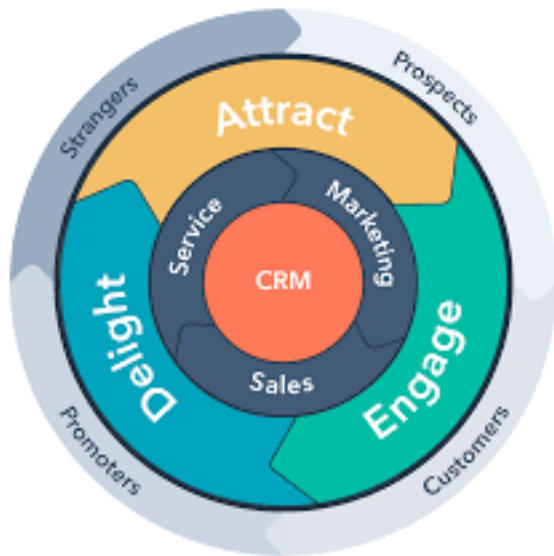


Agenda

1. Our quickest intro yet
2. Housekeeping: Q&A, Audio, Recording
3. Common Hubspot misfires
4. Quick steps to re-start momentum
5. Getting long-term value
6. Recap & resources



HubSpot



Attract Tools

- Ads
- Video
- Blogging
- Social media
- Content strategy

Engage Tools

- Lead flows
- Email marketing
- Lead management
- Conversational bots
- Marketing automation

Delight Tools

- Smart content
- Email marketing
- Conversations inbox
- Attribution reporting
- Marketing automation

The background features two large, overlapping, organic green shapes. One shape is a bright lime green, while the other is a slightly darker shade of green. They are positioned in the upper right and lower left corners, framing the central text.

Common Hubspot misfires

Our top four

#1

The set-it-and-forget-it



A woman with long dark hair, wearing a grey sweater, is sitting at a desk and looking down at a smartphone in her hands. A young child with dark hair, wearing a green sweater, is sitting next to her, looking intently at a laptop screen. The background is a blurred indoor setting.

#2

**The “I’m
too busy
to use it”**

#3

**The “it
doesn’t
work right”**





#4

The “nothing
has changed”

What's really the problem?



Roles
Training
Conventions
Management
Process



Use cases
Roles
Training
Configuration
Process
Reporting



Configuration
Roles
Training
Process
Use cases



Roles
Training
Configuration
Process
Reporting

The background features abstract, organic green shapes. A large, bright green shape occupies the upper right quadrant, while a smaller, darker green shape is partially visible within it. In the bottom left corner, there is a smaller, bright green shape. The overall composition is minimalist and modern.

Quick steps to restart momentum



Step 1: Get alignment (again)

Do the people who need to use it know why they are using it?

Do they understand the benefits?

Do the people they report to prioritize it as much as they should?

Quick Win

Hubspot Re-boot Meeting with key players (or key teams of players) to ensure they are heard, represented, and empowered in the process.



Step 2: Solve specific pain points

Don't boil the ocean by trying to do everything at once.

Start small with peeves that can be solved by Hubspot's **automation**, **consistency** and **personalization**.

Quick Wins:

Integrated lists – no import/export

Seamless sales, marketing reporting

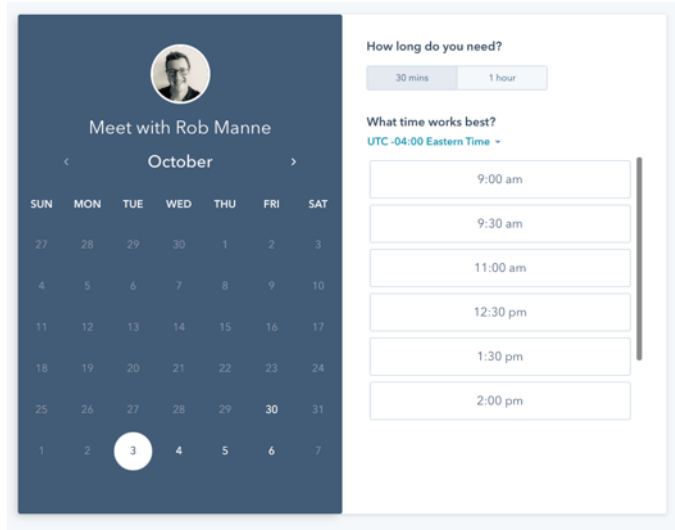
Meeting booking tool

Business card scanner

Templates

Step 2: Solve specific pain points

Meeting booker



A screenshot of a meeting booking application. On the left, a dark blue sidebar contains a circular profile picture of a man, the text "Meet with Rob Manne", and a calendar for the month of October. The calendar shows days from Sunday to Saturday, with the 3rd of October highlighted. On the right, a white panel contains the following elements: the question "How long do you need?" with two buttons labeled "30 mins" and "1 hour"; the question "What time works best?" with a dropdown menu showing "UTC -04:00 Eastern Time"; and a vertical list of five time slots: "9:00 am", "9:30 am", "11:00 am", "12:30 pm", and "1:30 pm".

Business card scanner



Step 2: Solve specific pain points

Templates

Edit Template

Name: First outreachOwned by: Julia Mongeau

Subject: How are you?Select a Folder

Hi Contact: First name ,

I see you're using our free CRM to manage your contact data. Are you interested in learning more about what HubSpot can do to help you grow better?

Schedule a meeting

Thanks,

Sender: Full Name

123456

B I U T More

8 Personalize Insert

Update existing template

Save as new Template

Cancel

This email looks fantastic!



Step 3: Map to existing processes

Tools don't replace processes.

Hubspot can drive new processes.
But it has to start by accelerating current ones.

What "wrap" can Hubspot provide to existing sales or marketing processes?

Think process > Hubspot > process > Hubspot

Quick Wins:

Sales reporting

Lead nurture

Lead capture

Lead qualification

Customer service

Step 4: Train, train, train



When was the last time people were trained? Who was trained on what?

How are people getting help when they have a problem?

How are you getting feedback for training gaps and system improvements?



Quick Wins:

Satisfaction/usage survey

Targeted training and feedback session

Hubspot office hours

Hubspot Slack or Teams group

Monthly tips & tricks

Celebrate successes

The background features two large, abstract, organic green shapes. One shape is in the top right corner, and another is in the bottom left corner, both with soft, blurred edges. The text is centered in the white space between them.

How to get long-term value

Channel your inner product manager

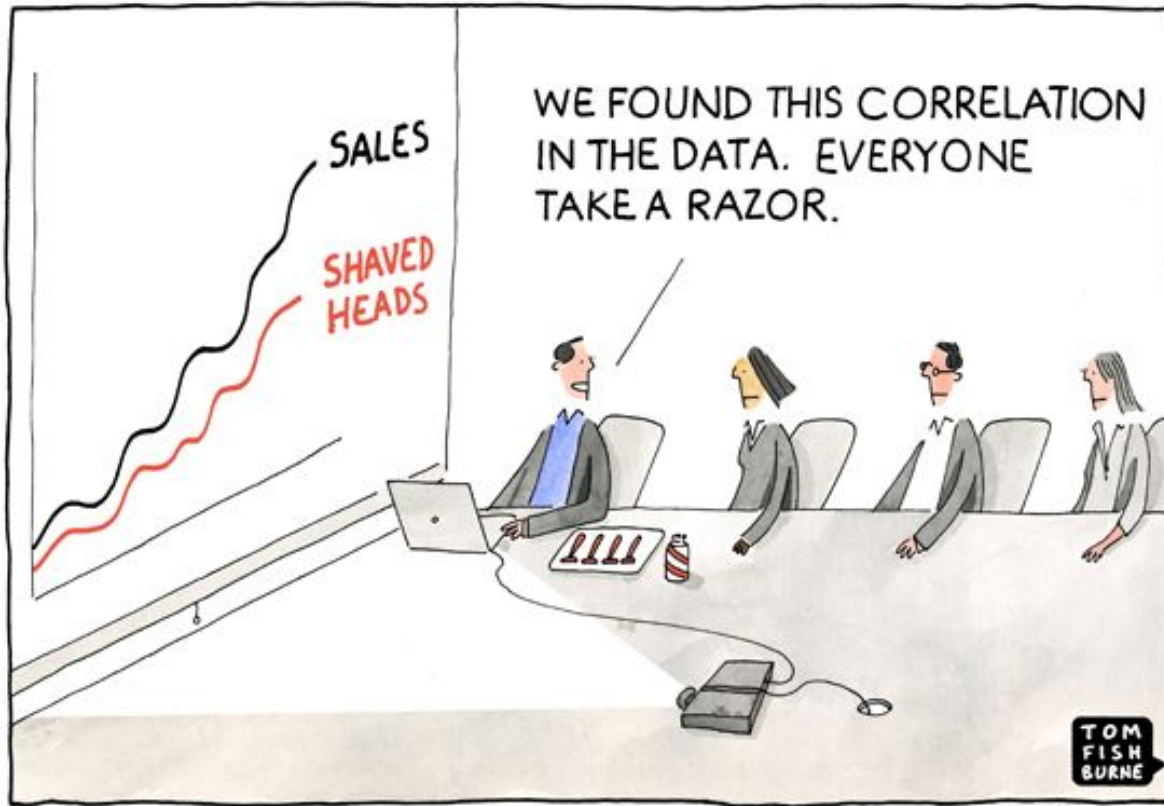


Make everything a campaign



Lead generation
Seasonal push
Contest
New content

Cross-sell / up-sell
Cold contacts
New client onboarding
CSAT survey



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Motivate with metrics and data

The background features two large, soft-edged green shapes. One is a large, light green shape in the upper right corner, and the other is a smaller, darker green shape in the lower left corner. The text is positioned in the center-left area of the image.

My Hubspot Needs Help

Recap



Recap

Be on the lookout for misfires!

Quick steps to re-start momentum

1. Get alignment (again)
2. Solve specific pain points
3. Map to existing processes
4. Train, train, train

Long-term approaches

1. Channel your inner product manager
2. Make everything a campaign
3. Motivate with metrics and data



Personalized Tip Sheets

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Free Digital Diagnostic

As tech options continue to expand, it's hard to keep up.
With 2021 on the horizon and digital only growing in importance, we want to help.

What to Expect

- ✓ **30-minute Video Discovery Call**
- ✓ **Expert Review of Your Priorities**
- ✓ **Completed Diagnostic Checklist**
- ✓ **1:1 Video Debrief Call**

Schedule your Digital Diagnostic right now, using the calendar.

Book Now

By signing up, you will also be added to our newsletter.
You can unsubscribe with one click at any time.

Select a Day

November 2020

< >

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Eastern Time - US & ... (10:38pm)

Calendar

Digital Diagnostic

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Your questions

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Generating growth