HubSpot- Customization, Integration, and Consulting Practice

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Cognitive Convergence is a Subject Matter Expert in Office 365, Dynamics 365, SharePoint, Project Server, Power Platform: Power Apps-Power BI-Power Automate-Power Virtual Agents.

Our HubSpot Marketing Consulting, Customization, Integration services and solutions, can help companies maximize business performance, overcome market challenges, achieve profitability and provide the best customer service.

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OBJECTIVE

Companies all over the world use HubSpot to unite their teams, empower their business, and grow better. This document will cover all the features of the HubSpot, explaining how can we bring together a variety of functionalities to capture leads, automate the lead nurturing and how to convert the customer by making a sale. In the end it will explain our services related to HubSpot.

HUBSPOT – A COMPLETE CRM SOLUTION FOR MARKETING, SALES, AND CUSTOMER SERVICE

HubSpot is an inbound marketing and sales platform that helps companies to attract visitors, convert leads, and close customers.

- Bringing together a variety of functionalities and allowing marketing and sales departments to manage all their activities in one place.
- Includes content creation, social media sharing, workflow automation, lead capture, customer relationship management, sales pipeline mapping, and performance tracking.
- Companies are better equipped to manage sales and marketing activities efficiently, and leads can be nurtured through the buyer's journey effortlessly.
- No more siloed information, no more misaligned departments. Everything happens in one place.

With HubSpot, you can:

1. Boost website traffic
2. Capture leads
3. Automate lead nurturing (i.e., build the relationship)
4. Convert the customer by making a sale

LET'S GET STARTED WITH HUBSPOT CRM ACCOUNT SET UP

- Easily log in to your HubSpot Account by adding the information they are asking for and the free trial will start.
- Some of the tools are free and some of them are paid.
- In the **Pricing tab,** you will the free tools marketing, sales, services, and operations tools.

HubSpot-WordPress Integration

- Integrate HubSpot's framework with WordPress, you combine two of your most powerful business tools.
- Visitors your website (and HubSpot's marketing features) attract can be seamlessly turned into leads.
- Leads converted into customers, loyal fans, followers, and/or promoters.

HubSpot Plugin

- WordPress dashboard, click Plugins on the left sidebar, then click the Add New button toward the top of the page.
- Type "HubSpot" into the search bar on the top-right of the page, then select the HubSpot – CRM, Email Marketing, Live Chat, Forms, and Analytics plugin, which should be your first result.
- Click the Install Now button on the top-right of the plugin, then click Activate once it's installed, which should just take a second or two.

Setting Up Your HubSpot Account:

Once activated, you'll automatically be brought to a page where you can create or sign in to your HubSpot account.

EASILY CREATE AND ADD CONTACTS

- Add a contact by clicking on the **Create contact**
- Adding all the details the system is asking for.

IMPORT CONTACTS:

- **Import contacts** from your computer through the Excel file because manually putting all the information for each contact is difficult.
- Import a regular list of people who you want to have as contacts, click File from Computer, then click Next.
- Option to import one or multiple files, and then you have the option to import one or multiple objects.
  For example, a one-object file will have information on just contacts; a multi-object file will have information on contacts and companies. After making your choice, you'll select the object or objects that you'll be importing.
- You'll then drag and drop or upload a file to be imported. There's a checkbox under the import field that says, "Update existing Contacts using 'Contact ID' exported from HubSpot."
  If the file that you're uploading includes information that you exported from HubSpot, check that box. That way, the information that's already in your HubSpot will be updated according to the Contact ID.

CONTACT NOTES

Notes section (in the center of the card), you can view or create notes to keep important info front and centre.

CONTACT OWNER

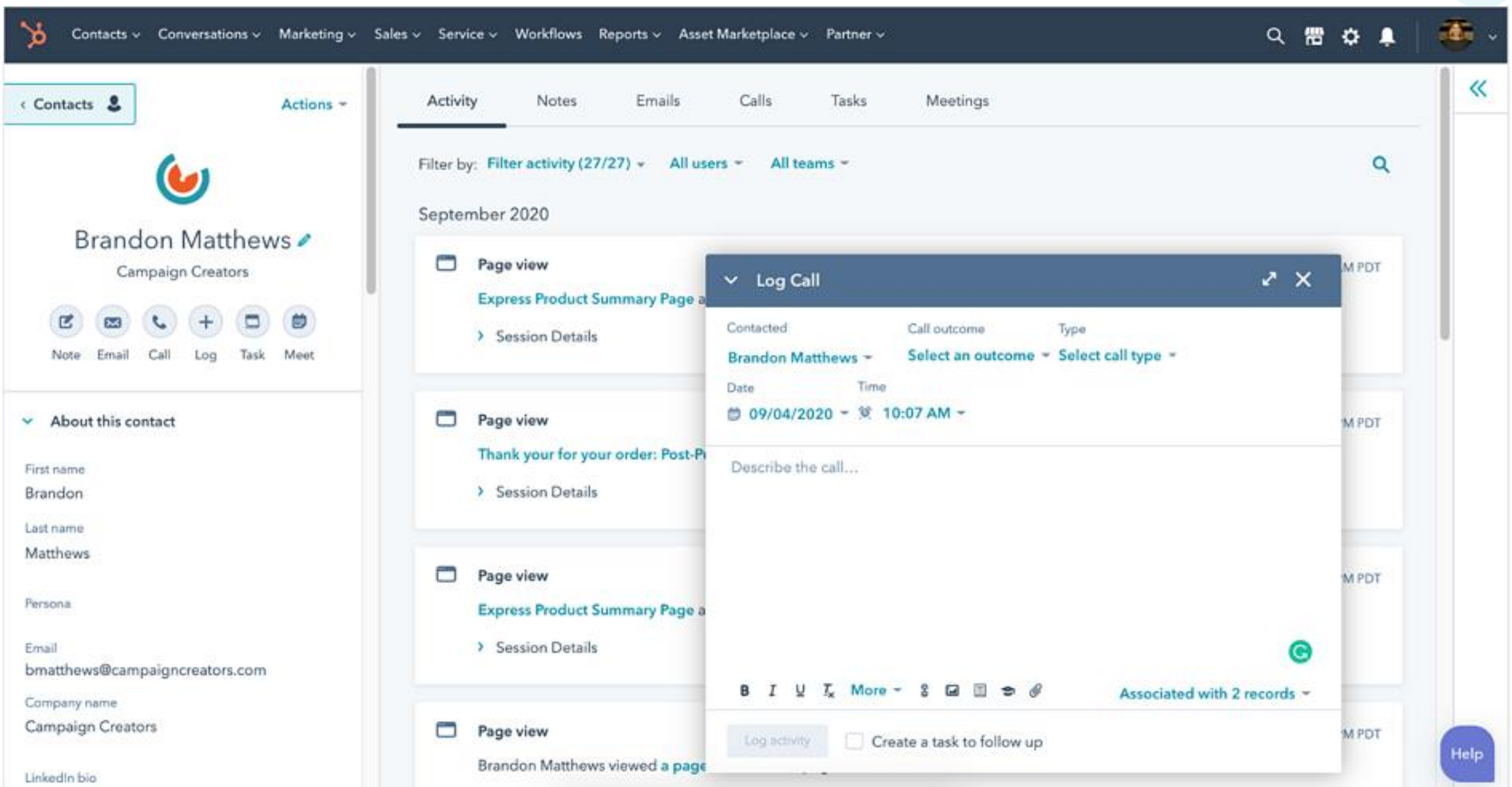
- Can be any HubSpot user or Salesforce integration user and can be set manually or via Workflows.
- Assign additional users to the contact record by creating a custom HubSpot user field type property.

GET A CLOSER VIEW AT YOUR CLIENT'S COMPANIES IN HUBSPOT

- Create data according to the companies by clicking the **Create Companies.**

LIMITLESS CALLS FROM HUBSPOT

- Easily make a direct call to contacts that you have already created or imported from your computer.
- Receive or dial a call the history of that will appear in the Call tab, can log or make a phone call. Can make a phone call right from the HubSpot plugin which lets you record call information and notes on the contact's card.

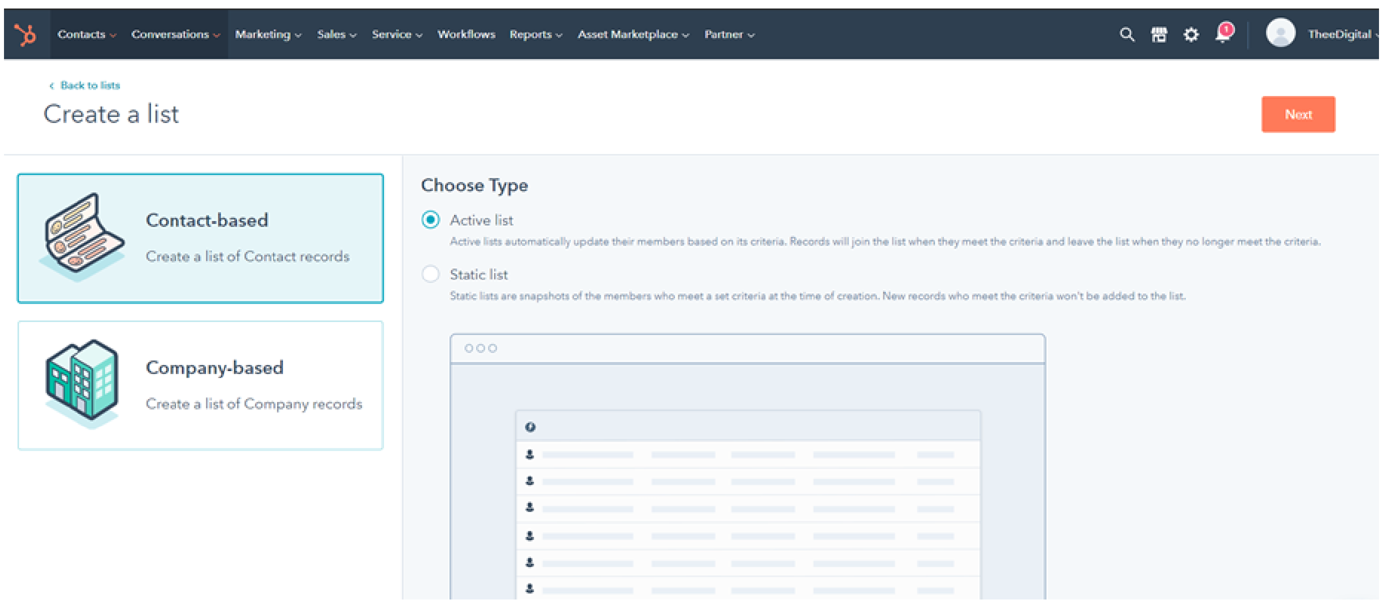


ACTIVITY FEED - COMPREHENSIVE DETAIL OF EACH CONTACT

Activities that you have performed on HubSpot will be visible on the activity feed.

LISTS - SEGMENT DATA FOR FUTURE OUTREACH

- Categorize the contacts by making a list
- lists tool in HubSpot allows you to create a list of contacts or companies based on property values and other characteristics, including activities.
- To set up your list criteria and add records to existing lists, learn how to determine criteria or manually add records to static lists.
- Some uses of lists in HubSpot include:
    1. Sending a marketing email to a list of contacts;
    2. Creating a list of bounced contacts;
    3. Enrolling a list in a workflow;
    4. Using List membership filters in other lists and custom reports;
    5. Creating ads audiences with lists;



TYPES OF LISTS

There are two types of lists in your HubSpot account: active lists and static lists.

ACTIVE LISTS

Active lists automatically update their members, records will join the list when they meet the criteria and leave the list when they no longer meet the criteria.

Examples of when active lists should be used include:

- Sending unique marketing emails based on each contact's behavior and properties.
- Send out a regular newsletter, an active list automatically manages the continually changing list of subscribers.
- Placing outbound calls to contacts based on behavior and property values.
- Grouping your contacts by lifecycle stage to continually identify behavior and properties for contacts in each stage.
- Segmenting records based on properties that change frequently over time, such as *HubSpot score*.

STATIC LISTS

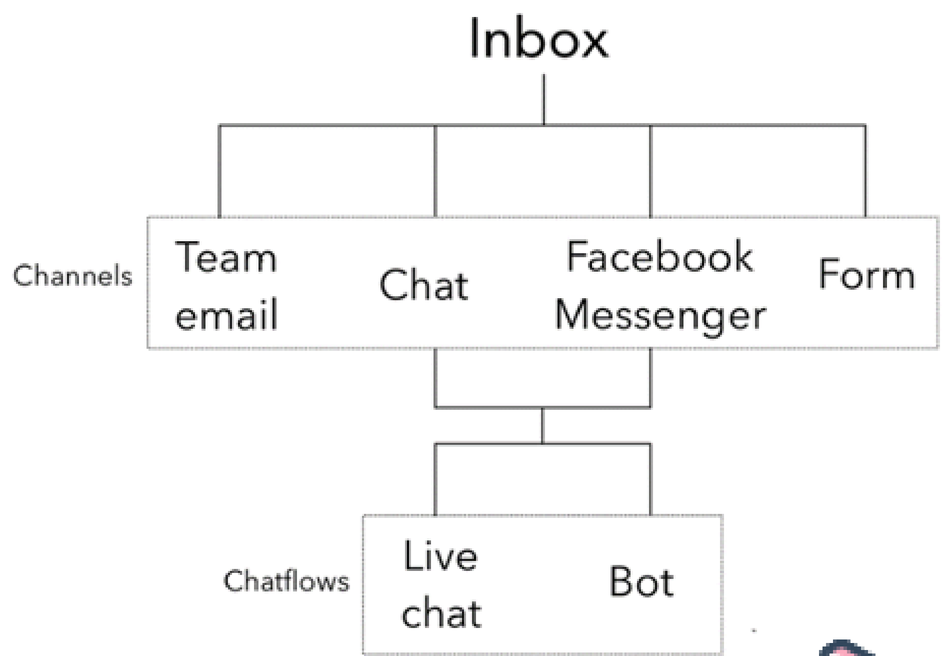
Static lists include records that meet set criteria at the point when the list is saved. Do not update automatically, so new records that meet the criteria will not be added to the list. Records can be manually added and removed from static lists.

Examples of when static lists should be used include:

- Manually adding records to a workflow.
- Sending one-time email blasts, email campaigns that you don't run often, and a list of contacts that don’t change (e.g., event attendees, staff lists for an internal newsletter, or lists from a trade show).
- Manually grouping records that may not have shared list criteria.
- Segmenting to bulk delete records from your account.

CONVERSATIONS - ENABLES STRONG MARKETING AUTOMATION CAPABILITIES WITH CONTACT DATA

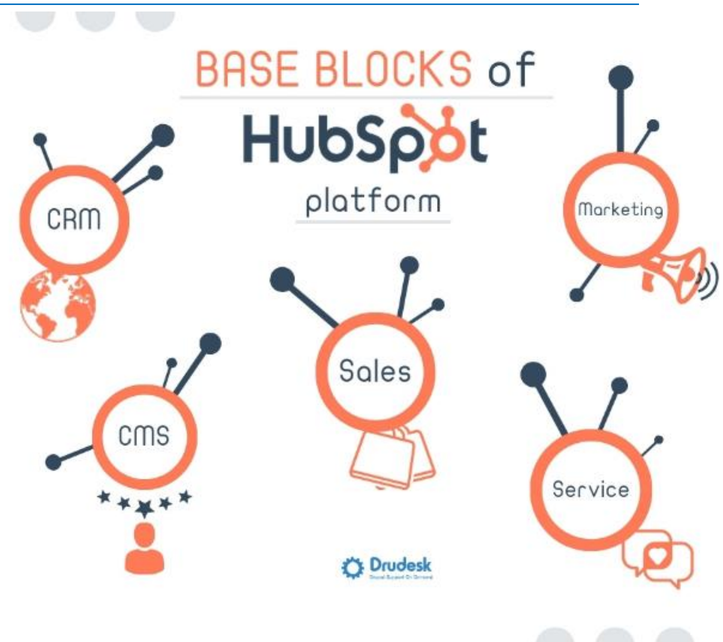
- Manage 1-to-1 customer communications at scale through a universal, collaborative, inbox that aggregates customer emails, chats, and more — and is accessible to your entire team.
- Your team can view, manage, and reply to incoming messages from multiple channels.
- Triage messages are sent via email address, Facebook, or your website in one unified inbox.
- Create tickets from each conversation to track a visitor's experience with your business



CONVERSATIONS INBOX

- Enter a name for your inbox and add team members.
- Depending on your HubSpot subscription, you can automatically route incoming conversations to specific users and teams.
- Configure your notification preferences and set up email filters to keep your inbox organized.
- Haven't connected a team email yet, HubSpot will automatically create a fallback email address in the inbox that allows you to use certain HubSpot tools, such as ticket automation.
    1. Set up the conversations inbox
    2. A guide to the conversations inbox
    3. Manage your inbox users

USING THE INBOX - VERY USER-FRIENDLY AND INTUITIVE USER INTERFACE



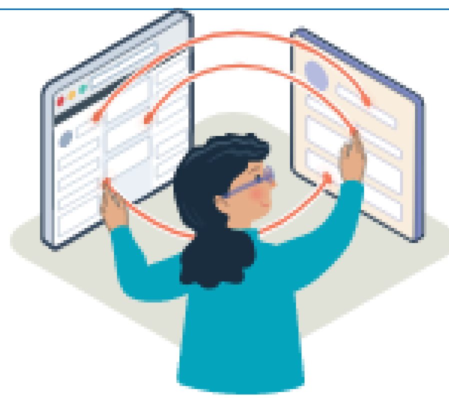
- Visitor who sends an email, starts a chat, or submits a form can reply to them in the inbox.
- Visitor who is new to your business can create a contact record to add them to your database.
- Any contact who has messaged your team before, you'll see known information about the contact, associated records, and past conversations in the right sidebar.
- Add a comment to an ongoing thread or reassign the conversation to another team member.

CHAT FLOW

- Create chat flows for your website pages.
- Depending on your goal, you will either create a live chat or a bot.
- Use targeting rules so that the chat flow appears on some of your pages or all of your pages.
- Set up your user profile so your avatar, name, and preferred meeting link display when visitors are chatting with you.
- Add chat flows to website pages that aren't hosted with HubSpot, you must also install the HubSpot tracking code on your external pages.

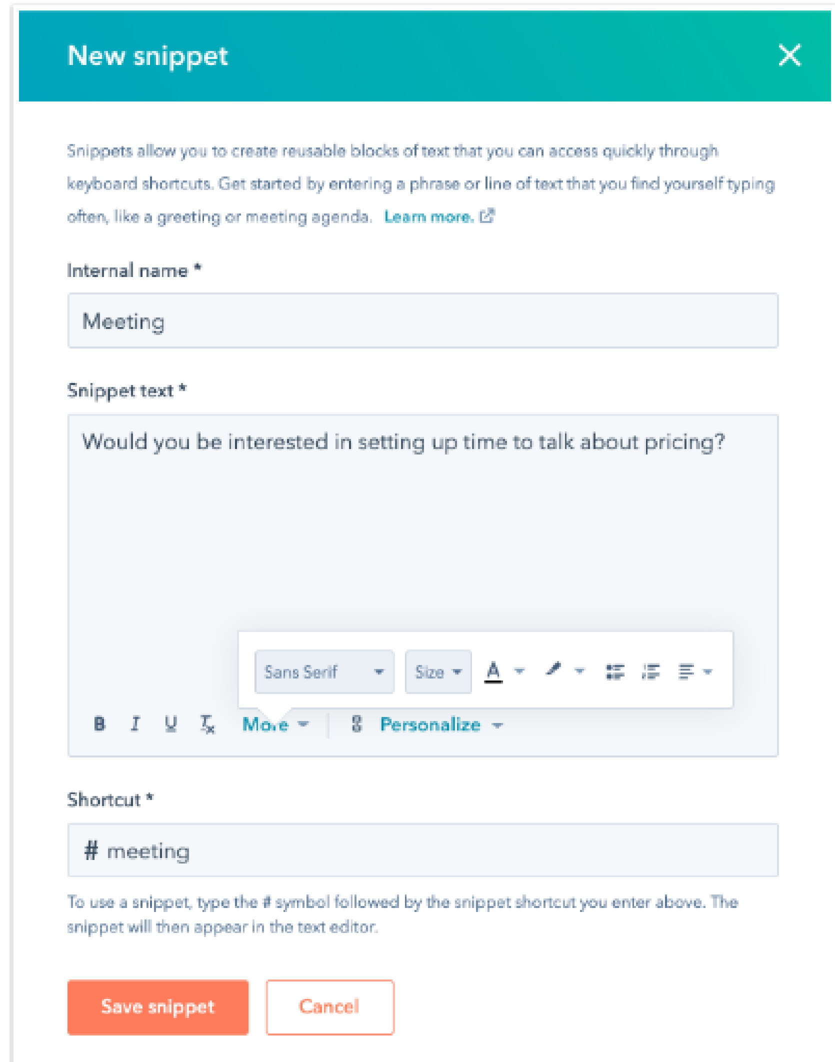
CREATE A LIVE CHAT

- Create a chat flow with live chat to connect visitors directly with members of your team.
- Live chat will appear as a widget on your website pages that visitors can click to start a real-time conversation with someone on your team.
- Create a live chat to connect a visitor on your pricing page to a member of your sales team,
- Another live chat that connects a visitor on your knowledge base articles to a member of your support team.



CREATE A BOT - PLENTY OF AVAILABLE INTEGRATIONS

- Create a chat flow with a bot to connect with your website visitors.
- Bot will appear as a chat widget on your website pages where a visitor can start a conversation.
- Helps qualify leads, book meetings, or create support tickets by sending a series of questions and automated responses., Gather initial information about the visitor before a member of your team takes over the conversation.



SNIPPETS

- Snippets are short, reusable text blocks that can be used on contact, company, deal, and ticket records; in email templates; in chat conversations; and when logging activity or notes.
- Create reusable emails, and learn more about the templates tool.

CREATE AND USE SNIPPETS

- Leave notes about prospects in the CRM, quickly pull in important details when writing an email to a prospect, and quick responses during a live chat conversation.
- Insert a snippet when logging activity or leaving a comment on a record using the HubSpot mobile app for Android.

TEMPLATES

- Layout of your HubSpot pages, emails, and themes.
- consists of modules and partials, and can reference other assets such as stylesheets and JavaScript files.
- Created either using the HubSpot CLI or in HubSpot's design manager.
- For content creators, the template is the first thing they'll select when creating a page or email.

TEMPLATE TYPES

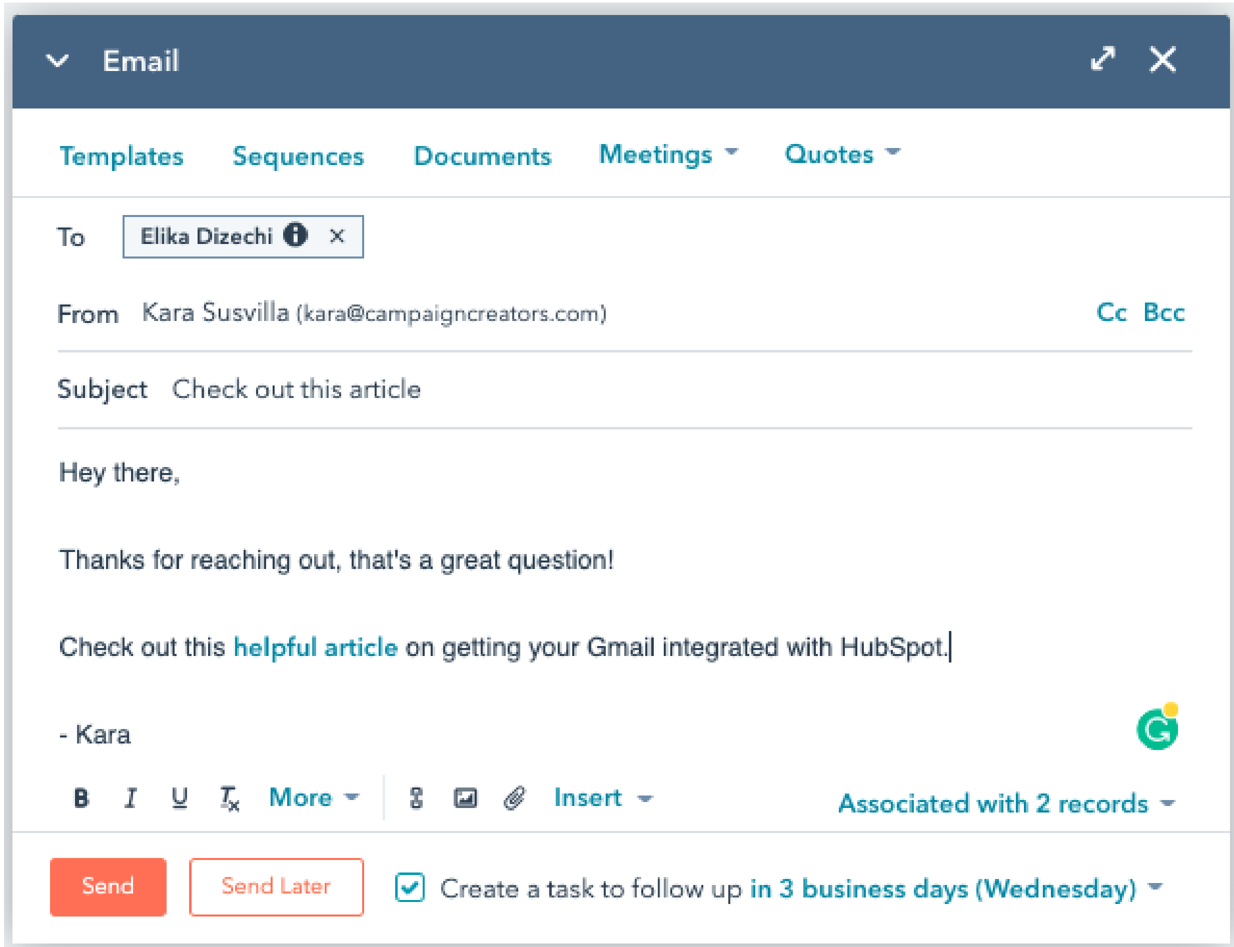
- Used for different types of content, such as website pages and blog posts.
- In coded templates, you designate the type of template by adding an annotation at the top of the file

EMAIL – HELPS SALES REPS SAVE TIME AND EFFORT

- Email templates are used by the email tool.
- Astringent set of requirements since they need to be viewed by many different email clients and conform to best practices to ensure proper deliverability.
- Both HTML + HubL and design manager drag and drop email templates come pre-populated with baseline components upon creation
- Template types are only visible for template selection when creating an email.

INVITE EMAIL

- By default, HubSpot sends an invite email to new users with a link to set their password.
- If the user has already set up a HubSpot password for another account, you can skip sending the welcome email by selecting the **Don't send an email invite when this user is added to the HubSpot** checkbox.


Email
Templates
Sequences
Documents
Meetings
Quotes
To
Elika Dizechi
From
Kara Susvilla (kara@campaigncreators.com)
Cc
Bcc
Subject
Check out this article
Hey there,
Thanks for reaching out, that's a great question!
Check out this helpful article on getting your Gmail integrated with HubSpot.
- Kara
More
Insert
Associated with 2 records
Send
Send Later
Create a task to follow up in 3 business days (Wednesday)

PAGE TEMPLATES

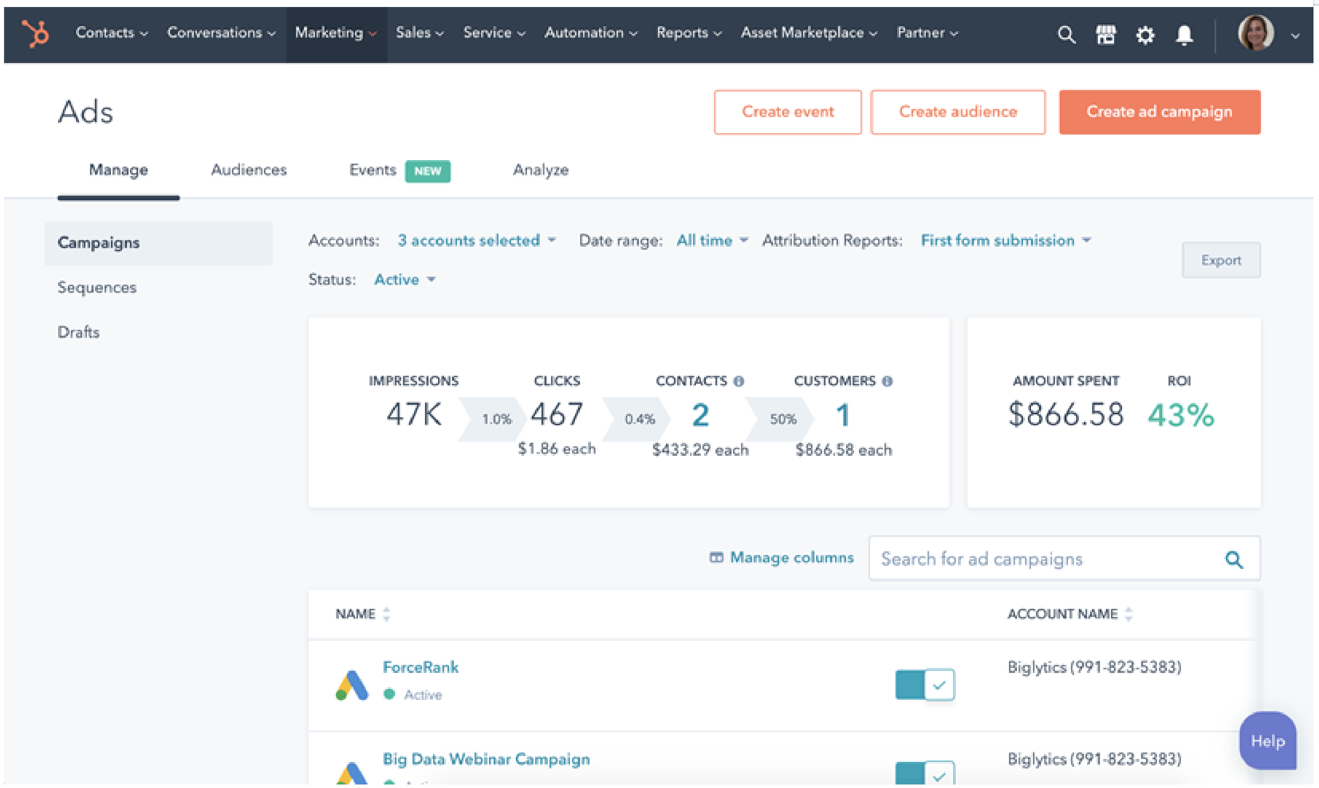
- Page templates are the most open-ended template type.
- Serve as any flavor of web page or landing page.
- Page Layouts are not pre-populated with any components.
- Coded page templates come pre-populated with sparse markup including suggested HubL tags for meta info, title, and required header/footer includes.
- **Examples** of pages that would typically use a page template would include but are not limited to:
    1. Homepage
    2. About us
    3. Contact

ADS – SEAMLESS LEAD SYNCING

- Generate new leads with simple ad creation and seamless lead syncing.
- Creating, measuring, and optimizing ads across multiple platforms is time-consuming.
- It's hard to commit a budget to ads when you are seeing less and less return on your ad spend.
- HubSpot ad management helps marketers stay targeted and relevant throughout the customer journey and, most importantly, drive more conversions and ROI.
- With CRM-powered targeting, the ability to report on data at every stage, you can manage your leads at scale and with efficiency--all from one data source, on one platform.

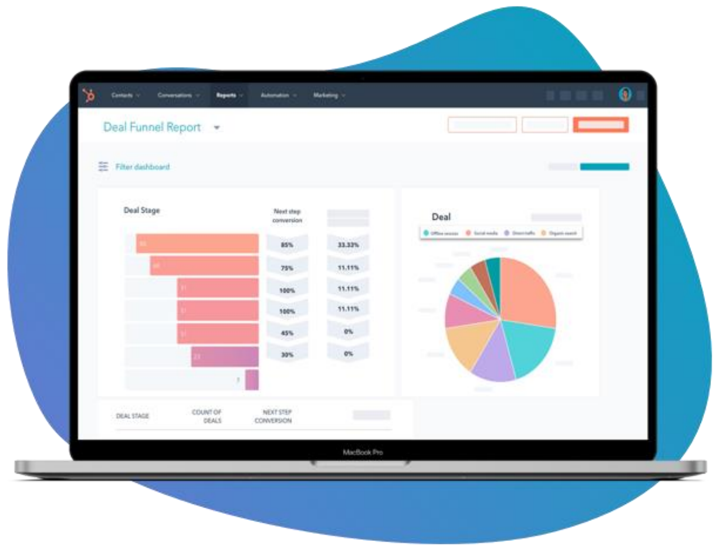
TRACK YOUR ADS MORE EFFECTIVELY

- Tracking allows HubSpot to attribute contacts to specific ads, by applying tracking parameters to the end of your ad URLs.
- Connect your ad account, and HubSpot will apply tracking to ads that are currently active or pending review.
- If HubSpot is unable to track an ad, some reporting data from the network like clicks and impressions will still display for that ad in the HubSpot ads tool.
- HubSpot is only able to track the following types of ads for contact attribution: Google Ads, Facebook, and Instagram Ads and LinkedIn Ads



HUBSPOT FORMS – UPDATE, INFORM, GENERATE NEW LEAD, ETC. ALL IN ONE SOLUTION

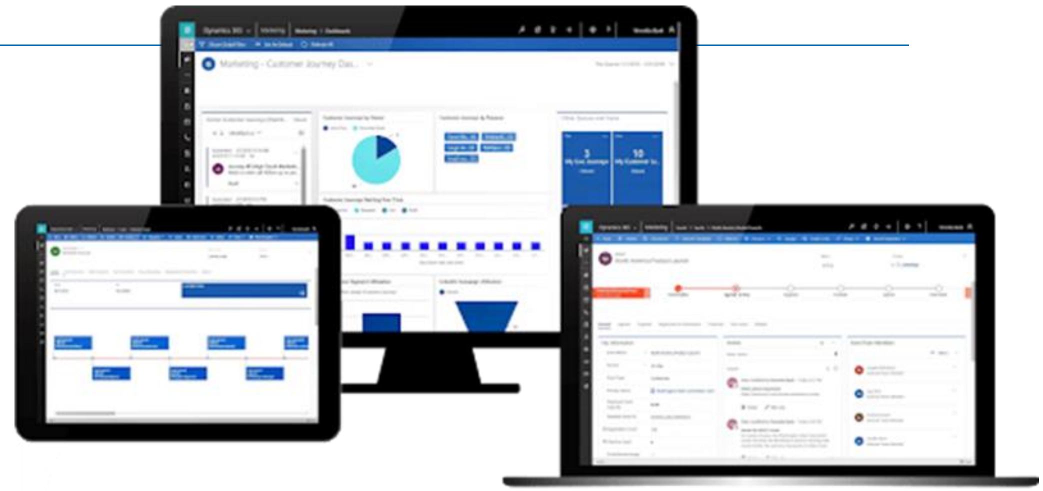
- HubSpot Forms is simply an online form creation tool in HubSpot. HubSpot Forms is an intelligent way to capture contact information from your inbound efforts.
- Quickly add forms to your website, whether it was created in HubSpot or not.



DEALS – TRACK POTENTIAL REVENUE

- Deals in HubSpot to track potential revenue.
- Contact takes an action that could lead to revenue, such as booking a meeting with you to discuss your product or service.
- When created, a deal record should be associated with the contacts and companies that are involved with the deal. This helps HubSpot associate the relevant activities to deal record

TASKS – SCHEDULE YOUR TO-DO-LIST



- Keep track of your to-do list in HubSpot by creating tasks.
- Create tasks as reminders for specific records and manage multiple tasks in task queues.
- ***Sales*** or ***Service Hub*** *Starter*, *Professional,* or *Enterprise* users can also create recurring tasks.
- Plan your tasks based on your schedule and past performance, or automate tasks based on deal stages.
- Once you've created tasks, learn how to edit, complete, and delete tasks.

TASK DETAILS – ALL ENTITES

- Regardless of where you create a task in HubSpot, you can fill in the following information.
- Set a default due date, due time, and reminder date for all tasks you create.

1. **Title:** enter a **task name** in the *Title* field. Include the text *call* or *email* in the title of your task to automatically set the corresponding task type.
2. **Type:** select **Call**, **Email**, or **To-do**. If you're using HubSpot's integration with LinkedIn Sales Navigator, select **Sales Navigator - Send InMail** or **Sales Navigator - Connection request**.
3. **Priority:** select if the task is a high priority.
4. **Associate with records** or **[x] associations:** search and select **records** to associate with the task.
5. **Assigned to:** select the **user** to who the task is assigned.
6. **Queue:** add the task to an existing task queue or create a new task queue.
7. **Due date:** select the **date** and **time** the task is due.
8. **Set to repeat** (***Sales Hub*** or ***Service Hub*** *Starter*, *Professional*, and *Enterprise* users only): select the **checkbox**, then enter a **number** and select an **interval of time** for your task to repeat.
9. **Task reminders** or **Send reminders:** click the **dropdown menu** to select when an email reminder should be sent to the task owner.

Upload documents

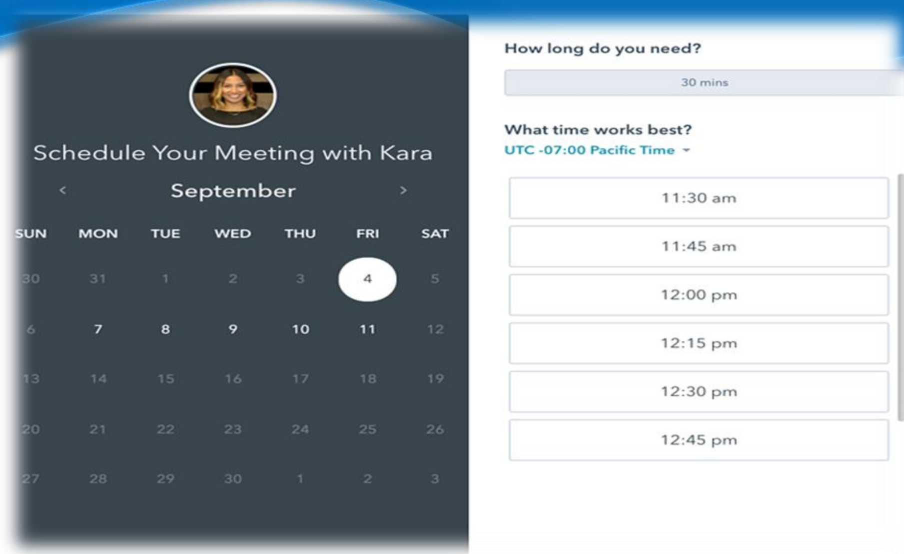
With the documents tool, you can build a library of content for your entire team to upload and share documents with your contacts.

Share your document with contacts

- HubSpot will automatically apply to track when you share a document
- Show you if/when your contact views the document.
- Require recipients to enter their email addresses before viewing the content.

Manage meetings tool settings

- In your calendar settings, you can connect a Google or Office 365 calendar to the meetings tool
- an event on your connected calendar, the scheduling page will show that you're busy during the event time.
- Edit the default scheduling page, add additional calendars, or host the scheduling page URL on a connected domain in your settings.
    - Connected calendar is not required to view, edit, or create scheduling pages in the meetings tool, but it is required to book meetings.



CREATE TICKETS – TRACK CUSTOMER INQUIRIES AT THE TIME THEY ARE MADE

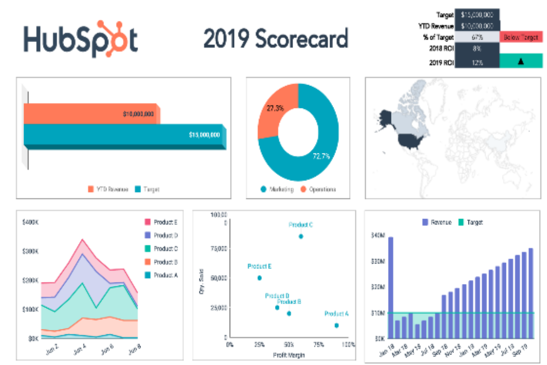
- Organize all of your customer inquiries in one place and track trends over time.
- Create individual tickets from your tickets index page, a contact record, or your conversations inbox.
- Automate the process using workflows and the support form.

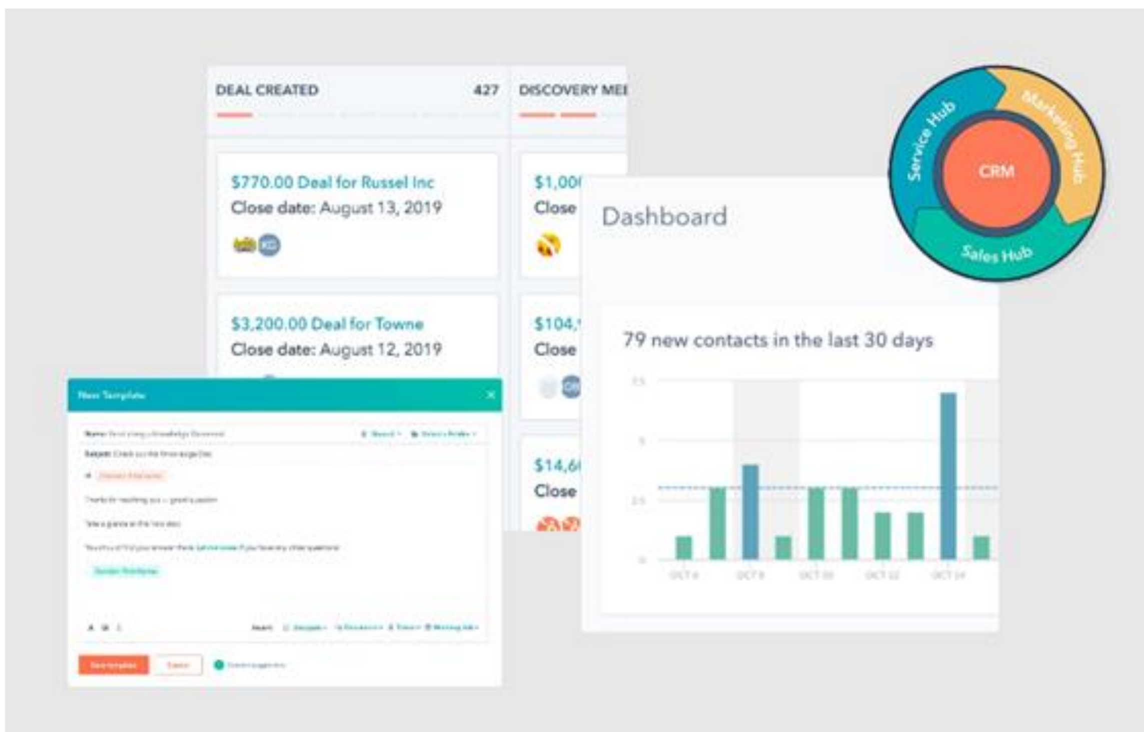
CREATE CUSTOM REPORTS – ANALYZE OBJECTS AND ACTIVITES

- Flexibility in analyzing objects and activities in your HubSpot account.
- Different types of custom reports that you can create, based on your reporting needs.
- Custom report to your reports list, a dashboard, or save it as an export.
- Depending on your subscription, you can create the following types of custom reports:
  1. Single object reports: analyze contacts, companies, deals, tickets, quotes, custom objects, activities, line items, or feedback submissions.
  2. Funnel reports: measure the conversion rates between certain stages in a customer's lifecycle or deal's pipeline. If you have an Enterprise subscription, you can also create a custom events funnel.
  3. Custom report builder: an advanced report builder that enables you to analyze objects in relation to marketing, sales, and service activities.
  4. Measure of which sources, assets, and interactions impacted lead generation (Marketing Hub and CMS Hub Enterprise only).
  5. Deal creates attribution reports: a measure of which sources, assets, and interactions impacted deal generation (Marketing Hub Enterprise only).

MANAGE YOUR DASHBOARDS WITH HUBSPOT - MAKES IT EASY TO SEE OVERVIEW OF ALL OPPORTUNITIES

- Organize related reports into one view using a dashboard.
- New dashboards for different reporting purposes, share dashboards with other users in your account, and clone or delete existing dashboards to stay organized.
- Create new dashboards and customize their reports for your personal use.
- Share a dashboard with others in your HubSpot account, edit its visibility.
- Clone dashboards that are visible to you and delete dashboards you've created to reduce clutter.
- Super admins and users with Reports & dashboards permission can view and make changes to all dashboards, regardless of visibility or ownership.





CONCLUSION

If you are looking for a CRM application that creates an organized structure and enhances your sales process with automatic information on your leads, HubSpot is a strong contender. It's free, quick to learn and easy to use.

Our Consultancy services:

1. Planning marketing campaigns, establishing efficient sales processes, and building a customer-first services organization, as applicable.
2. Best practices to set up HubSpot in a way that helps your team achieve optimal results.
3. Quantifying the impact of your marketing, sales, and services activities with reporting and KPI tracking.

Contact Us

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