

CRM application that creates an organized structure and enhances your sales process with automatic information on your leads.

# HUBSPOT

## Customization, Development, and Consulting Practice



**Makes inbound sales very easy to manage**

Cognitive Convergence

<https://marconvergence.com/>

+1 4242530744

[shahzad@cognitiveconvergence.com](mailto:shahzad@cognitiveconvergence.com)



**Current Location:** Lahore, Pakistan

**Planned Front-end Office:** California/Washington States- USA

# About us

Cognitive Convergence is a subject matter expert in HubSpot consulting. We have a team of experienced consultants that ensure to leverage HubSpot's capabilities to boost website traffic, capture leads, automate lead nurturing, customer conversions etc.

Our core HubSpot consulting are:

- ✓ Planning marketing campaigns
- ✓ Establishing efficient sales processes
- ✓ Building a customer-first services organization, as applicable.
- ✓ Services activities with reporting and KPI tracking.
- ✓ Informed decision-making
- ✓ Implementation of a marketing automation software with an inbound strategy.

# HubSpot at a Glance

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 allowing marketing and sales departments to manage all their activities in one place.
- Offer features like:
  - Content creation
  - Social media sharing
  - Workflow automation
  - Lead capturing and qualification
  - Customer relationship management
  - Sales pipeline mapping with 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:

- ✓ Automate lead nurturing (i.e. build the relationship)
- ✓ Boost website traffic
- ✓ Capture leads
- ✓ Convert the customer by making a sale

## Setup up your HubSpot CRM account

- 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 for 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

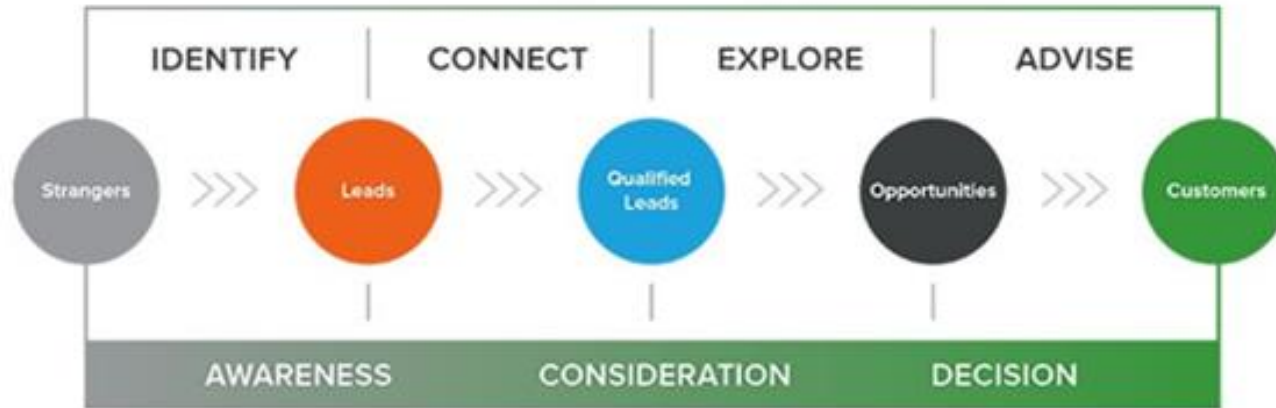
- WordPress dashboard, click Plugins on the left sidebar, then click the Add New button toward the top of the page.
- Click the Install Now button on the top-right of the plugin, then click Activate once it's installed, which should just take a second or two.

### 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.



## Inbound Sales Methodology



HubSpot

## Easily Create and Add Contacts



### Contact Notes

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

### Contact owner

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



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

**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.

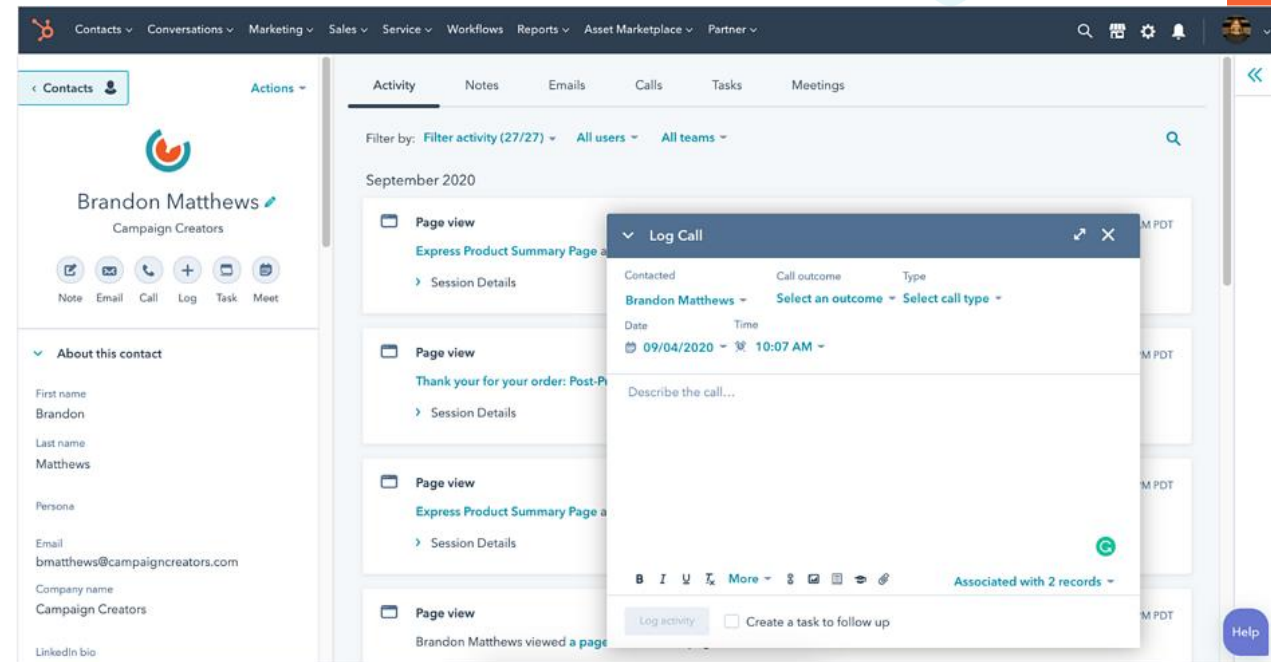
# Calls from HubSpot

- Easily make a direct call to contacts that you have already created or imported from your computer.
- Receive or dial a call the history 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.



# Companies in HubSpot

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





# Activity feed

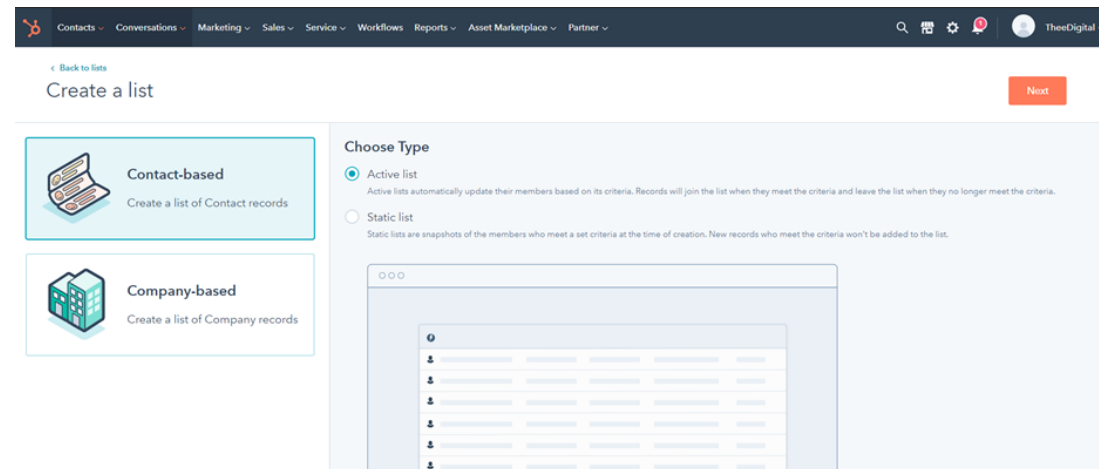
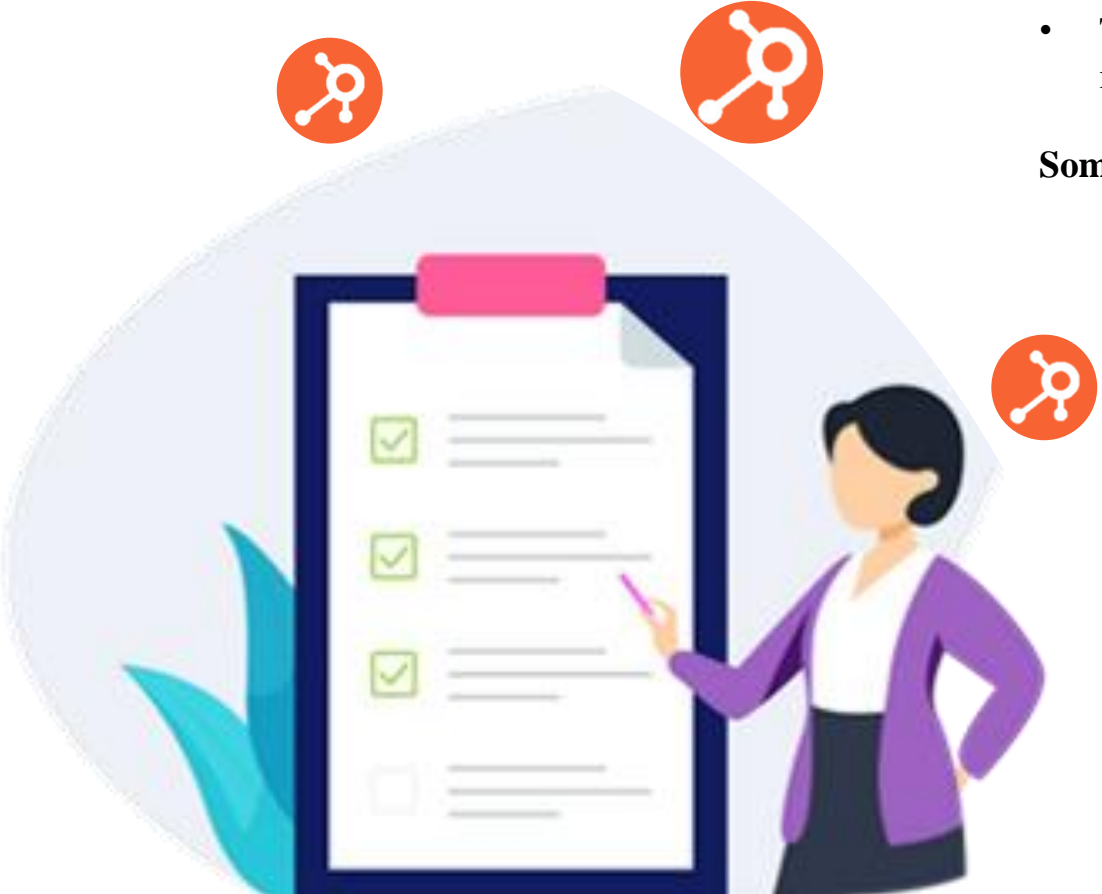
Activities that you have performed on HubSpot will be visible on the activity feed.

## Lists

- Categorize the contacts by making a list
- Allows 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:

- ✓ Sending a marketing email to a list of contacts;
- ✓ Creating a list of bounced contacts;
- ✓ Enrolling a list in a workflow;
- ✓ Using List membership filters in other lists and custom reports;
- ✓ Creating ads audiences with lists



Contacts Conversations Marketing Sales Service Workflows Reports Asset Marketplace Partner

< Back to lists

### Create a list

Next

**Choose Type**

☒ Active list  
Active lists automatically update their members based on its criteria. Records will join the list when they meet the criteria and leave the list when they no longer meet the criteria.

☐ Static list  
Static lists are snapshots of the members who meet a set criteria at the time of creation. New records who meet the criteria won't be added to the list.

0			
1			
2			
3			
4			
5			
6			

# Types of lists

There are two types of lists in HubSpot account:

## Active lists

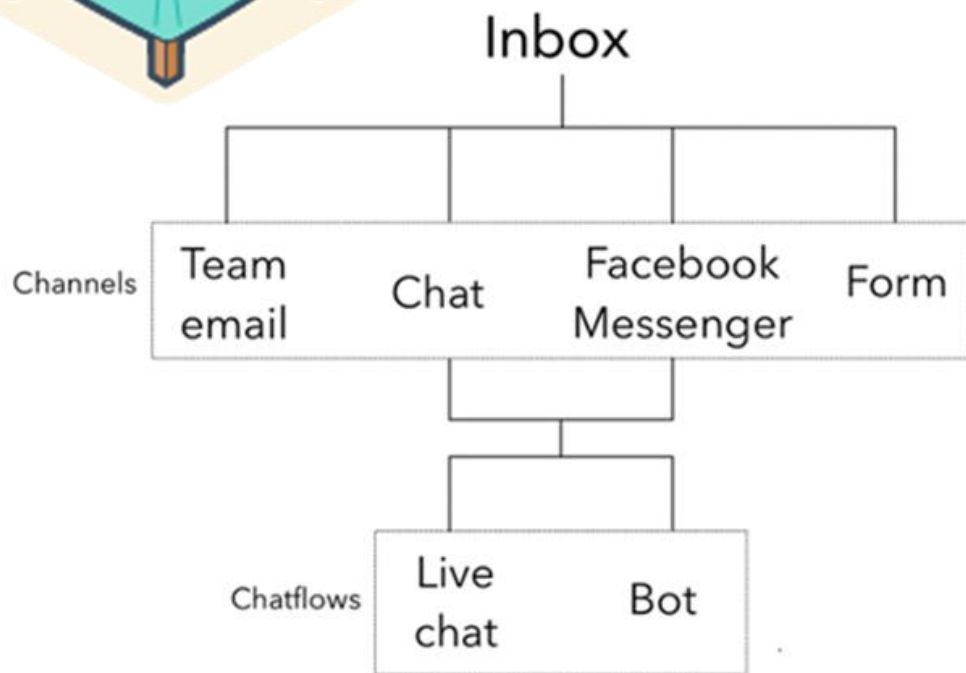
- Automatically update their members based on theirs.
- Records will join the list when they meet the criteria and leave the list when they no longer meet the criteria.

## 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.





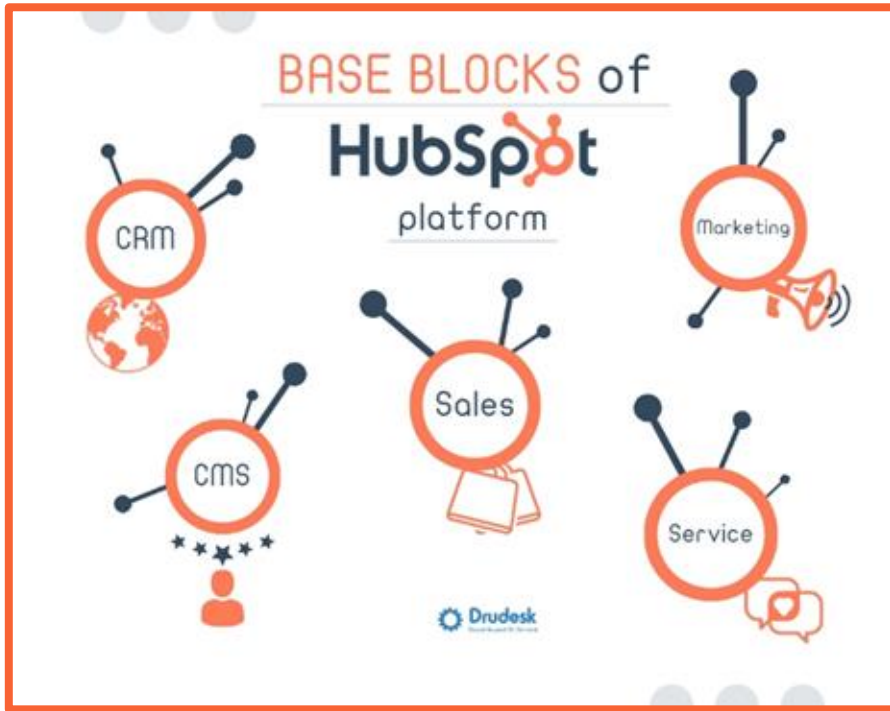


## Conversations

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

## Conversations inbox

- Enter a name for your inbox and add team members.
- HubSpot automatically create a fallback email address in the inbox that allows you to use certain HubSpot tools, such as ticket automation.
  - ✓ Set up the conversations inbox
  - ✓ A guide to the conversations inbox
  - ✓ Manage your inbox users



## Chat flow

- Create chat flows for your website pages.
- Depending on your goal, you will either create a live chat.
- Use targeting rules so that the chat flow appears on some of your pages or all your pages.
- Set up your user profile so your avatar, name, and preferred meeting link display when visitors are chatting with you.

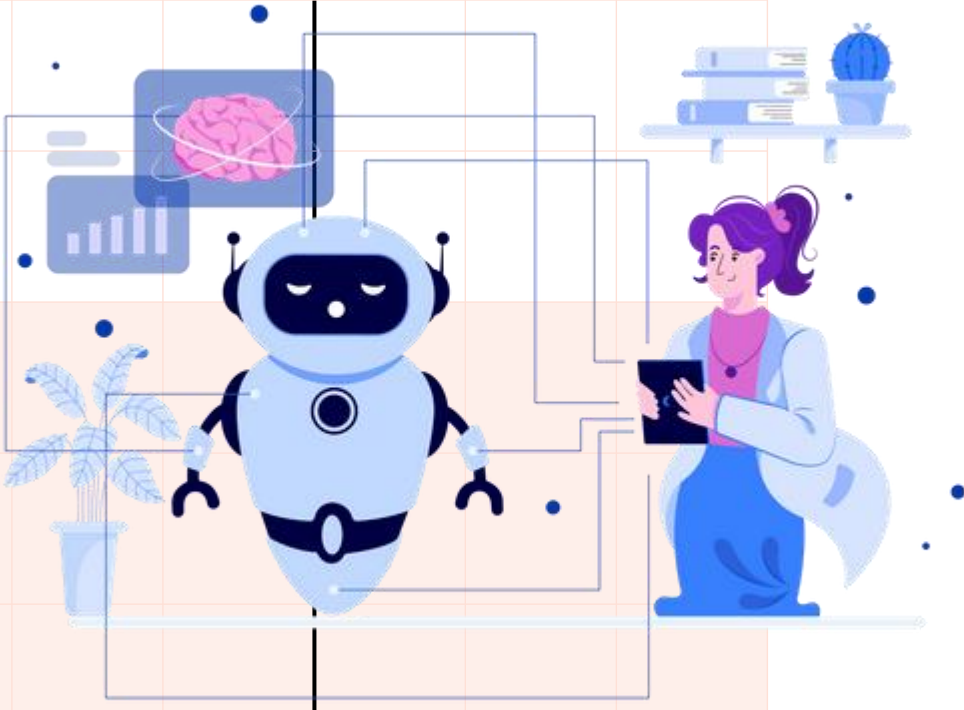
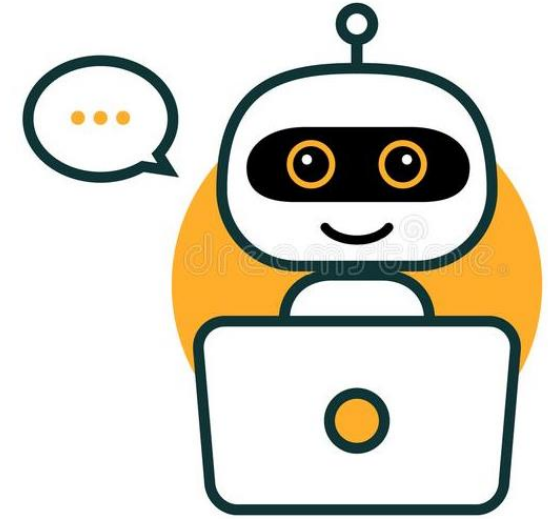
## Using the inbox

- Visitor who sends an email, starts a chat, or submits a form, can reply to them in the inbox.
- Can create a contact record to add them to your database.
- Any contact who has messaged your team before, you'll see the 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.
  - ✓ Compose and reply to emails in the conversation's inbox
  - ✓ Chat with your website visitors
  - ✓ Collaborate with your team in the inbox
  - ✓ Manage tickets in your inbox



## 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.



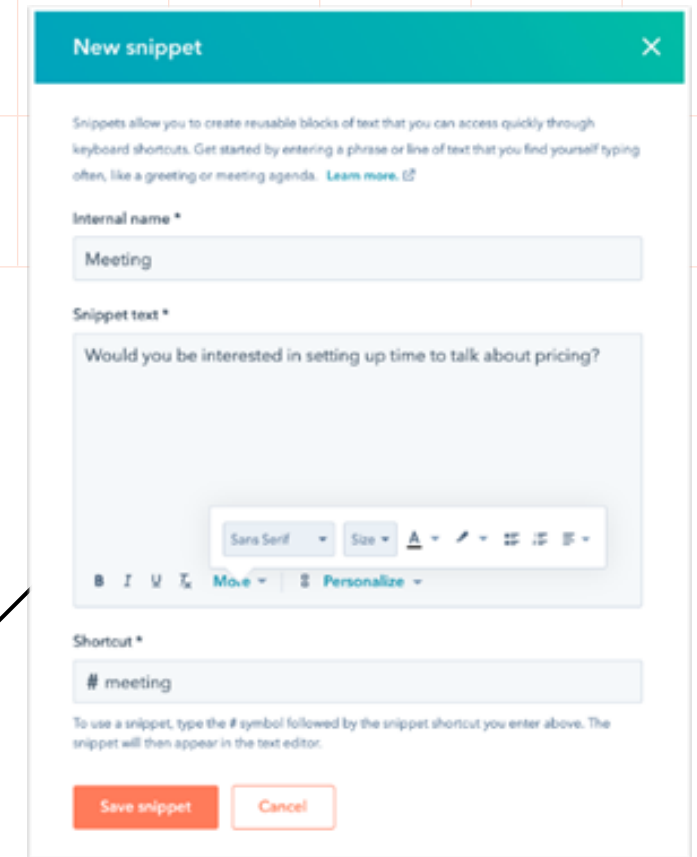
## Create a bot

- 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.



# Create and use 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.  
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.



New snippet

Snippets allow you to create reusable blocks of text that you can access quickly through keyboard shortcuts. Get started by entering a phrase or line of text that you find yourself typing often, like a greeting or meeting agenda. [Learn more.](#)

Internal name \*

Meeting

Snippet text \*

Would you be interested in setting up time to talk about pricing?

Sans Serif Size A B I U T Move Personalize

Shortcut \*

# meeting

To use a snippet, type the # symbol followed by the snippet shortcut you enter above. The snippet will then appear in the text editor.

Save snippet Cancel



- ✓ Insert a snippet when logging activity or leaving a comment on a record using the HubSpot mobile app for Android.
- ✓ There are two ways to add a snippet:
  1. Type the # symbol into the text editor. Start typing the snippet shortcut, then select the snippet from the dropdown menu. The snippet will automatically populate in the text editor.
  2. At the bottom of the text editor, click the snippets icon, then select a snippet from the dropdown menu.

# Email

- 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.

## Send 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.



# Templates

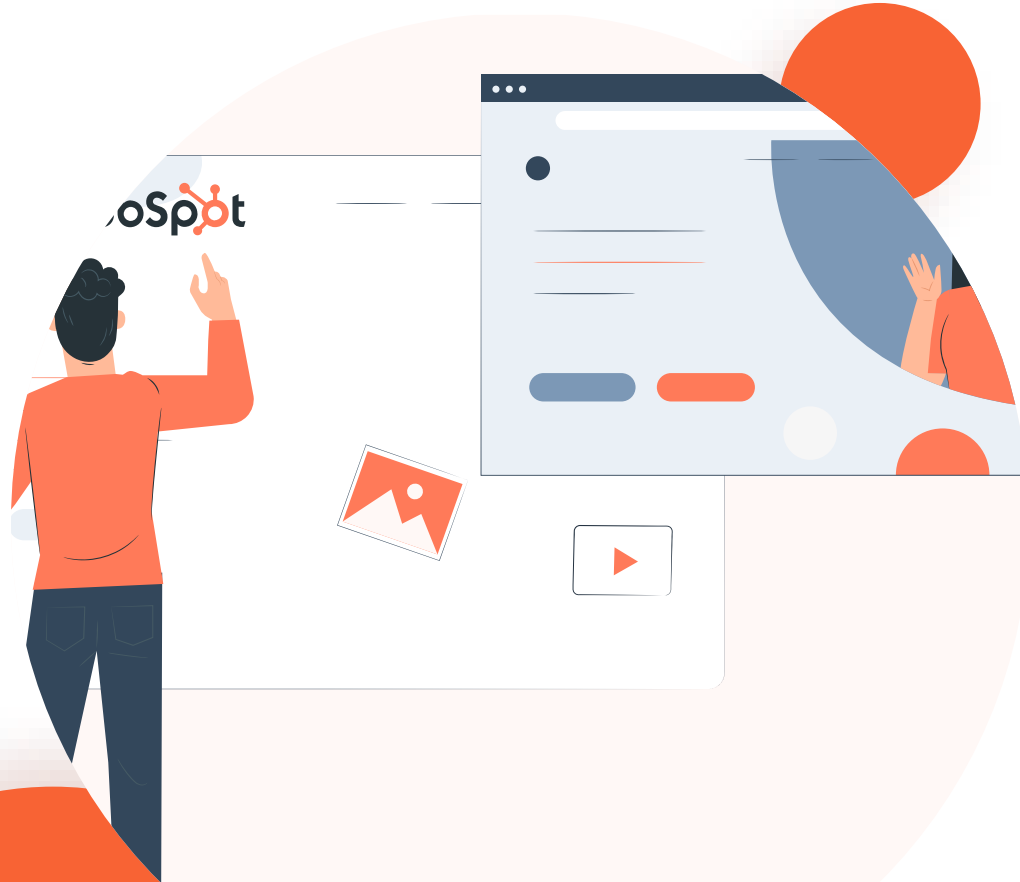
- Layout of your HubSpot pages, emails, and themes.
- consists of modules and partials, and can reference other assets such as stylesheets and JavaScript files.
- Created either using the HubSpot CLI or in HubSpot's design manager
- For content creators, the template is the first thing they'll select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



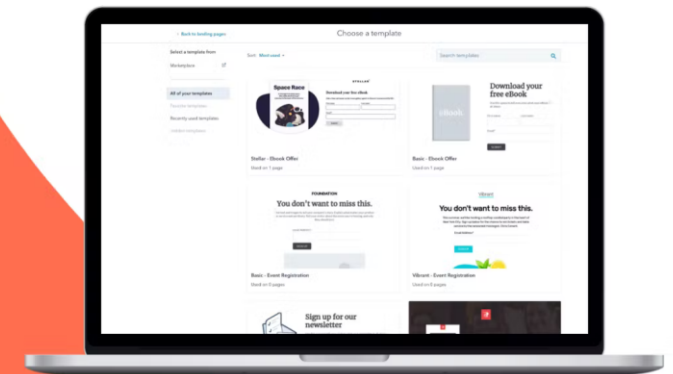
# Landing Pages



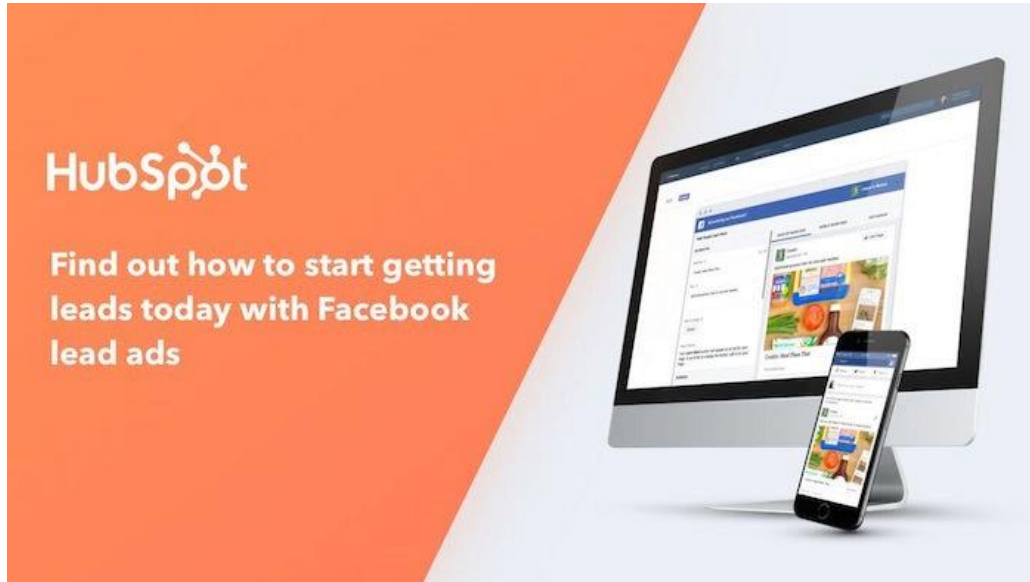
- Page templates are the most open-ended template type.
- Serve as any flavor of web page or landing page.
- Page Layouts are not pre-populated with any components.
- Coded page templates come pre-populated with sparse markup including suggested HubL tags for meta info, title, and required header/footer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

## Select your template.

Choose from any of our pre-built templates and edit it to meet your exact needs.







## Ads

- 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.

## Ad tracking in HubSpot

- 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 Ads, Instagram Ads, and LinkedIn Ads**



# HubSpot Forms

- 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.

Choose a pop-up form type



Pop-up box



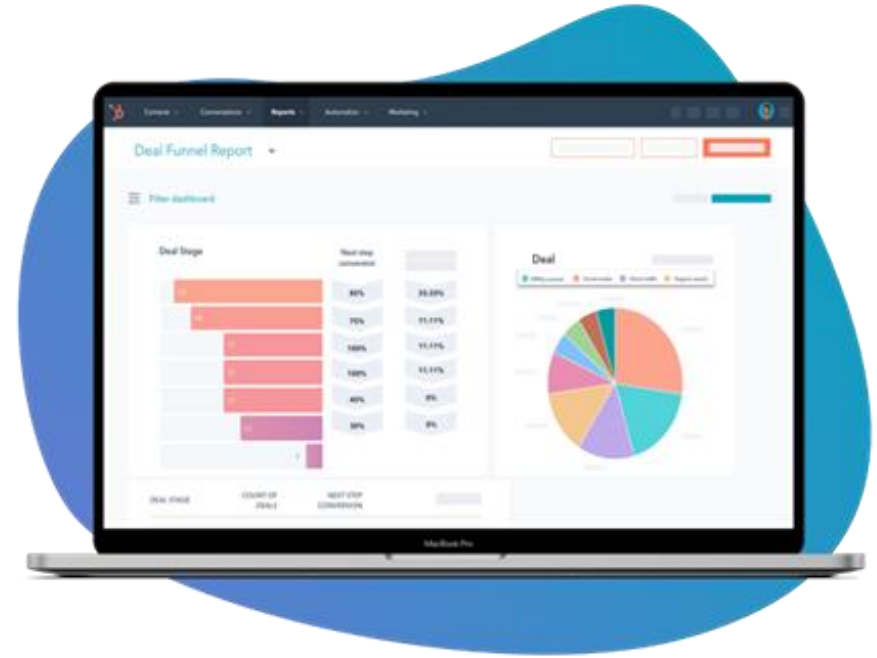
Drop-down banner



Slide-in box left



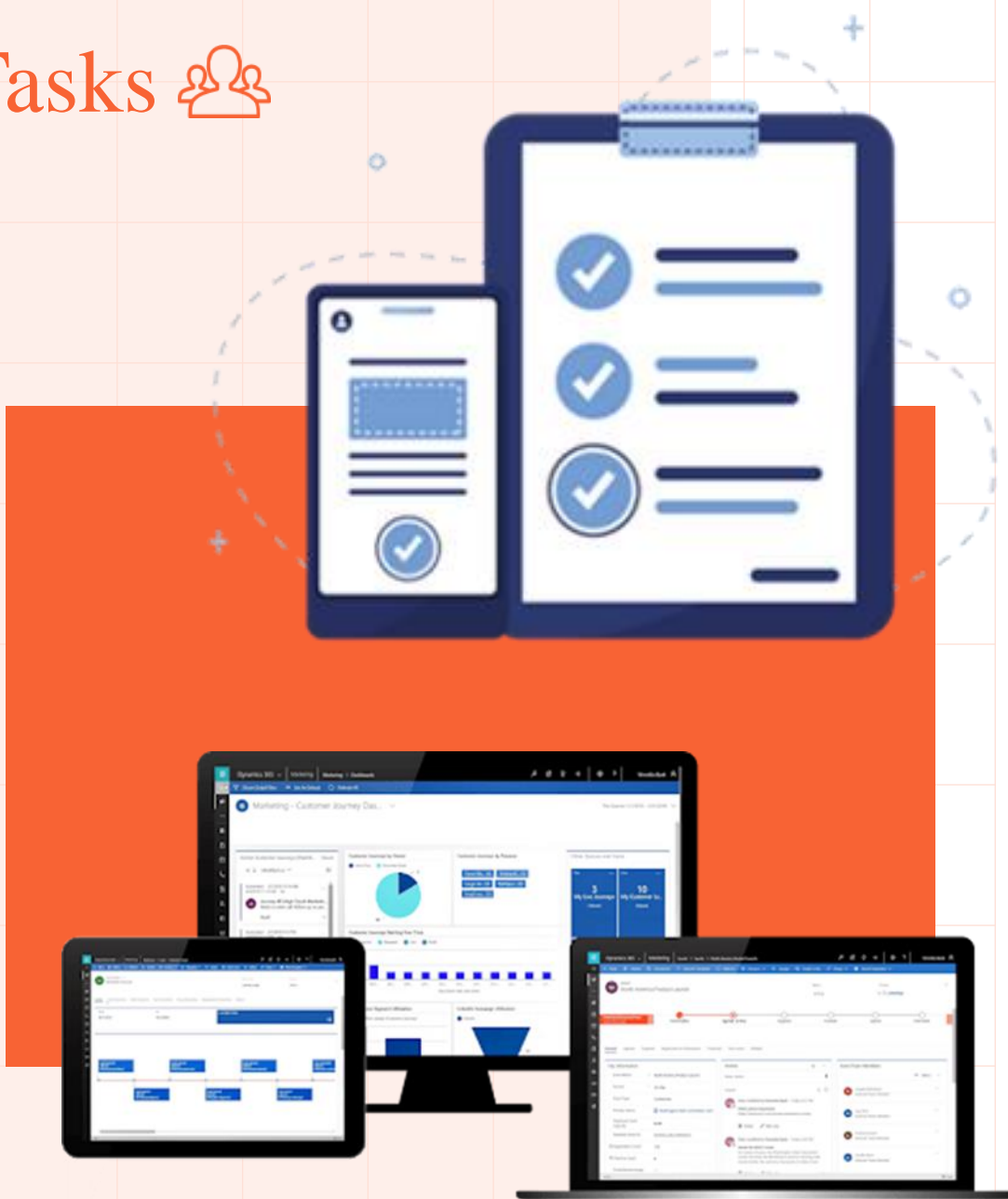
Slide-in box right



## Deals

- 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 the deal record.

# Tasks



- 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.
- Once you've created tasks, learn how to edit, complete, and delete tasks.

## Task details:

- Regardless of where you create a task in HubSpot, you can fill in the following information.
1. **Title:** enter a **task name** in the *Title* field.
  2. **Type:** select **Call**, **Email**, or **To-do**.
  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. **Task reminders** or **Send reminders**
  9. **Notes:** enter details about your task.

# 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.



13 of 1,000 created

New folder

Upload new document ▾

Search all documents

LINKS CREATED	VIEWS	OWNER ▾
7	9	Julia Mongea

Local file

Choose existing file

Dropbox

Google Drive

Box

## Create tickets

- 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.



# Connect your Gmail calendar

Calendar that is hosted with Google Apps (G Suite), Gmail (Google Free), or Office 365 to the meetings tool. Before connecting your calendar, keep in mind the following:

1. When you connect a calendar to the meetings tool, the associated inbox will automatically connect in your email integration settings.
2. Once your calendar is integrated, you can disable the inbox connection without disabling the calendar connection
3. Connect your inbox as a shared inbox in the conversation tool, your calendar cannot be connected with the meetings tool.
4. Only personal inboxes can be connected to the meetings tool.



## Manage meetings tool settings:

- 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
- If Calendar is not connected, the scheduling page will be in offline mode, so meetings can be requested but will not be automatically added to the calendar.

A screenshot of a meeting scheduling interface. On the left, a dark grey sidebar shows a profile picture of a woman, the title 'Schedule Your Meeting with Kara', and a calendar for September with the 4th highlighted. The main area on the right is white and contains two sections: 'How long do you need?' with a '30 mins' button, and 'What time works best?' with a dropdown menu showing 'UTC -07:00 Pacific Time' and a list of time slots from 11:30 am to 12:45 pm.

How long do you need?

30 mins

What time works best?

UTC -07:00 Pacific Time

11:30 am

11:45 am

12:00 pm

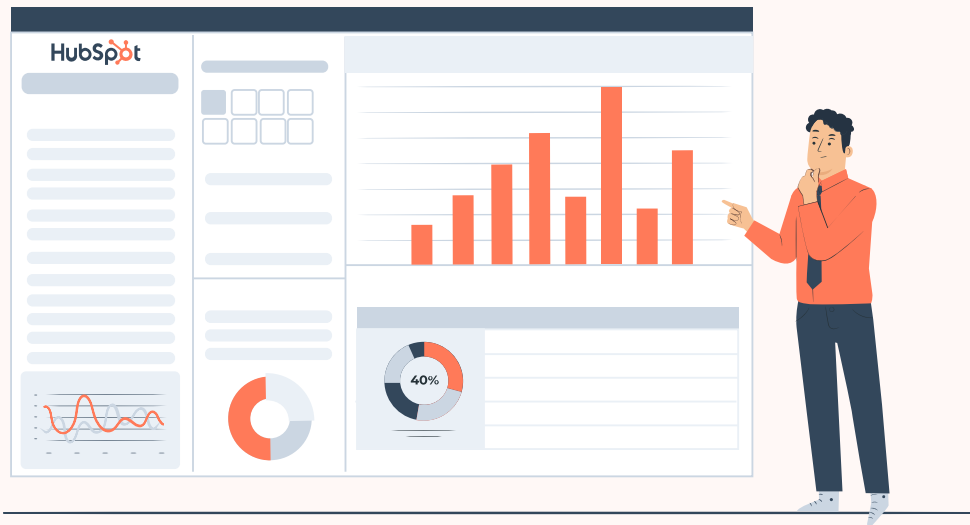
12:15 pm

12:30 pm

12:45 pm

# Create custom reports

- 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:



- ✓ Single object reports: analyze contacts, companies, deals, tickets, quotes, custom objects, activities, line items, or feedback submissions.
- ✓ Funnel reports: measure the conversion rates between certain stages in a customer's lifecycle or deal's pipeline. You can also create a custom events funnel if you have an Enterprise subscription.

- ✓ Custom report builder: an advanced report builder that enables you to analyze objects in relation to marketing, sales, and service activities.
- ✓ Measure of which sources, assets, and interactions impacted lead generation (**Marketing Hub** and **CMS Hub Enterprise** only).

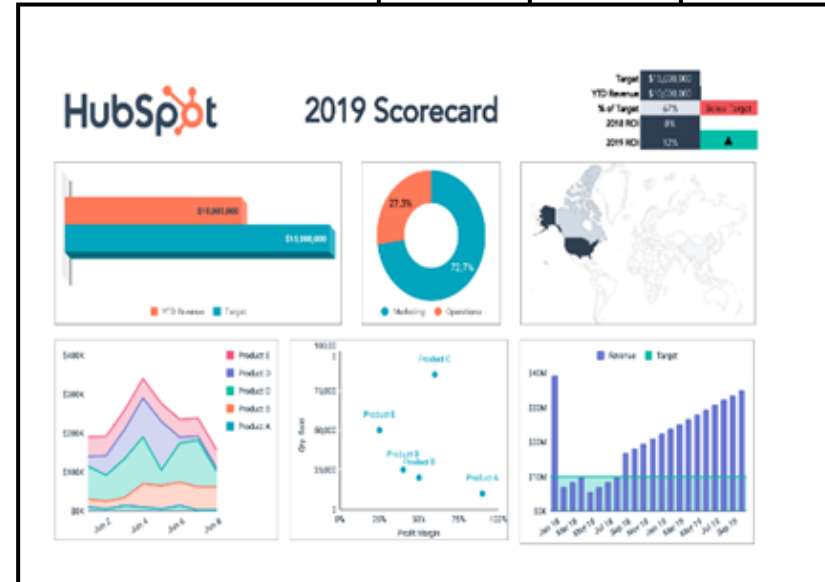
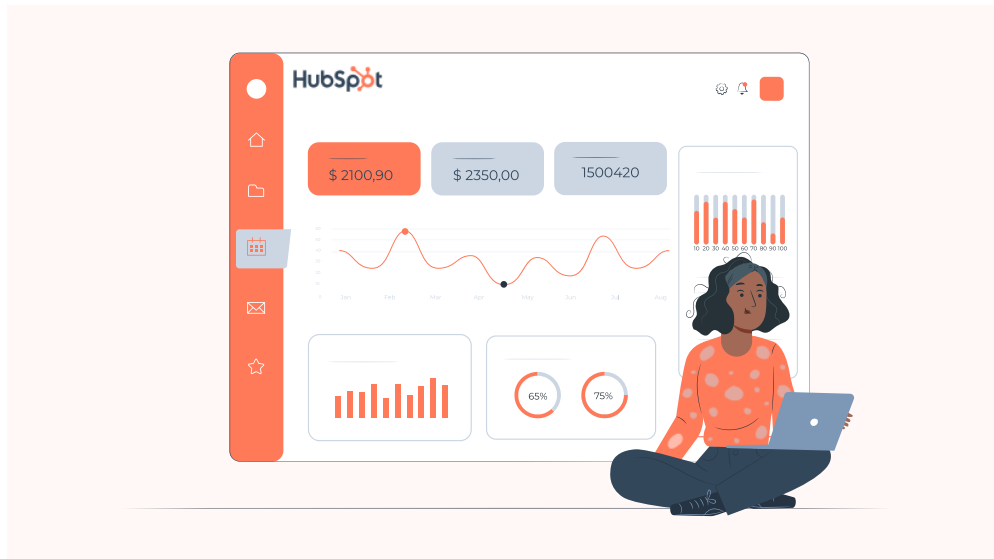


- ✓ Deal creates attribution reports: a measure of which sources, assets and interactions impacted deal generation (**Marketing Hub Enterprise** only).
- ✓ Measure which sources, assets, and interactions impacted revenue (**Marketing Hub Enterprise** only).



# Manage your dashboards with HubSpot

- Organize related reports into one view using a dashboard.
- Share dashboards with other users in your account, and clone or delete existing dashboards to stay organized.
- Customize reports for your personal use.
- Share a dashboard with others in your HubSpot account, and edit its visibility.
- Clone dashboards that are visible to you and delete dashboards you've created to reduce clutter.



# Contact us

HubSpot Consulting Services of Cognitive Convergence offers strategic opportunities to clients, investors, and partners that are:

- ✓ Unique and industry defining
- ✓ Mutual interest centric business approach
- ✓ Significantly enhance the company's footprint
- ✓ Turn grow revenues by entering new and exciting
- ✓ Technology Domains, App development ideas, Solution Development, and Joint venture projects
- ✓ 1st mover advantage with
  - Talent: 100%
  - Timing: 100%
  - Technology: 100%
  - Technique: 100%

## THANK YOU

For questions or queries, contact us, we will be sure to get back to you as soon as possible

**Cognitive Convergence**

<https://marconvergence.com/>

+1 4242530744

shahzad@cognitiveconvergence.com