



# 11 Things You're Probably Not Using in HubSpot That You Should Be



HubShqts



# Today's Agenda:

- Goals of this session
- 11 Things
- No Sales Pitch
- Q+A
- Appendix: More Things

# Our goals for you



## Expose you to a bunch of HubSpot features you may not be aware of

- Being informed allows you to make **better decisions**
- Being aware of options allows you to **set priorities**

## Answer your questions

- We'll stay on the call as long as needed to answer all your questions

## Take away one (yes one!) 'thing' and implement it in the next month

- Remember: **progress**, not perfection
- (There's always something more in HubSpot you can incorporate into your business - don't get overwhelmed)

# Format



**Content:** We're going to **sprint** through a ton of features and tips (50 mins)

- Focus on the **what**, not the **how**
- You can return to the 'how' afterwards

## Here's the deck

- You can view this deck right now, here: <https://www.hubshots.com/11-things-deck>
- Feel free to skip ahead in the deck so you can see what is coming  
(ie just like you would if you were watching a YouTube video)
- We're planning to run this session **quarterly** (and update the deck accordingly)

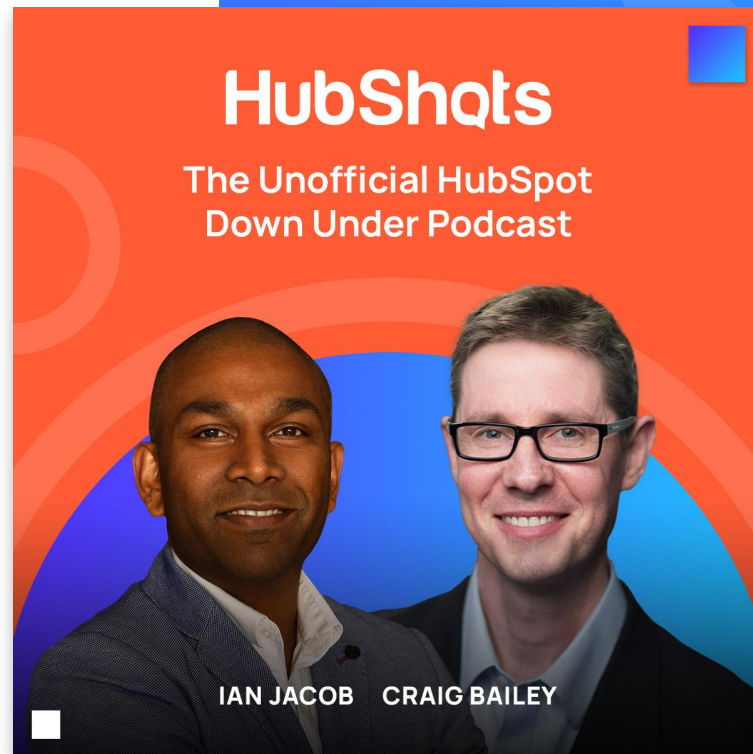
## Questions: Add your questions in the chat

- We'll answer all your questions at the end



# What/Who is HubShots?

- HubShots = “HubSpot in the real world”
- Podcast started in 2015 (7+ years!)
  - Episode 289 published last Friday
- YouTube channel started in 2018
- Two HubSpot Platinum Partner agencies:
  - **Ian Jacob:** Search & Be Found
  - **Craig Bailey:** XEN



# About Us



## Ian Jacob

CEO and Founder of [Search & Be Found](#).

Ian is a business growth strategist specialising in marketing and sales strategy with a focus on HubSpot automation. With 20+ years of experience, Ian has worked with companies like Macquarie Bank, Ericsson, and Telstra (and he hopes to add you to that list!).



## Craig Bailey

CEO and Founder of [XEN Systems](#).

Craig has more than 30 years experience working in software development and IT. With a thorough understanding of both the technical and business sides of HubSpot software, he's focussed on delivering process improvement to companies using HubSpot as the foundation.

HubShqts

# About Us



**Ian and Craig**

29 December 2015

Recording [episode 13](#)  
of HubShots

([Episode 1](#) was recorded  
06 October 2015)



**Brian Halligan**

Inbound 2016

Listen to [episode 100](#) of  
HubShots



**Dharmesh Shah**

Inbound 2016

One day soon...

**HubShots**



Let's get started...

# 11 Things

HubShqts

## Across the hubs

- (CRM in general)
- Marketing
- Sales
- Service
- CMS
- (not Operations this time)

# 11 Things (of things)



## [1] New things

Brand new stuff just released

## [2] Settings things

Settings you may have missed

## [3] CRM things

General CRM wide things

## [4] Page things

Landing pages and Pages things

## [5] Marketing things

Ads, forms and campaign things

## [6] Sales things

Meetings, Templates

## [7] Service things

Surveys, Conversations

## [8] Conceptual things

- Relevancy
- Business processes

## [9] Automation things

Workflow goals

## [10] Report things

Custom report builder

## [11] Final things

Avoiding overwhelm

# [1] New Things

HubShots

## Worth noting

- Inline editing
- Custom Journey Analytics reports
- Lifecycle Stage options

# Inline Editing

Simple updating of records in Views

The 'Excel' experience

The screenshot displays the HubSpot Contacts interface. At the top, there's a navigation bar with various tabs like 'Contacts', 'Conversations', 'Marketing', etc. Below this, a 'Contacts' view is active, showing 497 records. A table lists contact details including Name, Lifecycle Stage, Contact Owner, Buying Role, Lead Status, Contact Unworked, and Contact Priority. A dropdown menu is open for the 'Buying Role' of a contact, showing options like 'Influencer', 'Decision Maker, End User', 'Executive Sponsor', 'Legal & Compliance', and 'Other'. At the bottom, a 'Save' button is highlighted, along with a 'Cancel' button and a notification that there are '13 unsaved changes'.

NAME	LIFECYCLE STAGE	CONTACT OWNER	BUYING ROLE	LEAD STATUS	CONTACT UNWORKED	CONTACT PRIORITY
[Redacted]	Lead	Ian Jacob (ian.jacob@...	..	New	True	Very High
JANDEZ	Lead	Ian Jacob (ian.jacob@...	..	Open	True	Very High
[Redacted]	Lead	Unassigned	..	..	True	Very High
[Redacted]	Sales Qualified Lead	Ian Jacob (ian.jacob@...	Decision Maker, End User	In progress	True	Very High
[Redacted]	Lead	Unassigned	Influencer X	..	True	Very High
[Redacted]	Lead	Craig Bailey (craig@xen...	Search	..	True	Very High
ivac	Lead	Craig Bailey (craig@xen...	..	..	True	Very High
Brisia	Evangelist	Craig Bailey (craig@xen...	End User	Unqualified	True	Very High
ord	Lead	Unassigned	Executive Sponsor	..	True	Very High
onds	Lead	Unassigned	Influencer	..	True	Very High
ds	Lead	Craig Bailey (craig@xen...	Legal & Compli...	..	False	Very High
xe	Customer	Kylie Browne (kylie@xe...	Other	..	False	Closed won
pl5	Sales Qualified Lead	Ian Jacob (ian.jacob@...	Champion	..	True	Very High
[Redacted]	Lead	Unassigned	..	..	True	Very High
[Redacted]	Lead	Unassigned	..	..	True	Very High



# Custom Journey

Just rolling out now...

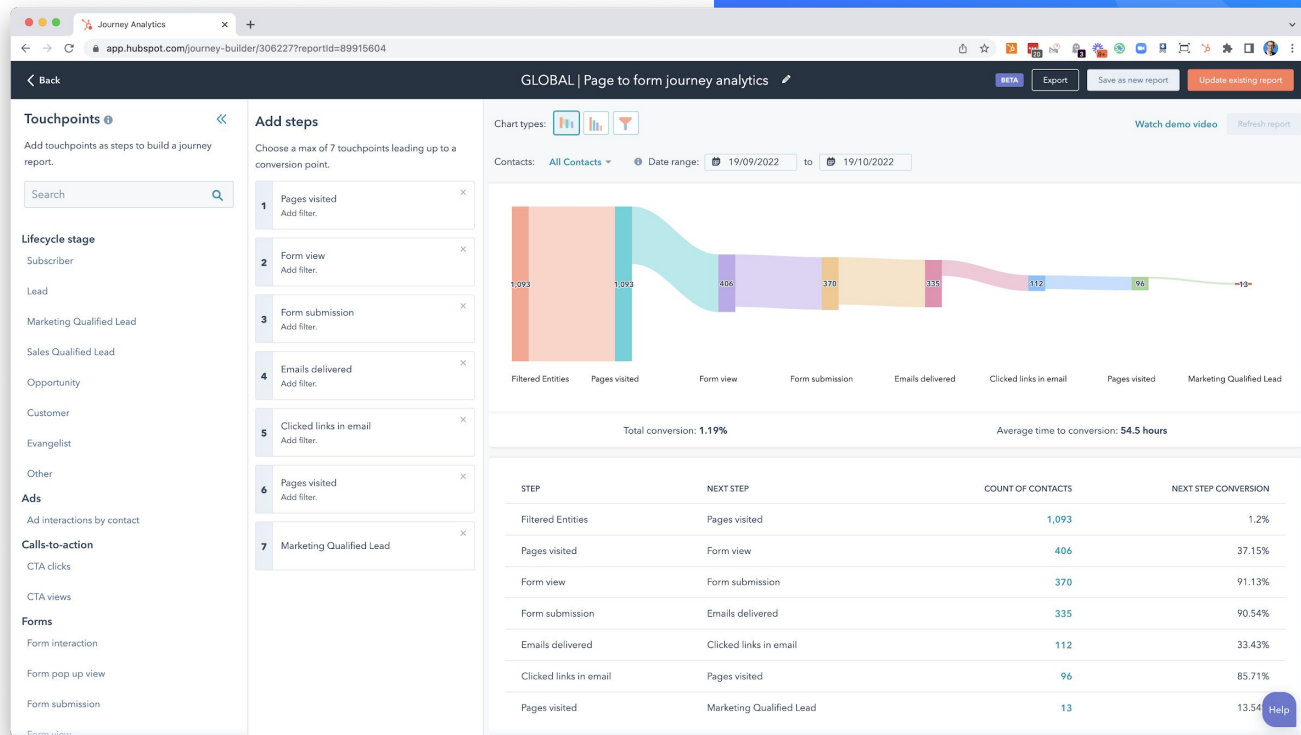
[HubSpot KB article](#)

The screenshot shows the HubSpot 'Create Report' interface. The browser address bar displays 'app.hubspot.com/discover/306227/create/reports?source=analytics-tools'. The page title is 'Create report'. On the left sidebar, there are filters for '1-15 of 21 results', 'Search reports', 'Filter templates', 'Clear filters', 'Data sources' (Set to 'Select'), and 'Visualization' (Set to '(1) filter selected'). The main content area is titled 'Create reports from scratch' and features four options: 'Single object' (Report on a single object such as your contacts), 'Custom Report Builder' (Report on all of your HubSpot data within a streamlined build flow), 'Customer Journey Reports' (Analyze all the touchpoints in your customer experience in one report), and 'Attribution' (See what interactions or activities drove conversions and revenue). The 'Custom Report Builder' option is highlighted with an orange border. Below this, there is a section 'Create reports from templates' with two report templates: 'Average session duration by session date with source breakdown' (On average, how long are visitors staying on my website?) and 'Became a customer date by average days to close' (How is my average days to close a contact as a customer trending over time?). The first template shows a line chart for 'Website pages' with data series for Organic search, Direct traffic, Other campaigns, Referrals, and Organic social. The second template shows a line chart for 'Contacts' with data series for Average Days To Close.

# Custom Journey

Analyse 7 touchpoints on contact journeys with you

[HubSpot KB article](#)



# Lifecycle Stage

Set the lifecycle stage on a contact when a deal is created

- Default is Opportunity
- Some companies prefer Sales Qualified

The screenshot displays the HubSpot Lifecycle Stage Settings interface. The 'Contacts' tab is selected in the top navigation. In the left sidebar, 'Contacts' is highlighted under 'Data Management'. The main content area shows the 'Automation' section with three rules. The first rule, 'Set lifecycle stage when a deal is created', is highlighted with an orange box and has a blue arrow pointing to the 'Sales Qualified Lead' option in its dropdown menu. The second rule, 'Set lifecycle stage when a deal is won', is also highlighted with an orange box. The third rule, 'Set lifecycle stage when a contact or company is created', is not highlighted. The 'Record Customization' tab is also visible in the top navigation.

# Lists

New 'Added to List date'

(But you can't sort by it!)

HubShots | Webinar | 11 Things | October 2022 | Registrants

Search in list

Active list Size: 57 contacts

Filters

Group 1

Form submission

- has filled out HubShots | Webinar | Sign Up Form on Any page

	NAME	ADDED TO LIST DATE	NUMBER OF PAGE VIEWS	MARKETING EMAILS CLICKED	MARKETING EMAILS OPENED	MAR
<input type="checkbox"/>	[Avatar]	20 Oct 2022 3:35 PM	0	--	1	
<input type="checkbox"/>	[Avatar]	20 Oct 2022 1:25 PM	2	1	1	
<input type="checkbox"/>	[Avatar]	20 Oct 2022 10:30 AM	0	1	1	
<input type="checkbox"/>	[Avatar]	20 Oct 2022 10:22 AM	2	--	--	
<input type="checkbox"/>	[Avatar]	20 Oct 2022 9:42 AM	2	--	--	
<input type="checkbox"/>	[Avatar]	20 Oct 2022 9:14 AM	3	1	1	
<input type="checkbox"/>	[Avatar]	20 Oct 2022 8:47 AM	3	--	--	
<input type="checkbox"/>	[Avatar]	20 Oct 2022 8:34 AM	2	--	--	
<input type="checkbox"/>	[Avatar]	20 Oct 2022 7:58 AM	4	--	--	
<input type="checkbox"/>	[Avatar]	19 Oct 2022 6:22 PM	10	--	--	
<input type="checkbox"/>	[Avatar]	19 Oct 2022 4:01 PM	3	1	1	
<input type="checkbox"/>	[Avatar]	19 Oct 2022 2:29 PM	2	1	1	
<input type="checkbox"/>	[Avatar]	19 Oct 2022 2:17 PM	2	1	1	
<input type="checkbox"/>	[Avatar]	19 Oct 2022 11:03 AM	2	1	1	
<input type="checkbox"/>	[Avatar]	19 Oct 2022 10:36 AM	4	--	1	
<input type="checkbox"/>	[Avatar]	19 Oct 2022 10:30 AM	2	--	1	
<input type="checkbox"/>	[Avatar]	18 Oct 2022 12:10 PM	2	--	--	

< Prev 1 Next > 100 per page

Help

## [2] Settings Things

HubShots

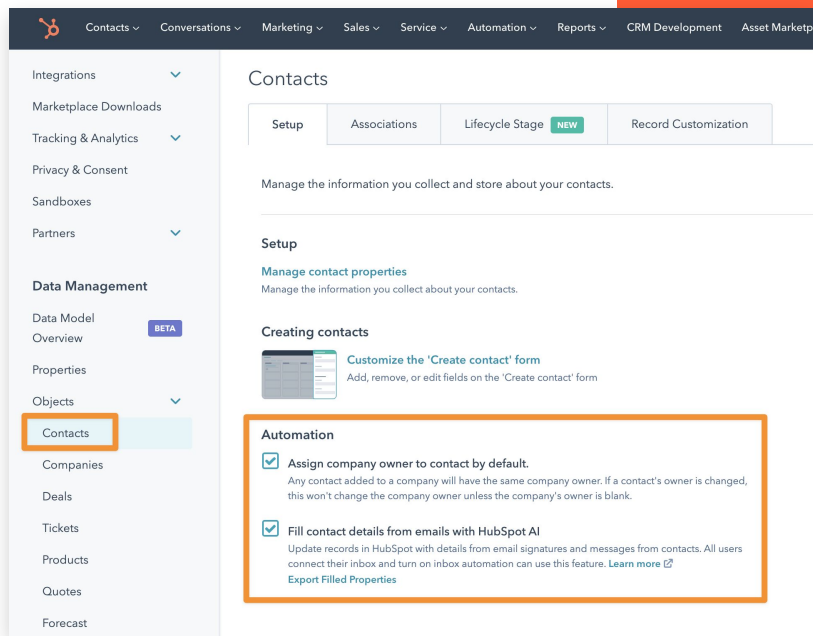
### In the 'cog' area

- Data enrichment
- Email settings
- Analytics views
- Score properties
- Permissions

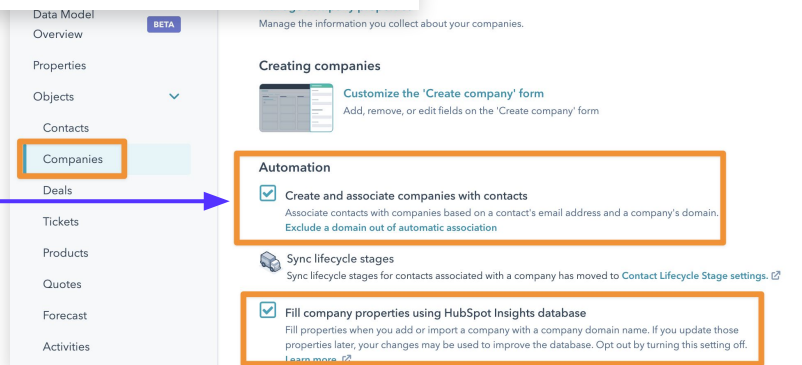
# Data Enrichment

Handy settings to enable

[HubSpot KB article](https://www.hubshots.com/11-things-deck)



My Favourite



# Data Enrichment

Enable this in your personal  
profile

[HubSpot KB article](#)

The screenshot shows the HubSpot User Preferences | Email settings page. The left sidebar has a 'Settings' section with 'General' highlighted. The top navigation bar has 'Email' highlighted. The main content area is titled 'General' and has tabs for 'Profile', 'Email', 'Calling', 'Calendar', and 'Tasks'. The 'Email' tab is selected. Below the tabs, there is a section for 'Email' with a 'Connect personal email' button. Below that, there is a table with columns 'EMAIL', 'STATUS', and 'INBOX AUTOMATION'. The table has one row for 'craig@xen.com.au' with 'Inbox type: G Suite', 'Enabled' status, and a checked 'INBOX AUTOMATION' toggle. Below the table, there is a 'Configure' section with 'Add email alias', 'Edit email signature', and 'Include unsubscribe link' options. The 'Never Log' section is at the bottom.

EMAIL	STATUS	INBOX AUTOMATION
craig@xen.com.au Inbox type: G Suite	Enabled	<input checked="" type="checkbox"/>

# Email Preferences

Let your contacts select what's relevant to them

The screenshot shows the HubSpot 'Email' settings page, specifically the 'Subscription Types' tab. The left sidebar has 'Email' selected under the 'Marketing' section. The main content area displays a table of subscription types. A callout box highlights the 'Manage preferences' link for a contact named Michele Connolly.

Subscription Types

Filter by status: Active Filter by language: All

NAME	DESCRIPTION	LANGUAGE(S)	STATUS
General	General company and product updates	English	Active
Featured Content	Webinars, eBooks, videos, case studies, blogs - the best of our website content	Missing primary language	Active
Product Updates	Feature releases, What's New guides, beta testing programs, and more	Missing primary language	Active
Training	Announcements for training courses, and training webinars	Missing primary language	Active
Events	Roadshows, User Groups, and other events hosted by	Missing primary language	Active
Transactional	Non-marketing email communications such as webinar & event confirmations.	Missing primary language	Active
One-to-one	Personalised one-to-one emails direct from the HubSpot default subscription type	English	Active

Callout box content:

Michele Connolly, PO Box 527, Chatswood, NSW 2057, Australia

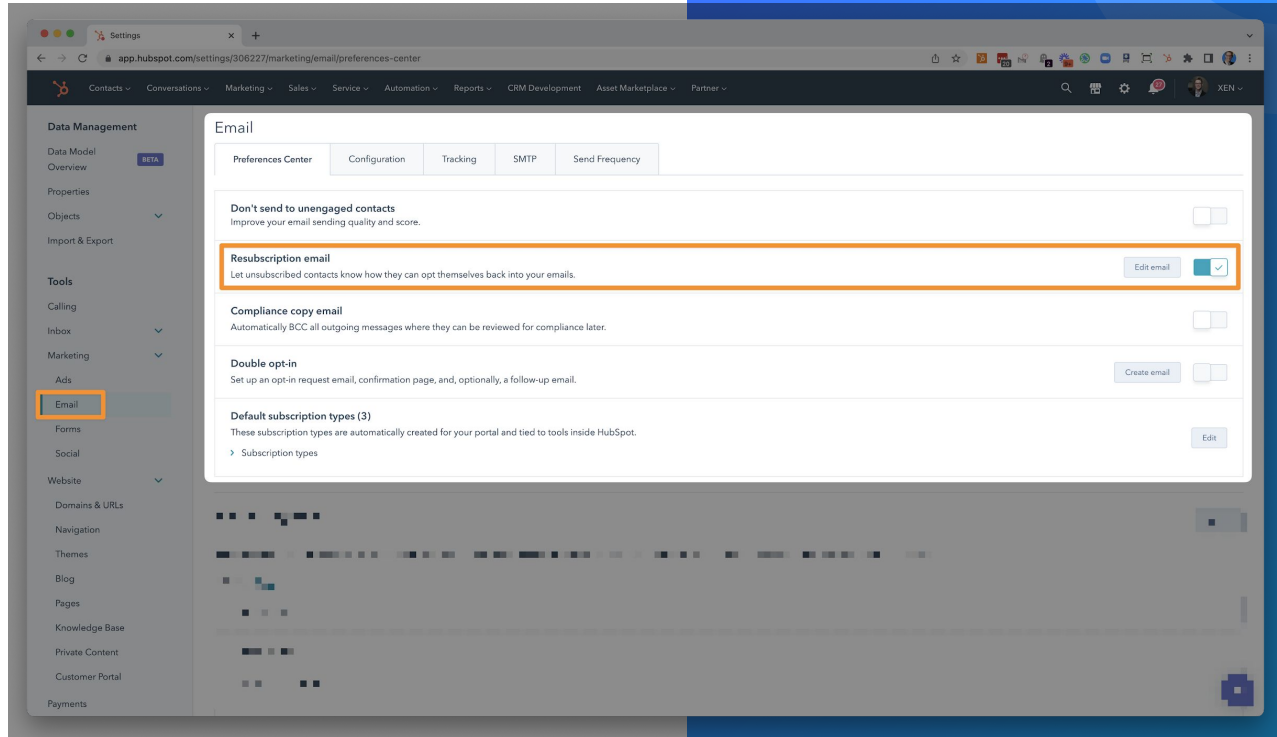
[Unsubscribe](#) [Manage preferences](#)



# Resubscribe Email

Gotcha: if not turned on,  
contacts who unsubscribe  
can't resubscribe

[HubSpot KB article](#)



# Analytics Views

Segment your traffic

The screenshot displays the HubSpot Analytics Views interface. The left sidebar shows the 'Settings' menu with 'Tracking & Analytics' expanded and 'Tracking Code' highlighted. The main content area shows the 'Reports & Analytics Tracking' section with three tabs: 'Tracking code', 'Advanced Tracking', and 'Analytics views' (which is active). Below the tabs, there's a table of 'SOURCES VIEWS' and a table of 'CUSTOM ANALYTICS VIEWS'.

**SOURCES VIEWS**

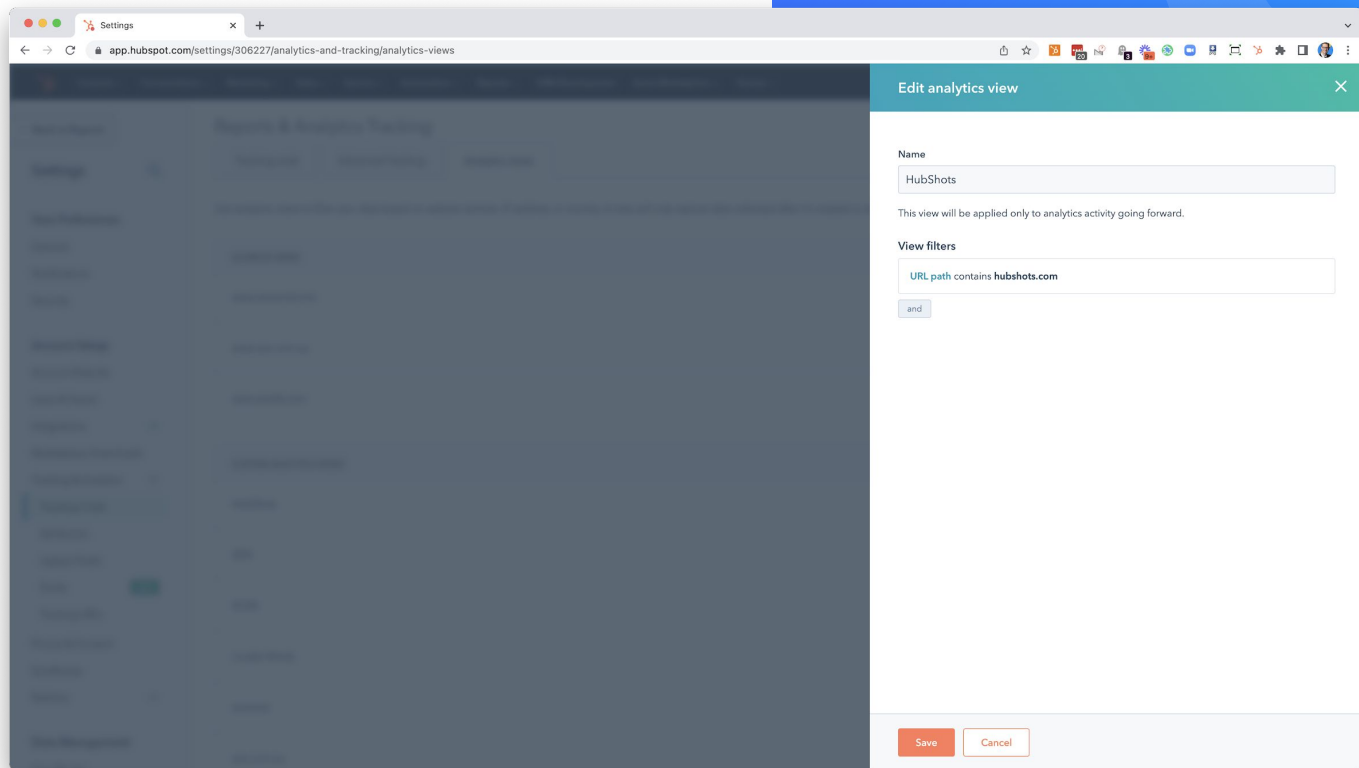
www.xensend.com
www.xen.com.au
www.xenkb.com

**CUSTOM ANALYTICS VIEWS**

	CREATED DATE	LAST MODIFIED
HubShots	6/9/2018	
XEN	6/9/2018	
GOW	6/9/2018	5/8/2021
Louder Minds	9/10/2018	
xensolar	19/8/2020	
xen.com.au	19/8/2020	

# Analytics Views

Across domains



# Analytics Views

Across geographies

Edit analytics view

Name

AU Traffic

This view will be applied only to analytics activity going forward.

View filters

Country equals **Australia**

and

Save

Cancel

Edit analytics view

Name

North America Traffic

This view will be applied only to analytics activity going forward.

View filters

Country is any of **United States, Canada**

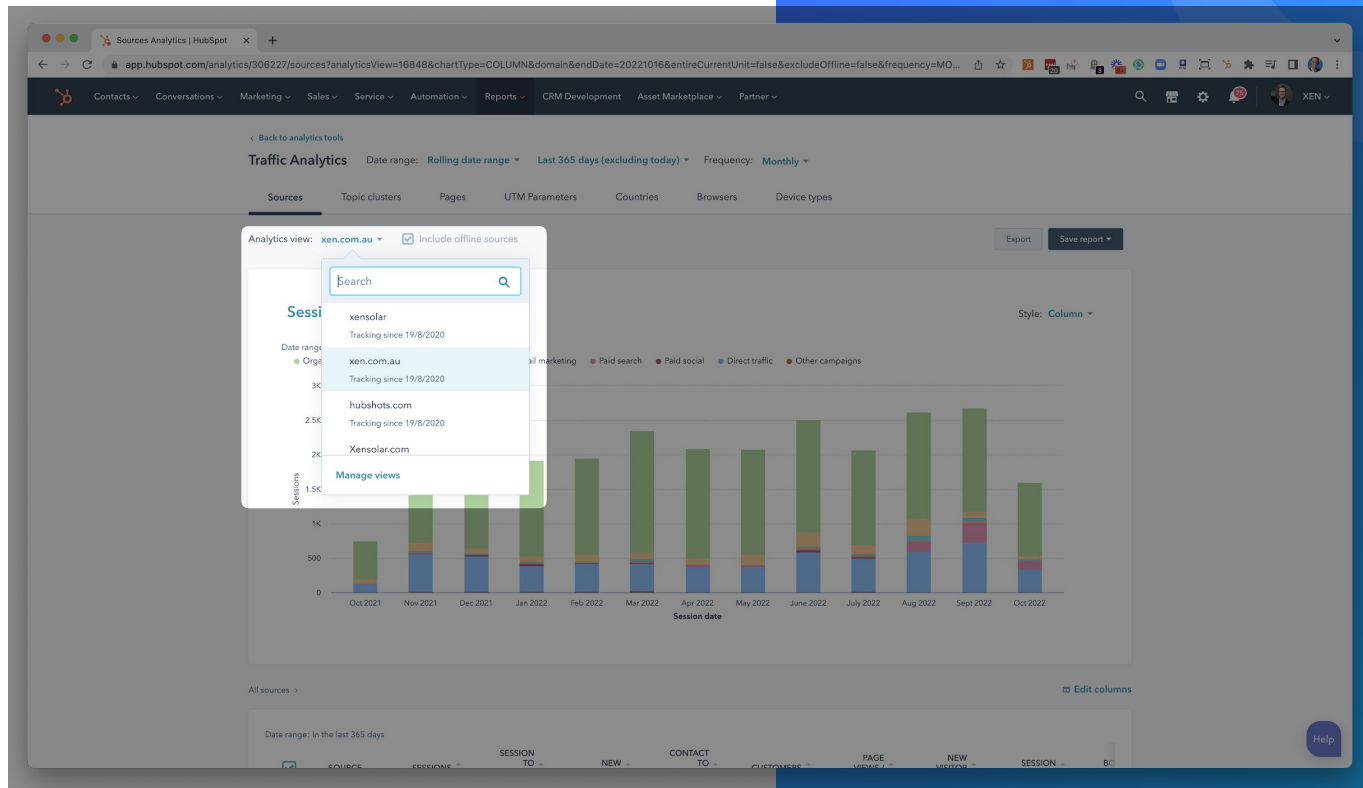
and

Save

Cancel

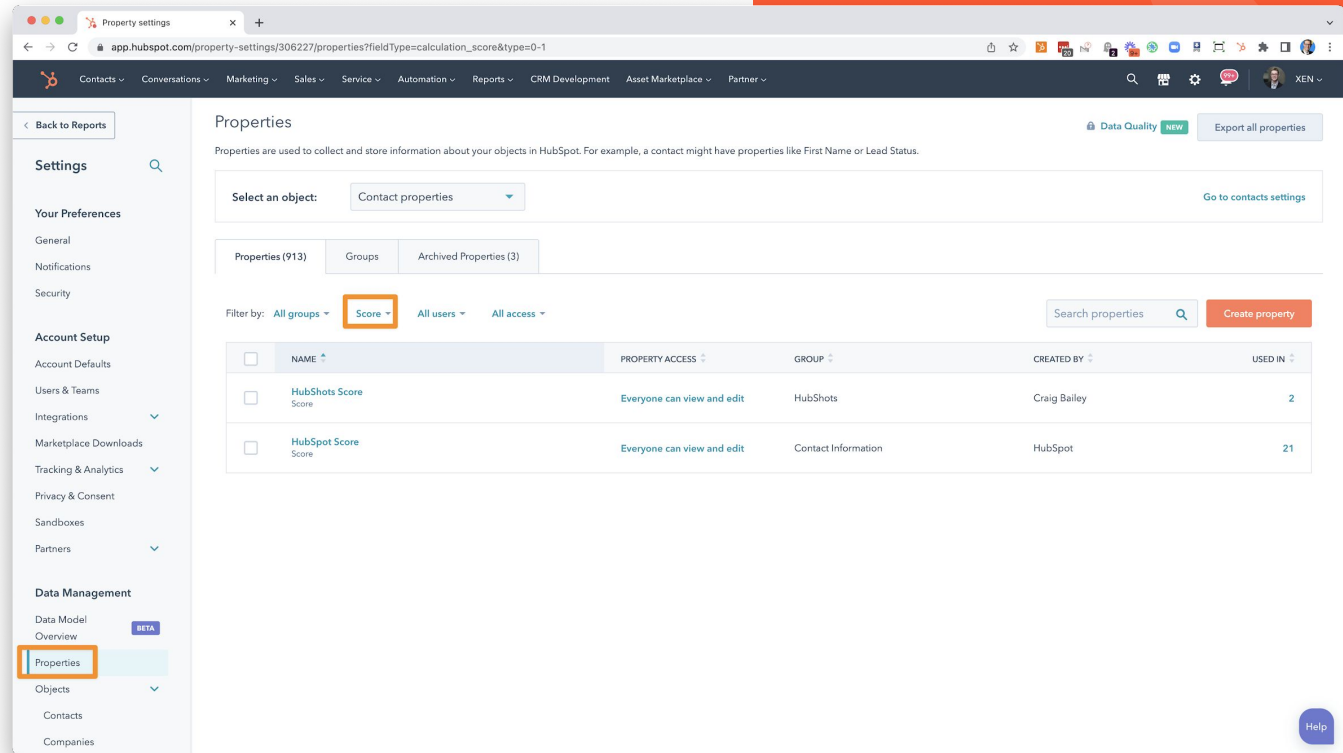
# Analytics Views

Use in reports



# Score Properties

You can create 'Score' properties



The screenshot shows the HubSpot Properties settings page. The left sidebar contains the following sections:

- Settings
  - Your Preferences
    - General
    - Notifications
    - Security
  - Account Setup
    - Account Defaults
    - Users & Teams
    - Integrations
    - Marketplace Downloads
    - Tracking & Analytics
    - Privacy & Consent
    - Sandboxes
    - Partners
  - Data Management
    - Data Model Overview (BETA)
    - Properties**
    - Objects
    - Contacts
    - Companies

The main content area is titled "Properties" and includes a description: "Properties are used to collect and store information about your objects in HubSpot. For example, a contact might have properties like First Name or Lead Status." Below this is a "Select an object:" dropdown menu set to "Contact properties" and a "Go to contacts settings" link. There are tabs for "Properties (913)", "Groups", and "Archived Properties (3)". A filter bar shows "Filter by: All groups", "Score" (highlighted with an orange box), "All users", and "All access". A search bar and a "Create property" button are also present. The table below lists the properties:

<input type="checkbox"/>	NAME	PROPERTY ACCESS	GROUP	CREATED BY	USED IN
<input type="checkbox"/>	HubShots Score	Everyone can view and edit	HubShots	Craig Bailey	2
<input type="checkbox"/>	HubSpot Score	Everyone can view and edit	Contact Information	HubSpot	21

# Score Properties

They allow you to build scores based on behaviours

Edit property

Score criteria

Test score criteria

Filters applied: 3 of 100

Positive

Add points when a record meets this criteria

Score: 15

Actions

List membership  
is member of HubShots | Engaged  
Subscribers

AND

AND

Score: 11

Actions

List membership  
is member of HubShots | Webinar | 11 Things |  
October 2022 | Registrants

AND

Negative

Remove points when a record meets this criteria

Score: -6

Actions

Email Domain is equal to any of gmail.com,  
outlook.com, hotmail.com, or yahoo.com

AND

+ Add criteria

Save

Cancel

# Team Management

Permission sets:

- Consistent setup
- Includes paid seat permissions

(Enterprise tier)

The screenshot shows the HubSpot Settings interface for a user named XEN. The 'Permission Sets' tab is selected, displaying a table of pre-defined permission sets. The table has columns for a checkbox, NAME, ACCESS, and USERS. The permission sets listed include various roles like Strategist, Specialist, Coordinator, Developers, and Admin, each with specific access levels across different HubSpot modules.

	NAME	ACCESS	USERS
<input type="checkbox"/>	XEN HubSpot Strategist + Sales Enterprise + Service Enterprise	Service Enterprise   Contacts   Account   Reports   Sales Enterprise   Partner program too	2
<input type="checkbox"/>	XEN HubSpot Specialist + Service Enterprise	Service Enterprise   Contacts   Reports   Sales   Partner program tools   Marketing	2
<input type="checkbox"/>	XEN HubSpot Specialist	Service   Contacts   Account   Reports   Sales   Marketing	0
<input type="checkbox"/>	XEN Digital Coordinator	Service   Contacts   Reports   Sales   Partner program tools   Marketing	4
<input type="checkbox"/>	XEN Developers	Contacts   Account   Sales   Marketing	2
<input type="checkbox"/>	View Only	Service   Contacts   Reports   Sales   Marketing	4
<input type="checkbox"/>	Super Admin	Super Admin	7
<input type="checkbox"/>	Inactive	Contacts	5
<input type="checkbox"/>	HealthCheck Access	Service   Contacts   Account   Reports   Sales   Marketing	0
<input type="checkbox"/>	CMS Developer	Contacts   Marketing	1



# [3] CRM Things

HubShqts

## Across the hubs

- Comments
- Notifications
- Global search
- Folders
- Views

# Comments

Collaboration everywhere...

The screenshot displays the HubSpot workflow editor interface. The workflow is titled "GOW | Oi5 | Send Daily Task Emails | Child". The workflow steps are as follows:

- Contact enrollment trigger**: No triggers set. Contacts can still be enrolled manually.
- 1. Delay for a set amount of time**: 1 minute, 4 contacts in this action.
- 2. Send email**: GOW | Oi5 | Daily Task Email, 21.5% click rate / 710 met goal criteria.
- 3. Delay for a set amount of time**: 23 hours, 58 minutes, 2473 contacts in this action.

A comment panel is open on the right side of the screen. It displays the message: "There are no comments on this workflow". Below this message, it says: "Collaborate with coworkers with comments. Leave a comment below and notify a coworker using @mentions." The panel also includes a text input area for writing a comment, a "Comment" button, and a "Cancel" button.

# Comments

Work together in HubSpot

The screenshot shows the HubSpot editor interface for a page titled 'HubShots | Subscribe (OLD)'. The page content includes the HubShots logo, a 'SUBSCRIBE TO HUBSHOTS' heading, and a paragraph about 'Practical HubSpot and Digital Marketing Insights'. A sidebar on the left contains various editing tools like 'Add', 'Contents', 'Theme', 'Search', 'Header', 'Image', 'Static modules', and 'Form'. On the right, a comments sidebar is open, displaying a list of comments from users like Craig Bailey and Ian Jacob. The comments discuss the new Contents folder view and a task in Teamwork. The interface also shows a 'Publish' button and a 'Help' button.

HubShots | Subscribe (OLD)

Content Settings Optimize Publishing Options

Run a test

Home >

Edit page

Add Contents Theme

Search

X Header

Image

H Contact Ian and Craig Title

T Sub Title

Static modules

Rich Text

T Please Fill In the Form Title

Static modules

Form

H Notify Me Section Title

H CTA Strip Section Title

Take The Challenge CTA

HubShots

Podcast Episodes Work With Us Subscribe

SUBSCRIBE TO HUBSHOTS

Practical HubSpot and Digital Marketing Insights

Each Week Ian Jacob & Craig Bailey compile the latest HubSpot and Digital Marketing news, tips & insights and put out a comprehensive email

The email includes all the items covered in their weekly podcast, plus bonus links, strategies, trends and analysis that doesn't make it into the show.

Typical updates include:

- HubSpot marketing features
- HubSpot sales features
- Marketing trends and insights
- Recommended reading across SEO, social media, paid advertising and content strategy
- Strategic initiatives that are working now
- Tips and tactics that are generating results for clients

I think our Subscribe page could do with a bit of love - isn't particularly interesting, and doesn't really indicate the compelling benefits of subscribing...

Your thoughts?

Reply

Craig Bailey 31 Aug at 2:13 PM

btw we don't seem to have the new Contents folder view showing on pages yet.

Reply

Craig Bailey 31 Aug at 2:16 PM

We have a task in Teamwork setup for this: <https://projects.xen.com.au/#/tasks/24674689>

Reply

Ian Jacob 31 Aug at 2:24 PM

@Craig Bailey I agree. Let's create a video showing them what they get.

Reply

Craig Bailey Today at 10:39 AM

This is the old style page. New page is here:

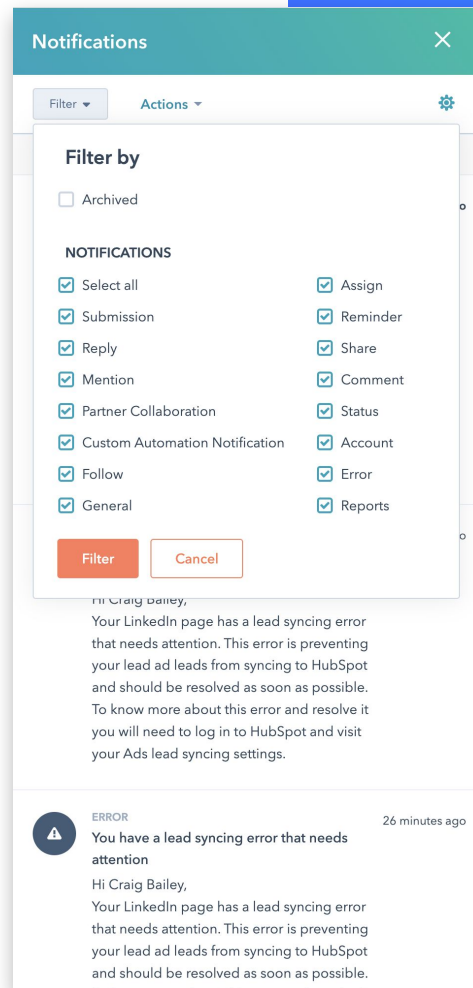
Write a comment. Send your colleague a notification by typing @ followed by their name.

B I U T Link Image Video

Comment Cancel

# Notifications

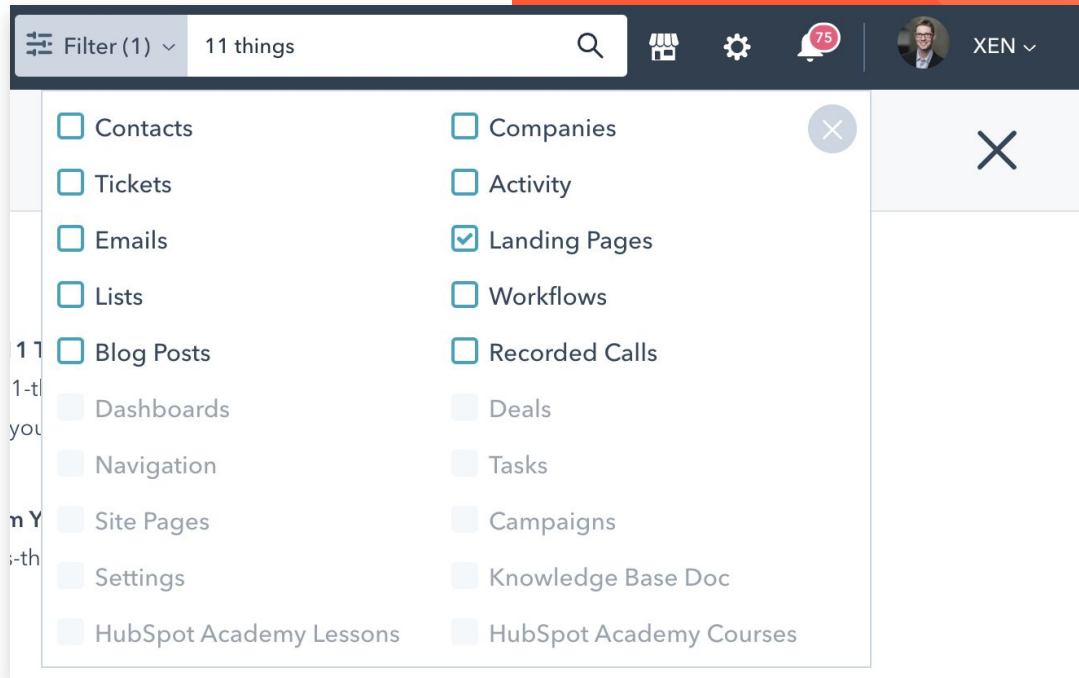
Yes, you can filter the Notifications  
(eg just see Comments)



# Global Search

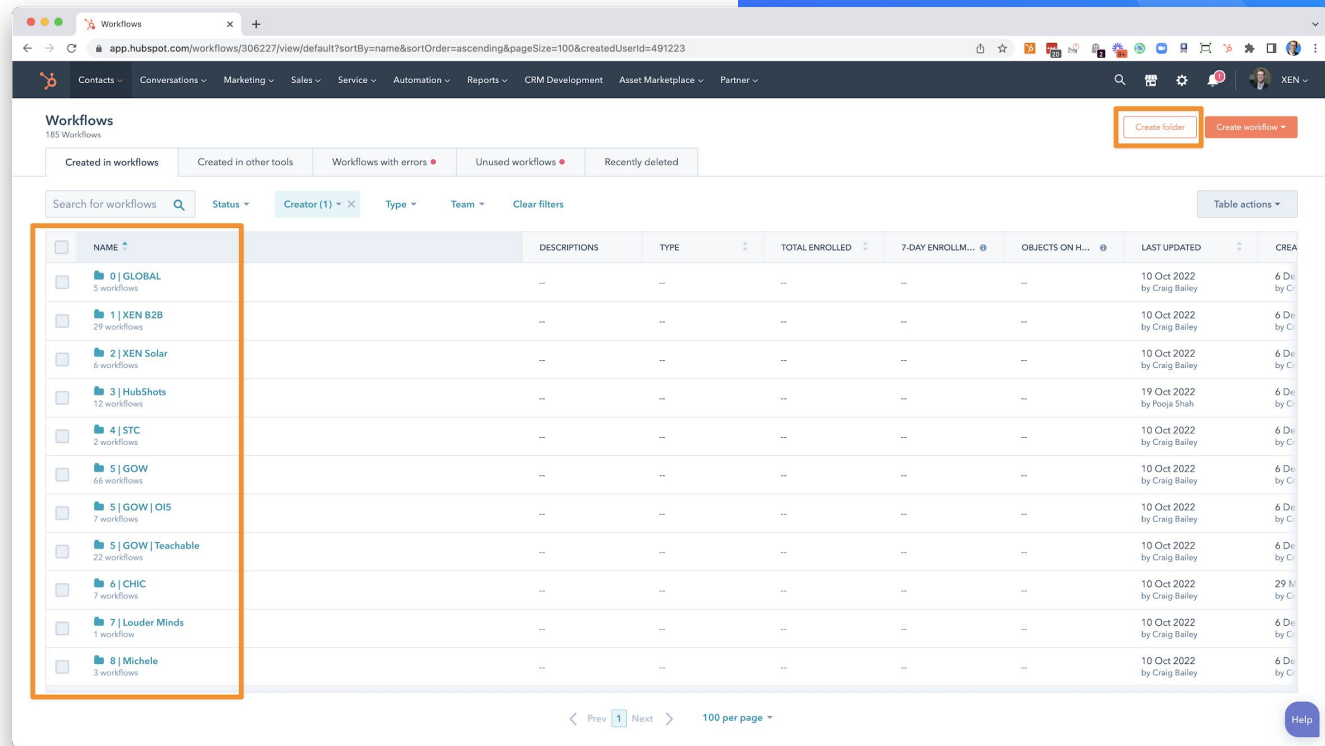
Save a few clicks...

Search on anything (objects and assets)



# Folders

Folders = quicker navigation



The screenshot shows the HubSpot Workflows interface. At the top, there's a navigation bar with various tool categories. Below it, the 'Workflows' section is active, showing 185 workflows. A sidebar on the left lists workflow folders, which are highlighted with an orange box. The main table displays a list of workflows with columns for Name, Descriptions, Type, Total Enrolled, 7-Day Enrollment, Objects on Hold, Last Updated, and Created By. The folders listed in the sidebar are: 0 | GLOBAL (5 workflows), 1 | XEN B2B (29 workflows), 2 | XEN Solar (6 workflows), 3 | HubShots (12 workflows), 4 | STC (2 workflows), 5 | GOW (66 workflows), 5 | GOW | OIS (7 workflows), 5 | GOW | Teachable (22 workflows), 6 | CHIC (7 workflows), 7 | Louder Minds (1 workflow), and 8 | Michele (3 workflows).

NAME	DESCRIPTIONS	TYPE	TOTAL ENROLLED	7-DAY ENROLLM...	OBJECTS ON H...	LAST UPDATED	CREA
0   GLOBAL 5 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C
1   XEN B2B 29 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C
2   XEN Solar 6 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C
3   HubShots 12 workflows	...	...	...	...	...	19 Oct 2022 by Pooja Shah	6 De by C
4   STC 2 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C
5   GOW 66 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C
5   GOW   OIS 7 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C
5   GOW   Teachable 22 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C
6   CHIC 7 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	29 M by C
7   Louder Minds 1 workflow	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C
8   Michele 3 workflows	...	...	...	...	...	10 Oct 2022 by Craig Bailey	6 De by C

# Folders

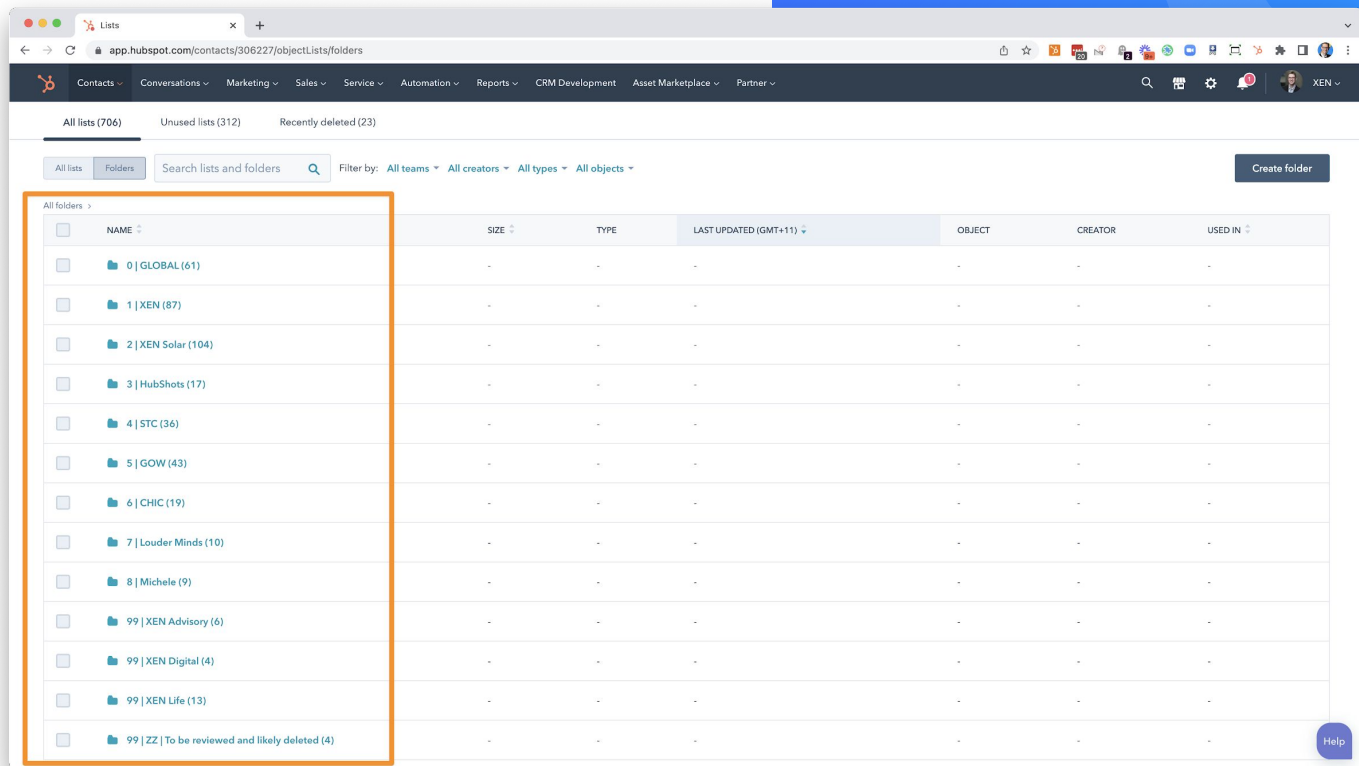
Helps when you can't sort by  
some columns

The screenshot shows the HubSpot Workflows interface. At the top, there's a navigation bar with various tabs like Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, CRM Development, Asset Marketplace, and Partner. Below this, the 'Workflows' section is active, showing 7 workflows. A breadcrumb trail '5 | GOW | OIS' is highlighted with an orange box. Below the breadcrumb, there's a search bar and filters for Status, Creator (1), Type, Team, and Clear filters. A 'Table actions' dropdown is on the right. The main table lists workflows with columns: NAME, DESCRIPTIONS, TYPE, TOTAL ENROLLED, 7-DAY ENROLLMENT AVERAGE, OBJECTS ON HOLD, LAST UPDATED, and CREATED. The columns '7-DAY ENROLLMENT AVERAGE' and 'OBJECTS ON HOLD' are highlighted with an orange box. The table shows several workflows, including 'GOW | OIS | Send Daily Task Emails | Child', 'GOW | OIS | Send Daily Task Emails | Parent', 'GOW | OIS | Welcome', 'GOW | Properties | OIS | Set End Daily Email', 'GOW | Properties | OIS | Set Start Daily Email', 'zz | GOW | OIS | Send Daily Task Emails | Child', and 'zz | GOW | OIS | Send Daily Task Emails | Parent'. At the bottom, there's a pagination bar showing 'Prev 1 Next' and '100 per page'.

<input type="checkbox"/>	NAME	DESCRIPTIONS	TYPE	TOTAL ENROLLED	7-DAY ENROLLMENT AVERAGE	OBJECTS ON HOLD	LAST UPDATED	CREATED
<input type="checkbox"/>	GOW   OIS   Send Daily Task Emails   Child	...	Contact Standard	4,772,935	17,196	2,478	27 Jul 2022	31 Dec 2020 by Craig Bailey
<input type="checkbox"/>	GOW   OIS   Send Daily Task Emails   Parent	...	Contact Standard	4,789,966	17,201	0	27 Jul 2022	31 Dec 2020 by Craig Bailey
<input type="checkbox"/>	GOW   OIS   Welcome	...	Contact Standard	15,022	53	16	27 Jul 2022	21 Nov 2021 by Craig Bailey
<input type="checkbox"/>	GOW   Properties   OIS   Set End Daily Email	...	Contact Standard	2,703	4	0	27 Jul 2022	8 Mar 2019 by Craig Bailey
<input type="checkbox"/>	GOW   Properties   OIS   Set Start Daily Email	...	Contact Standard	29,570	68	0	27 Jul 2022	8 Mar 2019 by Craig Bailey
<input type="checkbox"/>	zz   GOW   OIS   Send Daily Task Emails   Child	...	Contact Standard	6,084,599	0	0	27 Jul 2022	8 Mar 2019 by Craig Bailey
<input type="checkbox"/>	zz   GOW   OIS   Send Daily Task Emails   Parent	...	Contact Standard	6,085,615	0	0	27 Jul 2022	8 Mar 2019 by Craig Bailey

# Folders

Easy to see totals with folders



The screenshot shows the HubSpot Lists interface. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, CRM Development, Asset Marketplace, and Partner. Below the navigation bar, there are tabs for 'All lists (706)', 'Unused lists (312)', and 'Recently deleted (23)'. A search bar is present with the text 'Search lists and folders'. To the right of the search bar, there are filters for 'All teams', 'All creators', 'All types', and 'All objects'. A 'Create folder' button is located on the right side of the interface.

The main content area displays a table of folders. The table has the following columns: NAME, SIZE, TYPE, LAST UPDATED (GMT+11), OBJECT, CREATOR, and USED IN. The 'All folders' column is highlighted with an orange box. The table lists 14 folders, each with a folder icon, a name, and a count in parentheses.

NAME	SIZE	TYPE	LAST UPDATED (GMT+11)	OBJECT	CREATOR	USED IN
0   GLOBAL (61)	-	-	-	-	-	-
1   XEN (87)	-	-	-	-	-	-
2   XEN Solar (104)	-	-	-	-	-	-
3   HubShots (17)	-	-	-	-	-	-
4   STC (36)	-	-	-	-	-	-
5   GOW (43)	-	-	-	-	-	-
6   CHIC (19)	-	-	-	-	-	-
7   Louder Minds (10)	-	-	-	-	-	-
8   Michele (9)	-	-	-	-	-	-
99   XEN Advisory (6)	-	-	-	-	-	-
99   XEN Digital (4)	-	-	-	-	-	-
99   XEN Life (13)	-	-	-	-	-	-
99   ZZ   To be reviewed and likely deleted (4)	-	-	-	-	-	-

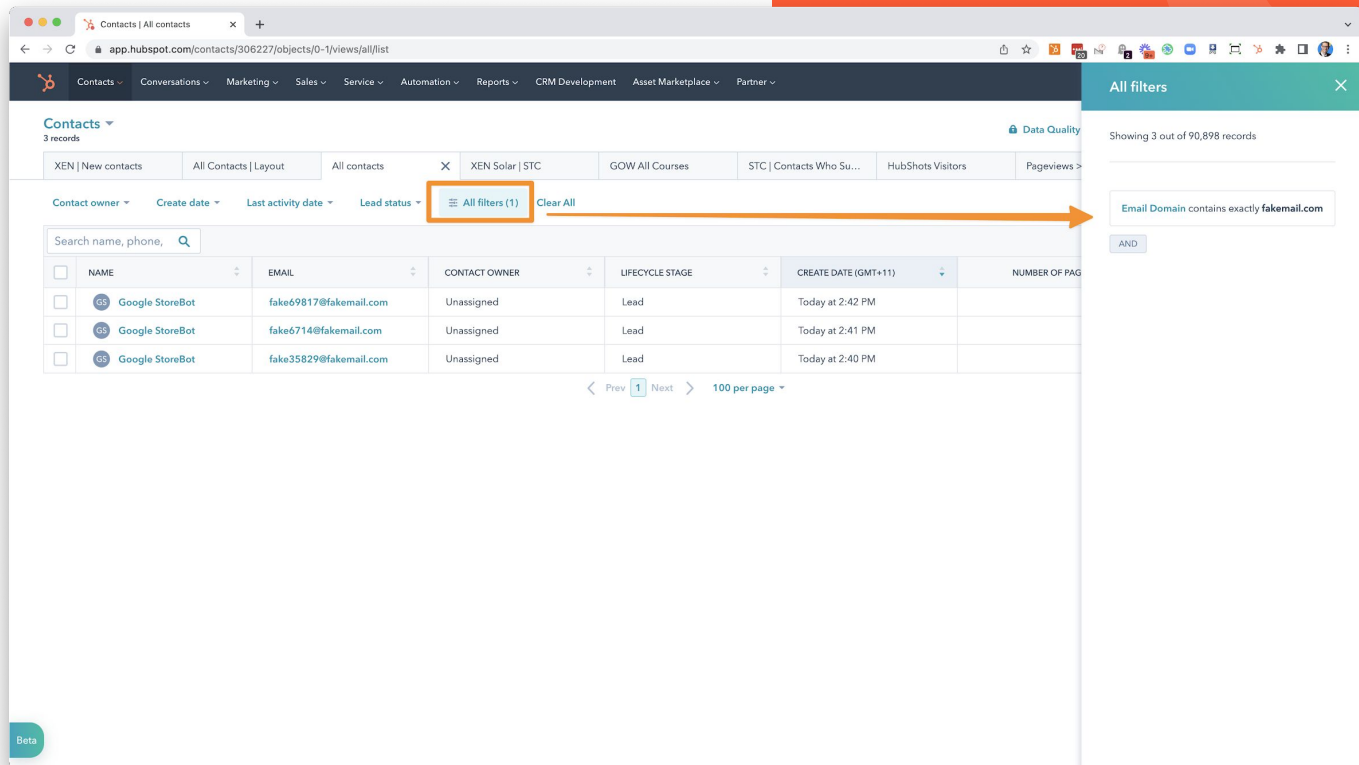


# Folders

TOOL	FOLDERS	SUBFOLDERS
<b>Lists</b>	Yes	<b>Yes</b>
<b>Emails</b>	Yes	<b>Yes</b>
<b>Workflows</b>	Yes	No
<b>Landing pages</b>	Yes (from Actions)	<b>Yes</b>
Website pages	No	
<b>Forms</b>	Yes	No
Campaigns	No	
CTAs	No	
<b>Documents</b>	Yes	No
<b>Sequences</b>	Yes	No
<b>Snippets</b>	Yes	No
<b>Templates</b>	Yes	No
Dashboards	No	
Reports	No	

# Views

Filter criteria on the fly



The screenshot shows the HubSpot Contacts interface. At the top, there's a navigation bar with various tabs like 'Contacts', 'Conversations', 'Marketing', etc. Below this, the 'Contacts' section is active, showing a list of 3 records. The table has columns for NAME, EMAIL, CONTACT OWNER, LIFECYCLE STAGE, CREATE DATE (GMT+11), and NUMBER OF PAGES. An orange box highlights the 'All filters (1)' button, and an orange arrow points from it to the 'All filters' sidebar on the right. The sidebar shows a filter criterion: 'Email Domain contains exactly fakemail.com'. The main table displays three records, all from 'Google StoreBot' with email addresses ending in '@fakemail.com'.

	NAME	EMAIL	CONTACT OWNER	LIFECYCLE STAGE	CREATE DATE (GMT+11)	NUMBER OF PAGES
<input type="checkbox"/>	Google StoreBot	fakemail.com	Unassigned	Lead	Today at 2:42 PM	
<input type="checkbox"/>	Google StoreBot	fakemail.com	Unassigned	Lead	Today at 2:41 PM	
<input type="checkbox"/>	Google StoreBot	fakemail.com	Unassigned	Lead	Today at 2:40 PM	

# Views

**Tip:** You can filter based on Lists

The screenshot displays the HubShots interface. On the left, a table is partially visible with columns for 'Shots Visitors' and 'Pageviews >'. A 'Data Quality' icon is present above the table. On the right, an 'All filters' overlay is shown, indicating 'Showing 57 out of 90,898 records'. A filter condition is highlighted with an orange box: 'List membership is any of HubShots | Webinar | 11 Things | October 2022 | Registrants'. Below this, an 'AND' button is visible.

Shots Visitors	Pageviews >

**All filters** ✕

Showing 57 out of 90,898 records

**List membership** is any of HubShots | Webinar | 11 Things | October 2022 | Registrants

AND

# Views

Set the column layout

The screenshot shows the HubShots interface. At the top, there's a dark navigation bar with a search icon, a storefront icon, a settings gear, a notification bell with '27', and a user profile 'XEN'. Below this, a 'Data Quality' badge with 'NEW' is next to 'Actions', 'Import', and 'Create contact' buttons. A filter bar shows 'Shots Visitors' and 'Pageviews > 20', with '+ Add view (8/50)' and 'All views' links. A 'Save view' button is above the table. The table has columns for 'NUMBER OF PAGEVIEWS' and 'MARKETING EM'. An 'Actions' dropdown menu is open, showing 'Export view' and 'Edit columns' options, which are highlighted with orange boxes.

The 'Choose which columns you see' dialog box is shown. It has a search bar for properties. Under 'Associations', there are checkboxes for 'Primary Company' (checked), 'Associated Companies', 'Associated Deals', 'Associated Tickets', 'Associated Payments', and 'Associated Subscriptions'. A link 'Don't see the property you're looking for? Create a property' is at the bottom. On the right, 'SELECTED COLUMNS (22)' lists: Name, Email, Predictive Lead Score, IP country, Lifecycle stage, Lead status, and Recent conversion. At the bottom are 'Apply', 'Cancel', and 'Remove all columns' buttons.

# Views

Save as your own view, including:

- Filter criteria
- Layout
- Sorting

The screenshot shows the HubSpot Views interface. At the top, there's a dark navigation bar with icons for search, storefront, settings, notifications (27), and a user profile (XEN). Below this, a toolbar contains 'Data Quality' (with a 'NEW' badge), 'Actions' (dropdown), 'Import', and 'Create contact'. The main area shows a table with columns 'ts Visitors' and 'Pageviews > 20'. A '+ Add view (8/50)' button and 'All views' link are on the right. A 'Save view' button is highlighted with an orange box. A 'Read-only view' dialog box is open, explaining that this is a standard view and suggesting to 'Save as new' to keep changes. The 'Save as new' link is also highlighted with an orange box. The dialog box contains 'Save' and 'Reset' buttons. In the background, a table with the header 'NUMBER OF PAGEVIEWS' is visible, showing rows with values 0, 2, 0, 2, 2, 3.

ts Visitors | Pageviews > 20 | + Add view (8/50) | All views

Save view

**Read-only view**

This is a HubSpot standard view or created by someone else. Save as new view to keep your changes.

Save | Reset

[Save as new](#)

NUMBER OF PAGEVIEWS
0
2
0
2
2
3

# [4] Page Things

HubShots

## Marketing Hub items

- Page views
- Drag and Drop builder
- Saved Sections

# Pages Views

New Views experience on  
Landing pages and pages

Filter, Sort, Set Columns  
Save

It's OK if you are confused by  
'pageviews' versus Pages Views

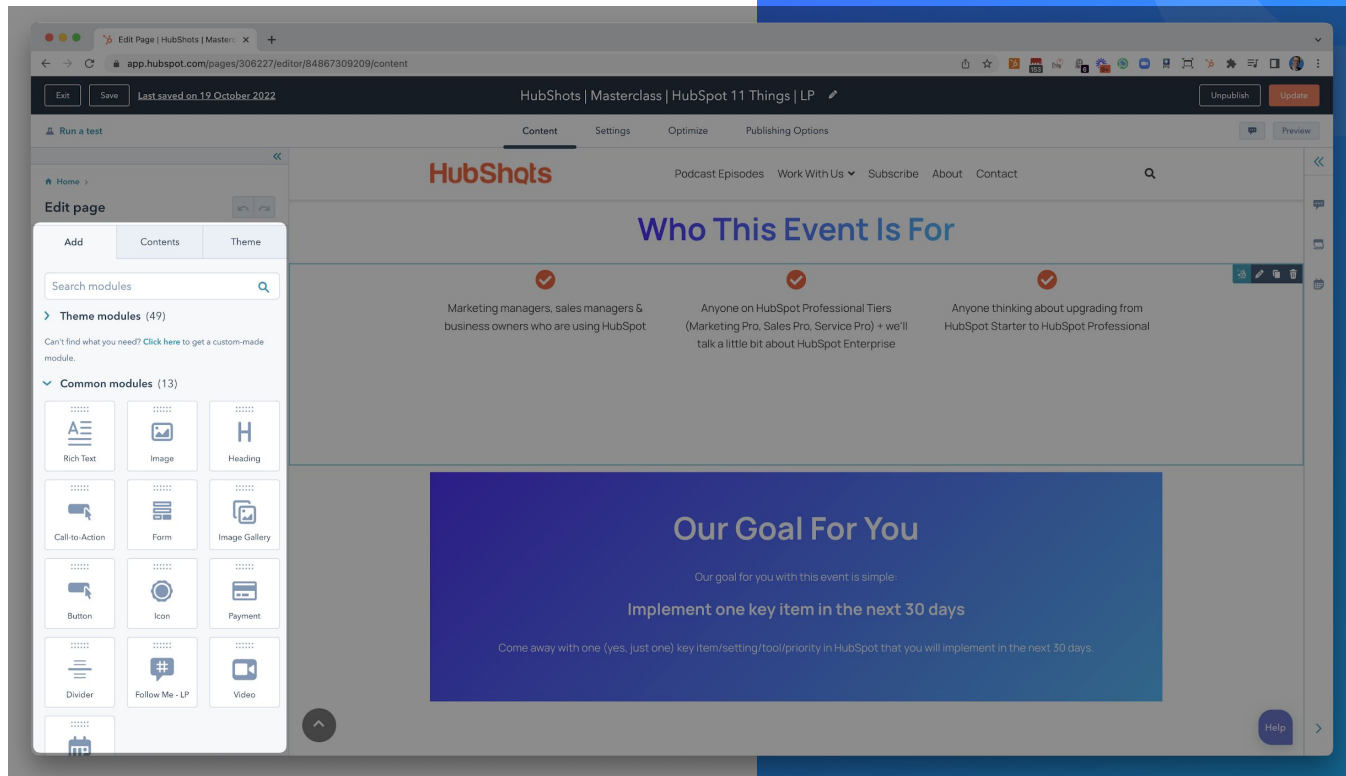
The screenshot shows the HubSpot interface for viewing landing pages. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, CRM Development, Asset Marketplace, and Partner. The main header shows 'Landing pages' with a menu icon and a 'Create' button. Below this, there are filters for 'All pages' and 'HubShots | Landing Pages (11)', along with a search bar and a 'Domain (1)' filter. A 'More filters' button is highlighted with an orange box. The table below has columns for NAME AND URL, PUBLISH STATUS, PUBLISH DATE, UPDATED BY, UPDATED DATE, CREATED BY, CREATED DATE, THEME, CAMPAIGN, and PAGE TITLE. The 'PUBLISH DATE' and 'UPDATED BY' columns are highlighted with orange boxes. The table lists several landing pages, including 'HubShots | Masterclass | 11 Things You're ...', 'HubShots | Building a Campaign in HubSp...', 'HubShots | Masterclass | HubSpot 11 Thin...', 'HubShots | Building a Campaign in HubSp...', 'Marie Test to delete | Event Template', 'HubShots | HubSpot Coaching (V2 TEST)', 'HubShots | HubSpot On-Demand | TY (OLD)', and 'HubShots QuickCheck | Questionnaire'. The bottom of the screen shows a 'Beta' badge, a 'Prev 1 Next' navigation bar, and a '25 per page' dropdown menu.

	NAME AND URL	PUBLISH STATUS	PUBLISH DATE	UPDATED BY	UPDATED DATE	CREATED BY	CREATED DATE	THEME	CAMPAIGN	PAGE TITLE
<input type="checkbox"/>	HubShots   Masterclass   11 Things You're ... www.hubshots.com/events/11-things-youre-probably	Draft	1 Jan 1970 10:00 AM	Pooja Shah	19 Oct 2022 9:34 PM	Pooja Shah	19 Oct 2022 9:01 PM	hubshots-child-CLEA...	HubShots We...	HubShots (DE
<input type="checkbox"/>	HubShots   Building a Campaign in HubSp... www.hubshots.com/hubspot-campaign-start-to-finish	Published	31 May 2022 4:16 PM	Erika Diduro	19 Oct 2022 1:15 AM	Marie Noelle ...	20 May 2022 11:41 AM	hubshots-child-CLEA...	hubshots-ca...	Building a Cam
<input type="checkbox"/>	HubShots   Masterclass   HubSpot 11 Thin... www.hubshots.com/events/11-things-youre-probably	Published	14 Sep 2022 10:21 AM	Erika Diduro	19 Oct 2022 1:15 AM	Marie Noelle ...	14 Sep 2022 10:16 AM	hubshots-child-CLEA...	HubShots We...	HubShots (DE
<input type="checkbox"/>	HubShots   Building a Campaign in HubSp... www.hubshots.com/hubspot-campaign-start-to-finish	Published	26 May 2022 4:56 PM	Erika Diduro	11 Oct 2022 10:08 PM	Marie Noelle ...	20 May 2022 11:48 AM	hubshots-child-CLEA...	hubshots-ca...	Building a Cam
<input type="checkbox"/>	Marie Test to delete   Event Template	Draft	1 Jan 1970 10:00 AM	Craig Bailey	10 Oct 2022 5:30 PM	Marie Noelle ...	12 Sep 2022 7:42 PM	hubshots-child-CLEA...	No campaign	No title
<input type="checkbox"/>	HubShots   HubSpot Coaching (V2 TEST)	Draft	1 Jan 1970 10:00 AM	Craig Bailey	10 Oct 2022 5:27 PM	Roselen Fern...	25 May 2022 5:13 PM	hubshots-child-CLEA...	No campaign	No title
<input type="checkbox"/>	HubShots   HubSpot On-Demand   TY (OLD) www.hubshots.com/hubspot-on-demand/thank-you	Draft	29 Jul 2022 12:34 PM	Craig Bailey	10 Oct 2022 5:27 PM	Madelone AL...	29 Jul 2022 12:29 PM	hubshots-child-CLEA...	hubshots-hu...	Thank you! W
<input type="checkbox"/>	HubShots QuickCheck   Questionnaire www.hubshots.com/quick-check-on-demand/thank-you	Published	9 Sep 2022 3:14 PM	Craig Bailey	10 Oct 2022 5:23 PM	Pooja Shah	9 Sep 2022 3:03 PM	hubshots-child-CLEA...	hubshots-hu...	HubShots Qui

# Page User Experience (UX)

Full Drag-and-Drop experience using Themes

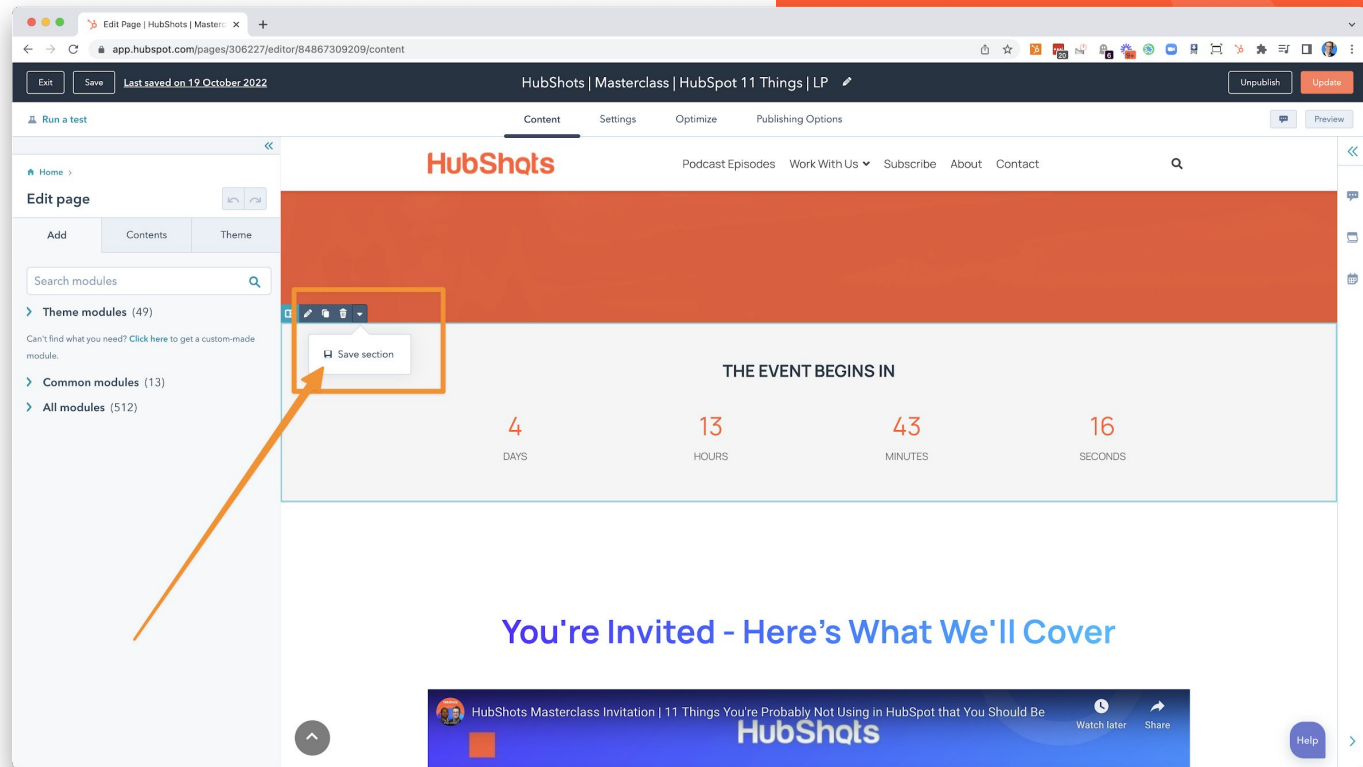
If you don't see these, it means you are using an old-style template





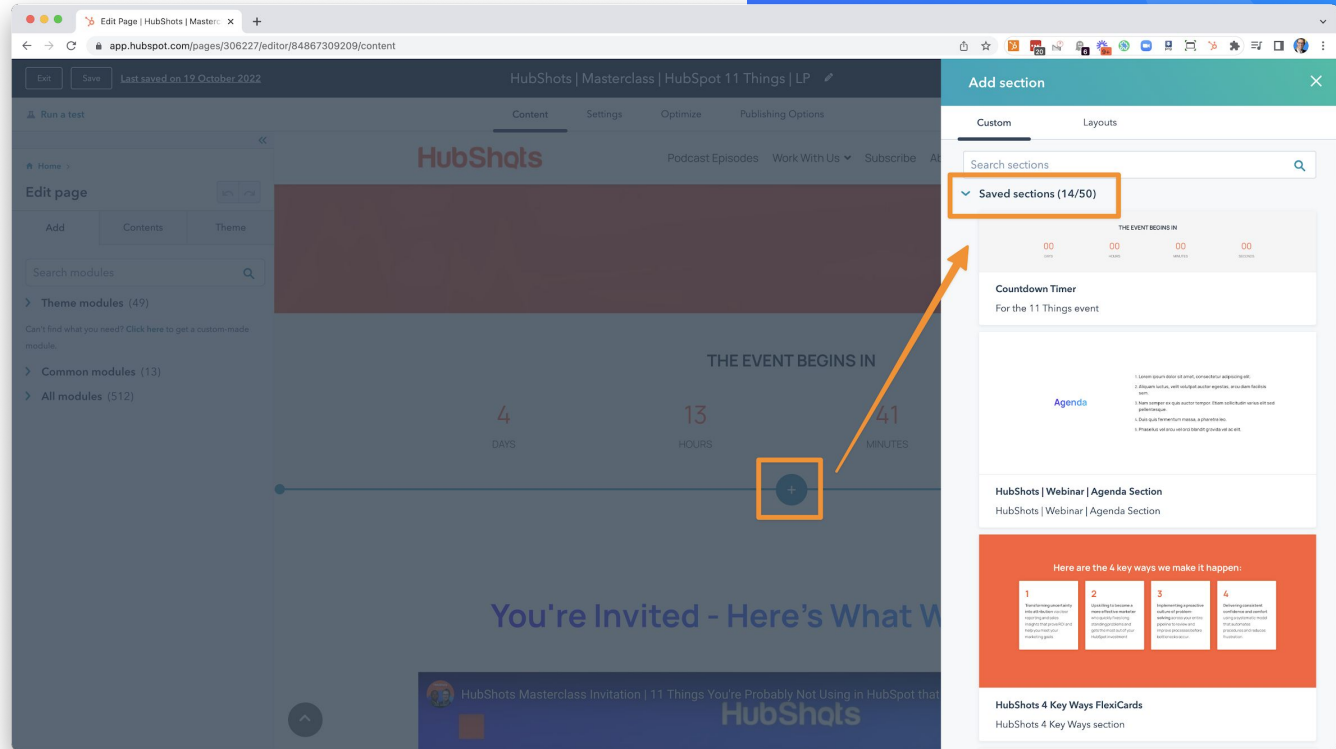
# Page Tip

Save Sections



# Page Tip

Re-use them later on other pages



# [5] Marketing Things

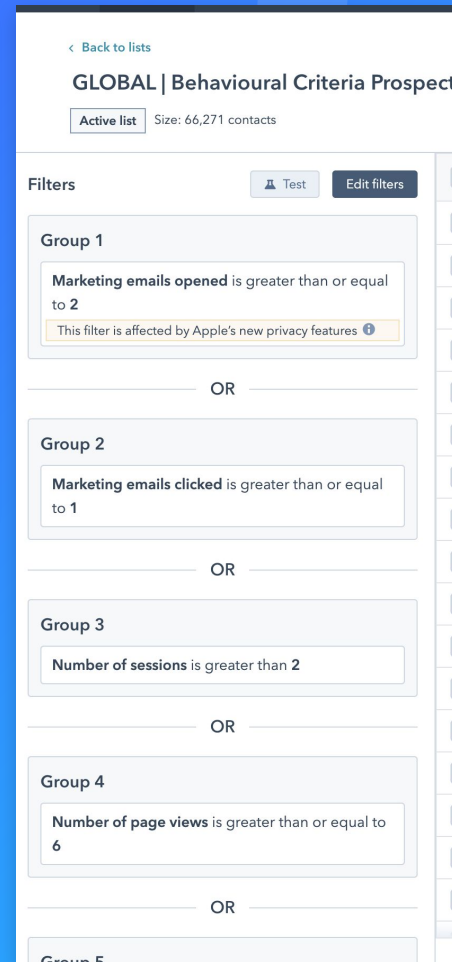
HubShots

## Marketing Hub items

- Lists
- Ads
- Forms
- Campaigns

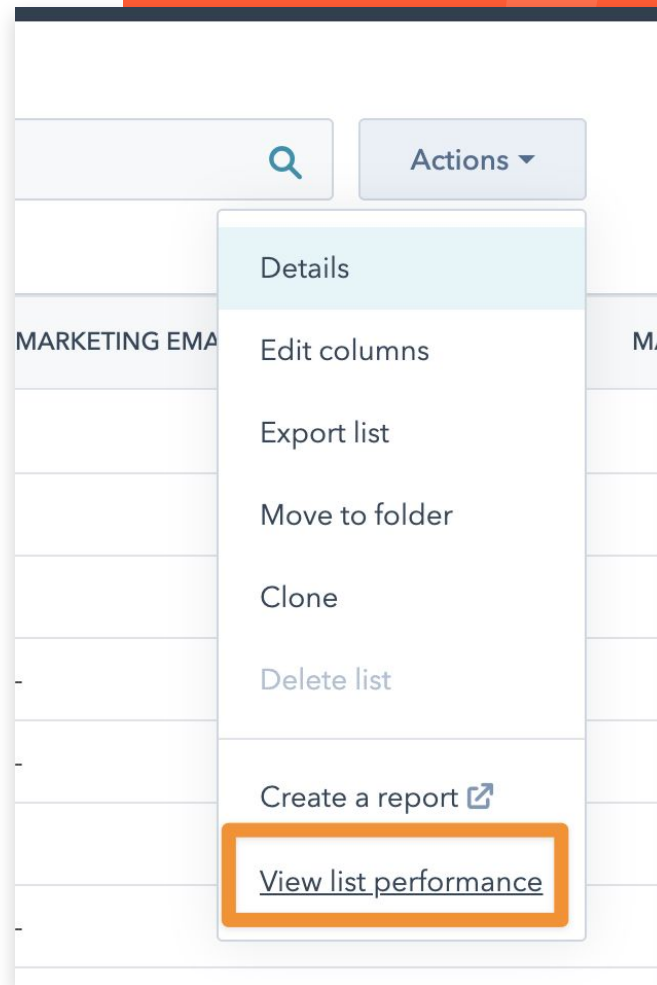
# Lists

Lists provide (much) more advanced filtering criteria than Views



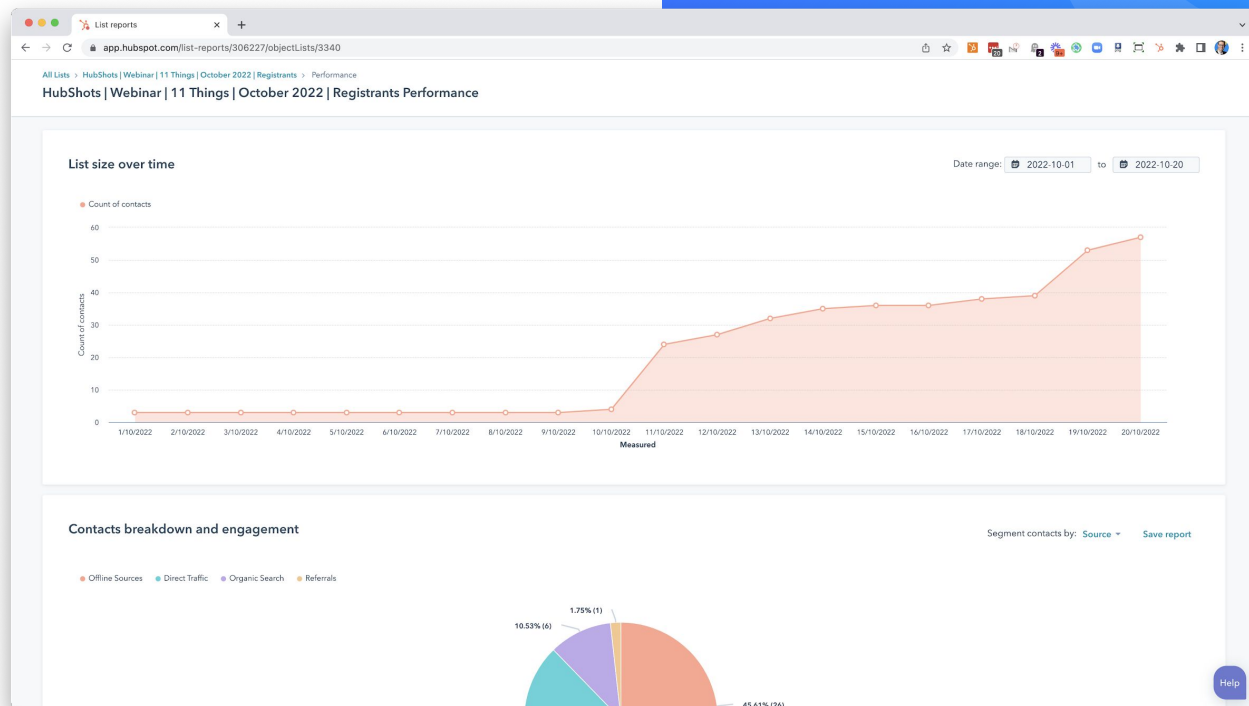
# List Performance

View how a list has grown over time



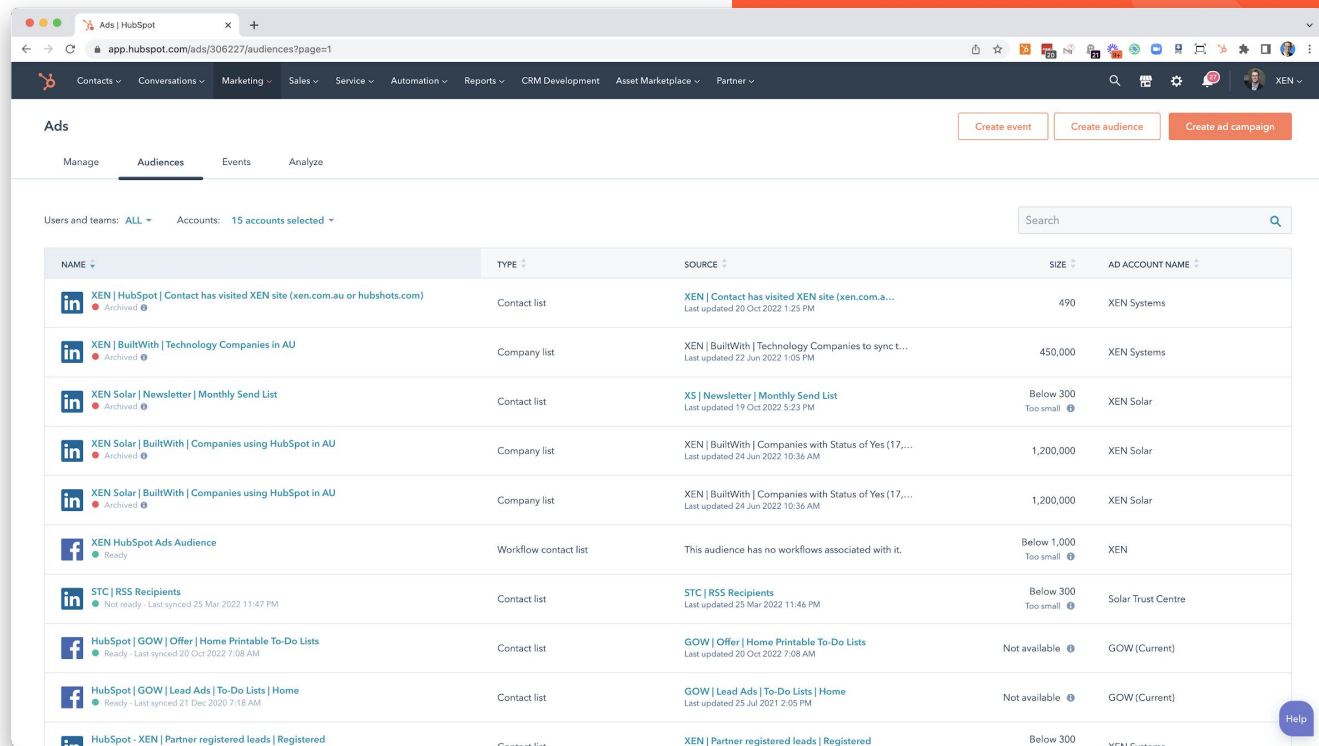
# List Performance

Includes source of contacts



# Ads

Sync contact lists as  
'Audiences' up to Facebook,  
LinkedIn and Google Ads



The screenshot shows the HubSpot Ads interface, specifically the 'Audiences' tab. The page displays a list of synced contact lists, each with columns for NAME, TYPE, SOURCE, SIZE, and AD ACCOUNT NAME. The list includes various audiences such as 'XEN | HubSpot | Contact has visited XEN site', 'XEN | BuiltWith | Technology Companies in AU', 'XEN Solar | Newsletter | Monthly Send List', and 'HubSpot - XEN | Partner registered leads | Registered'. The interface also features a search bar, filters for 'Users and teams' and 'Accounts', and buttons for 'Create event', 'Create audience', and 'Create ad campaign'.

NAME	TYPE	SOURCE	SIZE	AD ACCOUNT NAME
XEN   HubSpot   Contact has visited XEN site (xen.com.au or hubshots.com) <small>Archived</small>	Contact list	XEN   Contact has visited XEN site (xen.com.a... <small>Last updated 26 Oct 2022 1:25 PM</small>	490	XEN Systems
XEN   BuiltWith   Technology Companies in AU <small>Archived</small>	Company list	XEN   BuiltWith   Technology Companies to sync t... <small>Last updated 22 Jun 2022 1:05 PM</small>	450,000	XEN Systems
XEN Solar   Newsletter   Monthly Send List <small>Archived</small>	Contact list	XS   Newsletter   Monthly Send List <small>Last updated 19 Oct 2022 5:23 PM</small>	Below 300 <small>Too small</small>	XEN Solar
XEN Solar   BuiltWith   Companies using HubSpot in AU <small>Archived</small>	Company list	XEN   BuiltWith   Companies with Status of Yes (17,... <small>Last updated 24 Jun 2022 10:36 AM</small>	1,200,000	XEN Solar
XEN Solar   BuiltWith   Companies using HubSpot in AU <small>Archived</small>	Company list	XEN   BuiltWith   Companies with Status of Yes (17,... <small>Last updated 24 Jun 2022 10:36 AM</small>	1,200,000	XEN Solar
XEN HubSpot Ads Audience <small>Ready</small>	Workflow contact list	This audience has no workflows associated with it.	Below 1,000 <small>Too small</small>	XEN
STC   RSS Recipients <small>Not ready - Last synced 25 Mar 2022 11:47 PM</small>	Contact list	STC   RSS Recipients <small>Last updated 25 Mar 2022 11:46 PM</small>	Below 300 <small>Too small</small>	Solar Trust Centre
HubSpot   GOW   Offer   Home Printable To-Do Lists <small>Ready - Last synced 20 Oct 2022 7:08 AM</small>	Contact list	GOW   Offer   Home Printable To-Do Lists <small>Last updated 20 Oct 2022 7:08 AM</small>	Not available	GOW (Current)
HubSpot   GOW   Lead Ads   To-Do Lists   Home <small>Ready - Last synced 21 Dec 2020 7:18 AM</small>	Contact list	GOW   Lead Ads   To-Do Lists   Home <small>Last updated 25 Jul 2021 2:05 PM</small>	Not available	GOW (Current)
HubSpot - XEN   Partner registered leads   Registered	Contact list	XEN   Partner registered leads   Registered	Below 300	XEN Systems

# Ads

Sync lead form contacts down  
from LinkedIn and Facebook  
straight into HubSpot

The screenshot shows the HubSpot Ads settings page. The left sidebar has the 'Ads' menu item highlighted. The main content area is titled 'Ads' and has tabs for 'Ad accounts', 'Lead syncing', 'Pixels', and 'ROI'. The 'Lead syncing' tab is active. Below the tabs, there is a search bar and a 'Connect' button. A message states: 'Automatically sync your leads from lead generation ads to your HubSpot CRM. Any leads that converted on your ads in the last 90 days will sync over to HubSpot. To make sure your leads can be synced, please check you have the right permissions in the native ad manager. [Learn more](#)'. Below this, there is a toggle switch for 'Allow submissions from lead ads without email addresses to create contacts', which is currently turned off. The main section displays a list of connected ad accounts, categorized by platform (Facebook and LinkedIn). Each account entry includes a 'PAGE' or 'ACCOUNT' icon, a 'FORMS' column, and a 'CONNECTED BY' column. The 'FORMS' column is highlighted with an orange box. The data is as follows:

PAGE / ACCOUNT	FORMS	CONNECTED BY
Facebook (f)	2 forms	Craig Bailey June 8, 2022
Facebook (f)	2 forms	Craig Bailey June 8, 2022
Facebook (f) XEN Systems (146726485381844)	2 forms	Craig Bailey June 8, 2022
Facebook (f) XEN Solar (180013346085320)	0 forms	Craig Bailey June 8, 2022
Facebook (f) HubShots (1013403638680616)	0 forms	Craig Bailey June 8, 2022
Facebook (f) Solar Trust Centre (1712689685653477)	2 forms	Craig Bailey June 8, 2022
LinkedIn (in) XEN Systems (500746383)	1 form	Craig Bailey



# Forms

Add images, headings and HTML

**Note:** Can't embed videos (unsafe HTML)

The screenshot displays the HubSpot Forms editor interface. The top navigation bar includes a 'Back to all forms' link, the title 'HubShots | Demo form with decorations', and a status indicator 'Auto-saved with unpublished changes' along with an 'Update' button. Below the navigation bar, there are tabs for 'Form', 'Options', 'Style & preview', and 'Automation' (marked as 'NEW').

The 'Form' tab is active, showing a 'Form Fields' section with a 'Create new' button. The fields are organized into two rows. The first row includes 'Single-line text', 'Number', 'Single checkbox', 'Checkboxes', and 'Dropdown'. The second row includes 'Multi-line text', 'Radio', 'Date', 'File', and 'Header Text'. Below these, there are two more fields: 'Paragraph (RichText)' and 'Image', which are highlighted with orange boxes.

The right side of the editor shows a preview of the form. The preview has a heading 'HubShots Form Heading' and a large image of two men with the text 'HubShots The Unofficial HubSpot Down Under Podcast'. Below the image, there are input fields for 'First name' and 'Last name', each with a 'Contact Property' dropdown. There is also an 'Email' field with a 'Contact Property' dropdown. At the bottom, there is a 'View our Privacy Policy' link and a 'Sign your life away' button.

# Forms

Allow people to upload  
multiple files

Forms | HubSpot

app.hubspot.com/forms/306227/editor/6526ae4a-b99e-4b3d-83f5-e938f2a7717d/edit/form/field/0-1%2Fscreen

XEN | Scam Site Details

Back to all forms

Learn more

Form Options Style & preview Automation NEW Embed Actions

< Done Edit contact property

Field Type

File

Basic Logic

☐ Make this field required

☐ Make this field hidden

Label

B I U T L

Scam screenshots

Help Text

B I U T L

Any screenshots you are willing to share with us

☒ Allow multiple files

How happy are you with the Forms Tool?

First name firstname Contact Property

Last name lastname Contact Property

Email \* email Contact Property

Scam details scam\_details Contact Property

Any details you can provide such as the website of the scam site (eg www.xensystem-au .live) and how you found the scam site (eg Facebook post)

Cyber report details cyber\_report\_details Contact Property

If you have reported the issue to police or the Australian Cyber Security Centre, please provide details or case number

Scam screenshots screenshots Contact Property

Any screenshots you are willing to share with us

Choose file

Tick this to let us know it is OK to share your details with law enforcement agencies

☐ I am happy for you to share my details with police or cyber crime personnel scam\_consent\_to\_share Contact Property

Submit

Help

# Forms

Set the Lifecycle stage

Handy if some of your forms indicate higher intent

Eg a Request a Demo form might set to Sales Qualified

The screenshot shows the HubSpot Forms editor interface for a form titled "GOW | Oi5 | Start Daily Emails". The "Options" tab is selected, showing settings for the form. The interface includes a top navigation bar with "Form", "Options", "Style & preview", and "Automation" tabs. The "Options" tab contains three main sections: "Payment options", "Thank you message or page redirect option", and "Customize lifecycle stage based on submissions". The "Customize lifecycle stage based on submissions" section is highlighted with an orange box, showing a dropdown menu set to "Marketing Qualified Lead".

Forms | HubSpot

app.hubspot.com/forms/306227/editor/148d6c9a-45a2-480a-9ee8-dd25773604f3/edit/options

Back to all forms

GOW | Oi5 | Start Daily Emails

Auto-saved with unpublished changes

Update

Learn more

Form Options Style & preview Automation

Share Actions

Payment options

Collect payments

Users will be asked to pay after they complete this form

Thank you message or page redirect option

What should happen after a visitor submits this form (Required)

☐ Display a thank you message ☒ Redirect to another page

<https://www.getorganizedwizard.com/organize-in-5/started/>

View this link

Customize lifecycle stage based on submissions

Choose a lifecycle stage for any records created or updated by submissions to this form. Learn more about the limitations of this setting.

Set lifecycle stage to

Marketing Qualified Lead

Note: This setting will override the default Lifecycle stage in Lifecycle stage settings, but it will never move a contact or company back to a previous lifecycle stage.

Follow-up options

☐ Send submission email notifications to the contact's owner. Learn more

Help

# Campaigns

Add Assets

The screenshot displays the HubSpot Campaigns interface for a campaign titled "HubShots Webinar October 2022". The campaign details include:

- Owner: Tara Connolly
- Goal: Provide value to 20 clients
- Audience: Mid-large customers
- Budget: AU\$8,000.00
- Spend: AU\$5,000.00
- End date: 28/10/2022
- Start date: 12/09/2022

The "Assets" tab is selected, showing a list of email assets. An orange arrow points from the "Add assets" button in the top right corner to the "Add assets" modal. The modal lists various asset types:

- Ad campaigns
- Blog posts
- Calls-to-action
- Emails
- Forms **NEW**
- Landing pages
- Social posts
- Static lists
- Website pages
- Workflows

The modal also includes a section titled "Start adding assets to your campaign" with the text: "Choose an asset type and start adding assets to your campaign, so you can manage everything in one place." and a megaphone icon. At the bottom of the modal are "Save" and "Cancel" buttons.

HubShots

Get this slide deck here: <https://www.hubshots.com/11-things-deck>

# Campaigns

Add Assets

[Back to all campaigns](#)

## HubShots Webinar October 2022

Owner: Tara ConnollyGoal: Provide value to 20 clientsAudience: Mid-large customers

Budget: AUSD,000.00Spend: AUSD,000.00Start date: 12/09/2022

End date: 28/10/2022See details

CloseActionsAdd assets

Performance






Attribution

Assets

Tasks

Emails

View all emails

PREVIEW	TITLE	STATUS	COMMENTS
	HubShots   Webinar   Reminder Email   After (Oct 26)	● Sent	0
	HubShots   Webinar   Reminder Email   Day Of (Oct 25)	● Sent	0
	HubShots   Webinar   Reminder Email   Day Before (Oct 24)	● Sent	0
	HubShots   Webinar   11 Things   TY	● Sent	0
	HubShots   Online Event Invitation   11 Things	⊗ Draft	0




Forms

View all forms

TITLE	COMMENTS
HubShots   Webinar   Sign Up Form	0

Landing pages

View all landing pages

PREVIEW	TITLE	STATUS	COMMENTS
	HubShots   Masterclass   11 Things You're Probably Not Using In HubSpot That You Should Be   Resources	⊗ Draft	0
	HubShots   Masterclass   HubSpot 11 Things   LP	● Published	0
	HubShots   Masterclass   HubSpot 11 Things   TY	● Published	0

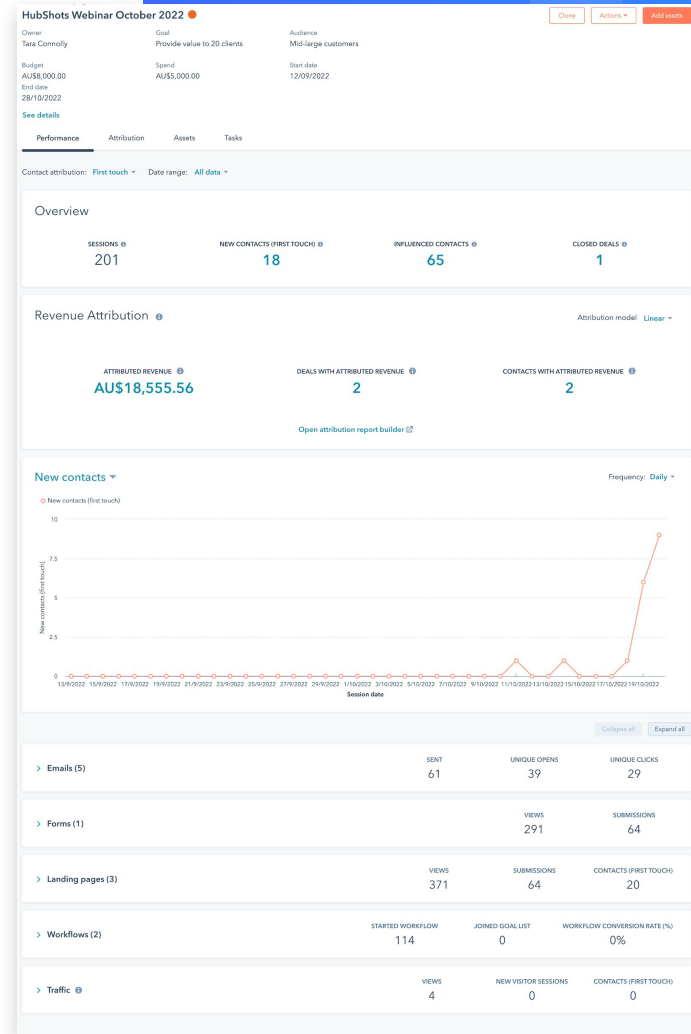
Workflows

View all workflows

TITLE	STATUS	COMMENTS
HubShots   Webinar   TY	● On	0
HubShots   Webinar   Reminder Email	● On	0

# Campaigns

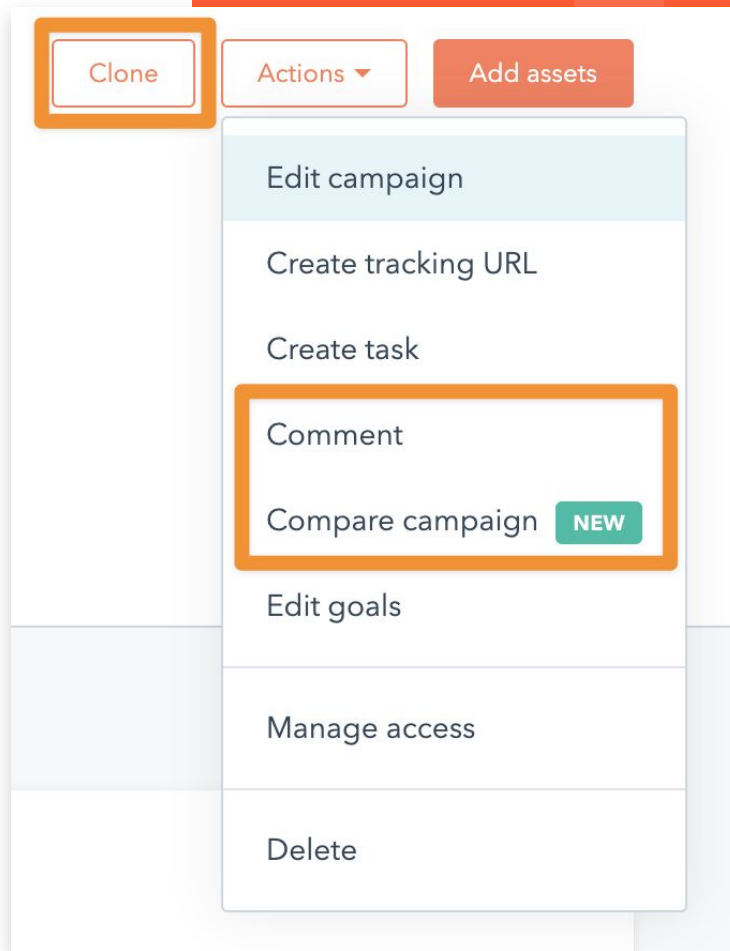
View Performance and Attribution



# Campaigns

Other handy features:

- Comment
- Compare campaigns
- Clone campaigns



# [6] Sales Things

HubShots

## Sales Hub items

- Meetings
- Deal pipeline mandatory fields
- Templates
- Sequences




# Meetings

You probably use 1-to-1 already


Have you used Group and Round Robin?

Choose a scheduling page type



**One-on-One**


Contacts can schedule a meeting with a single person on your team.



**Group**

Contacts can schedule a meeting with multiple people on your team.

[View example use cases](#)



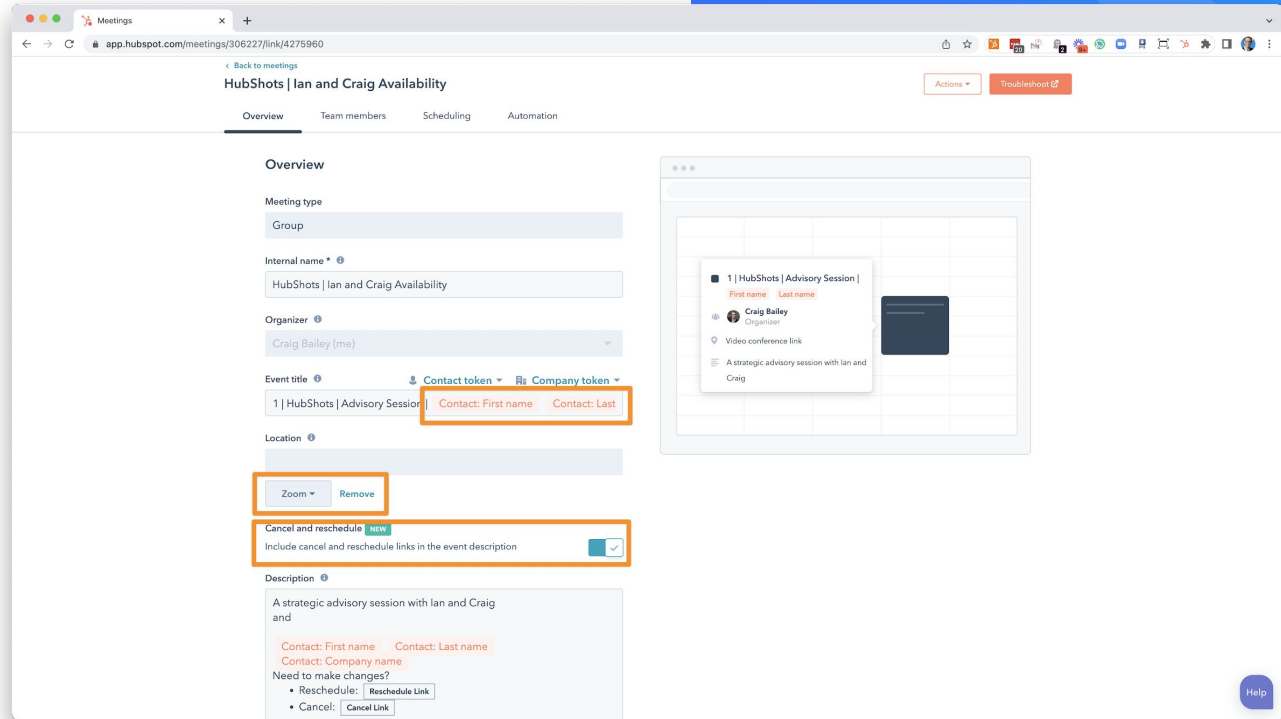
**Round robin**

Meetings are automatically distributed to a person on your team based on criteria that you set.

[View example use cases](#)

# Meetings

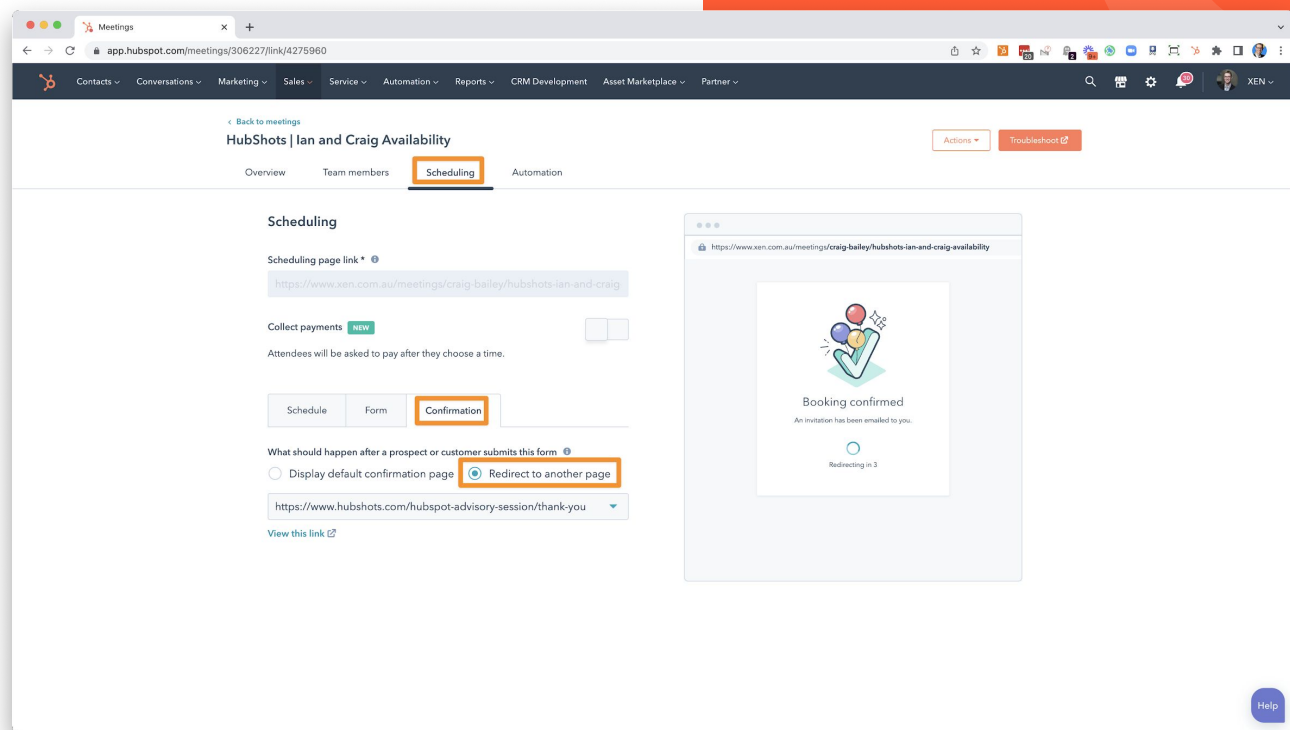
- Zoom and Teams now supported
- Cancel and reschedule feature



# Meetings

Redirect after confirmation

Helps with conversion tracking  
for ad platforms (eg LinkedIn)



# Meetings

Send reminder emails

The screenshot shows the HubSpot Meetings interface. The browser address bar displays `app.hubspot.com/meetings/306227/link/4275960`. The navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, CRM Development, Asset Marketplace, and Partner. The main header shows 'HubShots | Ian and Craig Availability' with tabs for Overview, Team members, Scheduling, and Automation. The Automation tab is active, showing two email automation rules: 'Confirmation email' and 'Pre-meeting reminder'. The 'Pre-meeting reminder' rule is expanded, showing a list of 'Scheduled reminder emails' with a table containing three rows: '1 hour before', '1 day before', and '3 days before'. The '1 day before' row is highlighted with an orange border. Below the table, the 'Email customization' section has a checked box for 'Include the Invite Description in reminder email body'.

Meetings

app.hubspot.com/meetings/306227/link/4275960

Contacts Conversations Marketing Sales Service Automation Reports CRM Development Asset Marketplace Partner

Back to meetings

HubShots | Ian and Craig Availability

Actions Troubleshoot

Overview Team members Scheduling Automation

Automation

Confirmation email

Send a confirmation email to attendees immediately after they schedule a meeting.

Send test email Test email will be sent to craig@xen.com.au

Pre-meeting reminder

Send an email reminder to attendees before a meeting starts.

Scheduled reminder emails

1	hour before	
1	day before	
3	days before	

Email customization

☒ Include the Invite Description in reminder email body

Preview reminder email

Help

# Deal Pipelines

Set Mandatory fields on pipeline stages

(This also works on Ticket pipelines)

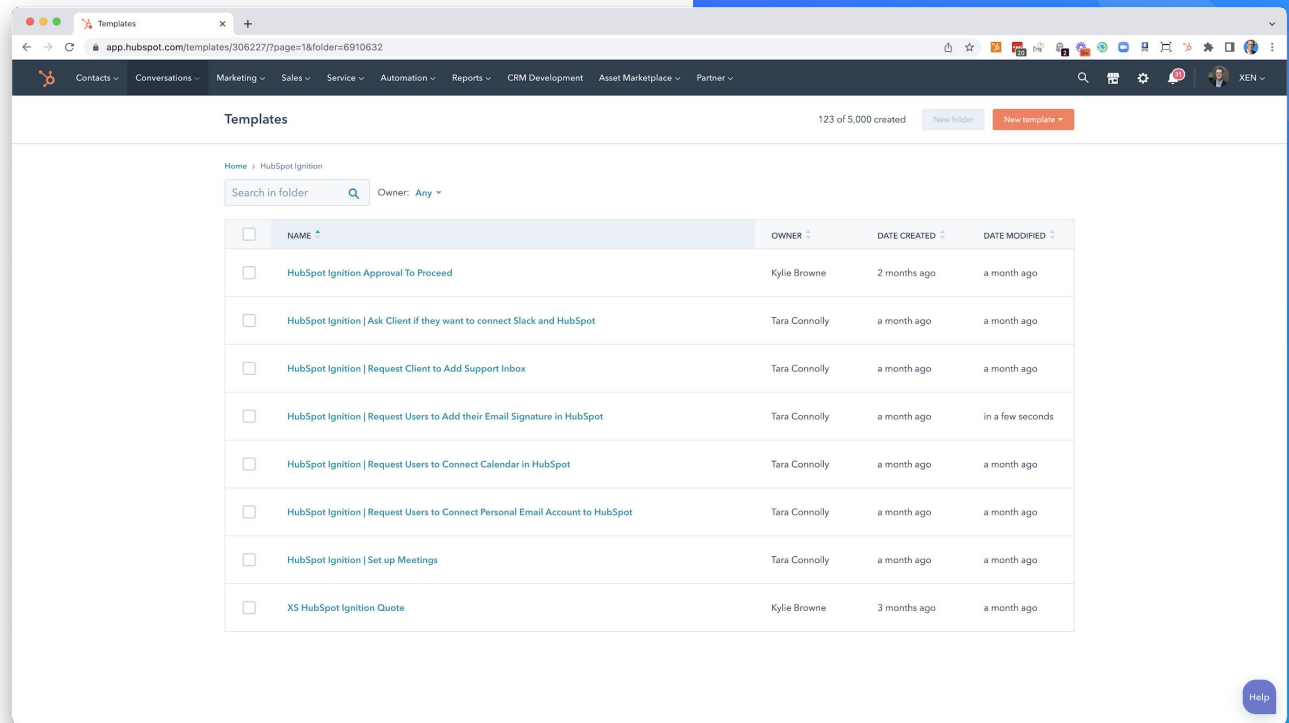
The screenshot displays the HubSpot Deal Pipeline Settings interface. The left sidebar shows the navigation menu with 'Deals' highlighted. The main content area is titled 'Deals' and includes tabs for 'Setup', 'Associations', 'Pipelines' (which is active and highlighted with an orange box), and 'Record Customization'. Below the tabs, there's a section for 'Select a pipeline:' with a dropdown menu showing 'XEN 2022'. The 'Board customization' section allows users to choose properties shown on each deal card. The 'Configure' tab is selected, showing a table of pipeline stages with their respective deal probabilities and update stage properties.

STAGE NAME	DEAL PROBABILITY	UPDATE STAGE PROPERTIES
Interest	10%	
Qualified	40%	XEN Brand & Type *
Costing Requested	60%	Amount
Costing Sent	80%	XEN Proposal , Deliver By Date , and Fit
Closed won	Won	

The 'Update deal stage properties' modal is open, showing a search bar and a list of properties. The 'XEN Brand & Type' property is selected and marked as 'REQUIRED' with a checkmark in a box. The modal also includes a 'Next' button and a 'Cancel' button.

# Templates

Prepare templates for  
repeatable business  
processes you send via email



# Templates

Use personalisation tokens

You can have your signature automatically added at the end

**Name:** HubSpot Ignition | Request Users to Add their Email Signature in HubSpot

**Owner:** Tara Connolly

**Subject:** HubSpot Ignition | Add your Email Signature in HubSpot Shared with everyone HubSpot Ignition


Hi **Contact: First name**,



Please add your email signature to your HubSpot Settings.  
Each user needs to do this for their own email signature.


If you'd like to create a new email signature, we have a suggested process here: <https://www.xenkb.com/create-a-html-email-signature-for-hubspot>

And then here's a process to add the signature in HubSpot: <https://www.xenkb.com/add-an-email-signature-to-hubspot-crm>

If you have any questions, just let me know!

**B** *I* U  **More**

  **Personalize** **Insert**

 Your signature will be included when you use this template. [Edit signature](#)

# Templates

When using personalisation tokens you can use the Sender object (ie that's you)

Eg to automatically add in your meeting link

The screenshot shows the HubSpot email template editor interface. A dropdown menu titled 'Type' is open, displaying a list of personalization tokens: Sender, Contact, Company, Sender (highlighted with an orange box), Placeholder, Deal, and Ticket. Below the dropdown, the 'Email' and 'Phone Number' tokens are also visible. The background shows a partially filled email template with fields for Name, Subject, and a body containing a 'Contact: F' token. The footer of the template includes a note: 'Your signature will be included when you use this template. [Edit signature](#)'.



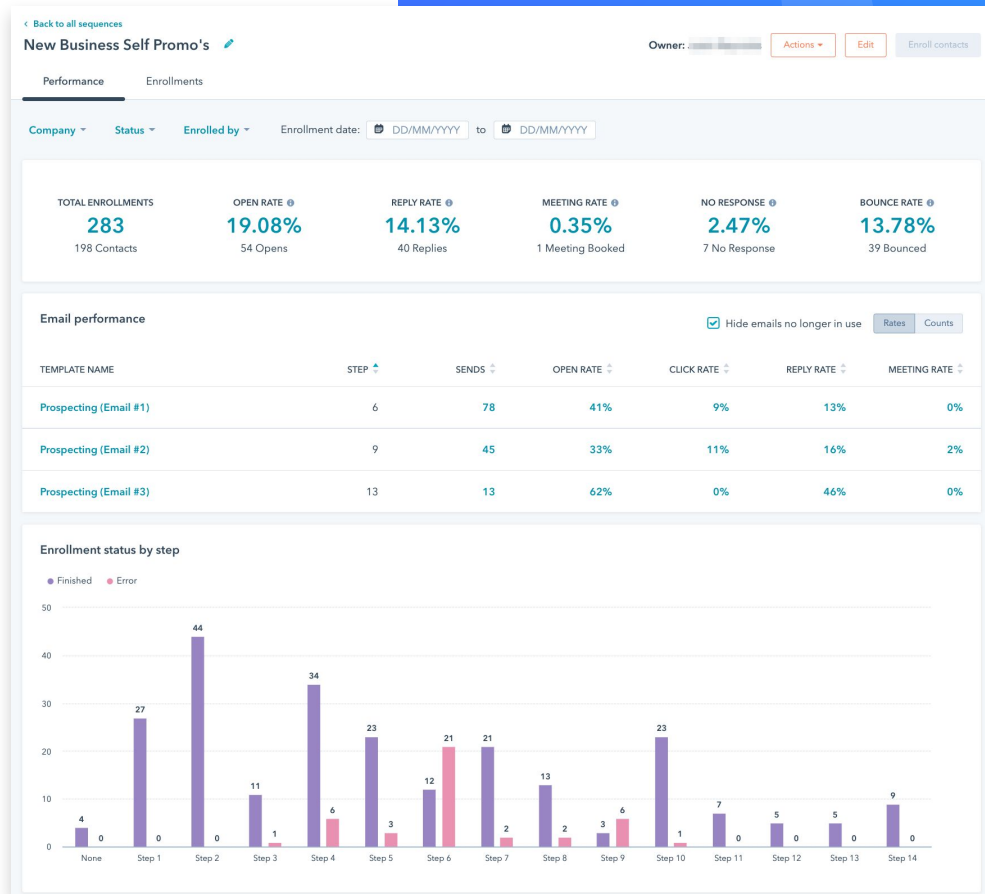
# Sequences

- 1:1 Sales communication
- Personalised
- Optimised based on data in HubSpot



# Sequences

Consistent emails unlock insights



# Sequences versus Workflows



## Sequences

- 1:1
- Sales focus (or is it?)
- Personalisation is managed case by case
- Ideal for highly personalised emails to smaller contact lists

Consider using Sequences for simple notifications to customers eg

- Prepare a set of useful updates
- Individually or batch enrol contacts

[HubShots Episode 242](#)

[HubShots Episode 276](#)

## Workflows

- 1: Many
- Marketing focus
- Personalisation is managed by smart content
- Ideal for larger contact lists, or set and forget email series

# [7] Service Things

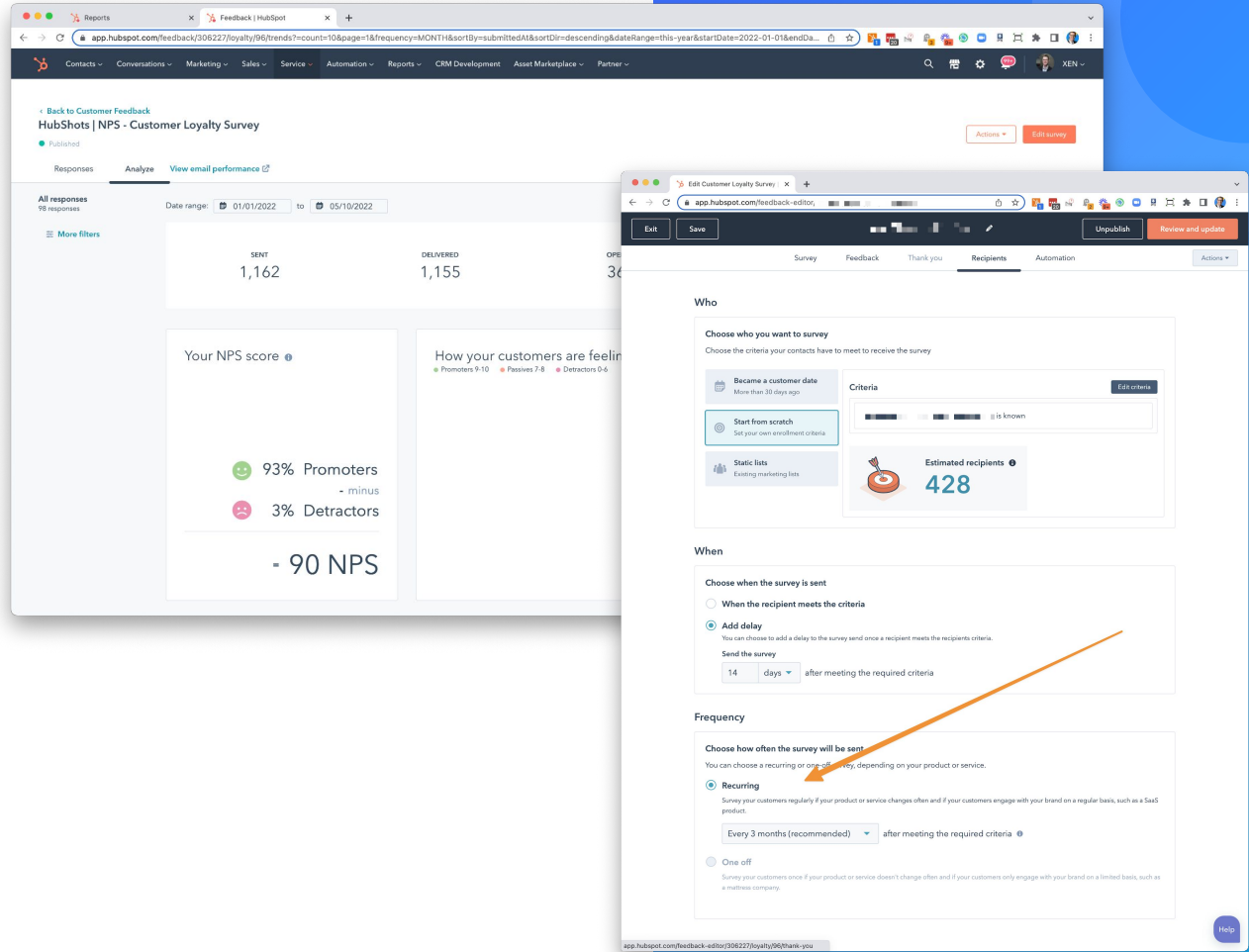
HubShqts

Service Hub items

Surveys

# Surveys

- Feedback Surveys
- Automatically set to resend



# Surveys

- Automatically notify about responses
- Speed to respond to feedback

The screenshot shows the HubSpot Automation interface for surveys. The top navigation bar includes 'Exit', 'Save', 'HubShots | NPS - Cu...', 'Unpublish', and 'Review and update'. The main header has tabs for 'Survey', 'Feedback', 'Thank you', 'Recipients', and 'Automation'. Below the header, a message says 'Save time. Automate your follow-up actions.' and 'Let simple workflows take care of your follow-up actions. Learn more about automation.'

The section 'Who gets notified about new survey responses?' contains a sign-up prompt and a list of users: 'craig@een.com.au' and 'ian.jacob@searchandbefound.com.au'. There is a checkbox for 'Only send notifications for survey responses that contain comments'.

The 'Send survey reminder email' section has a 'NEW' tag and explains that reminders can be sent to contacts who didn't respond. It includes a dropdown for '2 days recommen...' and a checkmark icon.

The 'Automate your follow-up actions' section provides instructions on setting up actions triggered by survey responses. A 'Please note' box states that automation workflows will apply to future survey responses only.

Three workflow templates are shown:

- When a survey response is 0 - 6 Detractors:** The workflow starts with '1. Create task' and 'Create task "Review and contact [First Name] about NPS Score" and assign it to Ian Jacob', followed by an 'END' node and a link to 'Open in Workflows'.
- When a survey response is 7 - 8 Passives:** The workflow starts with 'Create workflow'.
- When a survey response is 9 - 10 Promoters:** The workflow starts with '1. Create task' and 'Create task "Connect on LinkedIn with [First Name]" and assign it to Ian Jacob', followed by an 'END' node and a link to 'Open in Workflows'.

A 'Help' button is located in the bottom right corner.



Let's take a step back...

# [8] Conceptual Things

## Step back and consider items

- Frequency versus Relevancy
- Business processes
- Workflow matrix



# Frequency versus Relevancy

## Frequency

- Are we sending too many emails?
- I'm worried about unsubscribe rates
- Which days should we send emails

- Trying to sell

## Relevancy

- Are we sending relevant content
- Have we segmented our database appropriately?
- How do we make it easy for contacts to self-select what they want to consume

- Aiming to provide value



**Key takeaway:** Focus on relevancy

# Business processes in HubSpot (Tickets)

## From just customer service

- Ticket pipelines are just customer service
- Tickets are managed by service team
- Customer satisfaction/success



## To full business process









- Ticket pipelines are business processes
- Tickets are automated as much as possible
- Business Efficiency and Effectiveness



# Workflow comparison

## Hub vs Tier

[HubShots Episode 288](#)

	 FREE	 STARTER Simple workflow editor	 PRO Full workflow editor	 ENTERPRISE Full workflow editor
 Marketing Hub™	Trigger based on Form submit only 1 follow up email per form	Trigger based on <b>Form submit</b> only 10 actions per form	Trigger based on anything Unlimited actions per workflow Add/Remove from Static list Send marketing email Send internal marketing email Goals (Contact)	Trigger based on anything
 Sales Hub™		Trigger based on <b>Deal Stage</b> only	Trigger based on anything Quote workflows Rotate record to owner	Trigger based on anything Enroll/Unenroll from a sequence
 Service Hub™		Trigger based on <b>Ticket Status</b> only	Trigger based on anything Ticket workflows Feedback submission workflows Rotate record to owner	Trigger based on anything Enroll/Unenroll from a sequence
 Operations Hub™			Trigger based on anything Trigger a web hook Custom Code action Format Data action	Trigger based on anything

# [9] Automation Things

## Automation items

- Workflow goals
- Scheduled reports

# Workflow Goals

Use Goals to measure success of workflow actions

The screenshot displays the HubSpot Workflow editor interface. The browser address bar shows the URL: `app.hubspot.com/workflows/306227/platform/flow/55166880/edit`. The workflow is titled "GOW | Promote | 21 Day Simplify Your Life". The "Goals" tab is selected in the top navigation bar, and a "View or edit goal" button is highlighted with an orange box. The workflow steps are as follows:

- Contact enrollment trigger**: No triggers set. Contacts can still be enrolled manually.
- 1. Delay for a set amount of time**: 5 minutes.
- 2. Send email**: "GOW | Promote | 21 Day Simplify Your Life Challenge". The email content includes "2.1% click rate" and "6,111 met goal criteria", with the latter highlighted by an orange box.
- 3. Delay for a set amount of time**: 1 day, 1 contact in this action.

A modal window is open on the right, titled "Measure contact conversions. Contacts will be automatically unenrolled from this workflow when they meet your goal. You can view your goal conversion rate on the [performance](#) page. [Learn more about goals.](#)". The modal contains a configuration box with the following text:

List membership  
is member of GOW | GAL | All Courses Students

AND

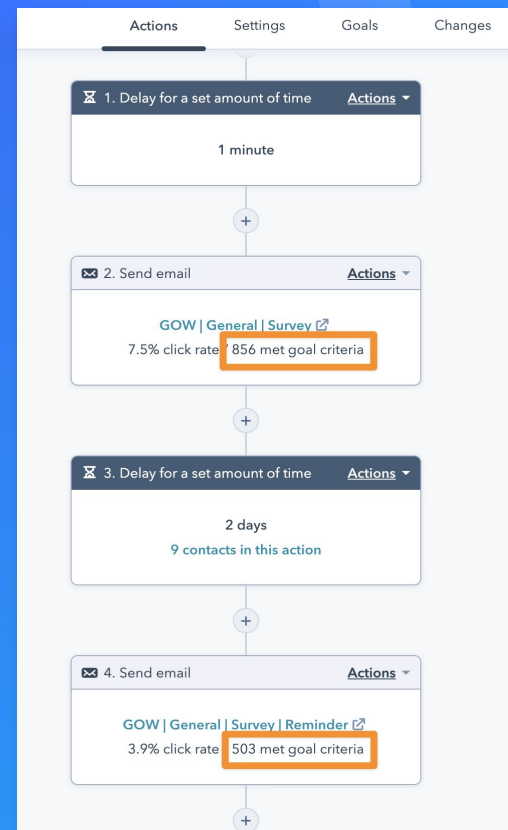
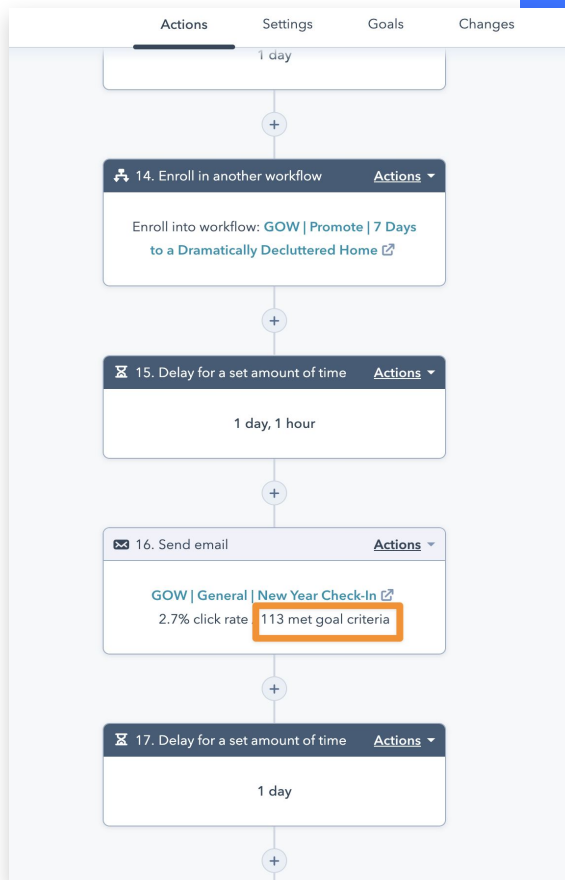
AND

OR

Buttons for "Clone" and "Delete" are visible in the top right of the modal. A "Help" button is located at the bottom right of the workflow editor.

# Workflow Goals

Compare goal results between Actions



# Reports

- Scheduled Dashboards
- Scheduled Reports

The top screenshot displays the 'Reports dashboard' in HubSpot. It features a 'Filter dashboard' dropdown menu with options: 'Copy URL', 'Email this dashboard', and 'Manage recurring emails'. The dashboard shows 'Marketing Performance' with a line chart for 'SESSIONS' (207,119) and 'NEW CONTACTS' (4,574). It also shows 'CUSTOMERS' (121). The bottom screenshot displays the 'Reports' table, which lists various reports. An 'Actions' dropdown menu is open for the report 'XEN | Date Part versus Frequency | Example 1', showing options: 'Customize', 'Rename', 'Clone', 'Export', 'Email this report', 'Manage access', 'Change owner', 'Add to dashboard', and 'Delete'.

NAME	DASHBOARDS	OWNED BY	ASSIGNED	LAST UPDATED
XEN   Revenue Interaction	0	Craig Bailey	Everyone	11/9/2021
XEN   Revenue Attribution	0	Craig Bailey	Everyone	11/9/2021
XEN   Form Submits	1	Craig Bailey	...	11/6/2020
XEN   Deals Analysis	0	Craig Bailey	Everyone	11/5/2021
XEN   Date Part versus Frequency   Example 1	0	Craig Bailey	Everyone	9/8/2022
XEN Solar   New Contacts By Source (This Week)	1	Andrea Villalobos	...	19/11/2021
XEN Solar   New Contacts By Source (Last Month)	1	Andrea Villalobos	...	19/11/2021
XEN Solar   New Contacts By Source	1	Andrea Villalobos	...	13/10/2021
XEN Solar   Landing pages by most total views (xs.com.au)	1	Andrea Villalobos	...	13/10/2021
XEN Solar   Landing pages by most total views (xs.com)	1	Andrea Villalobos	...	13/10/2021
XEN Solar   Email sent totals with engagement rates (Test)	1	Andrea Villalobos	...	13/10/2021
XEN Solar   Email (Test)	1	Andrea Villalobos	...	13/10/2021
XEN Solar   Contacts Created By Month	1	Andrea Villalobos	...	9/11/2021

# Reports

- Scheduled Dashboards
- Scheduled Reports

Email this dashboard

Is this a recurring email?

☐ No, this email will only be sent once

☒ Yes, this is a recurring email

Email nickname \*

Recipients won't see this name

Weekly Management Dashboard

Recipients \*

Craig Bailey (craig@xen.com.au) X

Tara Connolly (tara@xen.com.au) X

Roselen Fernandez (roselen@xen.com.au) X

Kylie Browne (kylie@xen.com.au) X

Email subject

XEN | All Divisions

Message

Weekly management dashboard

Schedule

Weekly

Day of week \*

Friday X

Time of day \*

Data is captured up to 2 hours before this email is sent. This is to make sure this email is delivered as on-time as possible.

🕒 1:00 PM

AEDT

Attach downloadable file

PDF

Formatting options

☒ One chart per page

☐ Multiple charts per page

Dashboard context

☒ Send dashboard without filters

☐ Send with filters

This email is scheduled to send every week on Friday at 1:00 PM AEDT.

Not getting our emails? Make sure that you've added HubSpot email addresses to your [allowlist](#) and turned on your [share notifications](#).

Schedule email

Preview

Cancel



# [10] Report Things

HubShqts

## Report items

Custom Report builder is a massive lever

# Reports

Custom Report Builder is powerful

(**New:** Restore deleted reports)

The screenshot shows the HubSpot Reports interface. The sidebar on the left contains the following filters:

- My reports: 298
- Favorites: 0
- Custom reports: 118 (highlighted with an orange box)
- Saved from library: 180
- On Dashboards: 254
- Not on Dashboards: 44
- Restore deleted reports: NEW (highlighted with an orange box)

The main table lists reports with the following columns: NAME, DASHBOARDS, OWNED BY, ASSIGNED, and LAST UPDATED. The table contains 15 rows of reports, including:

	NAME	DASHBOARDS	OWNED BY	ASSIGNED	LAST UPDATED
<input type="checkbox"/>	XEN   Top Web Pages by Traffic	1	Roselen Fernandez	--	19/10/2022
<input type="checkbox"/>	XEN   Top Landing Pages by Pageviews	1	Roselen Fernandez	--	19/10/2022
<input type="checkbox"/>	GLOBAL   Page to form journey analytics	0	Craig Bailey	Everyone	19/10/2022
<input type="checkbox"/>	GLOBAL   Page to form journey	0	Craig Bailey	Everyone	19/10/2022
<input type="checkbox"/>	GLOBAL   Page to form journey	0	Craig Bailey	Everyone	19/10/2022
<input type="checkbox"/>	HubShots   New visitor session totals by day with source breakdown	1	Craig Bailey	--	17/10/2022
<input type="checkbox"/>	Ticket average time to close by rep	0	Craig Bailey	Everyone	15/10/2022
<input type="checkbox"/>	Ticket average time to first response by rep	0	Craig Bailey	Everyone	15/10/2022
<input type="checkbox"/>	Ticket response totals by rep with SLA breakdown	0	Craig Bailey	Everyone	15/10/2022
<input type="checkbox"/>	Ticket closed totals by rep with SLA breakdown	0	Craig Bailey	Everyone	15/10/2022
<input type="checkbox"/>	GOW   Ticket average time to close by rep	1	Craig Bailey	--	15/10/2022
<input type="checkbox"/>	GOW   Ticket average time to first response by rep	1	Craig Bailey	--	15/10/2022
<input type="checkbox"/>	GOW   Ticket closed totals by rep with SLA breakdown	1	Craig Bailey	--	15/10/2022

# Reports

Report across almost everything...

The screenshot shows the HubSpot interface for selecting data sources. At the top, there's a navigation bar with 'Exit', 'Data sources', 'Sample reports' (with a 'NEW' tag), and 'Datasets'. The main heading is 'Select and join up to five data sources'. Below this, the 'Primary data source' is set to 'Contacts'. The 'Secondary data sources' are organized into categories: CRM, MARKETING, SALES, SERVICE, and OTHER. In the CRM section, 'Contacts' is checked. In the MARKETING section, 'Ad interactions by contact' is highlighted with an orange box. In the SALES section, 'Marketing email' and 'Website pages' are highlighted with an orange box. Other items like 'Companies', 'Deals', 'Tickets', 'Ad performance metrics', 'Blog posts', 'Cookie banner', 'Landing pages', 'Media', 'Web activities', 'Calls', 'Deal splits', 'Invoices', 'Line items', 'Quotes', 'Sales activities', 'Sales email', 'Sequences', 'Tasks', 'Conversations', 'Feedback submissions', and 'Custom behavioral events' are also listed with checkboxes. The interface is clean and modern, with a light blue and white color scheme.

Exit Data sources Sample reports **NEW** Datasets Selected: Contacts (primary) Next

[Customize associations](#)

### Select and join up to five data sources

**Primary data source**  
The main focus of your dataset. All data from this source will be available.

Contacts

**Secondary data sources**  
These sources look for a common data point to the primary source. Properties from that connection will be available.

**CRM**

☒ Contacts ☐ Companies ☐ Deals ☐ Tickets

**MARKETING**

☐ Ad interactions by contact ☐ Ad performance metrics **BETA** ☐ Blog posts ☐ Cookie banner ☐ Landing pages ☐ Marketing email ☐ Media **BETA** ☐ Web activities ☐ Website pages

**SALES**

☐ Calls ☐ Deal splits ☐ Invoices ☐ Line items ☐ Quotes **NEW** ☐ Sales activities ☐ Sales email **BETA** ☐ Sequences **BETA** ☐ Tasks

**SERVICE**

☐ Conversations ☐ Feedback submissions

**OTHER**

☐ Custom behavioral events **BETA**

Data join info **NEW**

# Reports

Getting started with reports

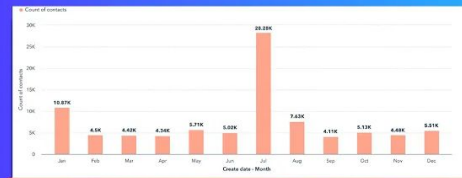
[Use our quick tips videos](#)

Getting Started with  
**HubSpot Custom  
Report Builder**

HubShots

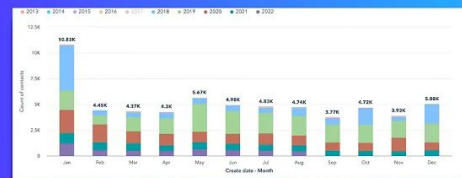


## Using Date Part in HubSpot Custom Reports



HubShots

## Using Break Down By in HubSpot Custom Reports



HubShots

# [11] Final Things

HubShqts

Avoiding overwhelm

Pick one thing

# Avoiding Overwhelm



## Focus on business impact

- What is your biggest pain point currently?
  - Inefficiency
  - Lack of training
  - Things get missed when people are away

## Focus on one thing

- Pick your top 5 items from today
- Give them priorities
- Which is your **top** priority?
- Implement **that thing** in the next 30 days



Tell us in the chat what your one thing is

# A Recap of 11 Things (of things)



## [1] New things

Inline editing, Custom Journey Analytics reports, Lifecycle Stage options

## [2] Settings things

Settings you may have missed

## [3] CRM things

General CRM wide things

## [4] Page things

Landing pages and Pages things

## [5] Marketing things

Ads, forms and campaign things

## [6] Sales things

Meetings, Templates

## [7] Service things

Surveys, Conversations

## [8] Conceptual things

- Relevancy
- Business processes

## [9] Automation things

Workflow goals

## [10] Report things

Custom report builder

## [11] Final things

Avoiding overwhelm



Over to you...



# But before that...

**Podcast:** [www.hubshots.com/subscribe](http://www.hubshots.com/subscribe)

**YouTube:** <https://www.youtube.com/c/HubShotsShow/>

**HubShqts**



# Questions?

Over to you...



Add a question in the chat

OR



Unmute and ask your question

# Questions



## Questions from the chat (Tara will add them into this slide during the call)

- Can I send marketing emails from (ie on behalf of) people in my sales team?
- Efficiency of process is our key thing and limiting opportunity for error I know we need a sequence for personal 1:1 in sales but **can we use SMS messaging in a workflow and then have it trigger a sequence if certain criteria are met - or does the sequence need to have a manual enrolment?**

## Comments:

- On the inline editing, I discovered that for lifecycle stage it won't work backwards!
- Love folders - in concept - tags would be better
- I received an email from HubSpot about API Key authentication to Private Apps by November 30, 2022.

# Thank you!

**Episodes:** [www.hubshots.com/](http://www.hubshots.com/)

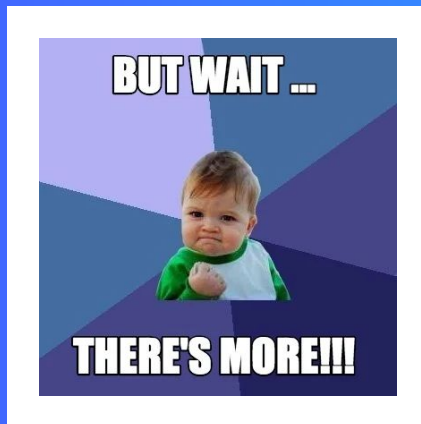
**YouTube:** <https://www.youtube.com/c/HubShotsShow/>

Look out for our **feedback survey** later this week :-)

## HubShqts



# More Things Coming



# More Things

- We're planning to run this 11 Things session **each quarter**
- We'll update it with the latest 'things' we recommend you implement

# Email Reply Address

Send from the contact owner, replies go to a general inbox

Edit Settings Sending

## Email settings

From name \* ⓘ

{{owner.fullname}}

From address \* ⓘ

☐ Use this as my reply-to address

{{owner.email}}

Reply-to address \* ⓘ

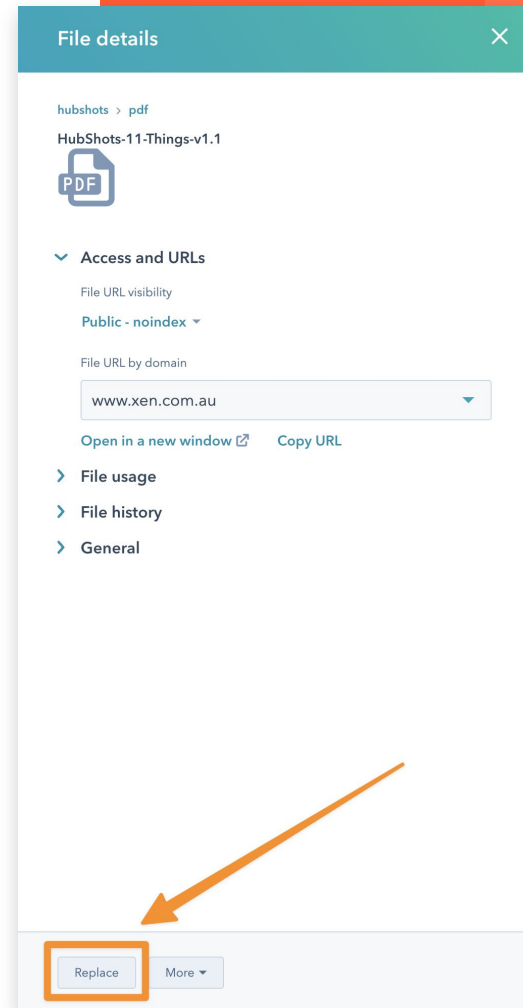
growth@xen.com.au

Make sure you're using a [HubSpot connected inbox](#) as your reply-to address to track replies

# Update Files

Automatically updates the link on any pages using the File

[HubSpot KB Article](#)

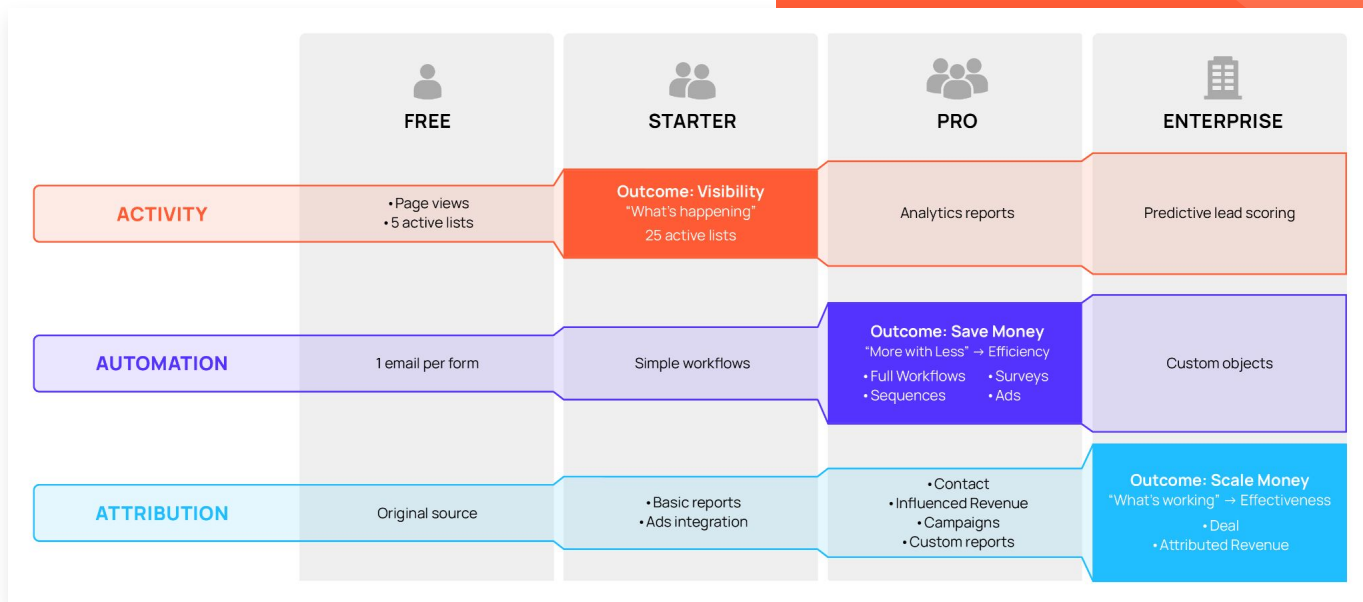




# Outcome Journey

## HubSpot Outcome Focus

- Activity
- Automation
- Attribution





# Thank you!



HubShqts

