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

HubShots

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.

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...

Let’s get started…

HubShots

11 Things

Across the hubs

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

HubShots

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

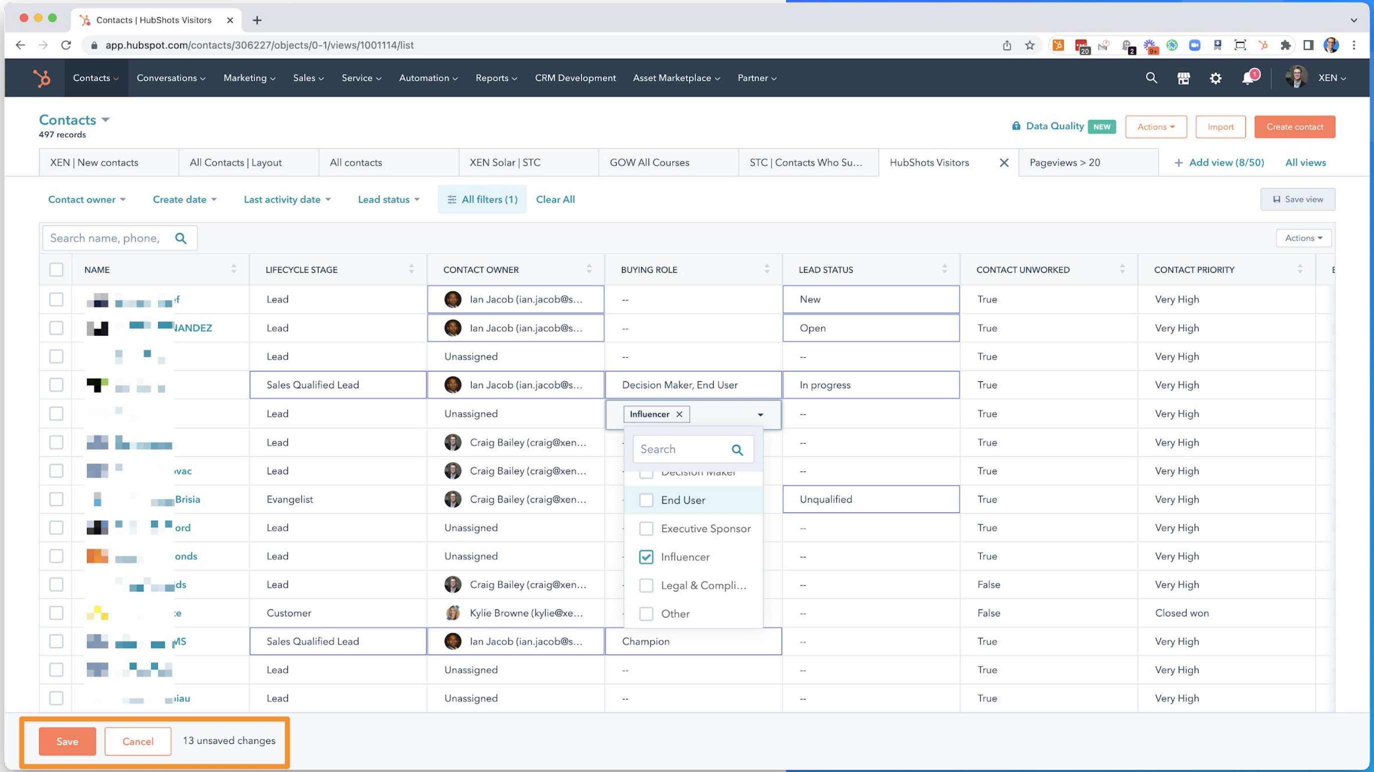
Worth noting

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

Inline Editing

Simple updating of records in Views

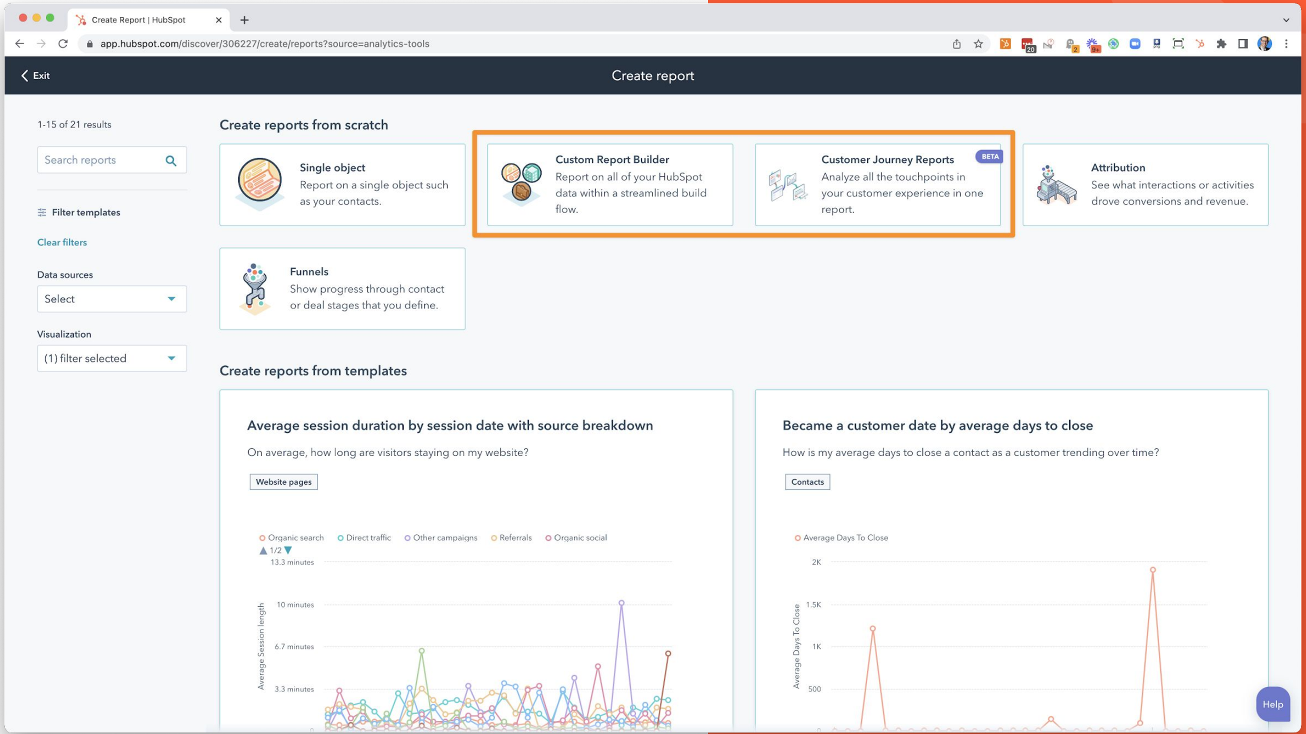
The 'Excel' experience



Custom Journey

Just rolling out now...

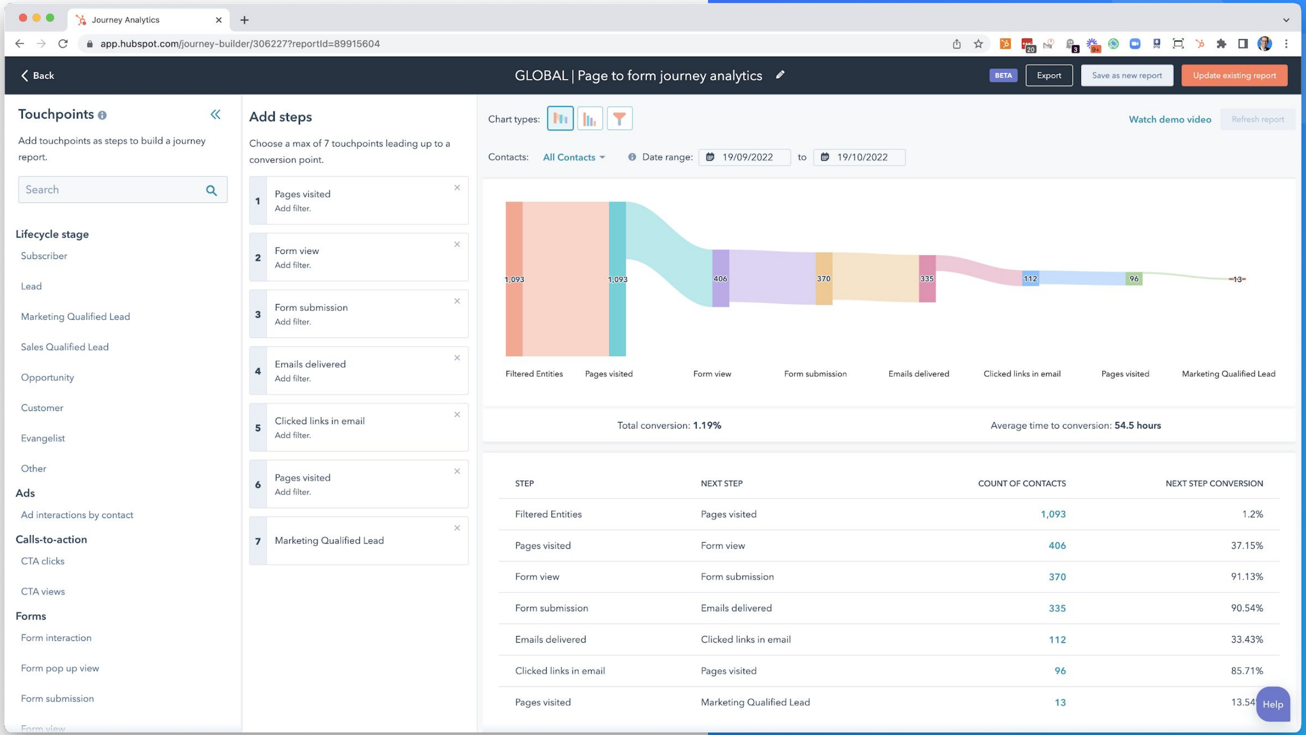
[HubSpot KB article]



Custom Journey

Analyse 7 touchpoints on contact journeys with you

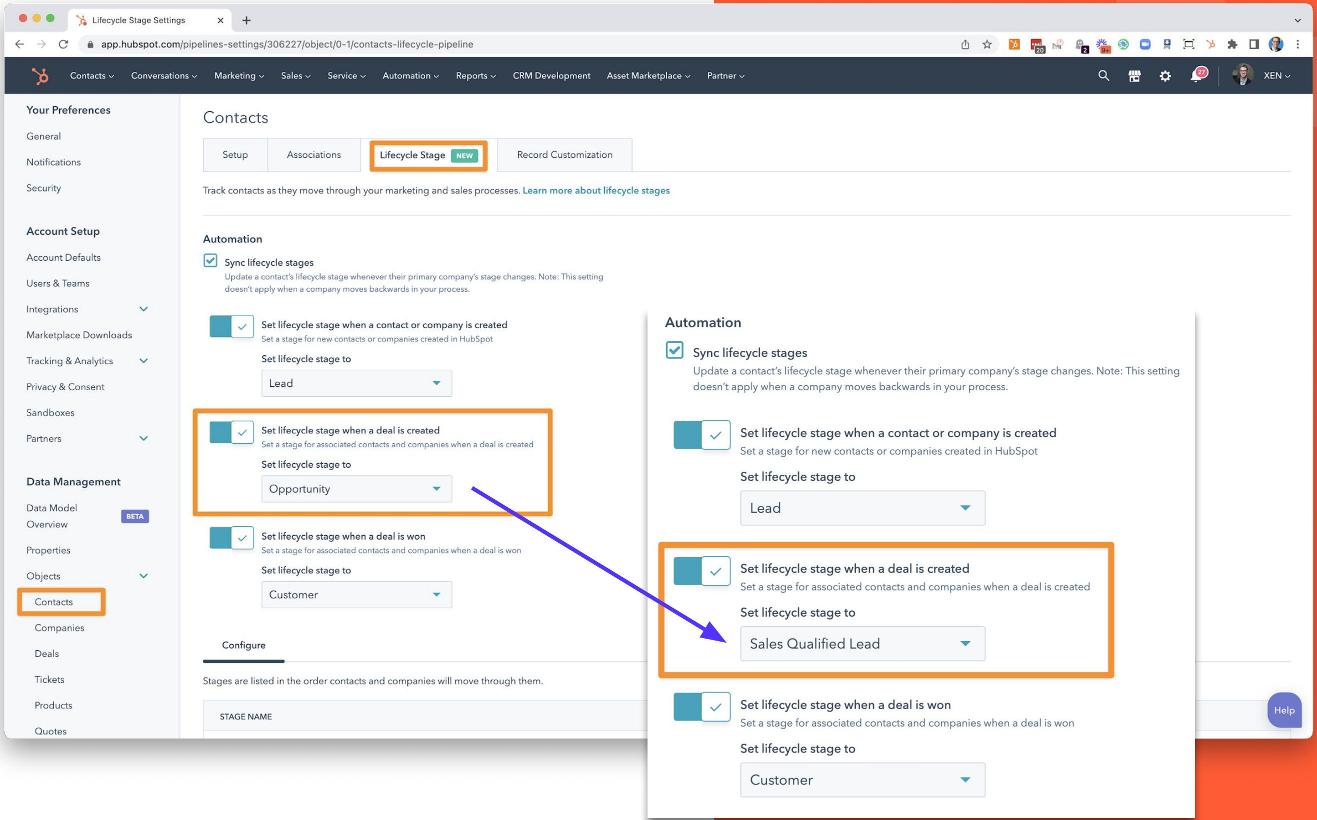
[HubSpot KB article]



Lifecycle Stage

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

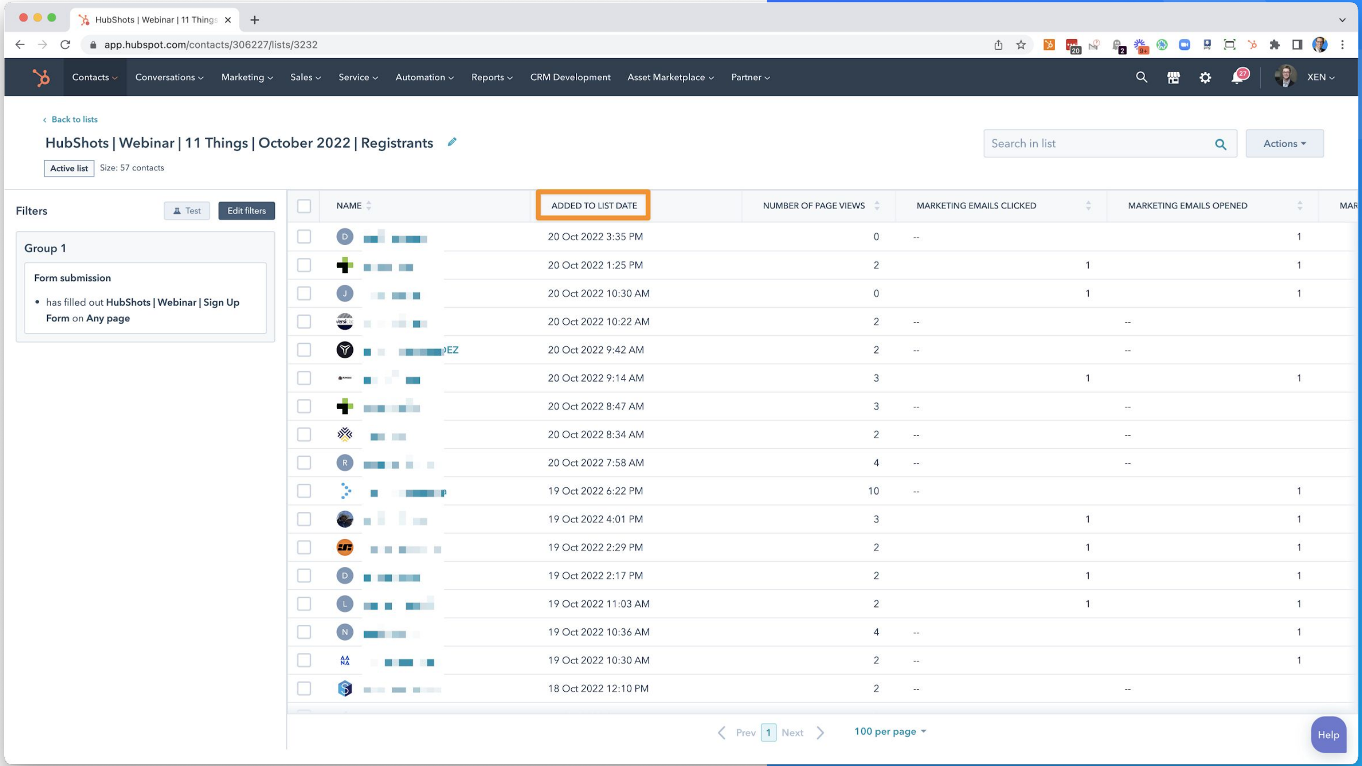
- Default is Opportunity
- Some companies prefer Sales Qualified



Lists

New 'Added to List date'

(But you can't sort by it!)



[2] Settings Things

HubShots

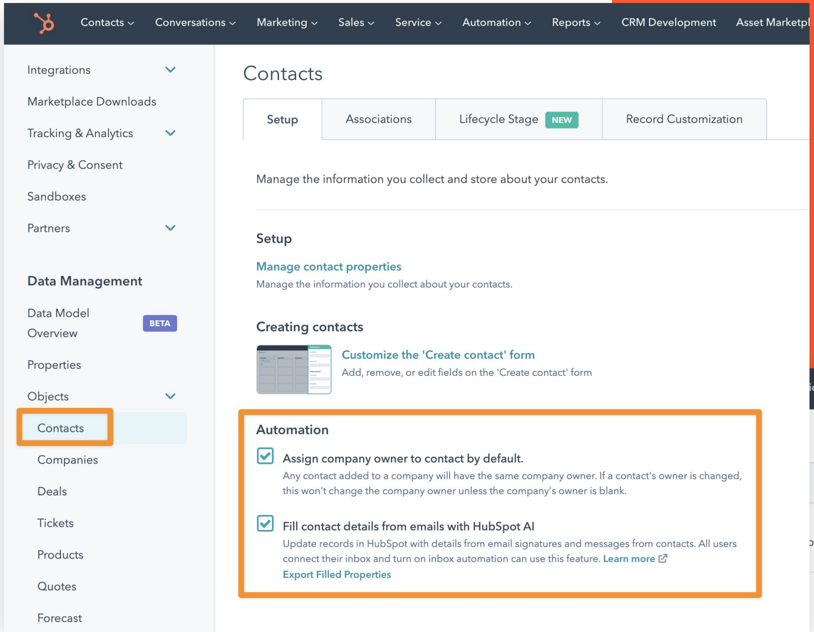
In the 'cog' area

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

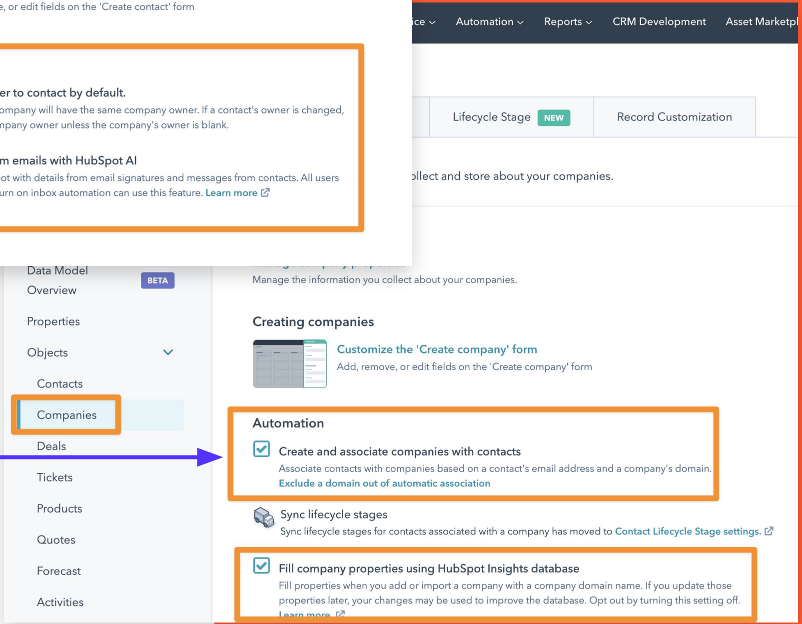
Data Enrichment

Handy settings to enable

[HubSpot KB article](#)



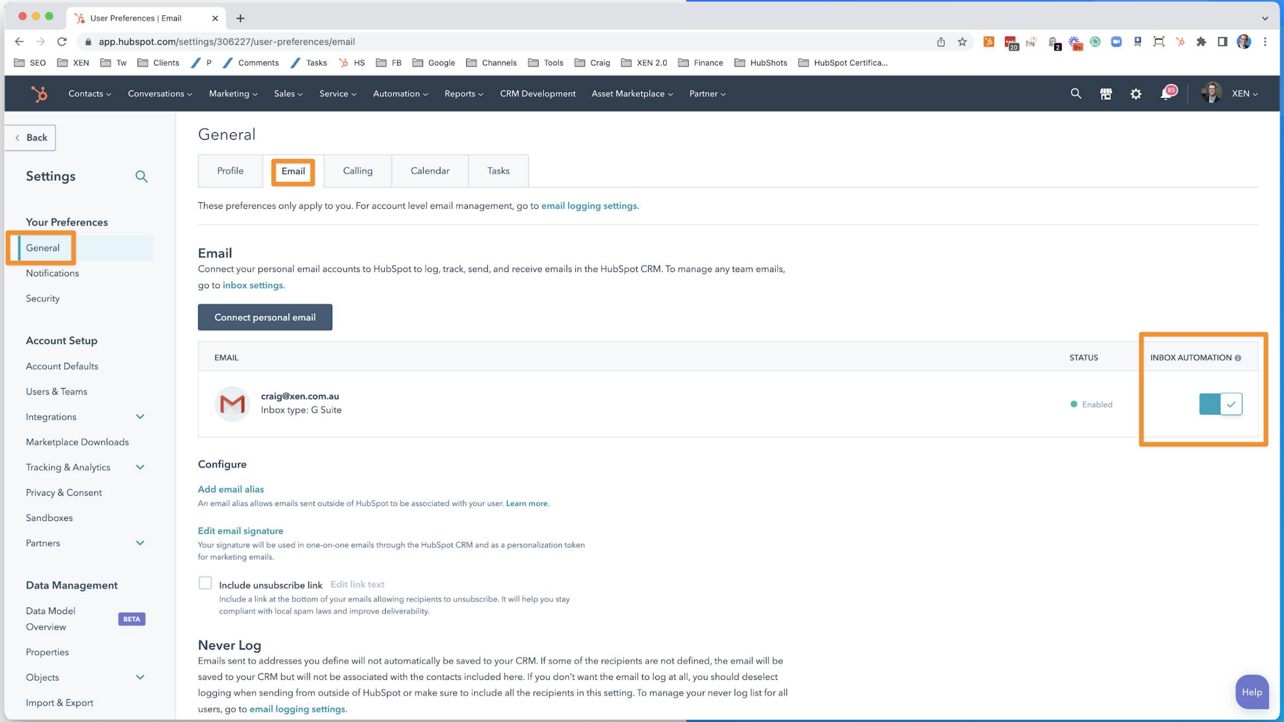
My Favourite



Data Enrichment

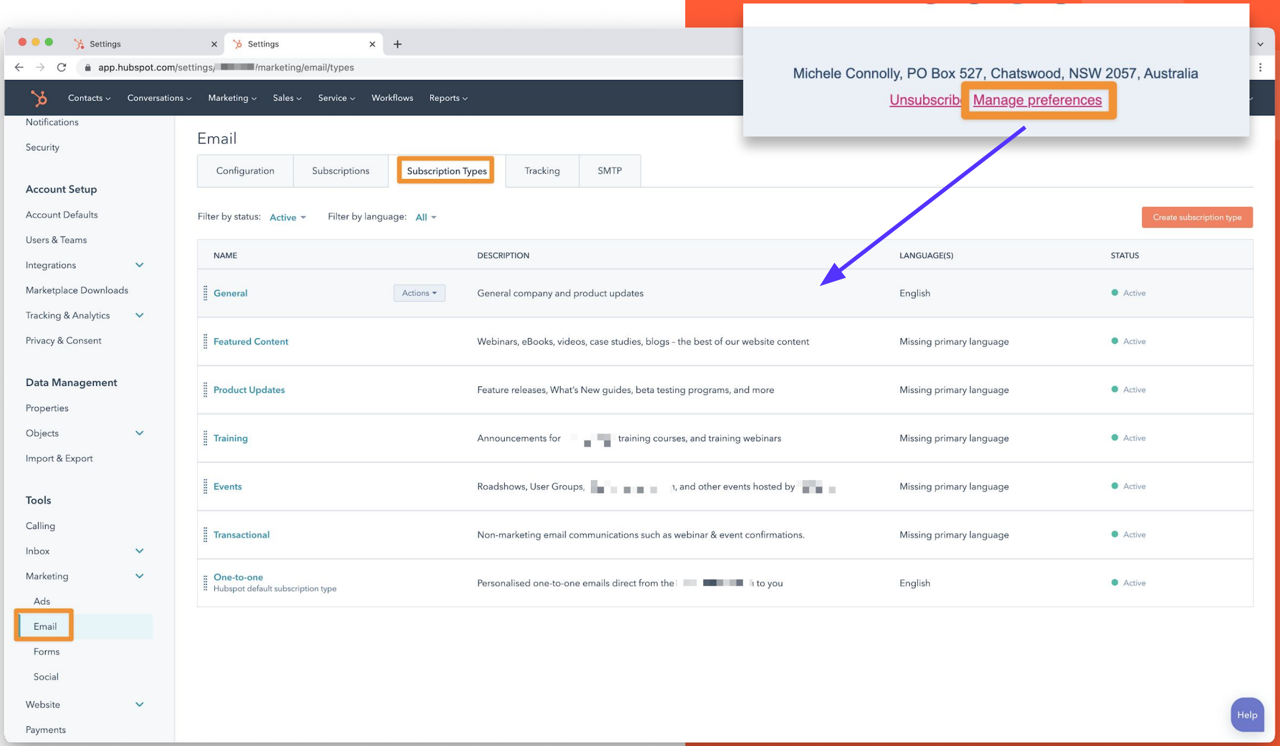
Enable this in your personal profile

HubSpot KB article



Email Preferences

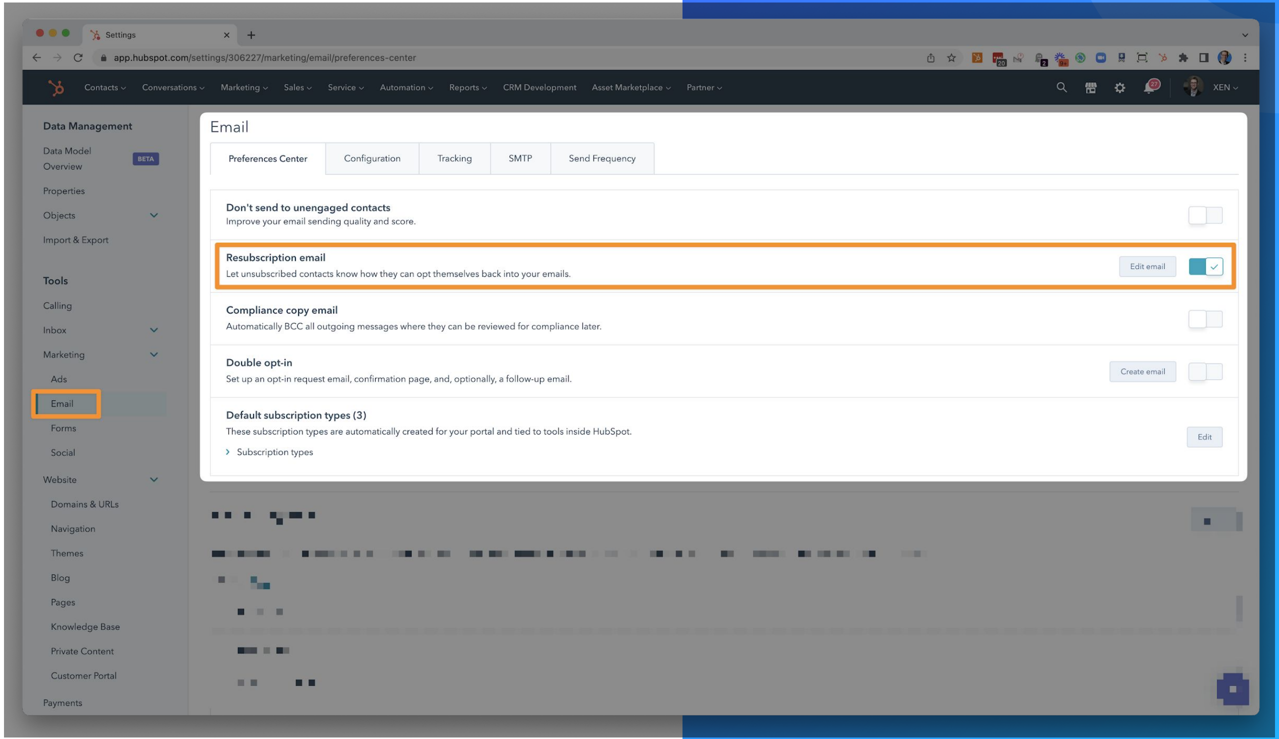
Let your contacts select what's relevant to them



Resubscribe Email

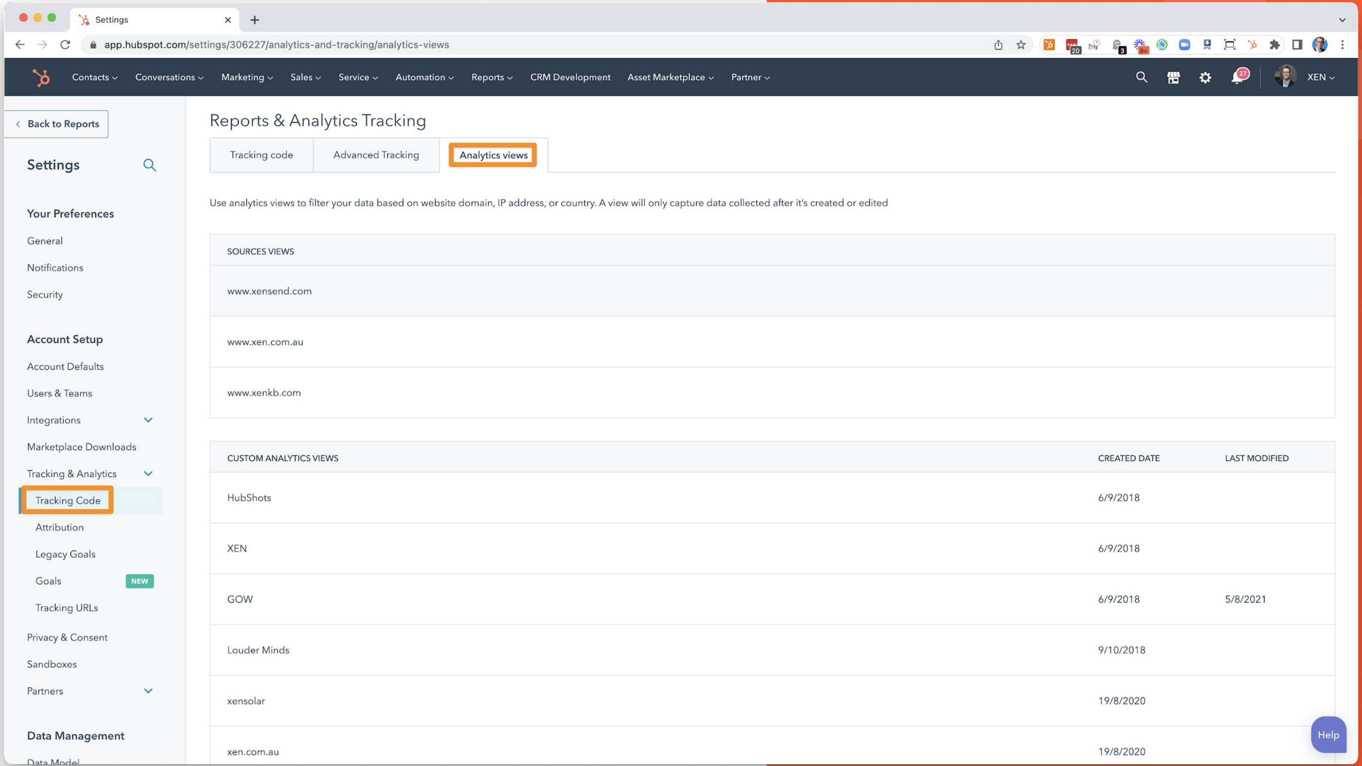
Gotcha: if not turned on, contacts who unsubscribe can't resubscribe

[HubSpot KB article]



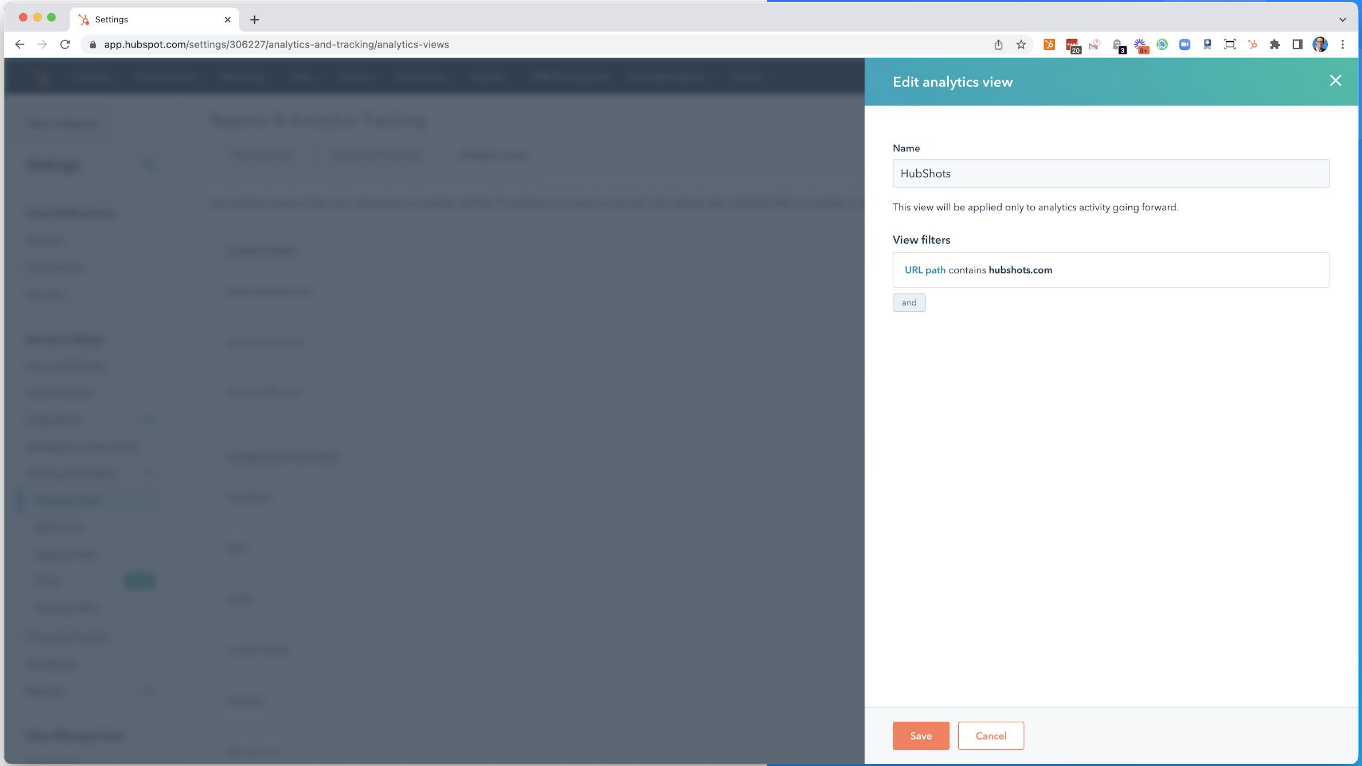
Analytics Views

Segment your traffic



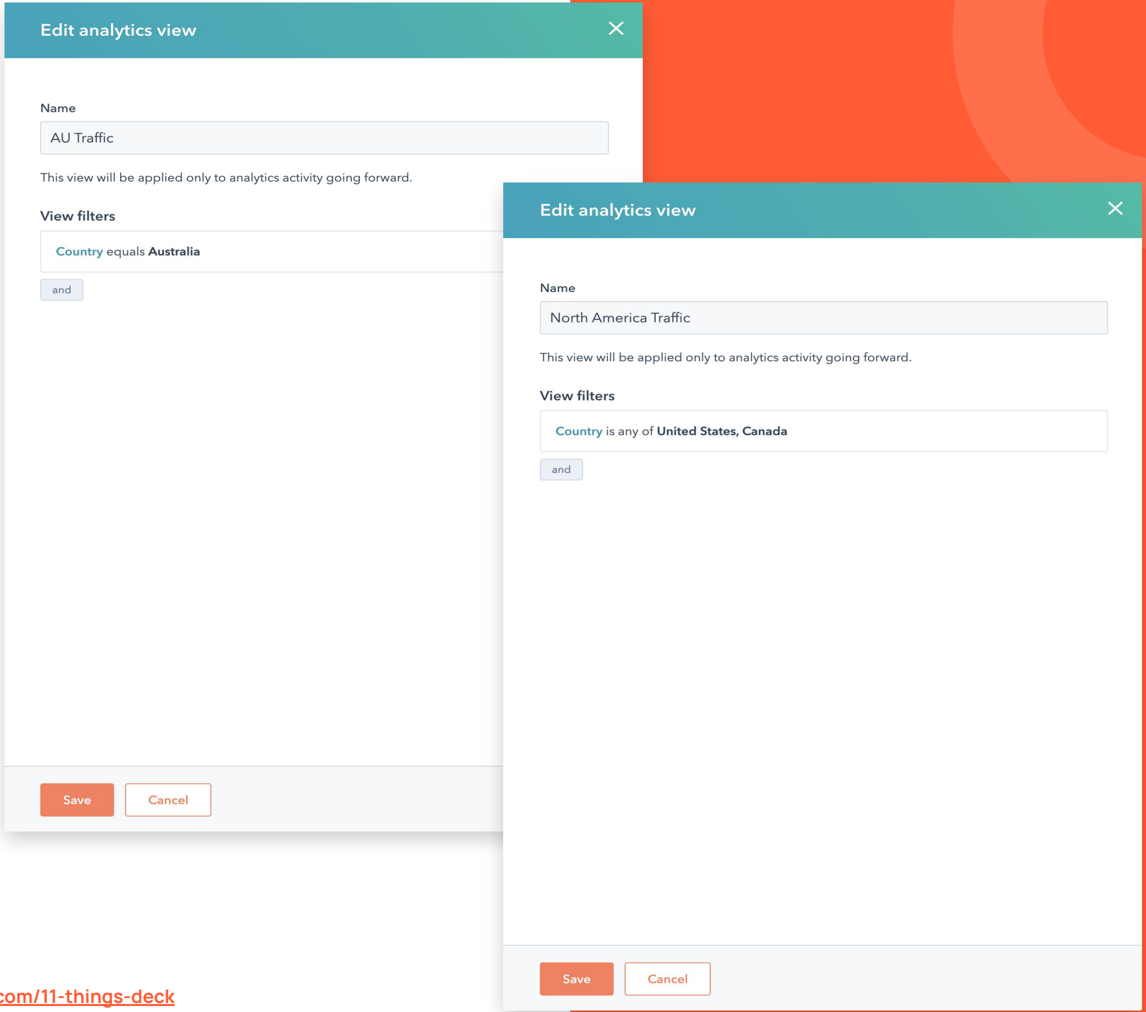
Analytics Views

Across domains



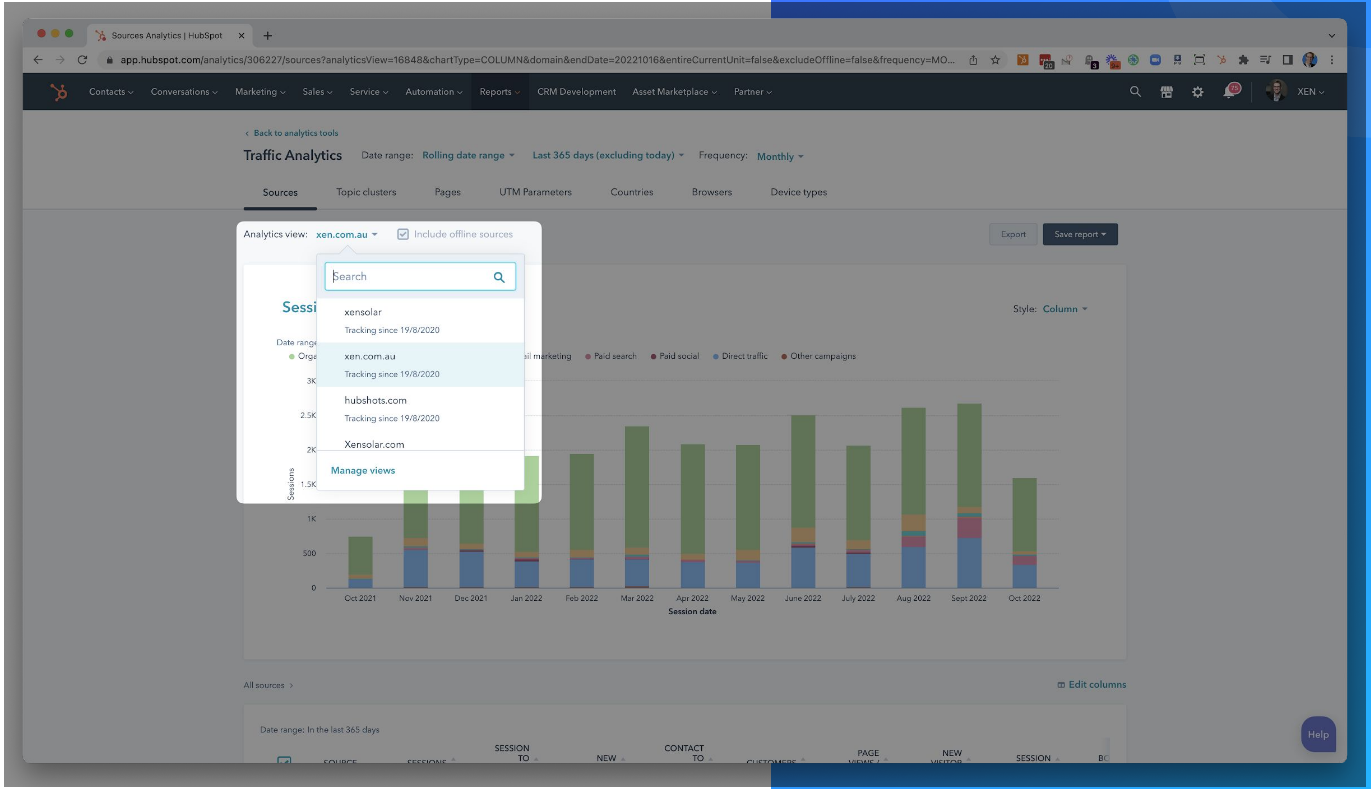
Analytics Views

Across geographies



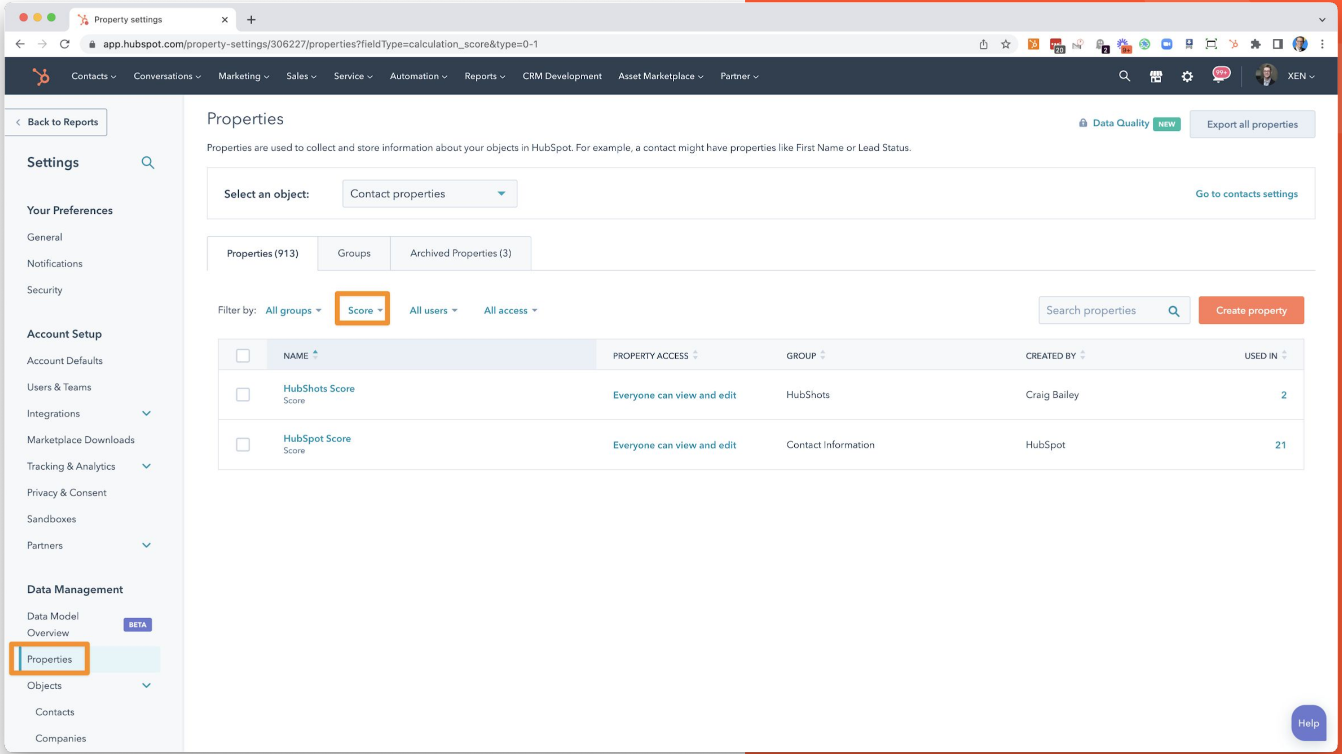
Analytics Views

Use in reports



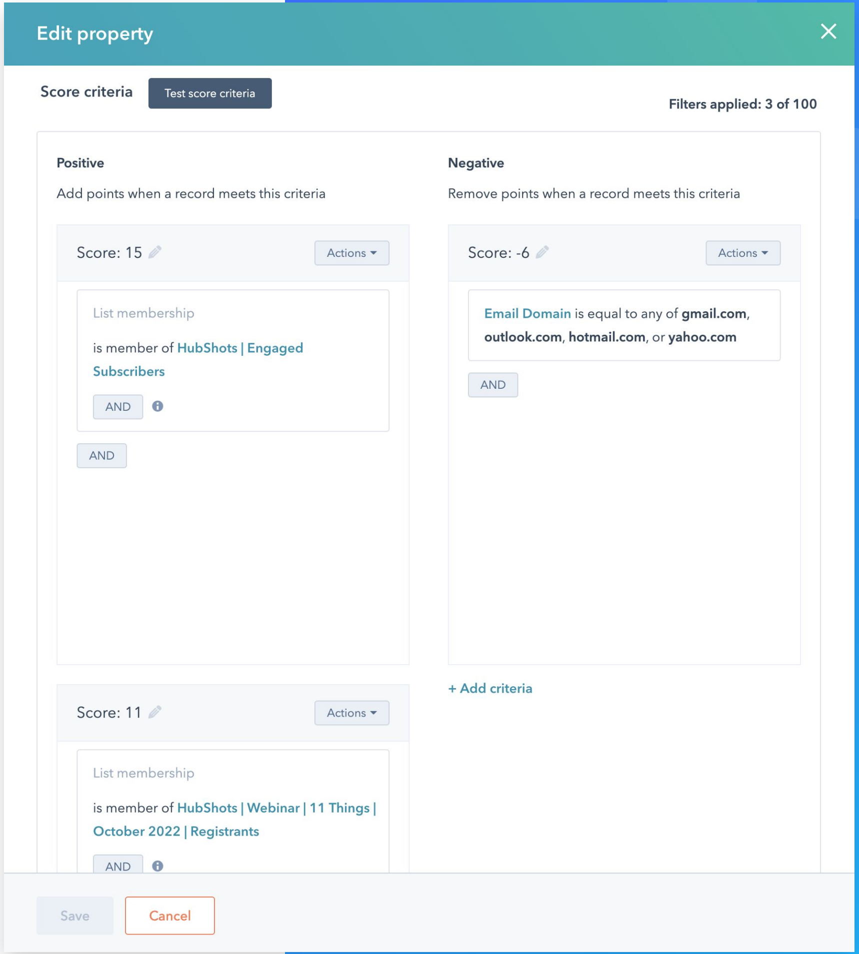
Score Properties

You can create 'Score' properties



Score Properties

They allow you to build scores based on behaviours

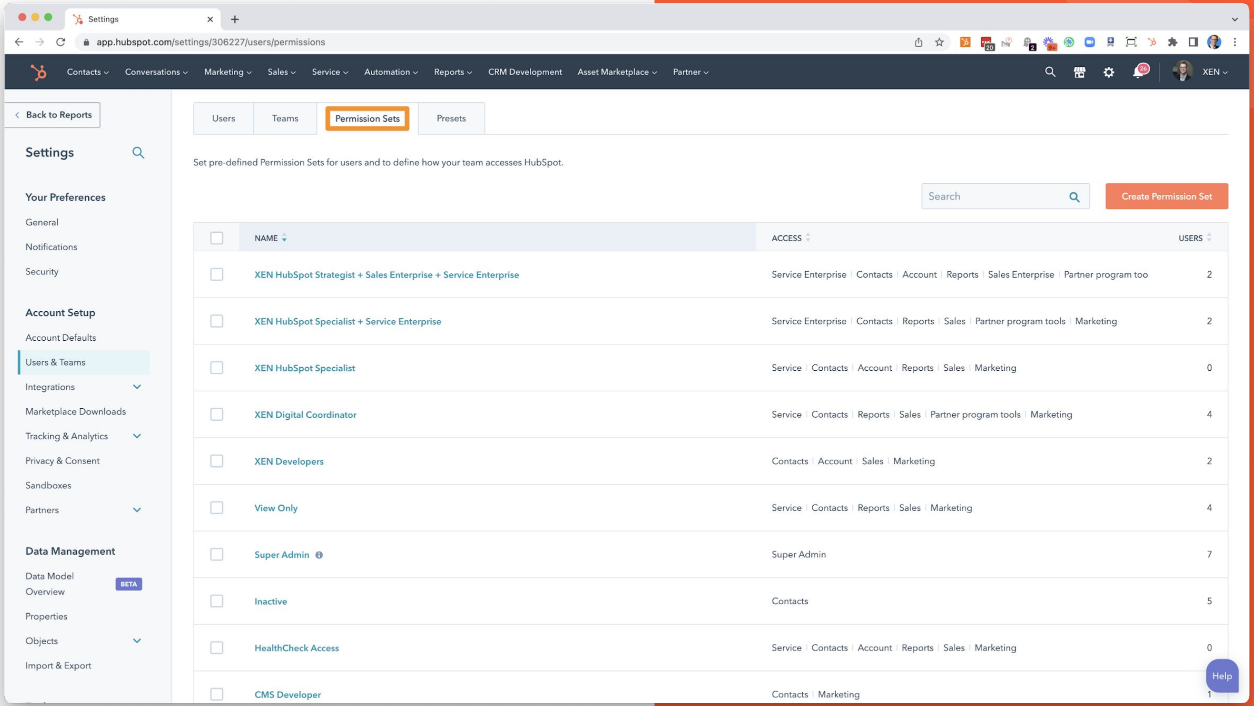


Team Management

Permission sets:

- Consistent setup
- Includes paid seat permissions

(Enterprise tier)



[3] CRM Things

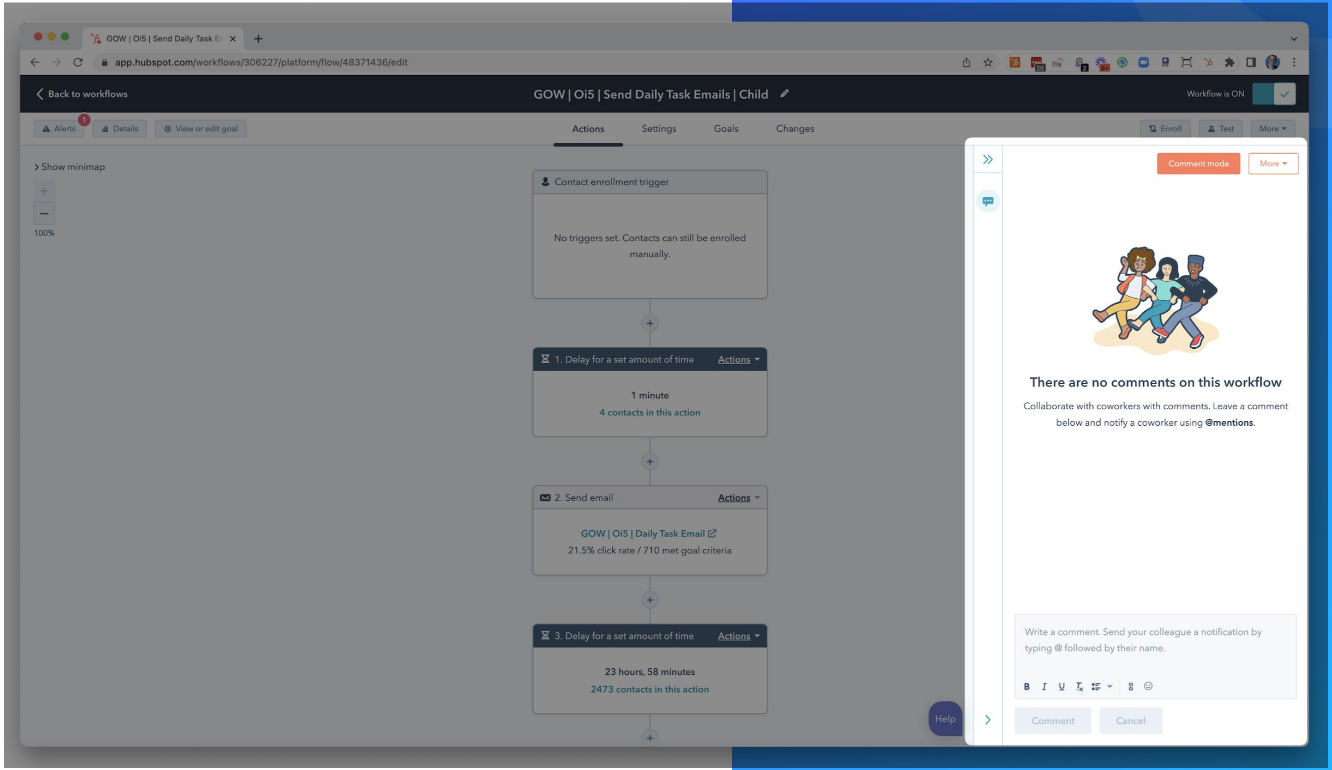
HubShots

Across the hubs

- Comments
- Notifications
- Global search
- Folders
- Views

Comments

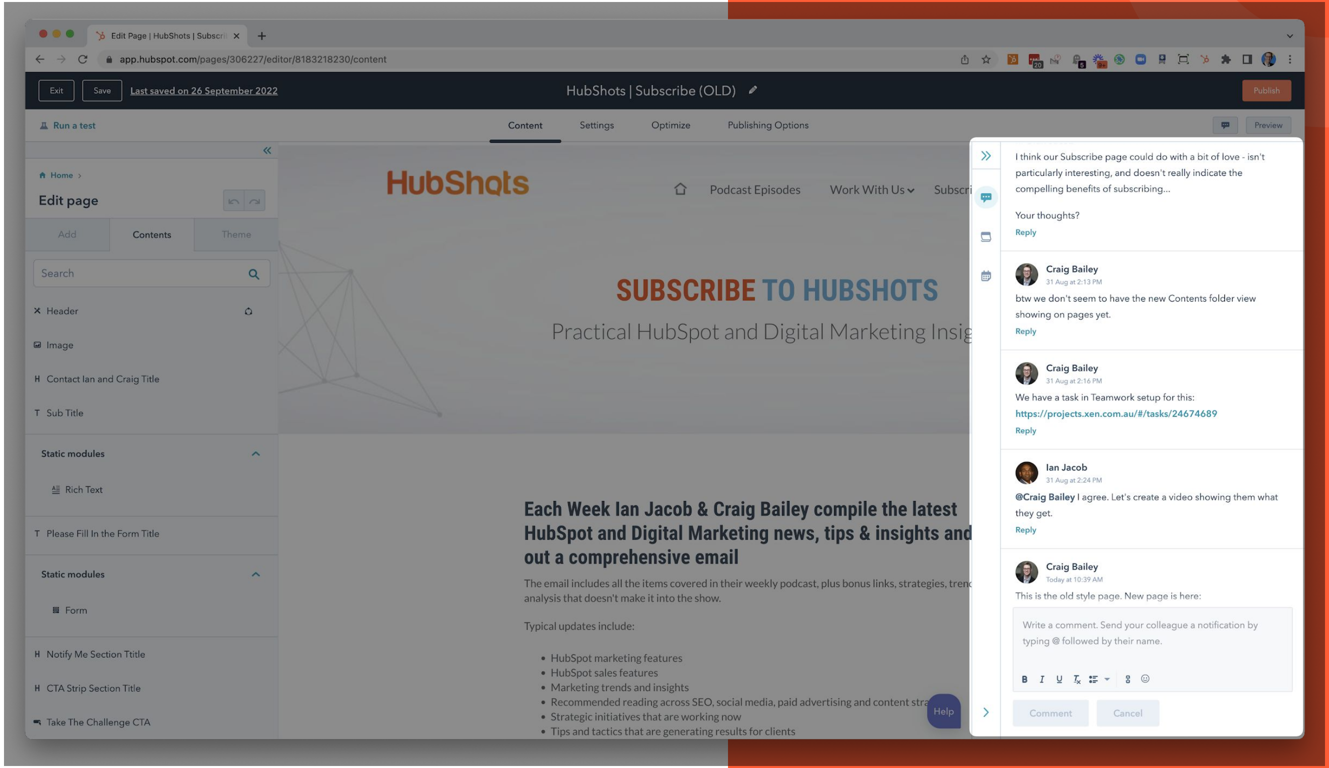
Collaboration everywhere...



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

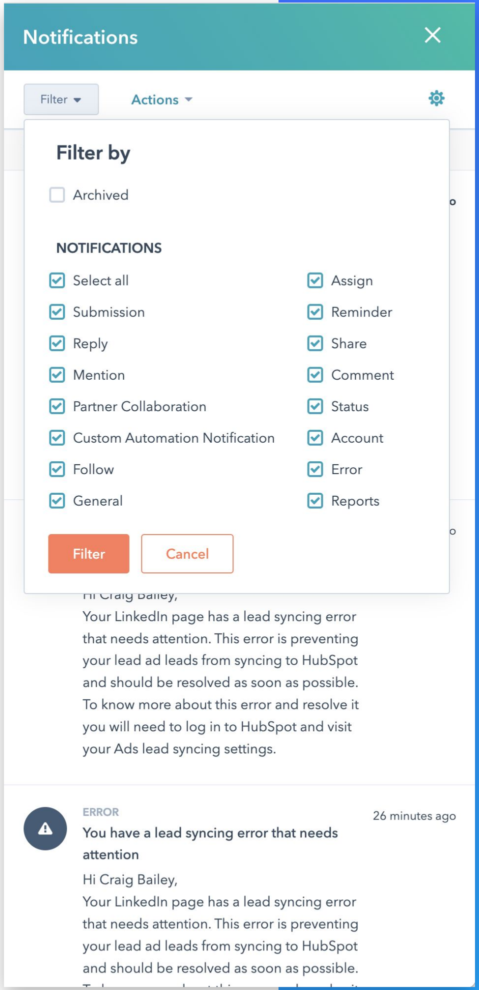
Comments

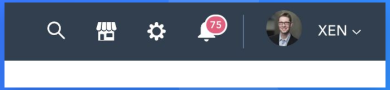
Work together in HubSpot



Notifications

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

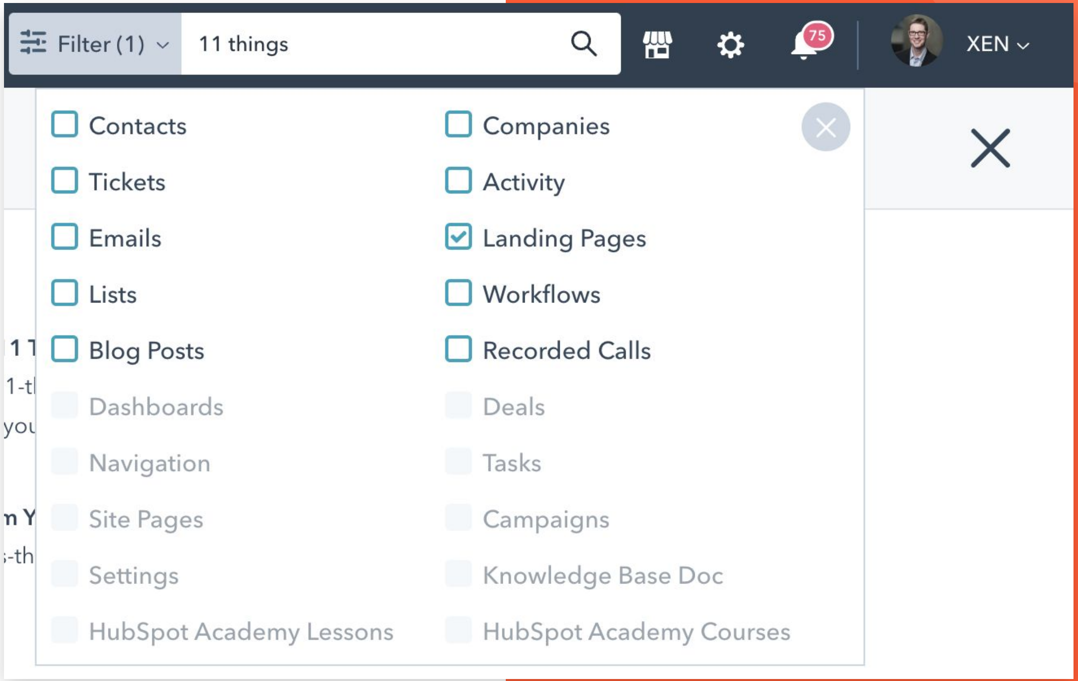




Global Search

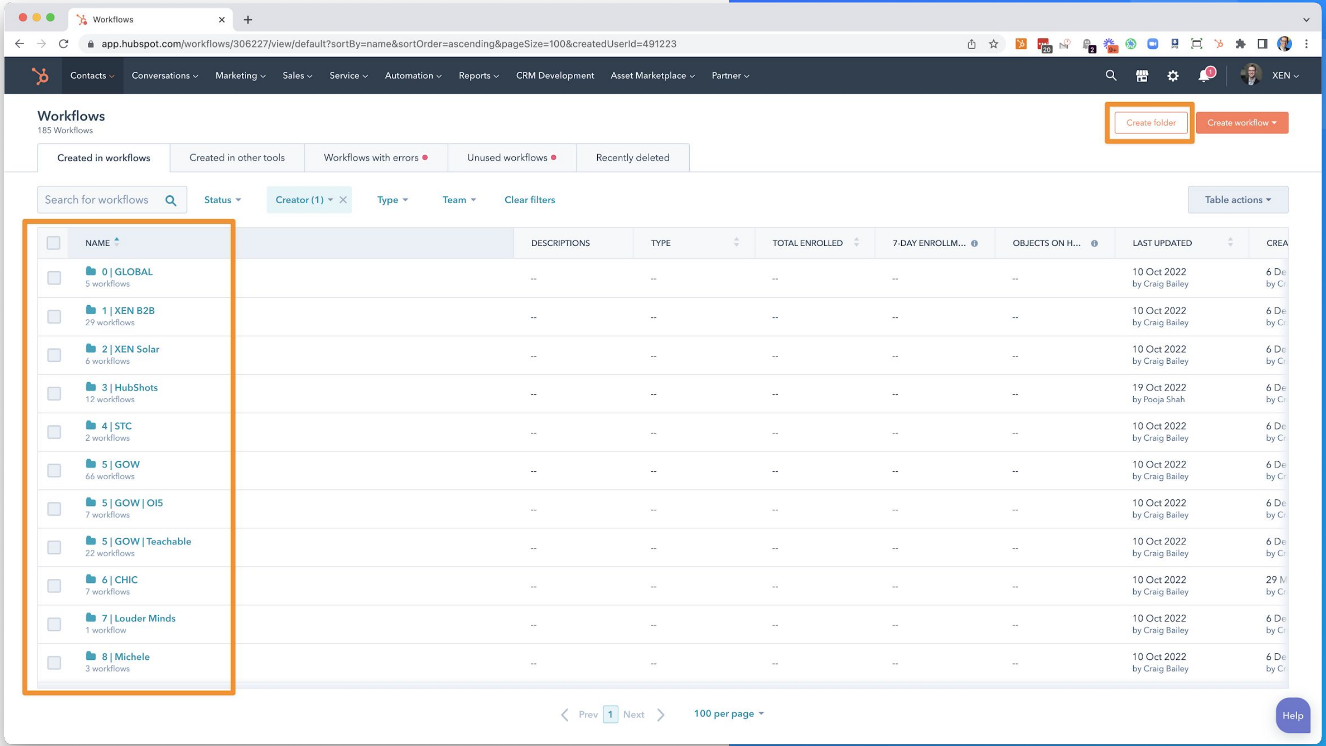
Save a few clicks...

Search on anything (objects and assets)



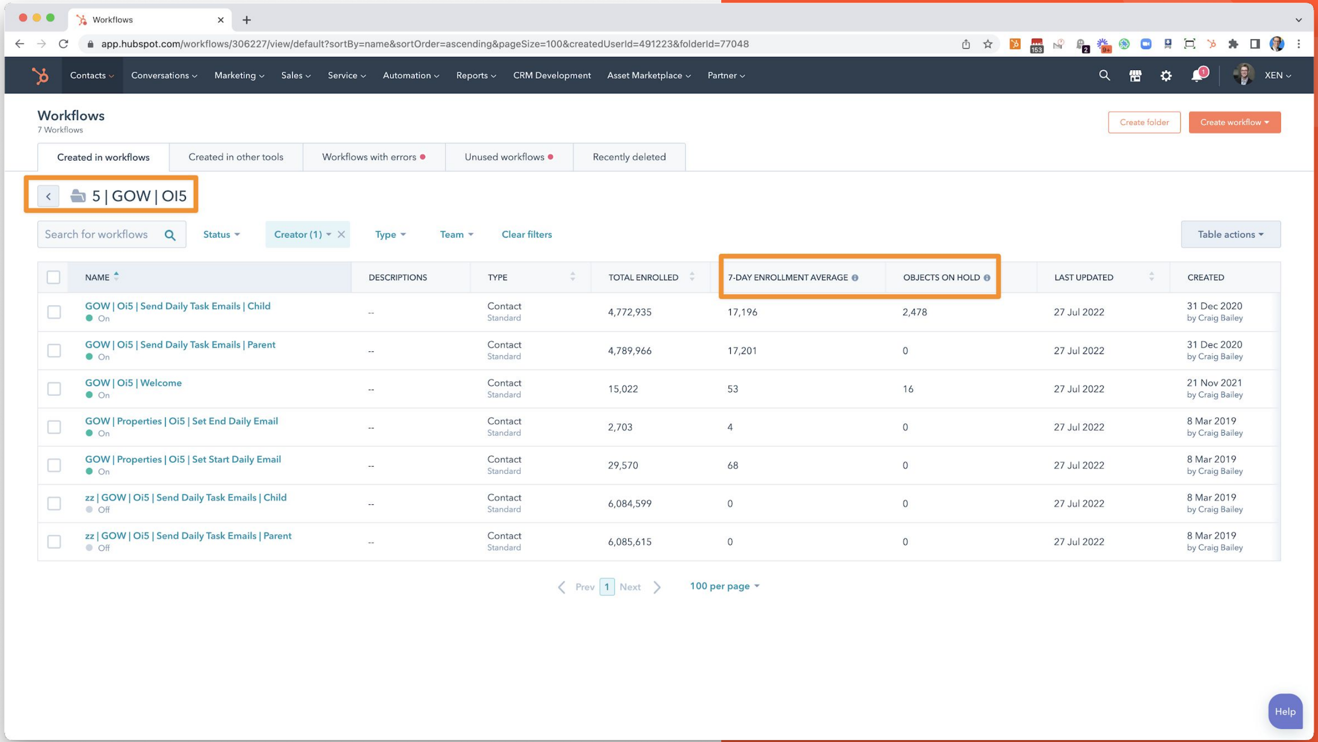
Folders

Folders = quicker navigation



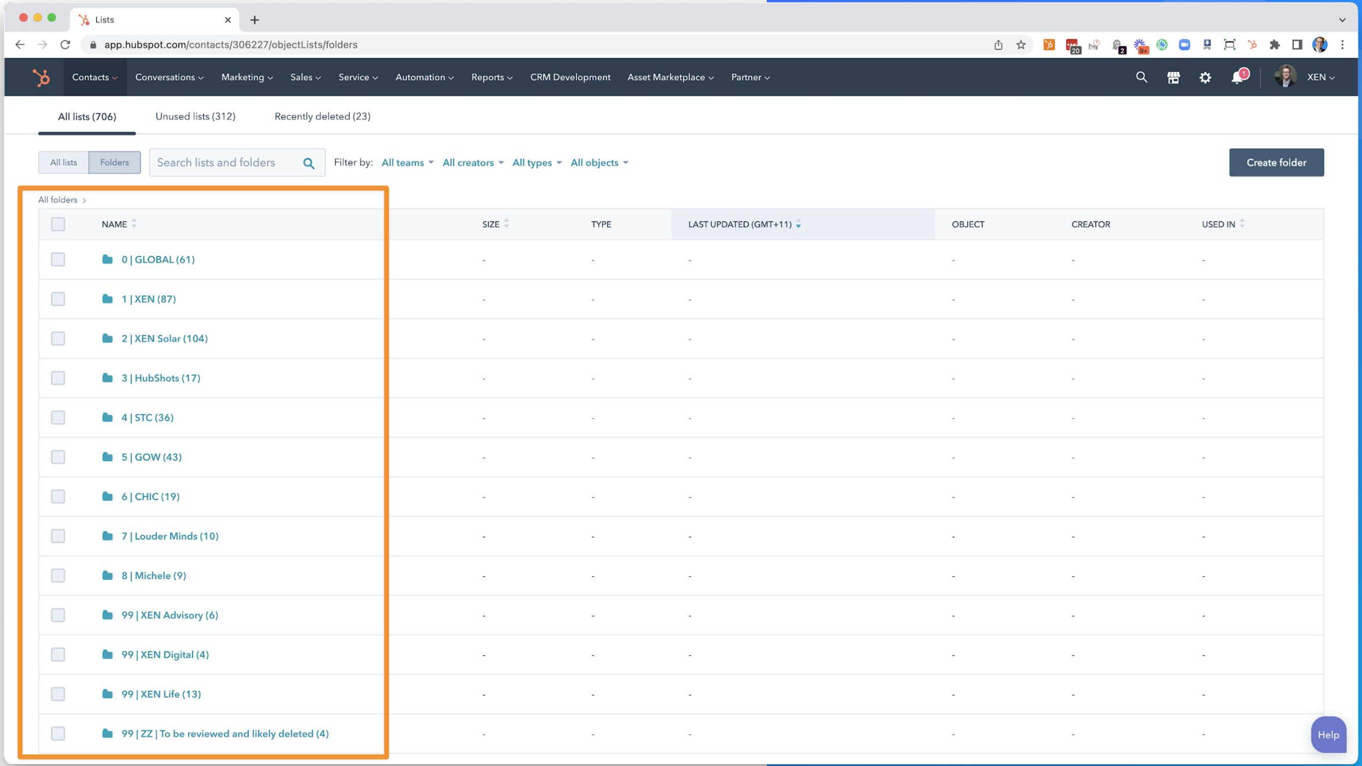
Folders

Helps when you can't sort by some columns



Folders

Easy to see totals with folders

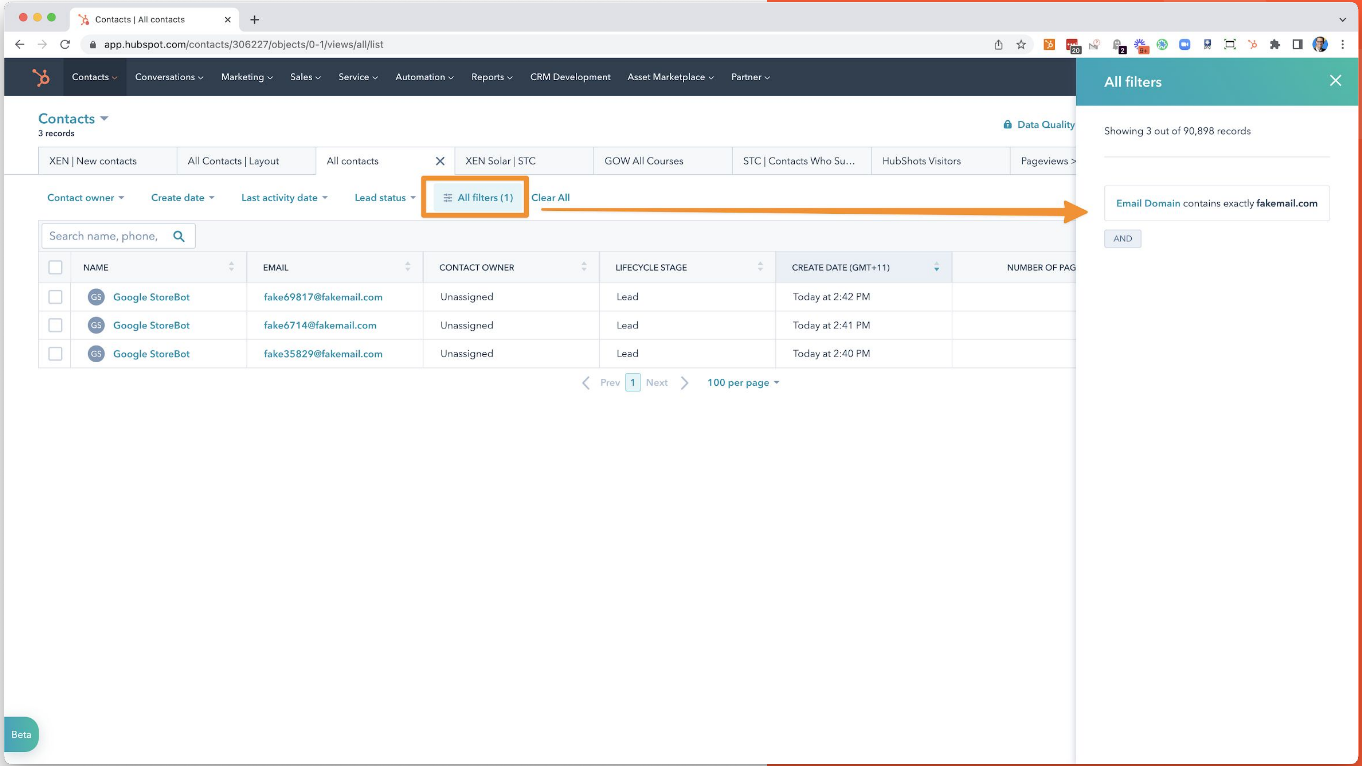


Folders

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

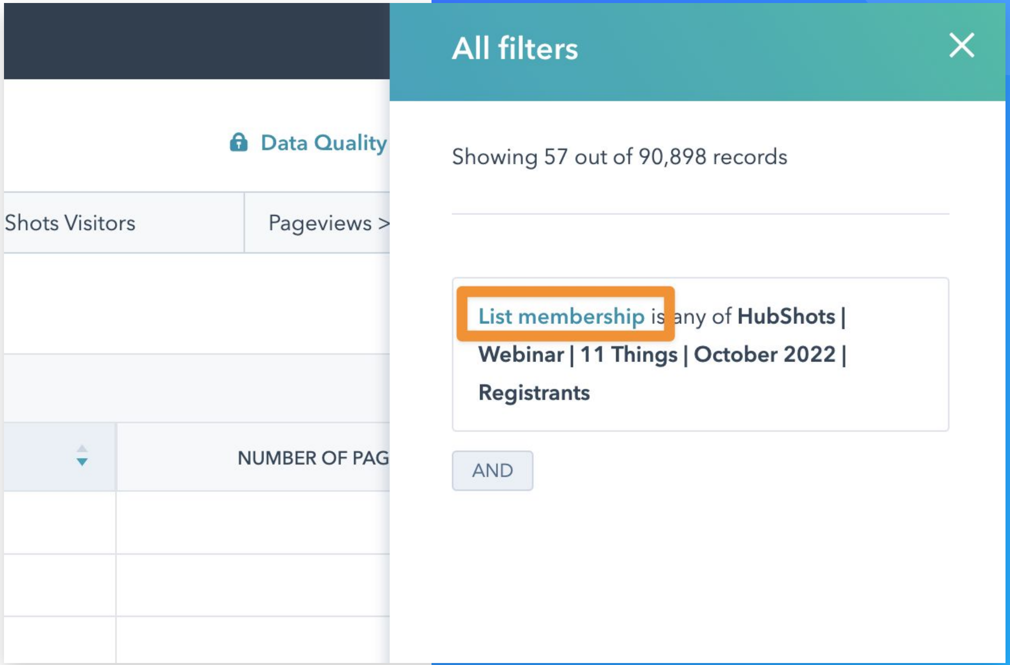
Views

Filter criteria on the fly



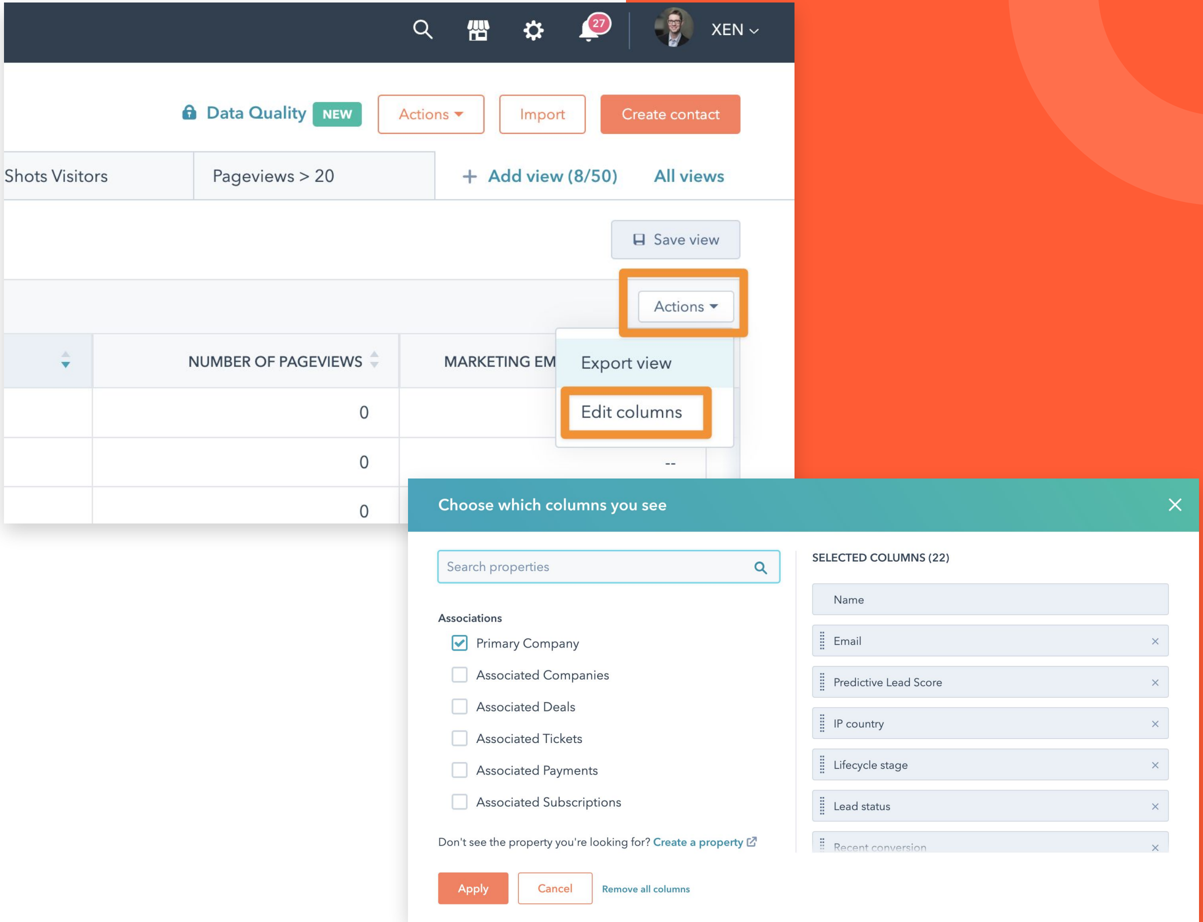
Views

Tip: You can filter based on Lists



Views

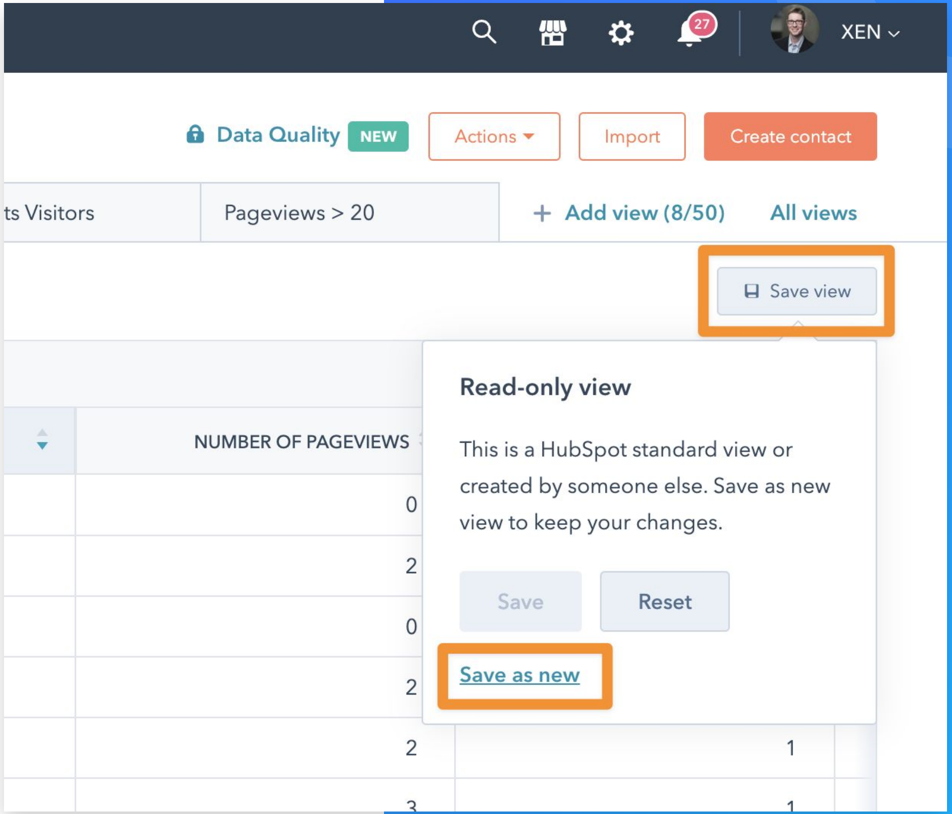
Set the column layout



Views

Save as your own view, including:

- Filter criteria
- Layout
- Sorting



[4] Page Things

HubShots

Marketing Hub items

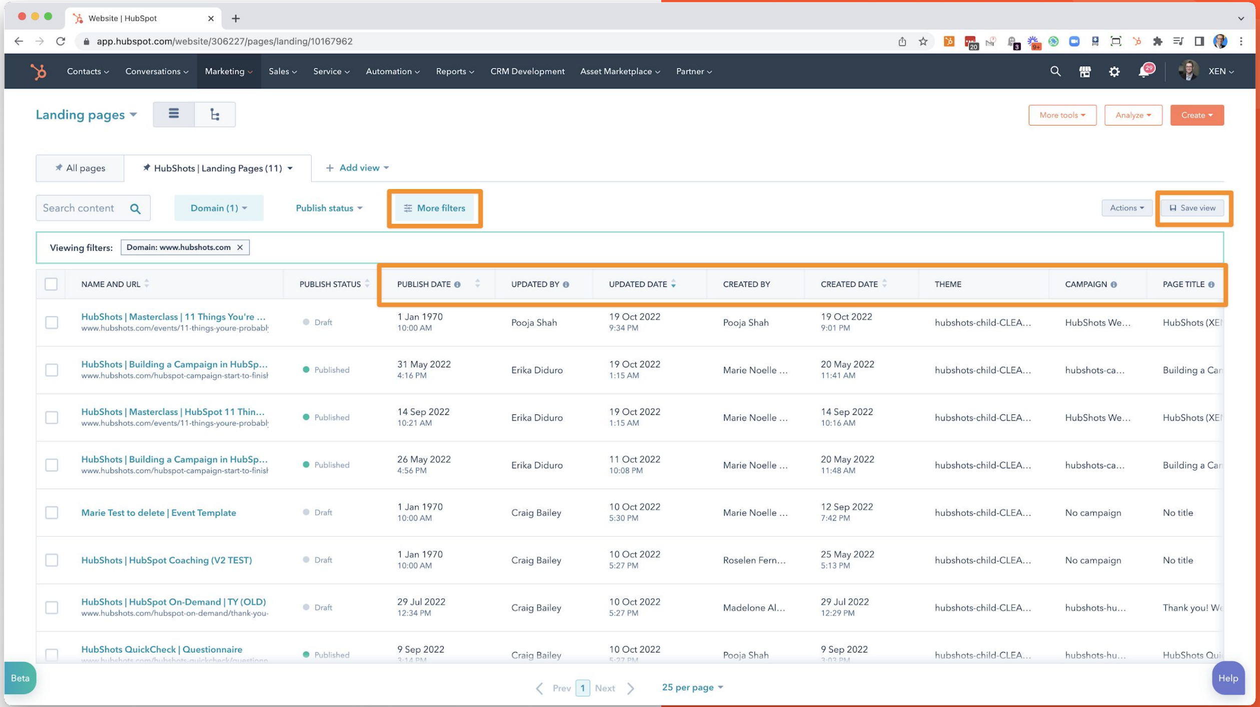
- Page views
- Drag and Drop builder
- Saved Sections

Pages Views

New Views experience on Landing pages and pages

Filter, Sort, Set Columns
Save

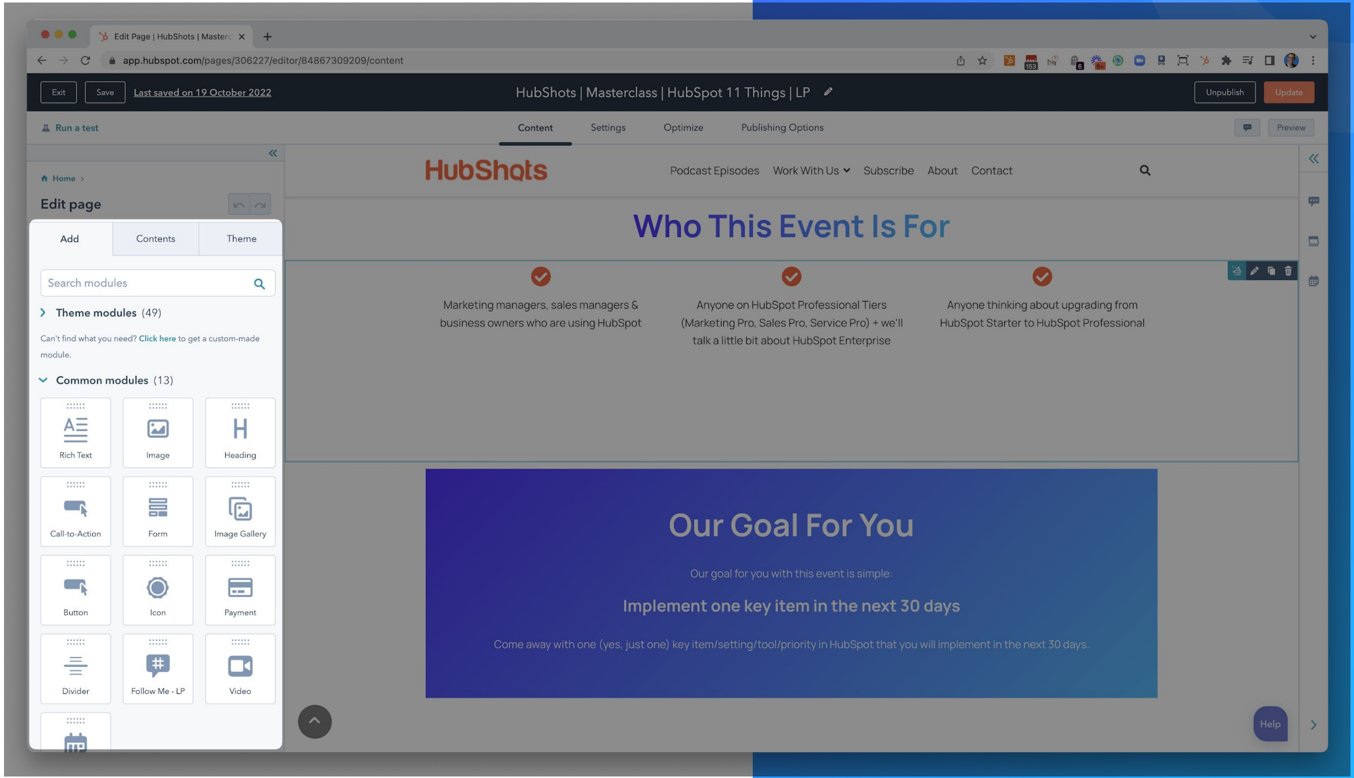
It's OK if you are confused by 'pageviews' versus Pages Views



Page User Experience (UX)

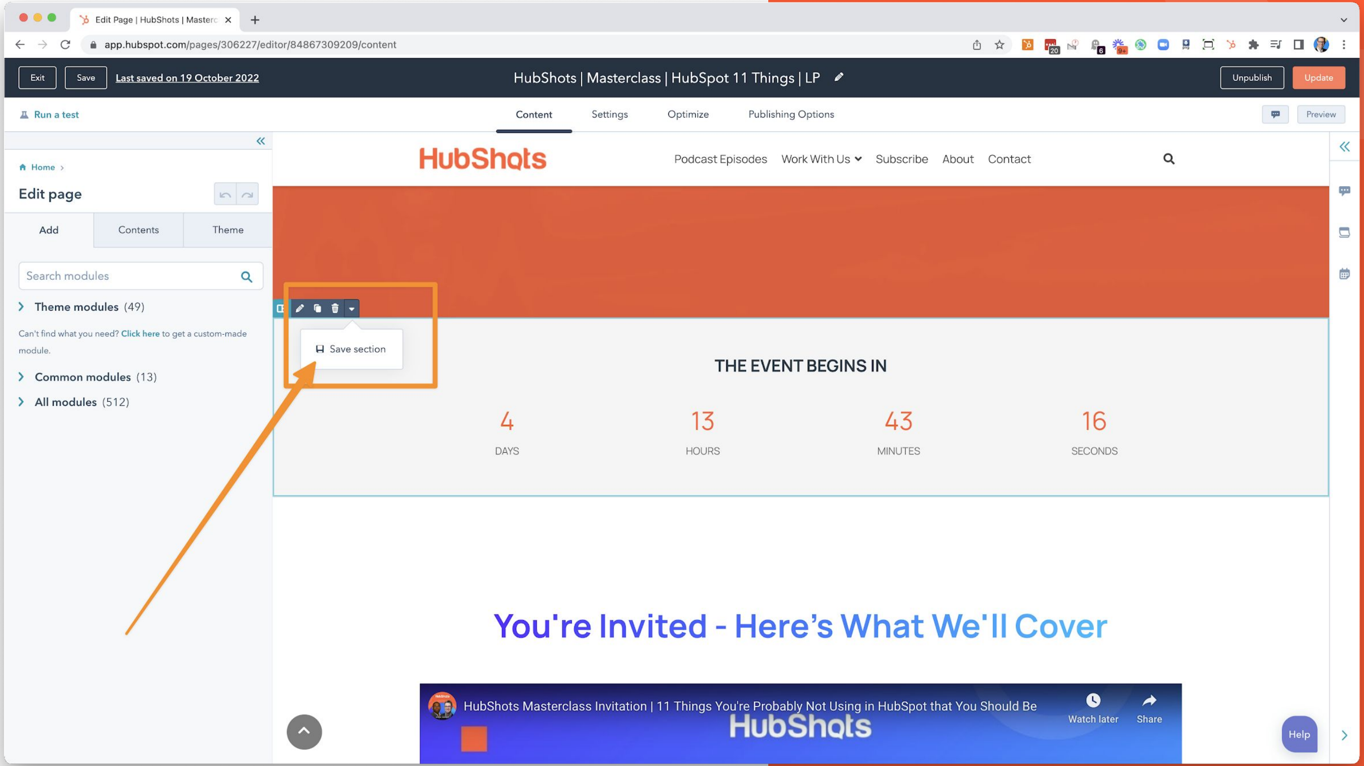
Full Drag-and-Drop experience using Themes

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



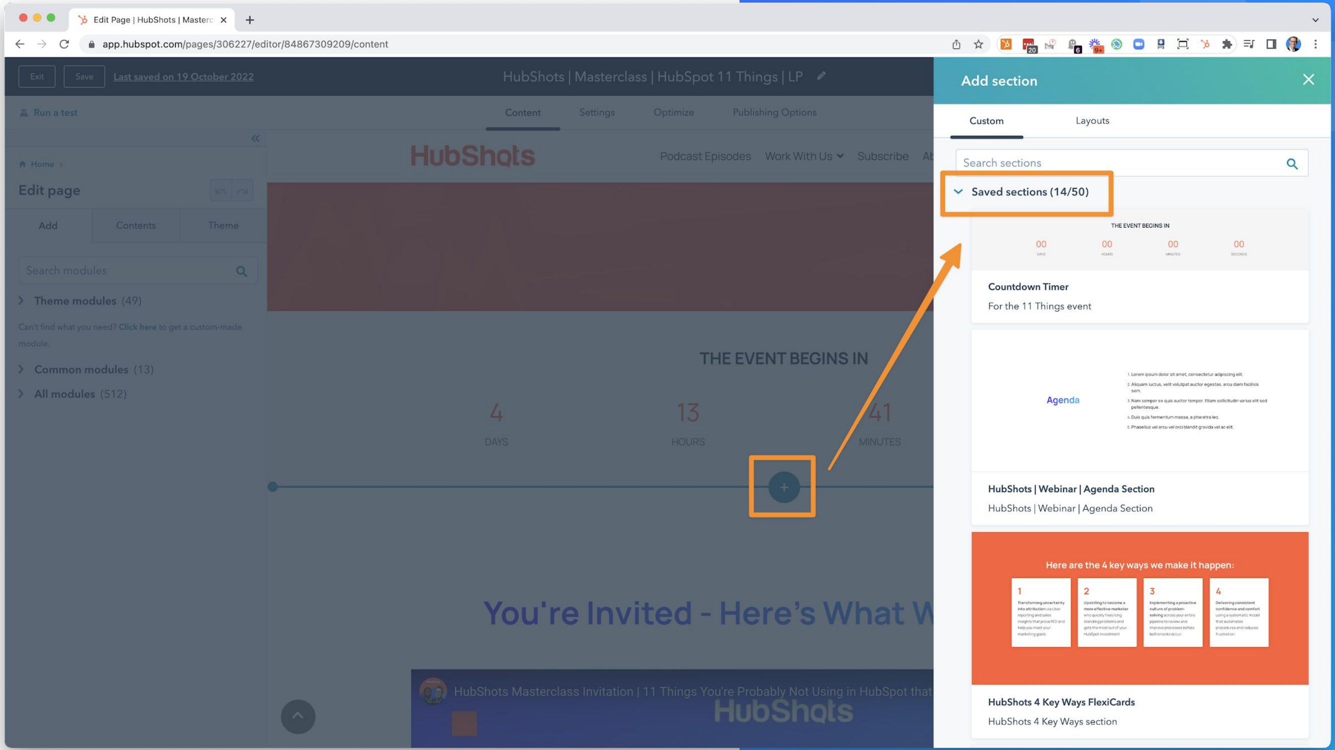
Page Tip

Save Sections



Page Tip

Re-use them later on other pages



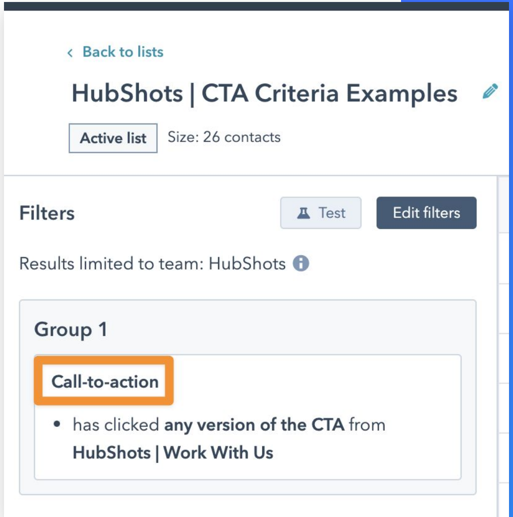
[5] Marketing Things

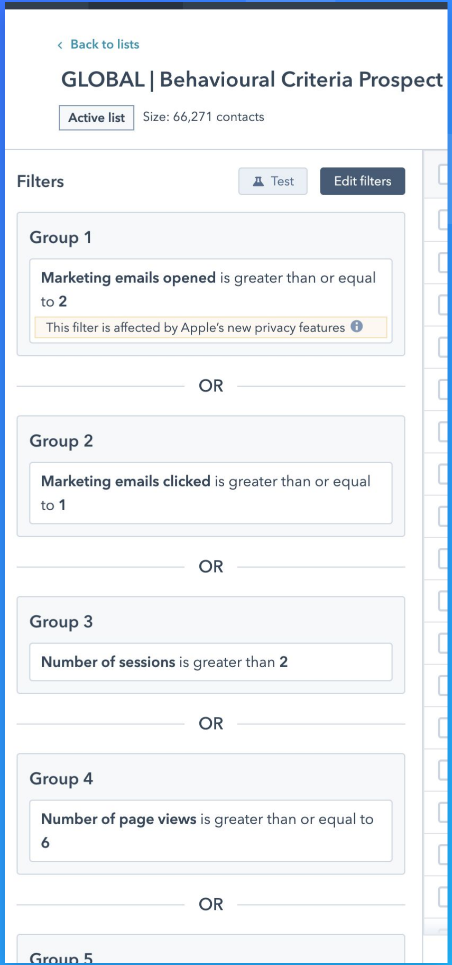
HubShots

Marketing Hub items

- Lists
- Ads
- Forms
- Campaigns

Lists

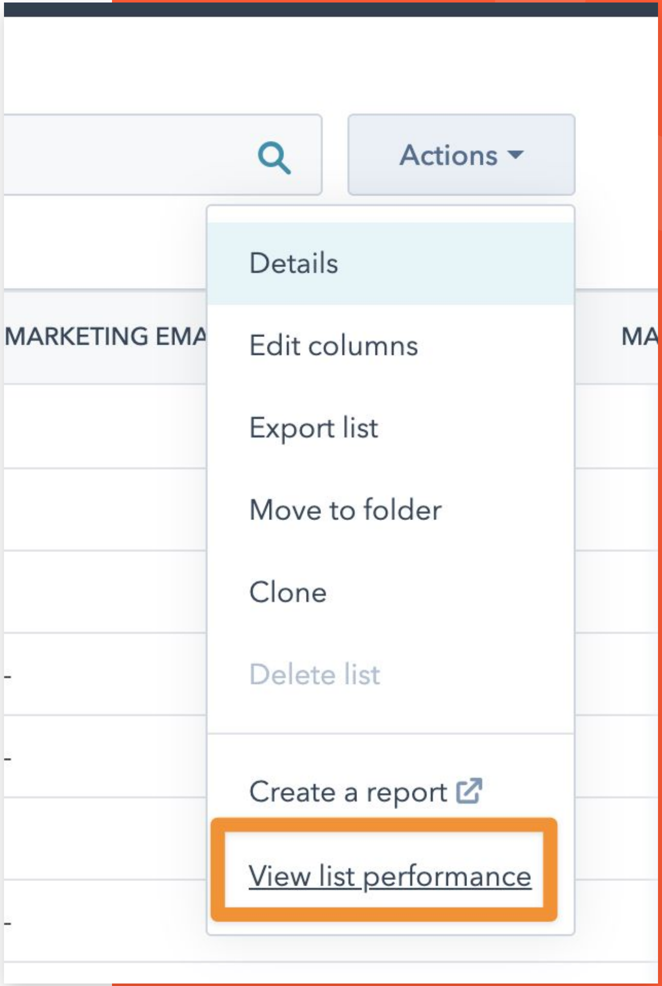




Lists provide (much) more advanced filtering criteria than Views

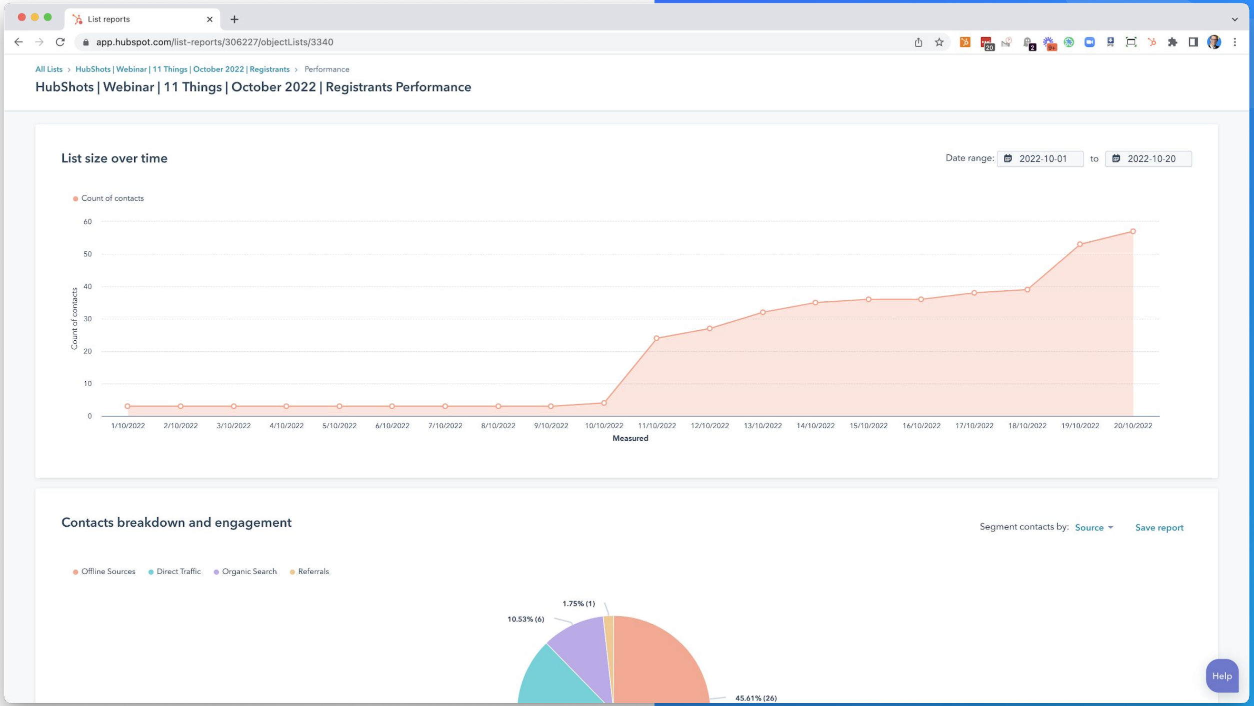
List Performance

View how a list has grown over time



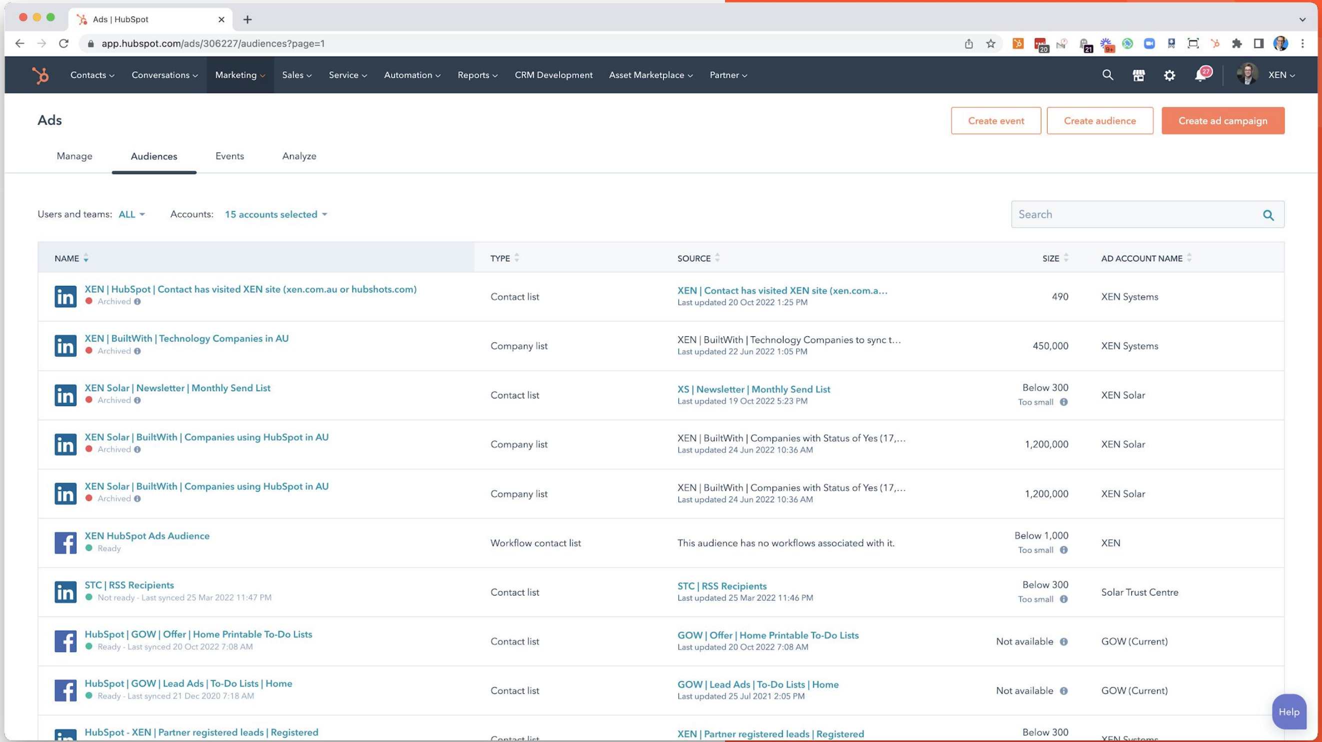
List Performance

Includes source of contacts



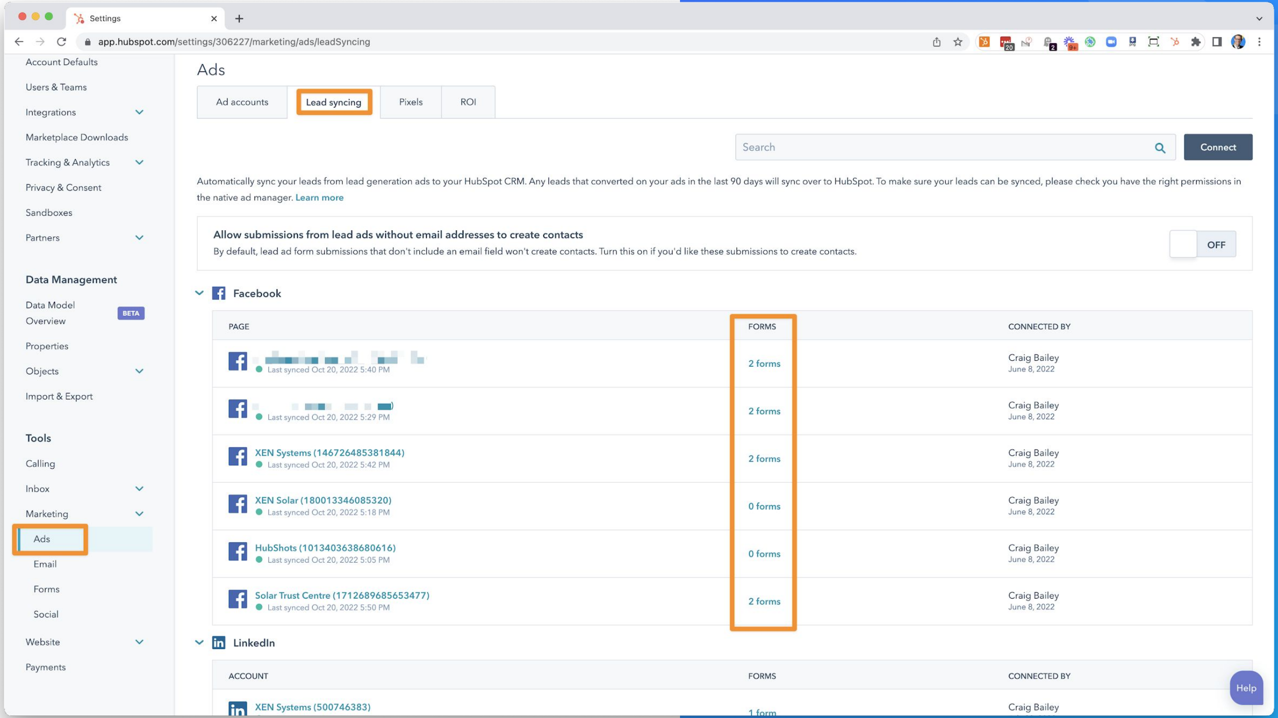
Ads

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



Ads

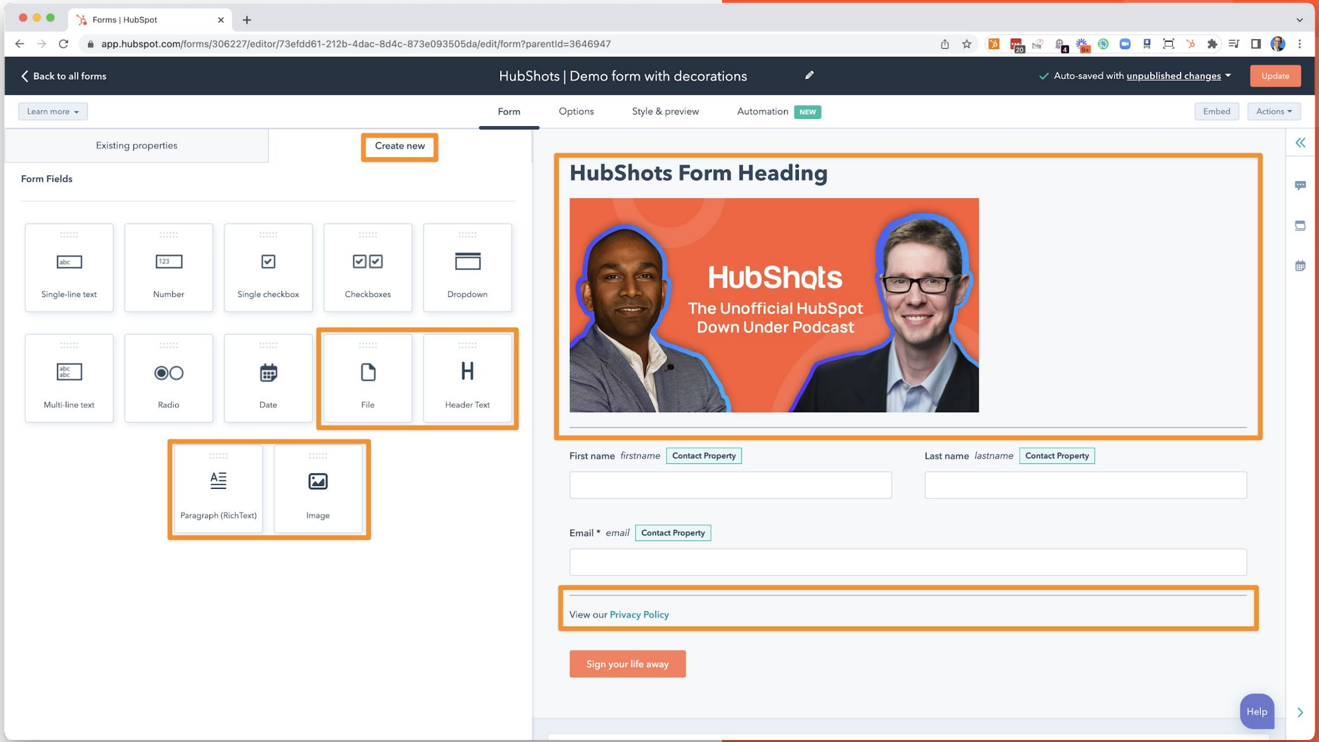
Sync lead form contacts down from LinkedIn and Facebook straight into HubSpot



Forms

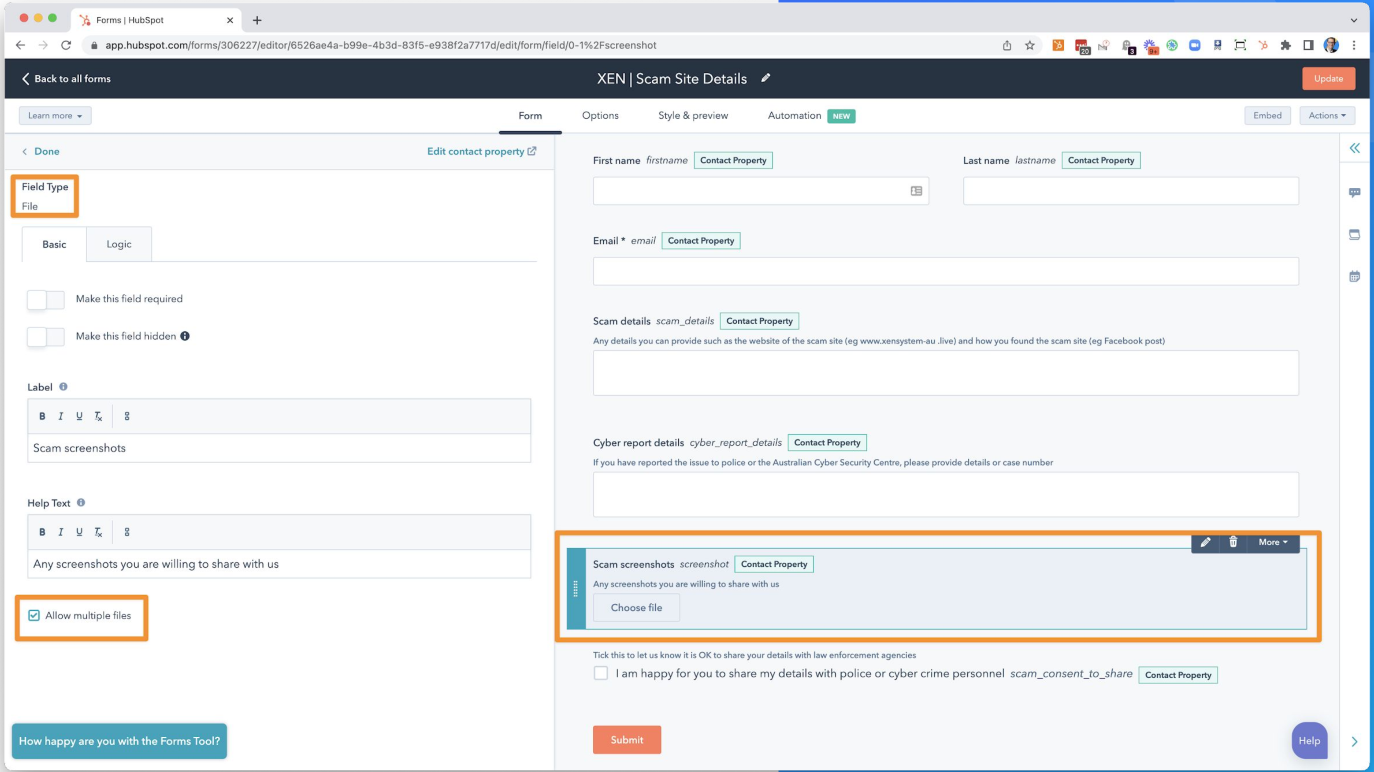
Add images, headings and HTML

Note: Can't embed videos (unsafe HTML)



Forms

Allow people to upload multiple files

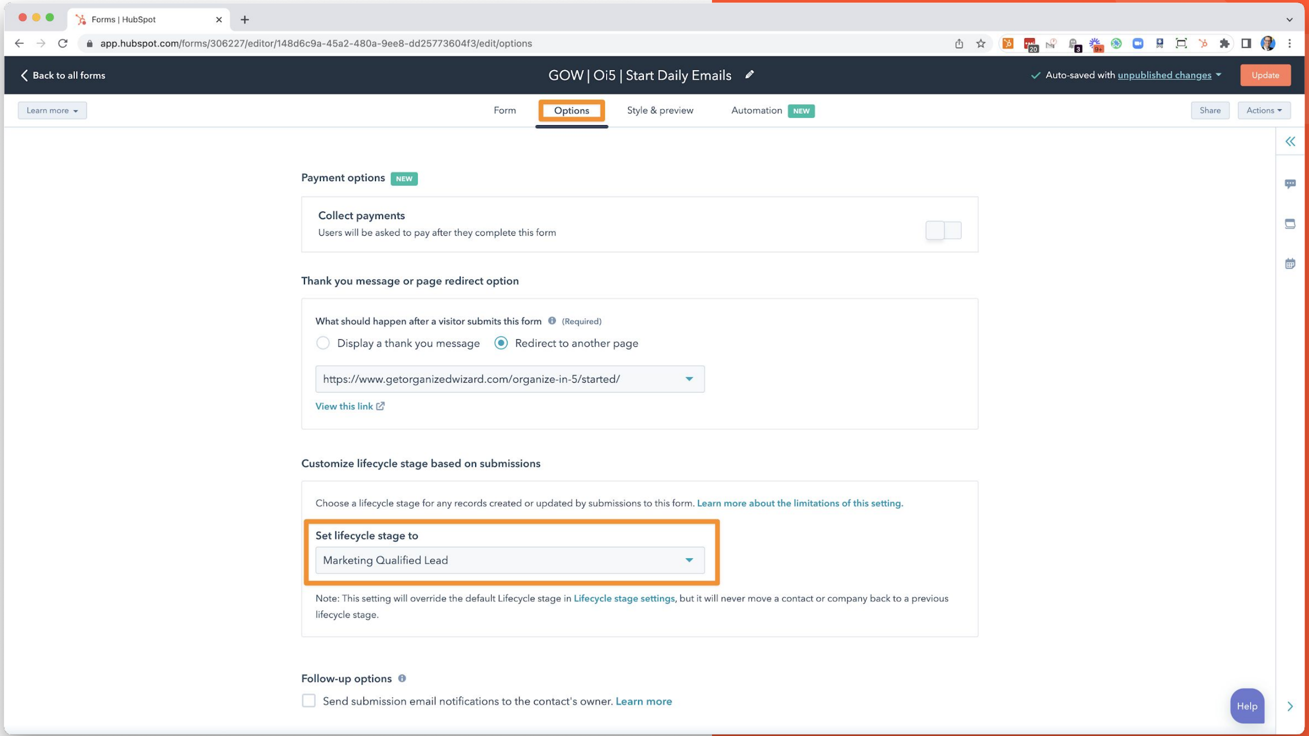


Forms

Set the Lifecycle stage

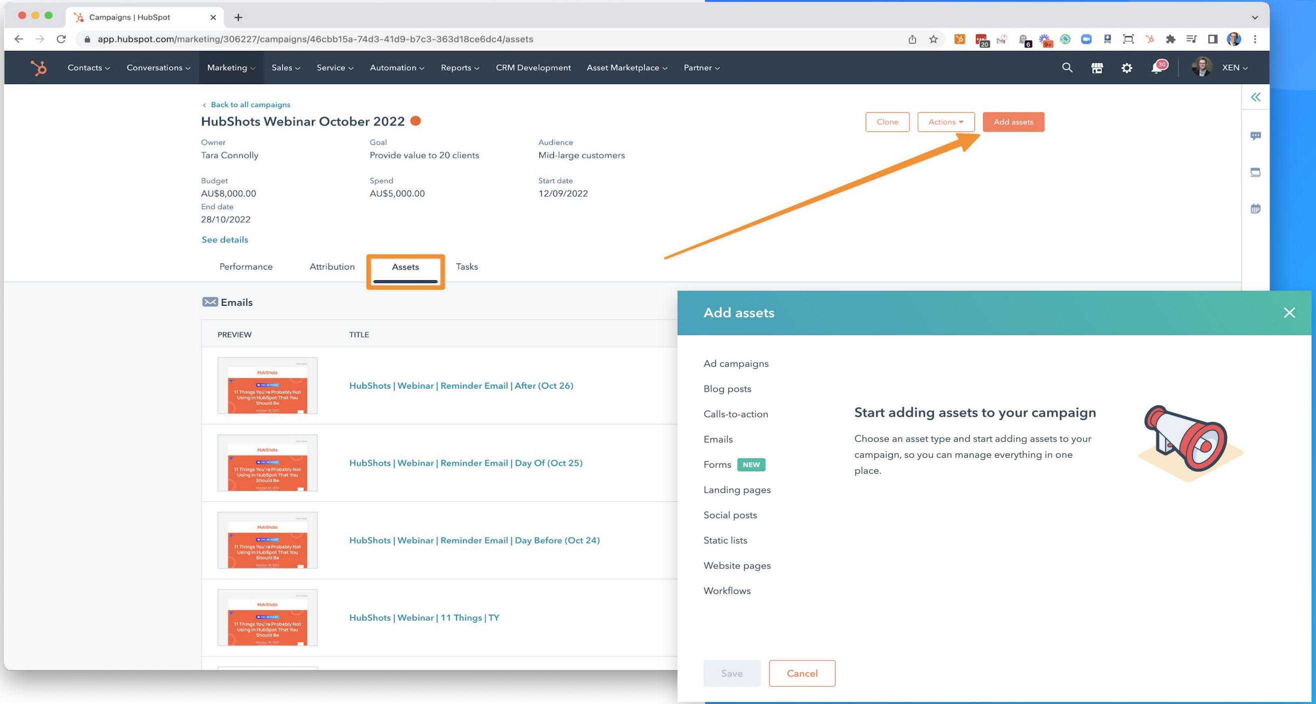
Handy if some of your forms indicate higher intent

Eg a Request a Demo form might set to Sales Qualified



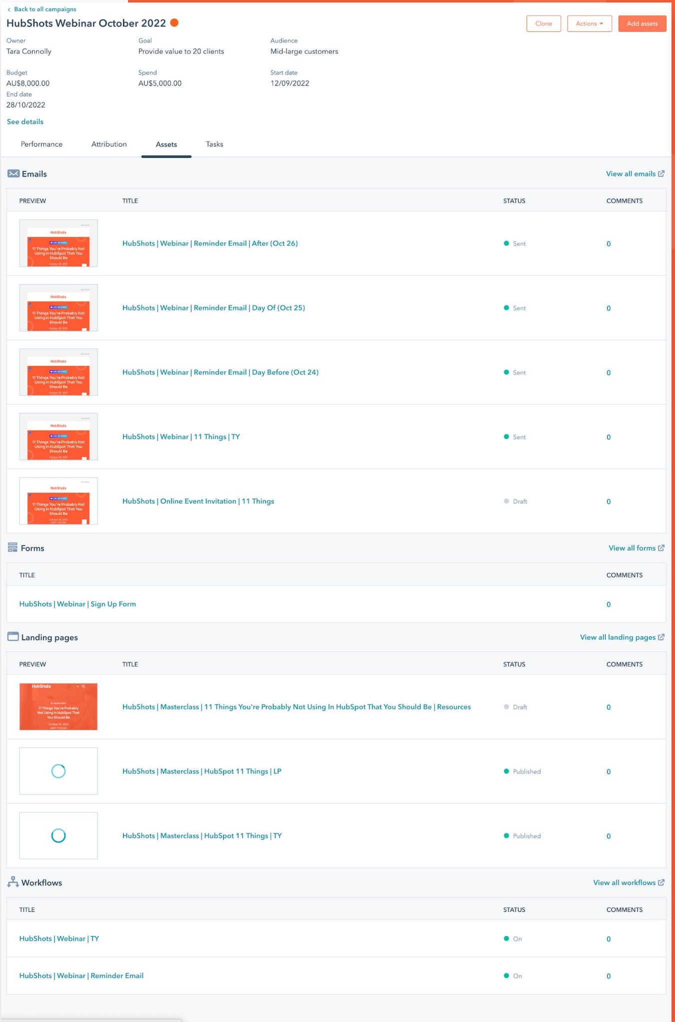
Campaigns

Add Assets



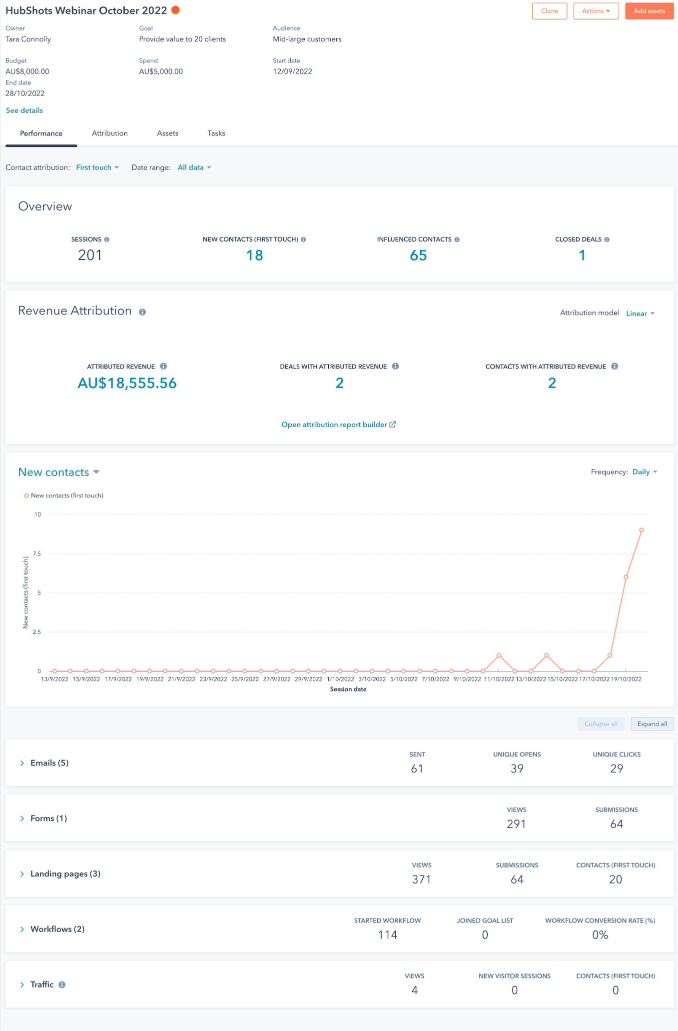
Campaigns

Add Assets



Campaigns

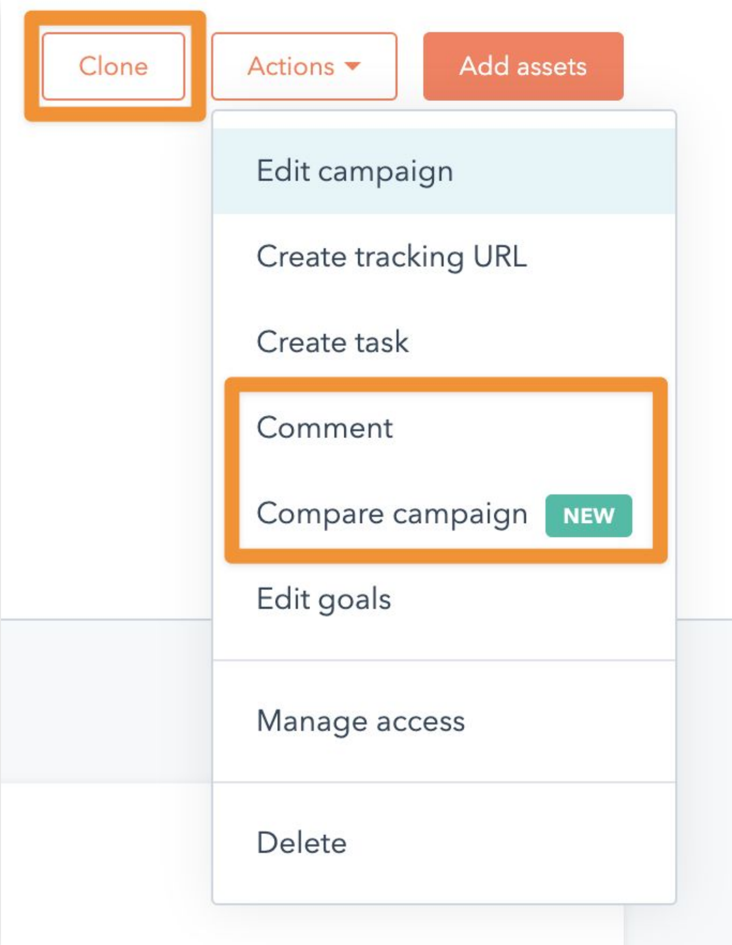
View Performance and Attribution



Campaigns

Other handy features:

- Comment
- Compare campaigns
- Clone campaigns



[6] Sales Things

HubShots

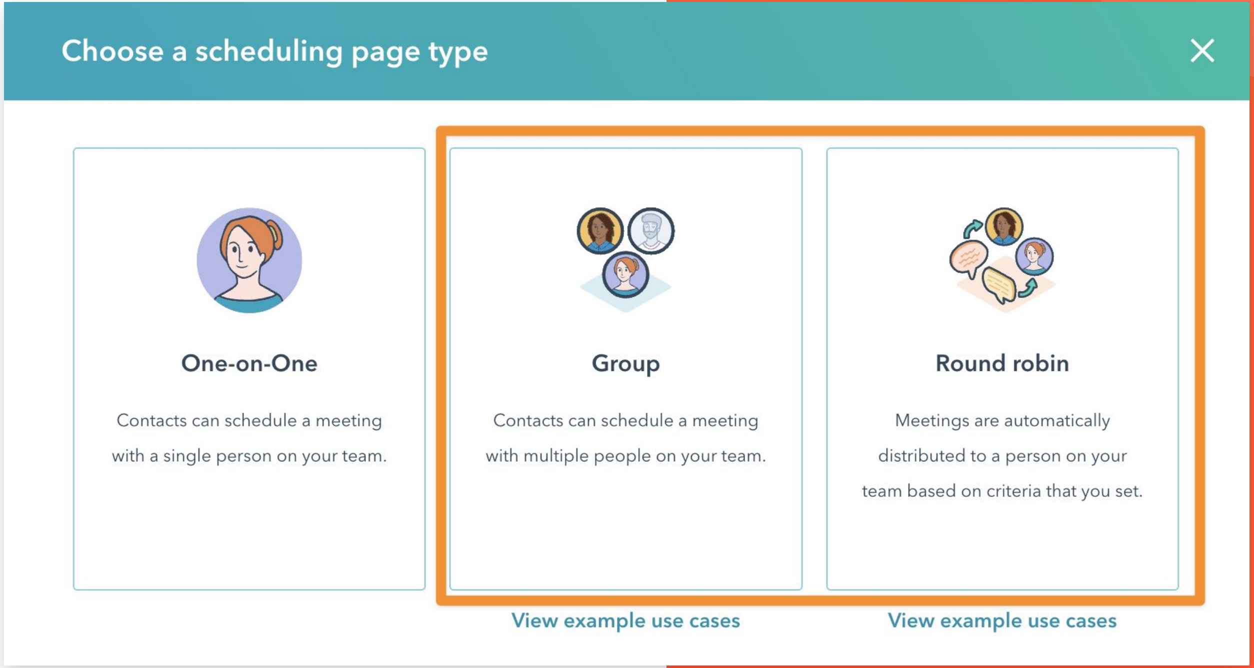
Sales Hub items

- Meetings
- Deal pipeline mandatory fields
- Templates
- Sequences

Meetings

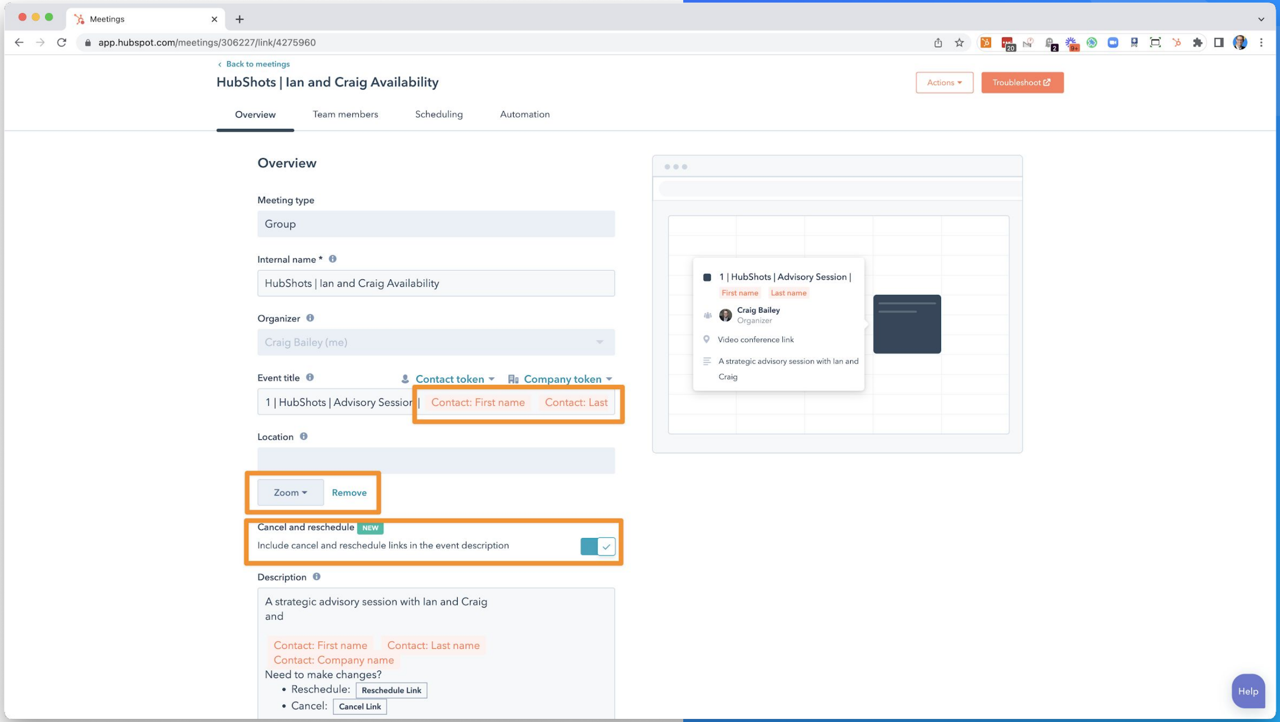
You probably use 1-to-1 already

Have you used Group and Round Robin?



Meetings

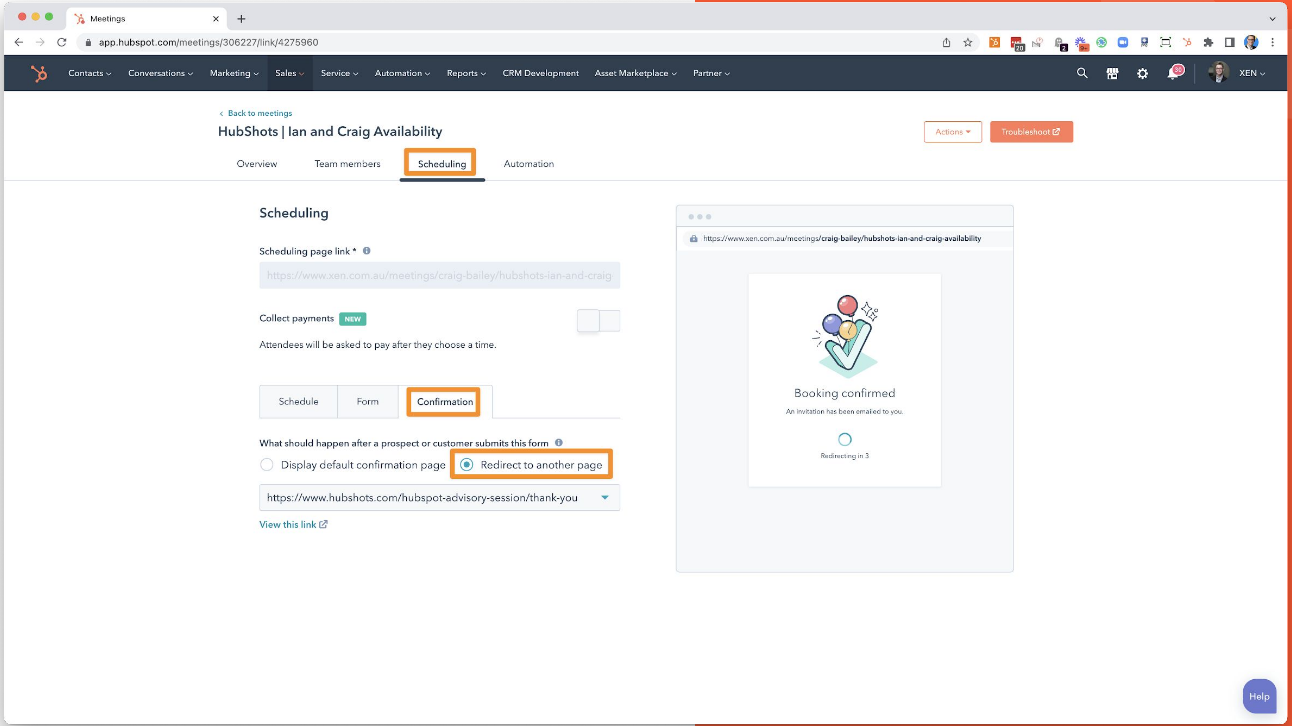
- Zoom and Teams now supported
- Cancel and reschedule feature



Meetings

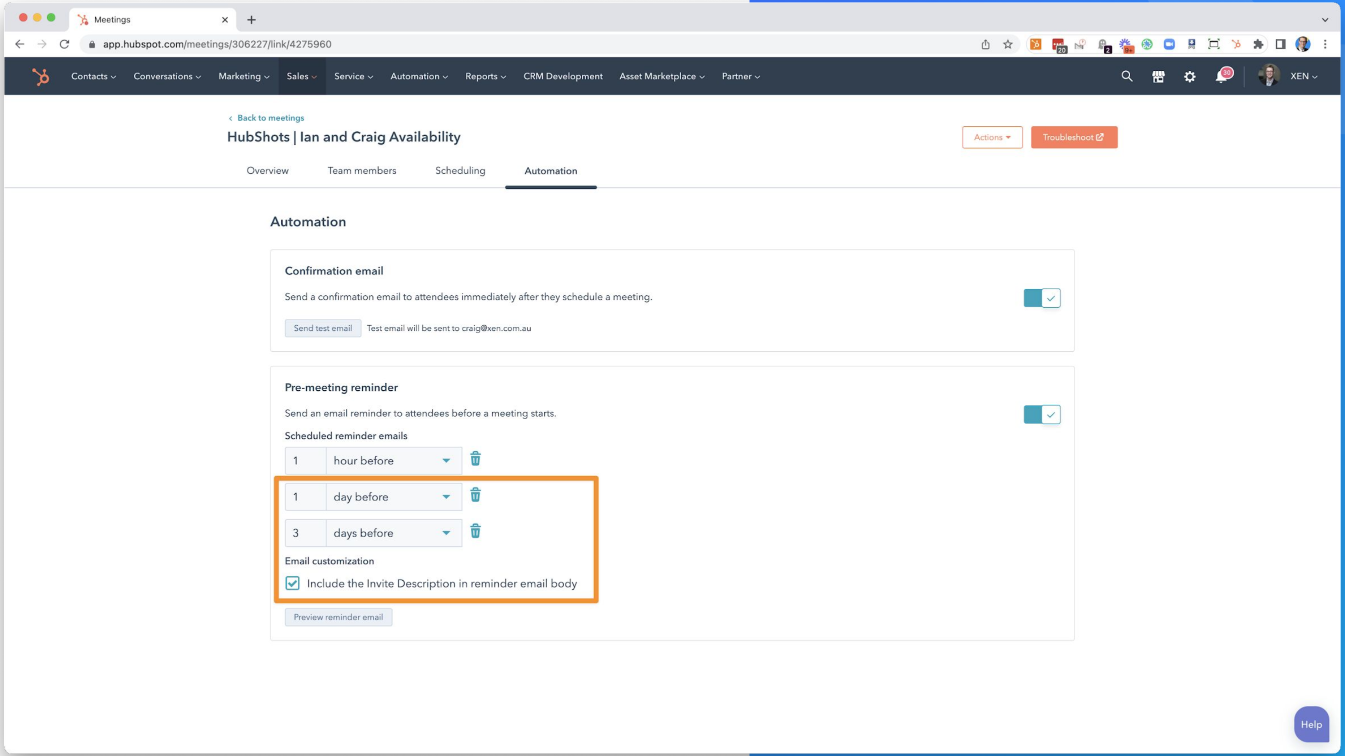
Redirect after confirmation

Helps with conversion tracking
for ad platforms (eg LinkedIn)



Meetings

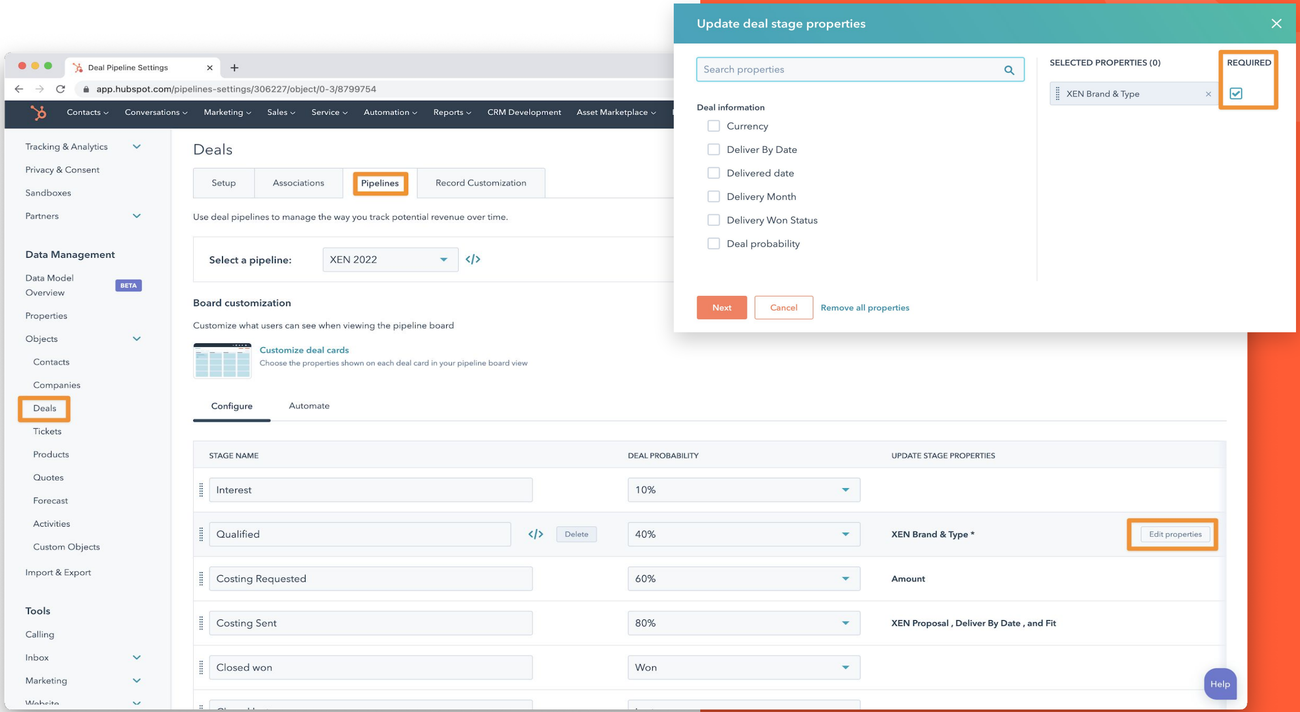
Send reminder emails



Deal Pipelines

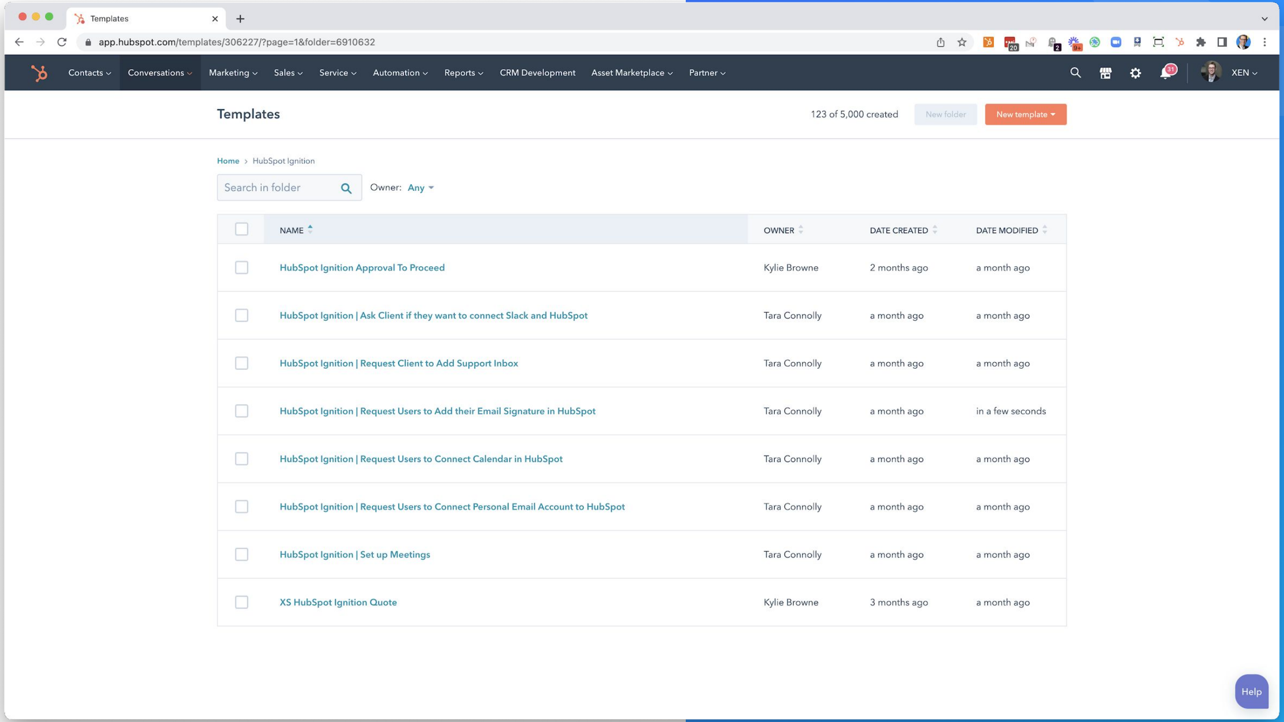
Set Mandatory fields on pipeline stages

(This also works on Ticket pipelines)



Templates

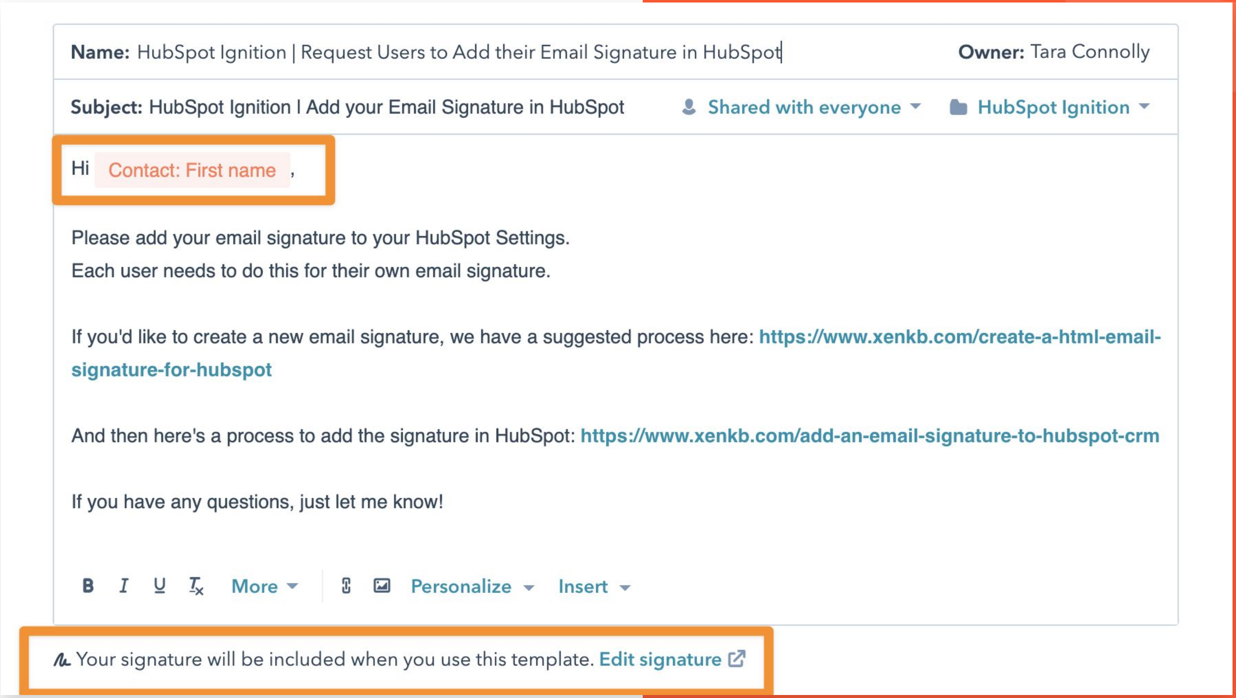
Prepare templates for repeatable business processes you send via email



Templates

Use personalisation tokens

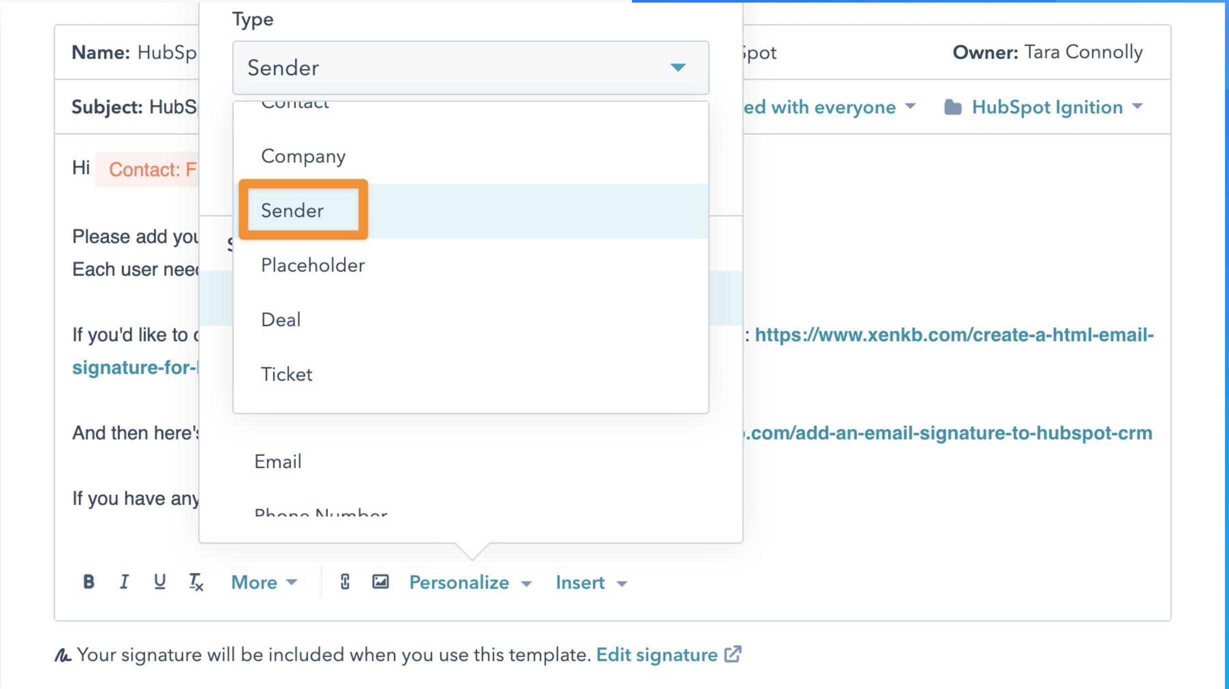
You can have your signature automatically added at the end



Templates

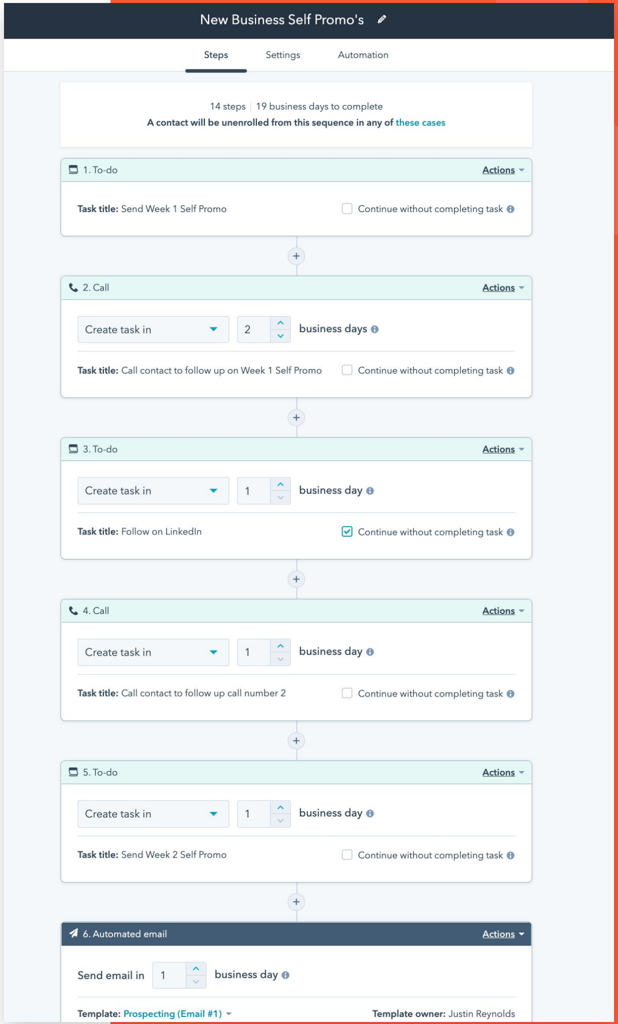
When using personalisation tokens you can use the Sender object (ie that's you)

Eg to automatically add in your meeting link



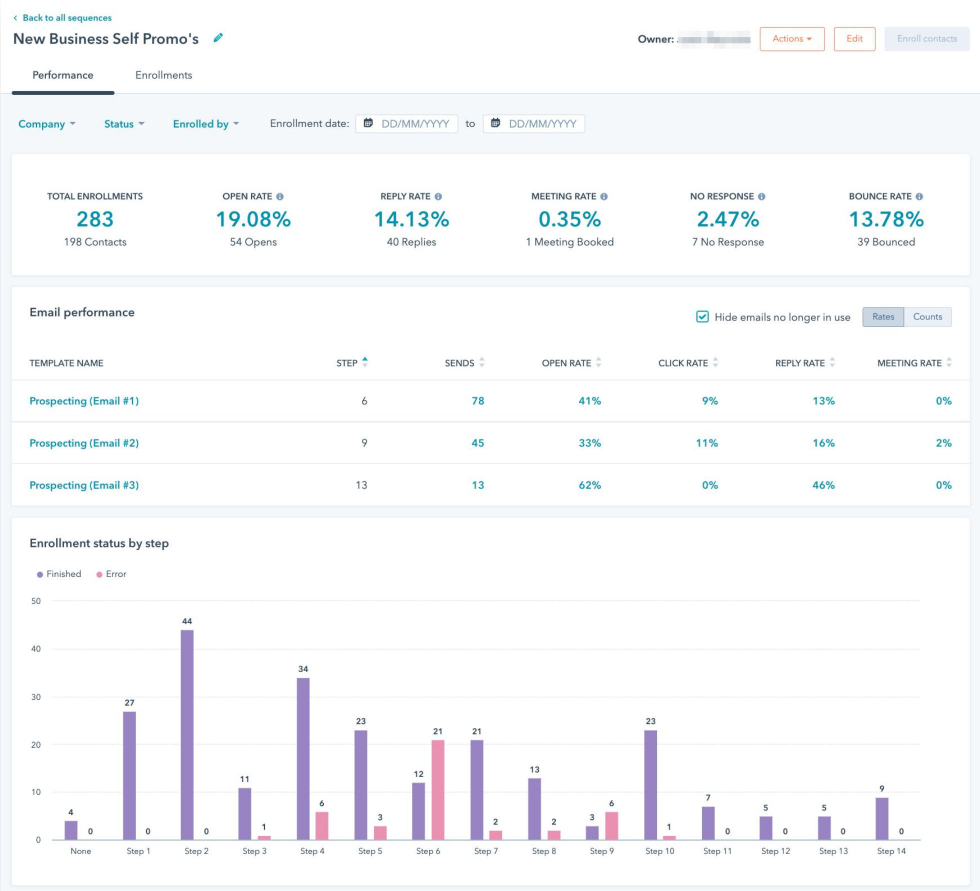
Sequences

- 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

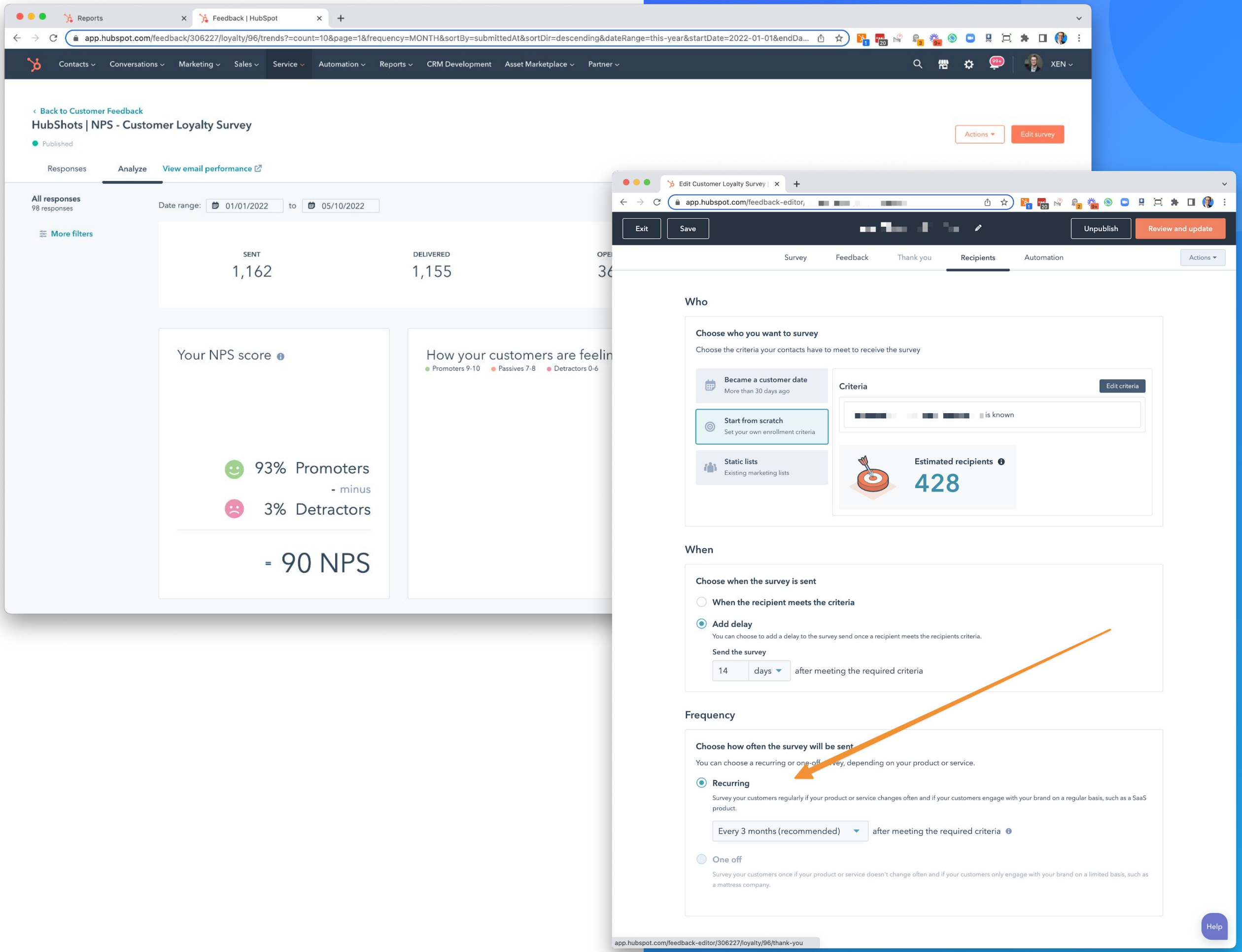
- 1: Many
- Marketing focus
- Personalisation is managed by smart content
- Ideal for larger contact lists, or set and forget email series

[7] Service Things

Service Hub items

Surveys

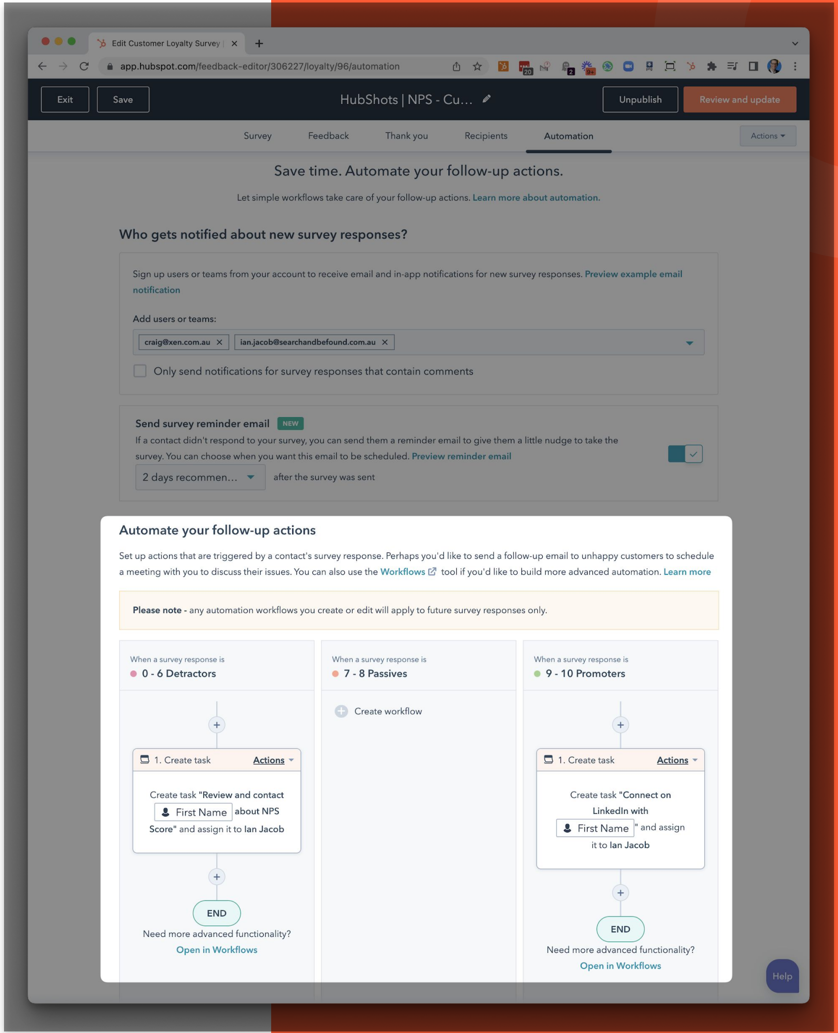
Surveys



- Feedback Surveys
- Automatically set to resend

Surveys

- Automatically notify about responses
- Speed to respond to feedback



Let’s take a step back…

[8] Conceptual Things

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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 **Form submit** 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 **Deal Stage** 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 **Ticket Status** 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

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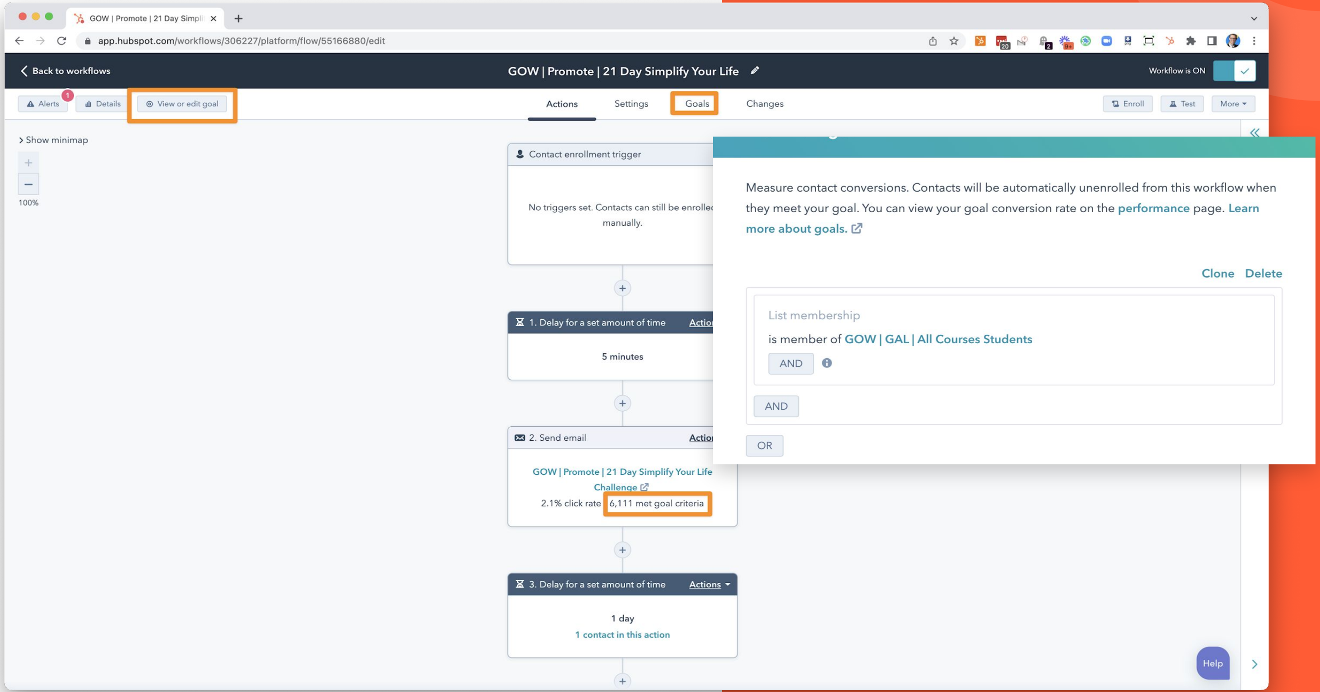
Automation items

- Workflow goals
- Scheduled reports

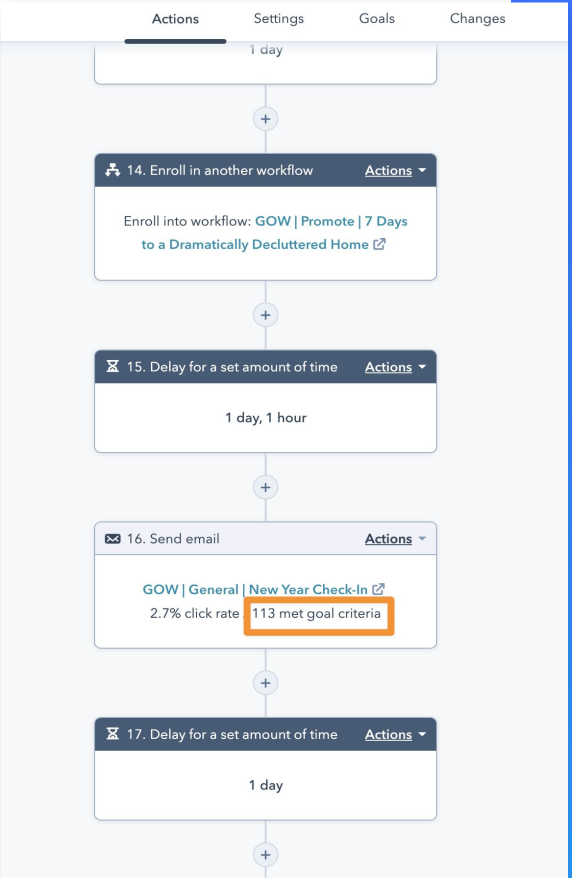
Workflow Goals

Use Goals to measure success of workflow actions



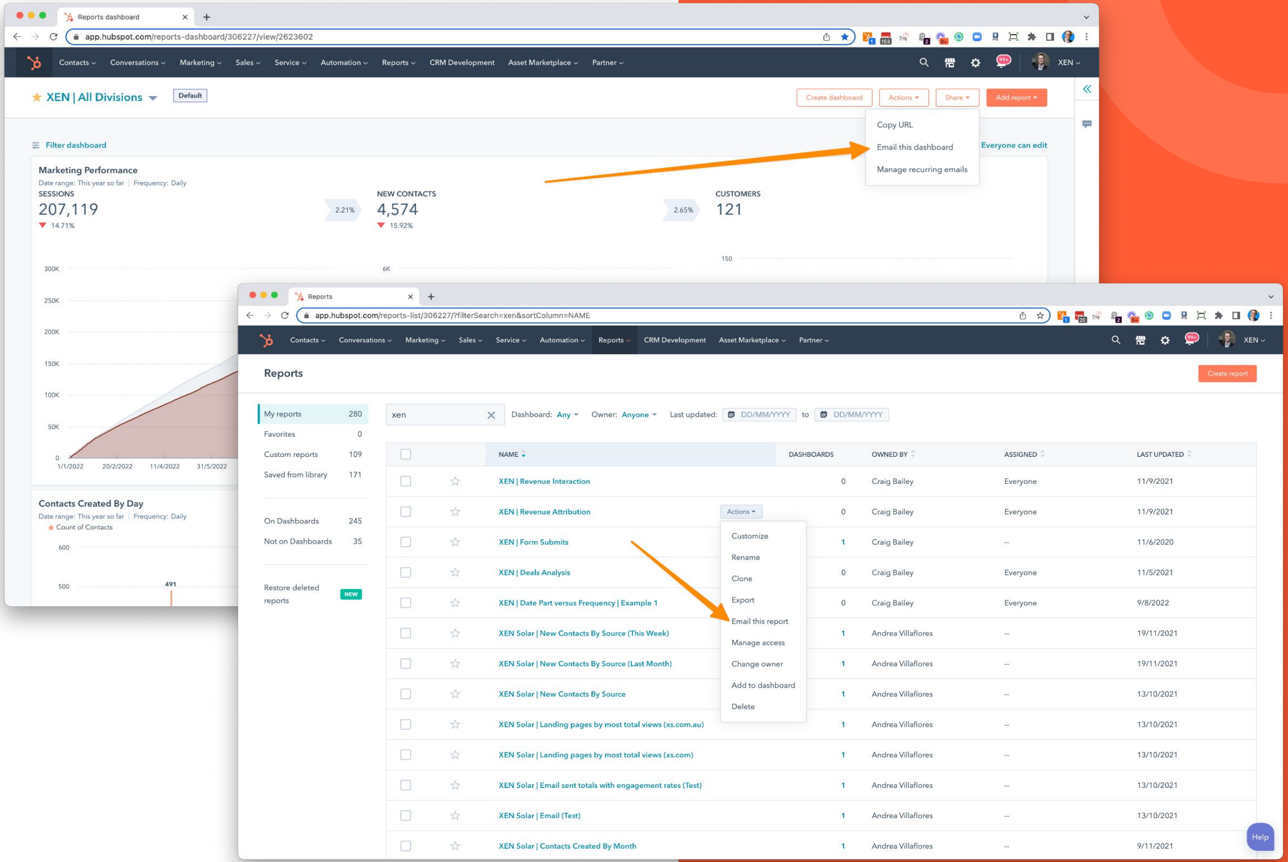
Workflow Goals

Compare goal results between Actions



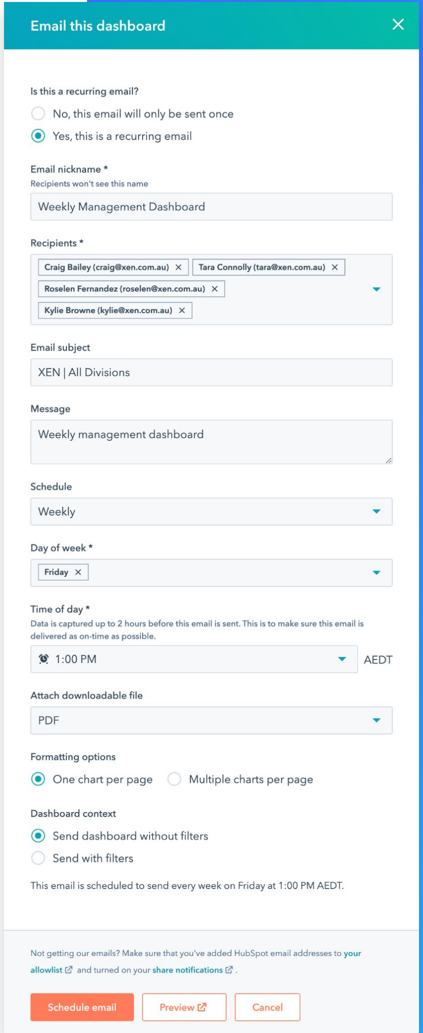
Reports

- Scheduled Dashboards
- Scheduled Reports



Reports

- Scheduled Dashboards
- Scheduled Reports



[10] Report Things

Report items

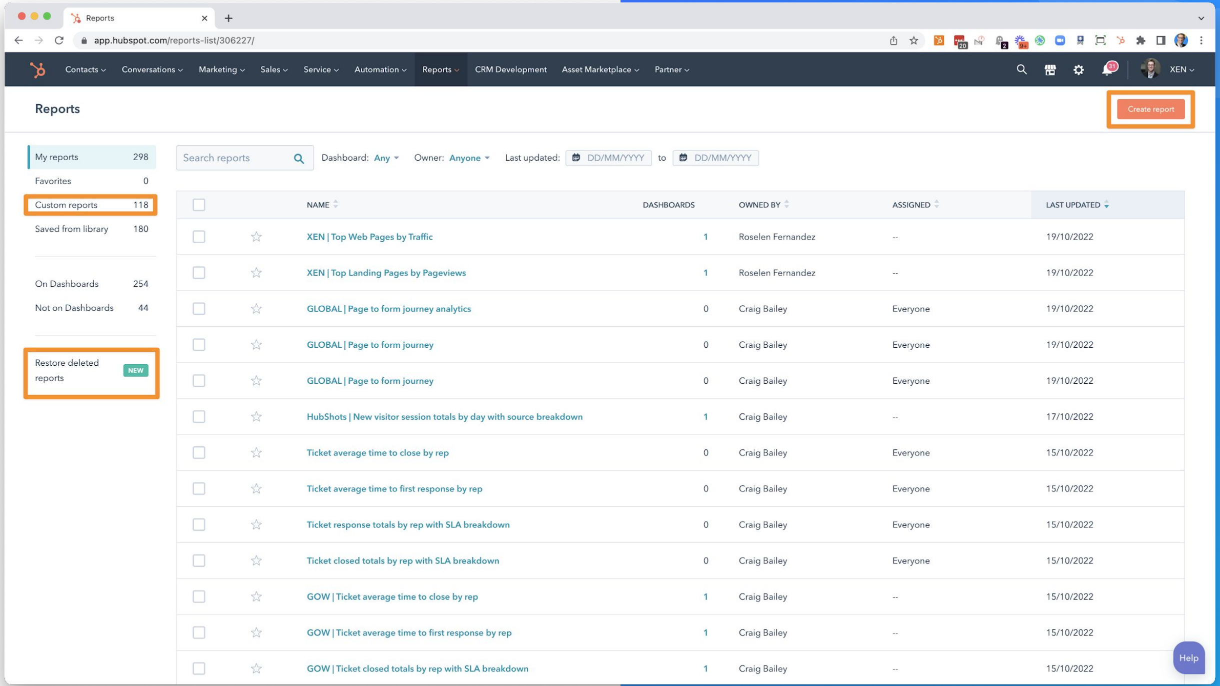
Custom Report builder is a massive lever

HubShots

Reports

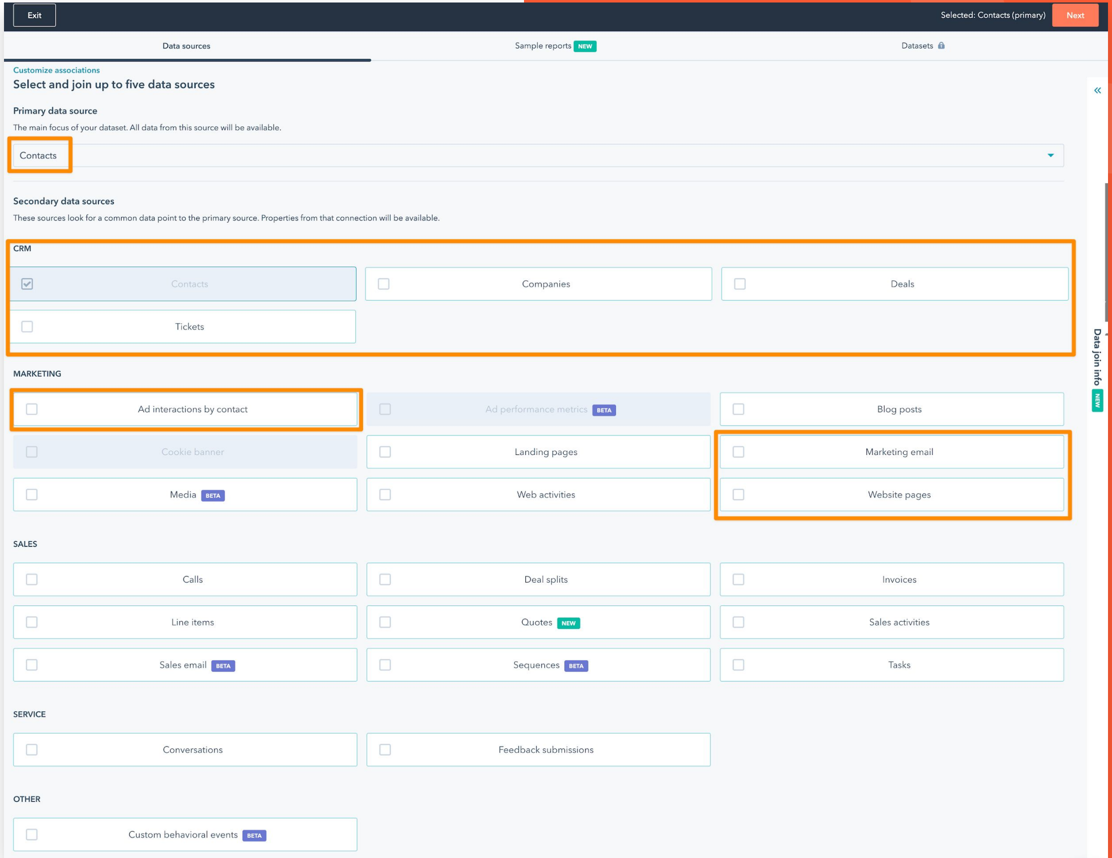
Custom Report Builder is powerful

(**New:** Restore deleted reports)



Reports

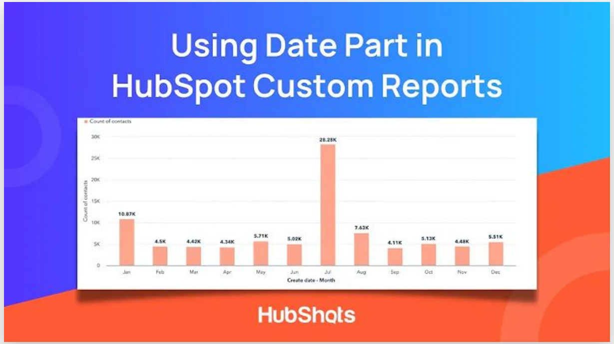
Report across almost everything...



Reports

Getting started with reports

Use our quick tips videos



[11] Final Things

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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

YouTube: https://www.youtube.com/c/HubShotsShow/

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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/

YouTube: https://www.youtube.com/c/HubShotsShow/

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

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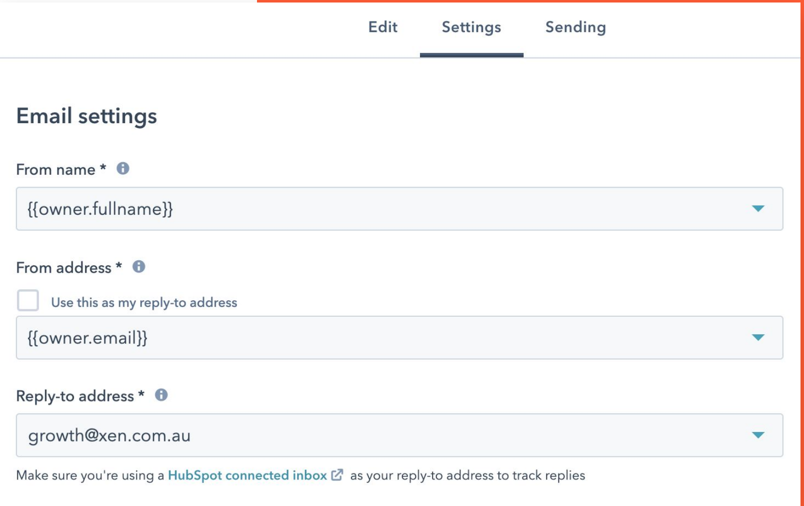
More Things Coming

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

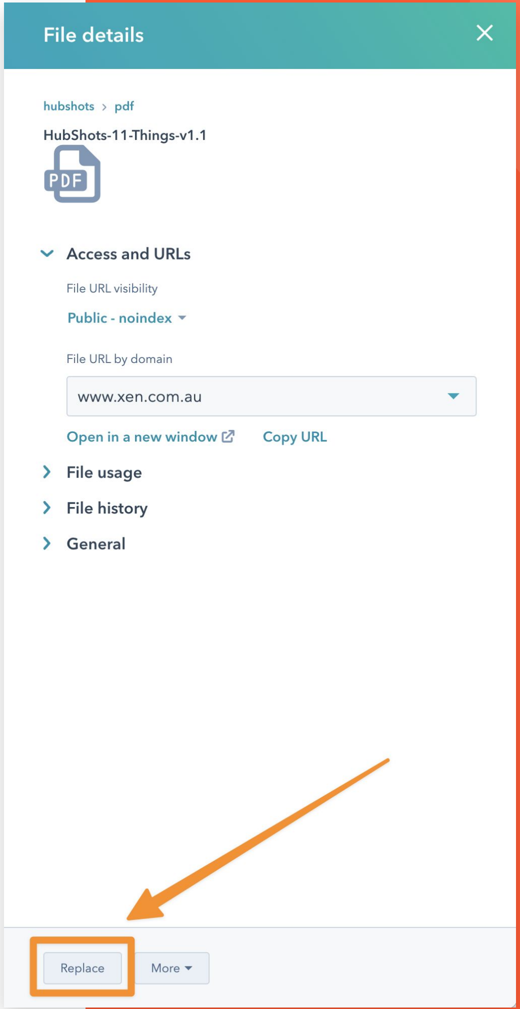
Send from the contact owner, replies go to a general inbox



Update Files

Automatically updates the link on any pages using the File

[HubSpot KB Article](#)



Outcome Journey

HubSpot Outcome Focus

- Activity
- Automation
- Attribution

	FREE	STARTER	PRO	ENTERPRISE
ACTIVITY	• Page views • 5 active lists	**Outcome: Visibility** "What's happening" 25 active lists	Analytics reports	Predictive lead scoring
AUTOMATION	1 email per form	Simple workflows	**Outcome: Save Money** "More with Less" → Efficiency • Full Workflows • Surveys • Sequences • Ads	Custom objects
ATTRIBUTION	Original source	• Basic reports • Ads integration	• Contact • Influenced Revenue • Campaigns • Custom reports	**Outcome: Scale Money** "What's working" → Effectiveness • Deal • Attributed Revenue

Thank you!

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