

Virtual Hubspot Manager

Comprehensive, Proactive
Management of your
HubSpot Portal

XEN



Table Of Contents

- 03 Overview
- 04 The Hubshots Framework
- 05 Is This For You?
- 06 How It Works
- 08 Outcomes
- 09 Subscription Scopes
- 11 Pricing
- 12 Frequently Asked Questions



Overview

The XEN Virtual HubSpot Manager subscription is a monthly managed service subscription (cancel anytime), where we take care of your HubSpot portal, ensuring it is organised and well implemented. As well as training your team and making sure you use HubSpot to its fullest.

You'll have a team of experienced HubSpot experts at the ready - available all year round (no need to worry about people going on holidays or off sick) - to proactively manage your HubSpot portal.

Ensuring best practices are implemented, assets are created, your staff are trained, and HubSpot functionality is used to its fullest.

An all-inclusive subscription, giving you peace of mind and immediate access to HubSpot experts.

For many businesses, this allows you to avoid having to hire another employee (ie saving you the cost of an FTE), or free up an existing employee to work on higher value items.

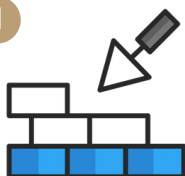
The Hubshots Framework

We use the HubShots Framework to proactively manage your HubSpot portal.

The HubShots Framework is a 5-Stage Plan for getting the most out of your HubSpot investment.

The five stages take you from basic survival to an approach of continuous improvement in your use of HubSpot.

1



Stage 1: Foundation

Focus: **Basics**

Setup your portal and make sure the basics are in place and everyone has access.

2

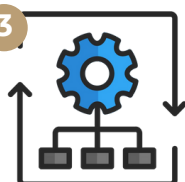


Stage 2: Enablement

Focus: **Activity**

Track all the key interactions including page views, email opens, ad clicks, social media engagements, sales activities and support conversations.

3

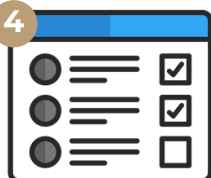


Stage 3: Efficiency

Focus: **Automation**

Get all your key marketing, sales and service processes automated, with the right people notified and your contacts nurtured

4



Stage 4: Effectiveness

Focus: **Attribution**

Be able to confidently identify what is working and why.

5



Stage 5: Empowerment

Focus: **Continuous Improvement**

You are freed up to proactively use the latest tools and grow your business results.

Is This For You?



This is a good fit for you if:

- ✓ **Inherited:** You've inherited HubSpot (ie the person who set it up is no longer with the company)
- ✓ **Upgraded:** You've been using parts of HubSpot for years, but have recently upgraded to a higher tier
- ✓ **Expanded:** You've added another Hub to your portal
- ✓ **Grown:** You've grown your use of HubSpot, but haven't kept up with all the new features
- ✓ You are a mid-large company or enterprise
- ✓ You need a team available all year round to look after all the administration of your HubSpot portal
- ✓ You need a team available all year round to help build campaigns, assets and workflows
- ✓ You don't have time to look after all the day-to-day 'stuff' in HubSpot and want that off your plate
- ✓ You don't have an internal CRM Manager already (either you can't afford one, or even if you can afford one, you can't find one!)
- ✓ You want to maximise your use of HubSpot



This is NOT a good fit for you if:

- ✗ **Ad-hoc:** You just need ad-hoc help with items
- ✗ **Irregular:** You are mostly happy with your use of HubSpot and what it is achieving for your company, and only need help occasionally
- ✗ **Mature internal team:** You already have an internal CRM Manager who looks after most of the day-to-day admin and setup items

How It Works

The XEN Virtual HubSpot Manager Subscription covers **5 key areas:**

1. GUIDANCE

It's easy to be overwhelmed and not even know how to best use HubSpot. ('Where do I start?')

First things first, let's understand your goals and ensure everyone is going in the same direction. And then make sure HubSpot is facilitating your goals, not hindering them.

Expert guidance and training for your team

- Advisory sessions with an experienced HubSpot Strategist
- Training sessions across any of the HubSpot tools and hubs
- Planning sessions to prioritise campaigns and processes
- Weekly or fortnightly WIP (work in progress) sessions to keep you informed
- Responsive access to any queries
- Includes a full HubSpot HealthCheck audit and review in the first month

2. FOUNDATION

Ensuring the foundation is optimised

If you've ever been worried about whether your HubSpot portal is 'set up right', worry no more - we take care of everything, including:

- Settings
- Contact, deal and ticket properties
- Marketing contacts management
- Simple workflows
- Simple reports
- Archiving old items (reports, lists, workflows, etc)
- Simple segmentation
- Ad platform integration
- Tracking on website
- Basic imports

3. BEST PRACTICES

Now that the foundation is in place, it's time to ensure you implement best practices - no more quick workarounds or disorganisation of items.

We proactively ensure best practices are implemented across your portal including:

- Naming conventions
- Folders
- Security and user access
- Advanced segmentation
- Email preference sets

4. AUTOMATION

Automation unlocks **Efficiency**

Answers the question: How do I get more with less?

Outcome: Save money

Automation focus includes:

- Maintaining workflows
- Building complex workflows to automate business processes across departments
- Advanced email nurtures
- Smart internal notifications
- ABM setup
- Sales pipelines
- Sequences
- Task management
- Ad audiences and events
- Conversation Inboxes
- Ticket pipelines
- Business process 'recipes'

5. ATTRIBUTION

Attribution unlocks **Effectiveness**

Answering the question: What's working?

Outcome: Scale money

Attribution focus includes:

- Integration of all data sources (social, paid)
- Attribution reports
- Scheduled reports
- Analysis and Insights
- Quarterly Insights Review

Outcomes

Here are the key deliverables and outcomes for your HubSpot portal:



Your HubSpot Portal Fully Managed



Best Practices Implemented and
Latest Features Utilised



Assets Created and Optimally Maintained



Team Continuously Trained

Subscription Scope



WHAT'S INCLUDED

- ✓ **HubShots Framework:** Fully maintained framework doc, updated with current priorities, and the planned items for each quarter
- ✓ **Guidance:** We're available for advisory sessions to guide you in your usage of HubSpot. From initial audits of your portal through to regular strategy sessions for how you can further use the tools, it's all included.
- ✓ **Training:** Regular training to your team(s) is included. We'll train your team across any areas of marketing, sales, service and CMS functionality.
- ✓ **Settings:** We keep an eye on all your portal settings, including new options as they roll out, and maintenance of existing items.
- ✓ **Objects:** Including contacts, companies, deals, tickets, custom objects and more - we ensure your database is maintained.
- ✓ **Tools:** Ensuring new features are embraced, and often missed tools are incorporated into your regular usage.
- ✓ **Best practices:** Everything from naming conventions, to managing your marketing contacts.
- ✓ **Campaign assets:** We'll build out all your marketing and sales campaign assets including pages, lists, forms, workflows, emails, CTAs, reports, dashboards, sequences and pipelines.
- ✓ **Automation:** Continual, incremental improvement across all your departments, automating processes to unlock efficiency - so your team can focus on being as effective as possible.
- ✓ **Attribution:** Including integration with your advertising platforms, calling and SMS platforms, to ensure all activity is captured. And then actionably reported on via custom reports and dashboards.
- ✓ **Archiving:** All those old properties, workflows, lists, forms, reports, pipelines and other items that are no longer used - we'll clean them up for you each month.
- ✓ **Analytics & Reporting Setup:** Tracking in place with analytics views, integrated with Google Analytics, Google Tag Manager and Google Search Console as required.

Subscription Scope



WHAT'S EXCLUDED

- ✘ **Graphic Design:** We include basic look and feel setup within HubSpot (eg colours and fonts), but custom design (eg banners, landing page design, email template design) is not included.

If required, we recommend our sister company - XEN Create - who specialise in graphic design and website design.

- ✘ **Copywriting:** We can assist with key messages for pages but in-depth website copywriting (eg sales copywriting) is not included.

If required, we can recommend external copywriters for you to consider.

- ✘ **Paid Advertising management:** We don't manage advertising campaigns (ie. Google Ads, LinkedIn Advertising, Facebook advertising, etc), but we do work closely with your advertising agency or team to ensure results are integrated into your HubSpot portal.

If required, we can recommend paid media agencies to consider.

- ✘ **Custom website themes:** We only use Themes from the HubSpot Marketplace for all page development. We don't build custom templates. We typically use CLEAN theme - the best selling theme on the HubSpot marketplace.

- ✘ **Custom integrations:** We only have expertise across the HubSpot Marketplace integrations. We don't build custom integrations.

- ✘ **In-person training and workshops:** We are happy to accommodate in-person meetings where possible and where appropriate. If we agree on an in-person meeting/workshop, our time spent travelling will be charged on top of your subscription.

- ✘ **Custom documentation:** We provide training videos, slide decks and process documents where appropriate but we don't develop, manage or maintain custom documentation for your HubSpot portal.

- ✘ **Projects:** We can help you work on HubSpot projects but if the project requires significant time, effort or more resources outside of the scope of the Virtual manager, we will talk to you about scoping out the project as a separate engagement. Examples of a significant project could include things like:
 - Integrating HubSpot with an external platform using native Marketplace apps including sandboxing, testing and go live
 - Implementing custom object/s in your HubSpot portal and automated processes to manage it
 - Implementing new Sales or Service Pipelines and automated processes to manage these.

Pricing

The estimated cost will depend on 4 key areas:

The number of hubs you want us to manage

This helps us understand the scope of areas we'll manage for you

The number of contacts

This helps us estimate the level of segmentation and typical management required

Your desired level of automation

This helps us understand how much focus we'll put into automating your business processes

- **Basic:** includes simple automation (eg thank you emails, internal notifications)
- **Standard:** includes nurture sequences, setting lifecycle stages, branching, deal pipelines, ticket pipelines
- **Advanced:** includes full business processes including complex sales, marketing and service processes

The number of campaigns you typically create each month

This helps us estimate the amount of work we'll put into building assets in your portal. Campaigns include all the standard assets ie landing pages, web pages, forms, lists, emails, CTAs, connecting ad platforms and reports.

Subscription pricing ranges from **AUD \$16,000 per month to \$2,500 per month** (plus GST for Australian customers).

Frequently Asked Questions:

Who is this for?

The Virtual HubSpot Manager subscription is ideal for mid-large companies who have been using HubSpot for at least 6 months.

It's ideal for companies who don't have (people or time) to manage all the strategy, administration and implementation pieces of HubSpot.

How much does it cost?

The subscription price depends on four (4) key areas:

1. *Which HubSpot hubs you have*
2. *How many contacts you have*
3. *How much focus you want to put on Automation*
4. *How many campaigns you create*

Will this reduce my costs (ie. save me money)?

By subscribing to our monthly managed service, you can save yourself the cost of a full-time employee.

Our team of experienced HubSpot experts will take care of your portal, ensuring it is organised and implemented to the best practices. We will train your team and ensure that they use HubSpot to its fullest potential. You'll have immediate access to HubSpot experts all year round, with no need to worry about holidays or sick leave. With our all-inclusive subscription, you can enjoy peace of mind knowing that your portal is in good hands, and you can focus on growing your business.

Thus, you'll save money by not having to pay for a full-time employee just to manage your HubSpot portal.

You can free up existing staff to work on higher value items in your company.

Frequently Asked Questions:

**Am I locked in?
Is it easy to
cancel?**

There is no lock-in. You simply pay month-to-month.

You can pause or cancel at any time.

You can also upgrade or downgrade at any time.

What's included in the subscription?

The Virtual Manager subscription includes all the administration and implementation items related to your HubSpot portal.

Please see page 10 & 11 for the full list of inclusions and exclusions.

**I've just
purchased
HubSpot - is this
a good fit for me?**

Probably not.

We have a whole other service focussed on getting you up to speed on HubSpot quickly. It's our HubSpot Ignition service.

Once your HubSpot portal is all set up, then you can come back here - the Virtual Manager will be a much better fit for you then.

**What's the
HubShots
Framework?**

The [HubShots Framework](#) is a capability maturity model showing the journey companies take in implementing HubSpot through their business.

It has 5 stages that show a company progressing from a predominantly manual set of processes with little tracking, through to a highly automated business with clear tracking and attribution of processes, contacts, deals and revenue.

If you are interested in chatting further about the **Virtual HubSpot Manager** offering, schedule a call today to discuss your requirements with an advisor.

[SCHEDULE A CALL](#)

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