



# HubSpot Training

Introduction to HubSpot for sales and marketing

# Training Overview

Using HubSpot for Sales, Marketing and Support

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- 1. 7 training sessions (eg weekly)**
  - **Each session: 1 hour training + 0.5 hour for questions/troubleshooting**
- 2. Sales, Marketing and Support together**
- 3. Training sessions will be recorded**
- 4. XEN team available via email ([team@xen.com.au](mailto:team@xen.com.au)) for any questions**

## **Goal of the training: Get everyone up-to-speed on:**

- What HubSpot is
- Where it fits in (and where it doesn't)
- Starting to use HubSpot

# Training Preparation

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1. Make sure you **have Zoom installed**
2. **Use Chrome** for HubSpot
3. **Be ready to share your screen** (via Zoom) if needed (eg for troubleshooting)

# Training Schedule

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- 1. Week 1: Overview of HubSpot**
- 2. Week 2: Integrating with HubSpot**
- 3. Week 3: Email in HubSpot**
- 4. Week 4: Sales tools (important for Marketing to know as well)**
- 5. Week 5: Support tools**
- 6. Week 6: Dashboards and Reporting**
- 7. Week 7: Workflows and Automation**

# [1] HubSpot Overview

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- **Overview** of HubSpot
- Where it fits in
  - Including how it fits in with other systems
- Where it doesn't
- What you can do in HubSpot
- Sales versus Marketing
- Understanding the current Sales process
- Getting everyone setup in HubSpot

# [2] Integrating with HubSpot

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- Installing the **HubSpot Connector**
- How it works, how to use it
  - Troubleshooting - fixing install issues
- Understanding the other company integrations
- Quick tips

# [3] Email in HubSpot

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- Marketing Contacts versus Non-Marketing Contacts
- The 3 types of email in HubSpot
- [1] **Sales emails**
  - Using Snippets
  - Using Templates
  - Sequences
- [2] **Marketing emails**
  - Newsletters
  - Nurture emails
- [3] **Conversations Inbox**
  - General emails eg [sales@yourdomain.com.au](mailto:sales@yourdomain.com.au)
- Naming Conventions

# [4] Sales in HubSpot

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- Overview of the **CRM**
- Tailoring the **layout**
- Using **Views**
- Deals
- Pipeline management



# [5] Support in HubSpot

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- Overview of the **CRM**
- Tailoring the **layout**
- Using **Views**
- Tickets
- Pipeline management

# [6] Dashboards and Reporting in HubSpot

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- Dashboard for departments
- Reports
  - Custom Report Builder
- Using Active Lists

# [7] Workflows and Automation in HubSpot

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- Using HubSpot to **trigger automated emails**
  - Based on behaviour of contacts
  - Based on attributes of contacts
- Automating **internal notifications**
  - Automating internal emails
  - Automating tasks and reminders
- Managing social channels
- Managing ad campaigns