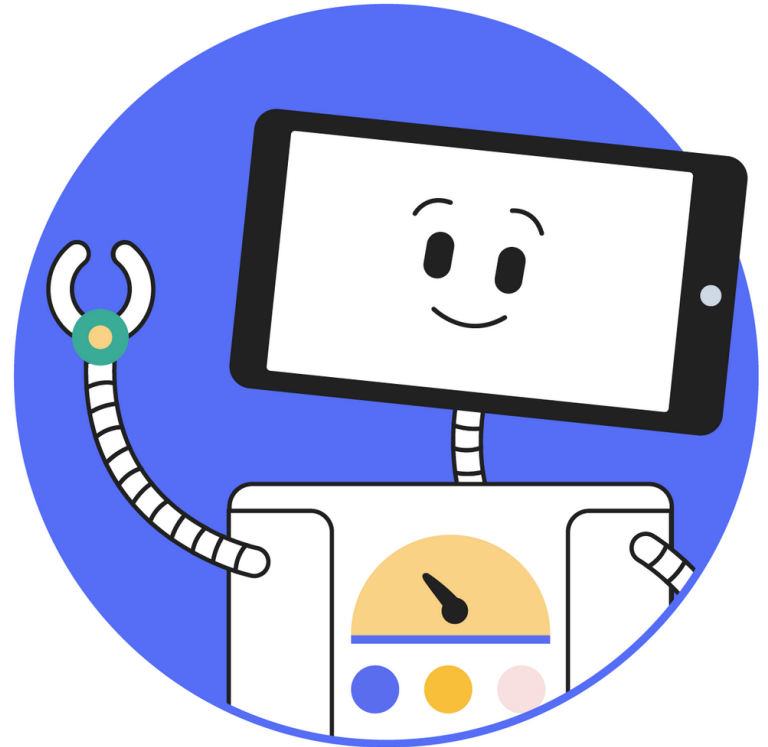


How to accelerate sales with HubSpot CRM

Matthew Stibbe

19 August 2020



What is sales acceleration?



Focus time and energy on leads that are more likely to convert and close and spend less time on...

- Unproductive leads
- Avoidable admin
- Writing repetitive emails
- Manually qualifying leads
- Research basic information
- Paperwork
- Reporting



14 tools, tips and tactics that accelerate sales in HubSpot CRM



Meetings

Forget meeting-setting ping-pong
Send someone a link instead
= Fewer emails, faster booking

Tips

- Round-robin
- Remember to block out holidays
- Superadmin editing
- Embed calendar in pages



Discovery call with an Articulate Consultant

< August >

MON	TUE	WED	THU	FRI	SAT	SUN
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6



Define meeting types

Define meeting types and outcomes
Record them for each call
= Painless activity reporting

Tips

- Use task lists to do call-out blocks
- Check out HubSpot's built in reports
- Logging calls lets you build lists based on last contact date

Enable and customize call and meeting types for your team.

Organize how your team logs activities by providing custom meeting and call types. Use these custom activity types to report on which calls and meetings are most successful in your sales process.

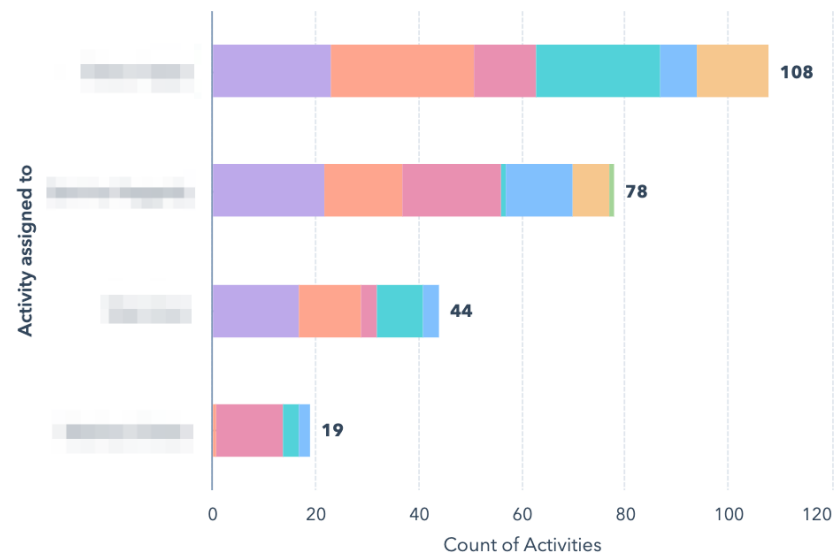


Call & meeting types

- Connect
- Discovery
- Goal setting (Gap)
- Proposal
- Reminder

+ Add another type

Left live message No answer Connected (No value)
Left voicemail Wrong number Busy



Record calls

(Or take notes while you talk)

One version of the truth

Need to share, not need to know

Tips






- Try click-to-call dial-out in HubSpot
- We use it with RingCentral
- Playback 'for training purposes' and review
- Gong.io ?

Log Call — ↗ ✕

Contacted	Call outcome	Type
Matthew Stibbe ▾	Connected ▾	Discovery ▾

Date	Time
📅 18/08/2020 ▾	🕒 17:43 ▾

Looks like a good opportunity.

B I U T_x More ▾      Associated with 2 records ▾

Create a task to follow up

Reporting in Databox

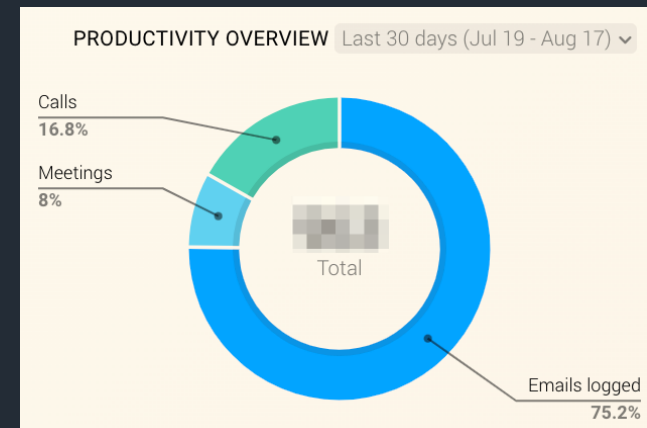
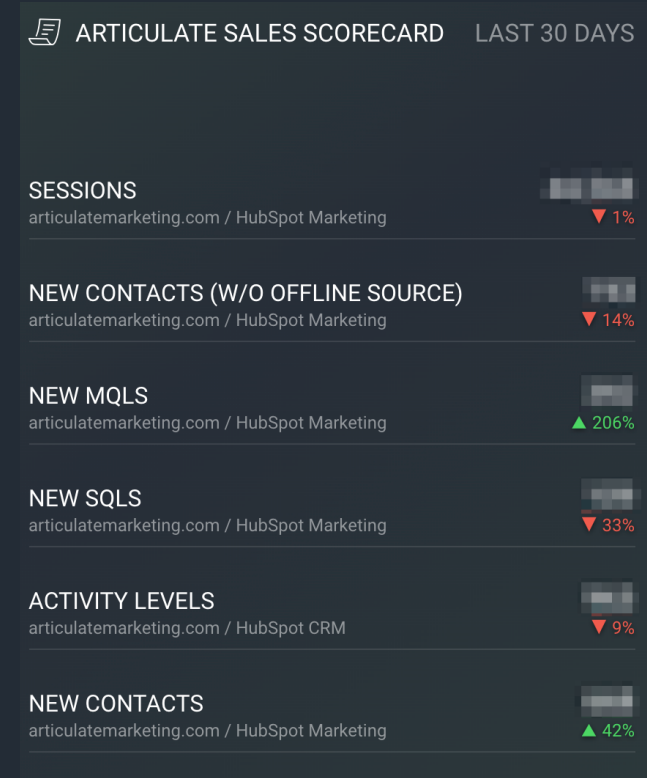
Automated email reporting

Shareable dashboards

= All the insight, no spreadsheets

Tips

- White labelling
- Daily or weekly emails
- Use Metrics tools for OKRs
- Cross-reference against Xero for revenue



Scan business cards

HubSpot app is free for Android and iOS
www.hubspot.com/products/business-card-scanner-app

Tips

- Use the HubSpot app as a contact database on your phone and enable Call ID

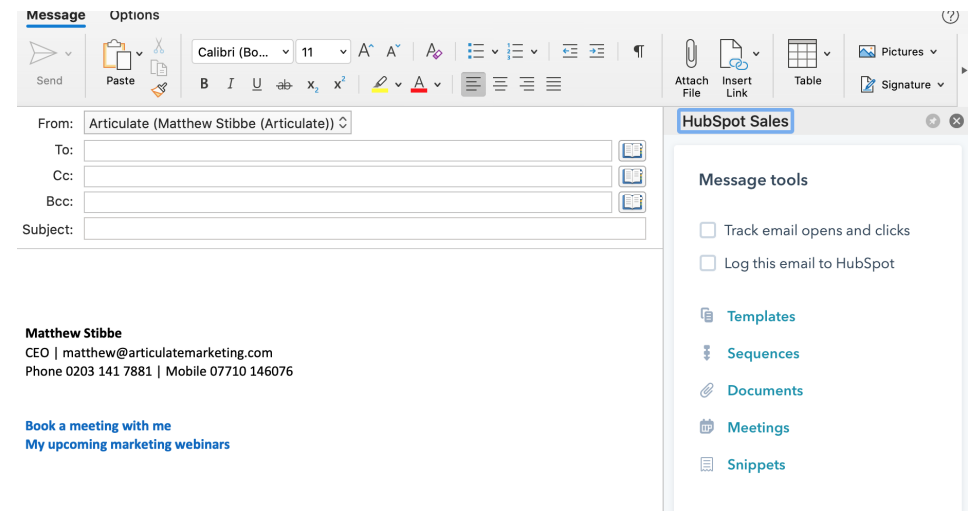


Email integration

Connect HubSpot to Office 365 or Google Apps
Log and track emails and meetings in app
Access templates, sequences, docs and meetings

Tips

- Get the right GDPR 1-1 sales email permissions set up first
- Check out forward to HubSpot email address



Templates

Save time but not writing each email individually
Any email you send more than three times should be templatised

Tips

- Set your signature so emails can be used by different people
- Lots of personalisation
- Set defaults for first name and company name
- Keep emails short
- Get someone to proofread them
- Always include a CTA

Name: Breakup 2020 v2 **Owner:** Matthew Stibbe

Subject: Goodbye for now 👤 Shared with everyone ▾ 📁 Select a Folder ▾

Hi **Contact: First name** ,

I was looking forward to reconnecting but I guess this isn't the right time. So I'll stop pestering you.

You've got my details if you ever want to talk about **Contact: Company name** and Articulate Marketing. It's never a bad time to talk.

One last thought: do you know anyone else who might need our help? If so, we offer a generous referral programme. [Get the details and sign up here](#). Tell all your friends!

Best wishes,

B I U T More ▾ | 📧 **Personalize ▾** **Insert ▾**

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

✅ This email looks fantastic!



Sequences

Just like human emails but automated

Tips

- A/B test constantly
- Integrate with tasks and LinkedIn to create multi-touch sales engagements
- 8-12 touchpoints per lead before you give up!

Sequences > Inbound Nurturing - Q2 2020

Inbound Nurturing - Q2 2020 Owner: [Avatar] Actions ▾ Edit Enroll contacts

Enrolled by: All ▾ Enrollment date: All time ▾

TOTAL ENROLLED	OPEN RATE ⓘ	CLICK RATE ⓘ	REPLY RATE ⓘ	MEETING RATE ⓘ	UNSUBSCRIBE RATE	BOUNCE RATE ⓘ
97	65%	15%	10%	3%	6%	1%

EMAIL ⓘ	TOTAL ENROLLED	OPEN RATE	CLICK RATE	REPLY RATE	MEETING RATE
Step 1: Automated email	97	15%	2%	2%	1%
Step 2: Automated email	92	40%	5%	2%	2%
Step 3: Automated email	86	17%	2%	3%	0%

Likelihood to close

Use HubSpot's AI tool to prioritise high-value contacts for sales activity

Tips

- Record sales outcomes so this works properly
- Compare results with your own customised lead scoring
- Use to prioritise not filter or segment



The screenshot shows the HubSpot Companies interface. At the top, it says 'Companies' with a dropdown arrow and '10,809 companies'. On the right, there are three buttons: 'Actions', 'Import', and 'Create company'. Below this, there's a navigation bar with 'All companies' selected, 'Likelihood to close' as the current view, and '+ Add view' and 'All views' options. A search bar is on the left, and 'Company owner', 'Create date', and 'More filters' are on the right. At the bottom right, there are 'Table actions' and 'Save view' buttons. The main table has four columns: 'NAME', 'LIKELIHOOD TO CLOSE', 'LAST BOOKED MEETING DATE (GMT+1)', and 'LAST LOGGED CALL DATE (GMT+1)'. The table contains seven rows of data, with the first row having a 72.5% likelihood to close.

<input type="checkbox"/>	NAME	LIKELIHOOD TO CLOSE	LAST BOOKED MEETING DATE (GMT+1)	LAST LOGGED CALL DATE (GMT+1)
<input type="checkbox"/>	[Redacted]	72.5%	23 Sep 2019	28 May 2019
<input type="checkbox"/>	[Redacted]	57.02%	23 Jun 2020	18 Jun 2020
<input type="checkbox"/>	[Redacted]	55.01%	Yesterday at 10:45	29 Jul 2020
<input type="checkbox"/>	[Redacted]	38.1%	18 Mar 2020	22 Nov 2019
<input type="checkbox"/>	[Redacted]	37.88%	Tomorrow at 16:00	16 Apr 2020
<input type="checkbox"/>	[Redacted]	37.68%	14 Jul 2020	3 Jul 2020
<input type="checkbox"/>	[Redacted]	37.42%	--	17 Jul 2020



LinkedIn Sales Navigator

Useful for initial 'sanity check' lead qualification and for non-email connections (and also prospecting)

Tips

- Connect on LinkedIn before cold calling or emailing, it's a polite way to 'introduce yourself'

The screenshot displays the LinkedIn Sales Navigator interface for a contact named Matthew Stibbe. On the left, the contact's profile is visible, including their name, title (CEO at Articulate Marketing), and company name. Below this, there are icons for Note, Email, Call, Log, Task, and Meet. A section titled 'About this contact' lists the first name (Matthew), last name (Stibbe), job title (CEO), and company name (Articulate Marketing). The main area shows an activity feed with a filter set to 'Filter activity (3/26)'. The activity is organized by month: August 2020 and July 2020. In August 2020, there are two entries: a 'Form submission' on 17 Aug 2020 at 15:48 GMT+1 where Matthew Stibbe submitted a 'Webinar on HubSpot subscription lists and building a GDPR-compliant database', and a 'Page view' on 13 Aug 2020 at 14:52 GMT+1 for 'Articulate Marketing Referral Programme'. In July 2020, there is a 'Form submission' on 30 Jul 2020 at 11:37 GMT+1 where Matthew Stibbe submitted a 'Pop-up form: SEO guide PDF lead flow on'. On the right side, there is a 'Sales Navigator' sidebar showing a LinkedIn profile card for Matthew Stibbe, including his location (London, England, United Kingdom), 2682 connections, and 500 shared connections. A 'Save in Sales Navigator' button is visible below the profile card.

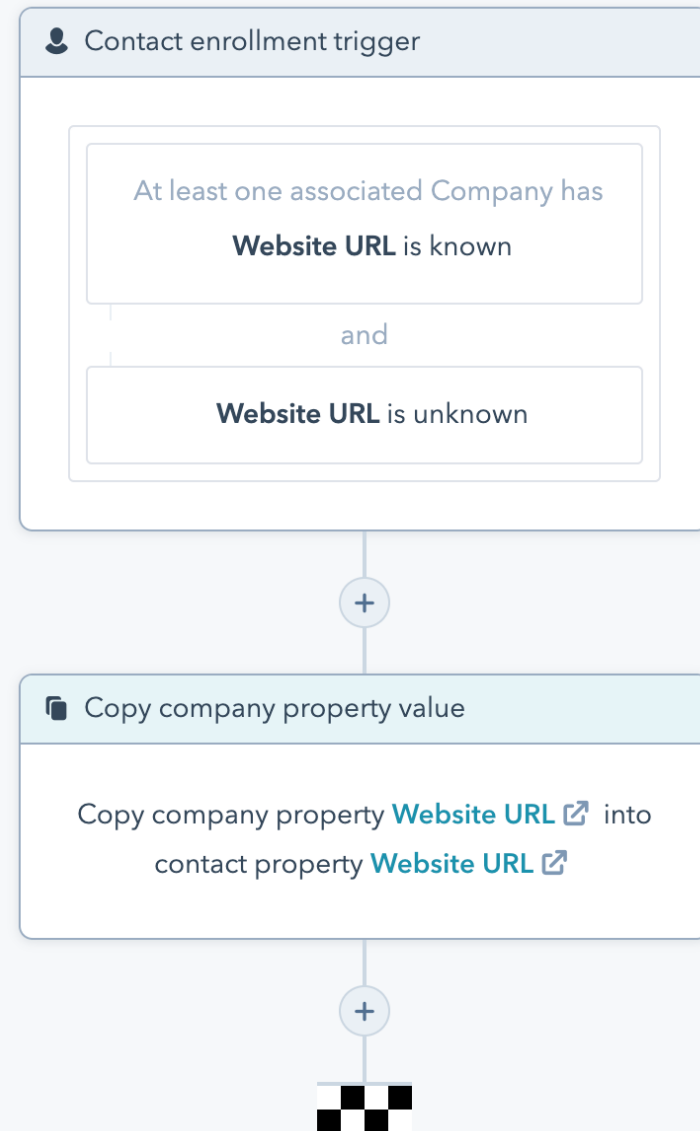


Contact enrichment from HubSpot Insights

HubSpot Insights is a database of company information that HubSpot gathers by combining third party data, web crawling, and crowdsourcing.

Tips

- Use workflows to copy properties like website URL, company name, phone number etc. to individual contact records.



Contact enrichment from email

Switch this option on and integrate your Gmail or Microsoft email account to capture things like phone numbers and job titles from people's emails (including out-of-office replies).

Automatically capture contact details from emails with HubSpot AI.

Update records in HubSpot with details from email signatures and messages from contacts. All users who connect their inbox and turn on inbox automation can use this feature. [Learn more..](#)

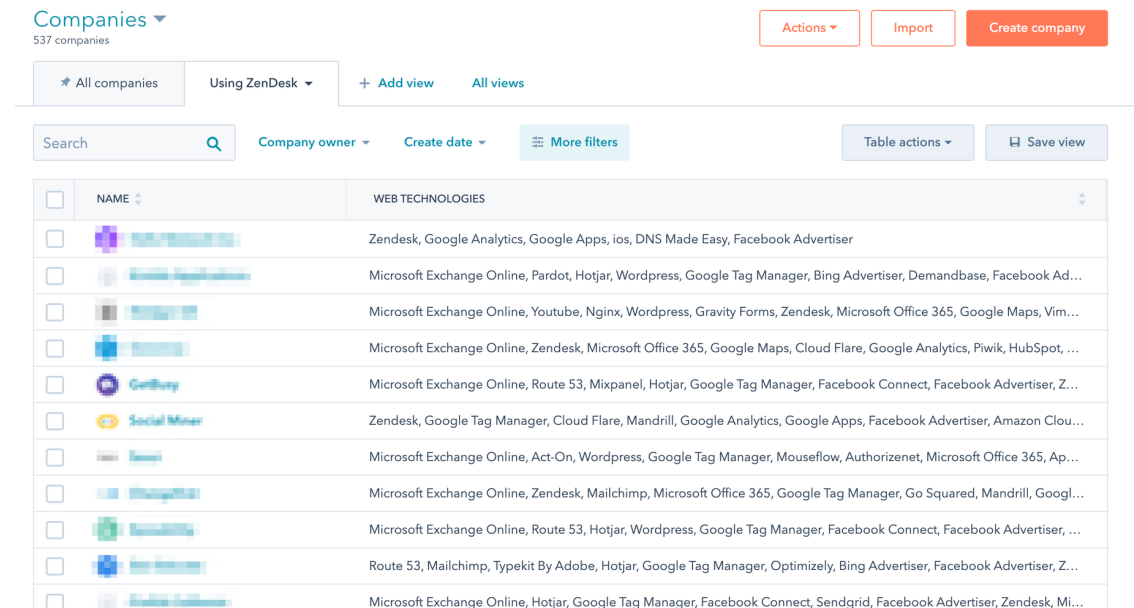


Company technology property

Using public information, HubSpot collects some information about the technology a company uses on its website.

Tips

- Use this property in conjunction with HubSpot's ABM features to create a target list
- Or use it to automatically disqualify contacts



The screenshot shows a HubSpot interface for a list of companies. The header includes 'Companies' with a dropdown arrow and '537 companies'. There are three buttons: 'Actions', 'Import', and 'Create company'. Below the header, there are filters for 'All companies', 'Using ZenDesk', '+ Add view', and 'All views'. A search bar is present, along with filters for 'Company owner', 'Create date', and 'More filters'. There are also 'Table actions' and 'Save view' buttons. The main table has two columns: 'NAME' and 'WEB TECHNOLOGIES'. The table lists several companies with their respective technology stacks.

<input type="checkbox"/>	NAME	WEB TECHNOLOGIES
<input type="checkbox"/>	[Redacted]	Zendesk, Google Analytics, Google Apps, ios, DNS Made Easy, Facebook Advertiser
<input type="checkbox"/>	[Redacted]	Microsoft Exchange Online, Pardot, Hotjar, Wordpress, Google Tag Manager, Bing Advertiser, Demandbase, Facebook Ad...
<input type="checkbox"/>	[Redacted]	Microsoft Exchange Online, Youtube, Nginx, Wordpress, Gravity Forms, Zendesk, Microsoft Office 365, Google Maps, Vim...
<input type="checkbox"/>	[Redacted]	Microsoft Exchange Online, Zendesk, Microsoft Office 365, Google Maps, Cloud Flare, Google Analytics, Piwik, HubSpot, ...
<input type="checkbox"/>	GetBuy	Microsoft Exchange Online, Route 53, Mixpanel, Hotjar, Google Tag Manager, Facebook Connect, Facebook Advertiser, Z...
<input type="checkbox"/>	Social Miner	Zendesk, Google Tag Manager, Cloud Flare, Mandrill, Google Analytics, Google Apps, Facebook Advertiser, Amazon Clou...
<input type="checkbox"/>	[Redacted]	Microsoft Exchange Online, Act-On, Wordpress, Google Tag Manager, Mouseflow, Authorizenet, Microsoft Office 365, Ap...
<input type="checkbox"/>	[Redacted]	Microsoft Exchange Online, Zendesk, Mailchimp, Microsoft Office 365, Google Tag Manager, Go Squared, Mandrill, Googl...
<input type="checkbox"/>	[Redacted]	Microsoft Exchange Online, Route 53, Hotjar, Wordpress, Google Tag Manager, Facebook Connect, Facebook Advertiser, ...
<input type="checkbox"/>	[Redacted]	Route 53, Mailchimp, Typekit By Adobe, Hotjar, Google Tag Manager, Optimizely, Bing Advertiser, Facebook Advertiser, Z...
<input type="checkbox"/>	[Redacted]	Microsoft Exchange Online, Hotjar, Google Tag Manager, Facebook Connect, Sendgrid, Facebook Advertiser, Zendesk, Mi...



Integrate your tasks

Manage your sales tasks alongside your other tasks

Very hard to integrate HubSpot tasks.

We use Unito.io

Tips

- Build tasks into sales sequences to prompt calls, reminders, LinkedIn connects etc.
- Measure task completion as a sales activity
- Other cool integration apps include PieSync and Zapier but they don't do HubSpot CRM tasks

The screenshot displays the Unito.io interface for a sync between HubSpot and Articulate Marketing. At the top, it shows 'HubSpot Unito sync' with a bidirectional arrow icon and the URL 'www.articulatemarketing.com'. Below this, it indicates 'Last sync: 2 hours ago'. A navigation bar contains buttons for 'Activity', 'Projects' (which is highlighted in blue), 'Filter tasks', 'Map fields', and 'More options'. Under the 'Projects synced' section, there are two tool selection boxes. The first box is labeled 'Sales tasks from HubSpot' and contains a dropdown menu with the option 'ClickUp via Matthew Stibbe'. The second box is labeled 'www.articulatemarketing.com' and contains a dropdown menu with the option 'Hubspot via Matthew Stibbe'.





That's all Folks!



Thank you!

Let's talk: www.articulatemarketing.com/meet

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www.articulatemarketing.com

