



WEBINAR

PROVIDENT

HubSpot
CERTIFIED PARTNER

MANAGING THE NEW NORMAL WITH HUBSPOT SALES & MARKETING



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Managing the New Normal with Hubspot Sales & Marketing

Agenda

1. How to produce Inbound leads for your sales team
2. How to manage a remote/distributed team with Hubspot
3. How to automate processes to ensure follow up and conversion of Prospects to opportunities
4. How to manage pipeline in a virtual environment and manage accurate forecasting
5. How to target customers more effectively through account based marketing



ProvidentCRM

ESTABLISHED IN 2000

Provident was established in 2000, initially based in Dublin - Ireland.

MULTI DISCIPLINARY ORGANISATION

Wealth of experience in implementing and operating CRM strategy and applications.

FOCUS ON CRM & TEAM MANAGEMENT

Strong team focused on CRM & Team management. Based in Ireland, the UK, Spain, and Portugal.

PARTNER

Hubspot Partner since 2019 and currently Platinum partner.



Services



CONSULTING



IMPLEMENTATION



INTEGRATION



TRAINING

PROVIDENT

What has changed for sure...

- People working from home
- People are worried about the future
- People leaning on content they can trust to inform their decisions
- Industries are getting more concentrated with a 'winner take all' outcome (Amazon - Billions of packages, Google (billions of searches), Facebook (billions of visits))



So how do we Survive and Thrive?

Adapting with Inbound Marketing

Adapt to Inbound Selling is training sales people to help first - sell later.

Measuring outcomes for Marketing and Sales and utilizing ABM



The Post-Covid Inbound Sales Process

Marketing focus on driving engagement with brand through content and intelligent account targeting

Marketing nurture leads until they ask to speak to sales - this process should be smart and automated and harness technology

The hand-over from the Marketing team to Sales should be automated and based on "measurable qualification" - lead scoring can be very effective here

Sales approach qualified leads with a help first mentality. Sales people should have the tools in place to ensure proper follow up and pipeline management

Long term view



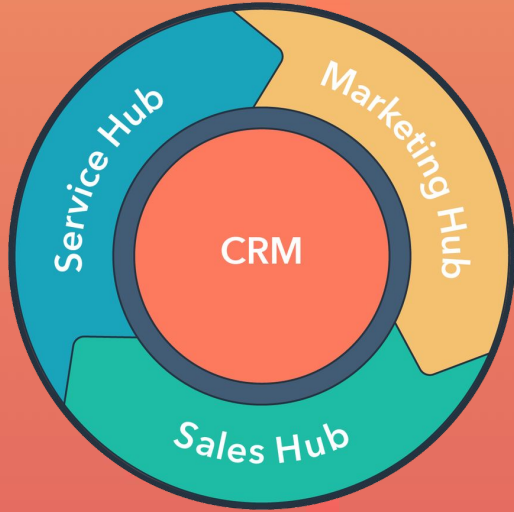
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Hubspot's Journey

- Hubspot Started as a Marketing Automation tool
- In 2014, Hubspot launched a CRM product for the SME market
- This market was dominated by competitors
- By using the Hubspot tools and the Inbound selling ethos we build a \$200m business form zero in just 6 years
- The tools that allowed Hubspot to do this are even more effective in the post Covid-19 marketing/sales process



Lead Generation



Marketing Hub Professional: SEO

SEO has changed. Build your authority in search with tools that help you plan your SEO strategy, optimize your content, and measure real return on investment.

The screenshot shows the 'SEO' section of the Marketing Hub Professional interface. The navigation bar at the top includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. The 'SEO' page has tabs for 'Topics', 'Recommendations', and 'BETA'. A link for '< Back to domains' is visible. The main heading is 'Recommendations' with the subtitle 'Find and fix SEO issues to get more search traffic.' Below this is a table of recommendations.

RECOMMENDATIONS	PAGES AFFECTED	IMPACT	REASON
Address duplicate pages View pages	182	High	Pages are duplicated. This may result in lower search engine rankings. Create more unique content.
Increase word count View pages	134	High	Top content is missing. This may result in lower search engine rankings. Add more content to your topic.
Remove title from meta description View pages	25	Medium	Your meta descriptions are missing. This may result in lower search engine rankings. No meta descriptions.
Add meta description View pages	38	Medium	Your meta descriptions are missing. This may result in lower search engine rankings. Add meta descriptions to help search engines understand your pages to help them rank and get clicks.
Add a single H1 tag View pages	182	Low	A single H1 tag is missing. This may result in lower search engine rankings. Add a single H1 tag to help search engines understand your page or have too many H1 tags.
Shorten title View pages	1	Low	Titles with more than 60 characters may not display in search engines. Shorten titles to help them get displayed.

Marketing Hub Professional:
Blogging Tools

HubSpot's blog makes it easy to create and optimize content with recommendations and measure which articles are having an impact.

The screenshot displays the HubSpot Marketing Hub interface. At the top right, there are buttons for 'Draft', 'BETA', and 'Edit'. A navigation link '< Back to blog posts' is visible in the top left. A dark sidebar on the left contains icons for 'Optimize', 'Analytics', and 'Content'. The 'Optimize' section is active, showing 'You're writing about the topic: big data'. Below this, there are 'SEO recommendations' categorized into 'TO DO' and 'DONE'. The 'TO DO' list includes: 'Add H1 tag', 'Add alt text to images'. The 'DONE' list includes: 'Word count in good range', 'Add topic to title', 'Add title', 'Page loads quickly', 'Add topic to meta description', and 'Title isn't in meta description'. On the right, a blog post titled '8 Common Misconceptions' is shown, authored by 'Sally Smiles' on '7/8/16 9:15 AM'. The post content begins with 'The list post is one of the most popular...' and 'Use your introduction as a way to help them. Keep it light by including... can include relating to your list, inc...'. A 'BIGLYTICS' logo is visible in the top right corner of the post area.

Marketing Hub Professional:

Social Tools

Link social interactions to real people in your database, so you can see deep context and prioritize conversations.

See every interaction with your messages, create custom keyword monitoring streams for everyone on your team, and measure social performance across every major channel in one place.

Never miss an opportunity to engage with followers or delight your customers.

The screenshot shows the 'Social' monitoring dashboard. At the top, there are tabs for 'Publishing', 'Monitoring' (which is active), 'Reports', and 'Messenger'. Below the tabs is a navigation menu with 'Inbox Streams' selected. The 'Inbox Streams' section lists several categories: 'All Activity' (11), 'Conversations' (2), 'Interactions' (2, highlighted), and 'New Followers' (7). Below this is the 'Twitter Streams' section, which includes a 'Create stream' button and a list of streams: '@hari_jags's Sent Messages', 'Duradry', 'AD/PD 2019', 'Mentions of @teamsolarMA', and '@hari_jags's Timeline'. There is also a 'More streams' dropdown and a 'Competitor Streams' section with a 'BETA' badge. The main content area shows a filter for 'All networks' and a 'New only' dropdown. Two social media posts are visible: a Facebook reaction from Biglytics with 1 like, and a Twitter retweet from @Biglytics with 1 retweet. A disclaimer at the bottom states: 'Under certain privacy laws and regulations, you must tell anyone who interacts with your connected social media accounts that you have access rights or ask you to delete their information. Since it isn't always possible to know which social media accounts are connected to your account their data may not be fully removed from the social tools. Before using this feature, please review our privacy policy.'

Marketing Hub Professional:

Granular Segmentation

Segment contacts based on their behavior and company information. Use these hyper-targeted lists to send emails, personalize website content, and power marketing automation.

The screenshot shows a CRM interface for creating a new list. At the top, there is a navigation link "< Back to lists" and a main heading "Name your new list" with an edit icon. Below the heading, it says "Estimation: - contacts". A dropdown menu shows "Active list" with a downward arrow and an information icon. To the right of the dropdown are "Clone" and "Delete" buttons. The main area contains two stacked criteria boxes. The first box is titled "Form submission" and contains the text "has filled out **Lead Form** on **Webinar: Big Data Algorithms**". Below this text is an "AND" button with an information icon. The second box is titled "GoToWebinar webinar" and contains the text "has attended **Demand Generation Webinar**". Below this text is another "AND" button with an information icon. At the bottom left of the criteria area is a third "AND" button. To the right of the criteria area is a list of contacts, each with a checkbox, a circular ID, and a name. The contacts listed are: KR Kyle Russel, KR Karianne Rosent, RB Rebeka Brekke, CM Chris McDermot, GS Guy Stoltenberg, BK Bernadine Kunz, CL Caroline Leanno, RM Rahul Mayer, and VH Vince Heller. At the bottom right of the contact list is a navigation bar with a left arrow, the text "Prev", and a box containing the number "1".

< Back to lists

Name your new list

Estimation: - contacts

Active list

Clone Delete

Form submission

has filled out **Lead Form** on **Webinar: Big Data Algorithms**

AND

and

GoToWebinar webinar

has attended **Demand Generation Webinar**

AND

AND

<input type="checkbox"/>	NAME
<input type="checkbox"/>	KR Kyle Russel
<input type="checkbox"/>	KR Karianne Rosent
<input type="checkbox"/>	RB Rebeka Brekke
<input type="checkbox"/>	CM Chris McDermot
<input type="checkbox"/>	GS Guy Stoltenberg
<input type="checkbox"/>	BK Bernadine Kunz
<input type="checkbox"/>	CL Caroline Leanno
<input type="checkbox"/>	RM Rahul Mayer
<input type="checkbox"/>	VH Vince Heller

< Prev **1**

Marketing Hub Enterprise:
Lead Scoring

Predictive Lead Scoring takes hundreds of demographic and behavioral factors into account to automatically score contacts based on their likelihood to buy.

The screenshot displays the Marketing Hub Enterprise interface. At the top, a navigation bar includes the logo and menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. Below this, a 'Manage properties' section is visible, featuring a contact profile picture and a 'Back' link. A white modal window is overlaid on the page, displaying a dropdown menu for 'Contact Property Name' (4 of 341 properties). The selected item is 'Contact priority', which has a 'Very High' score and a 'Likelihood to close' of 2.08. Below the modal, a 'Set default properties' button is visible. At the bottom of the page, there are input fields for 'First name', 'Last name', and 'Email', each with a clear (X) button.

Marketing Hub Professional:

Marketing Automation

Automate your marketing beyond just email. Setup nurturing based on contact, or run Account-Based Marketing (ABM) campaigns with company workflows.

Build your nurturing from scratch from HubSpot's powerful segmentation, or get started with a predefined template.

The screenshot shows the HubSpot Marketing Automation workflow creation interface. At the top, there is a navigation bar with a back arrow and the text "Back to workflows" on the left, and "Nurturing: New" on the right. Below the navigation bar, there are two tabs: "Start from scratch" and "Templates" (which is highlighted with a green "NEW" badge). The main content area displays four workflow templates, each with an icon and a description:

- Contact-based**: Start with a blank workflow that enrolls and is triggered off contacts. The icon shows a smartphone with a messaging app interface.
- Company-based**: Start with a blank workflow that enrolls and is triggered off companies. The icon shows a modern office building.
- Deal-based**: Start with a blank workflow that enrolls and is triggered off deals. The icon shows a brown briefcase.
- Ticket-based**: Start with a blank workflow that enrolls and is triggered off tickets. The icon shows a yellow ticket with a red border.

On the right side of the interface, there is a sidebar with the following sections:

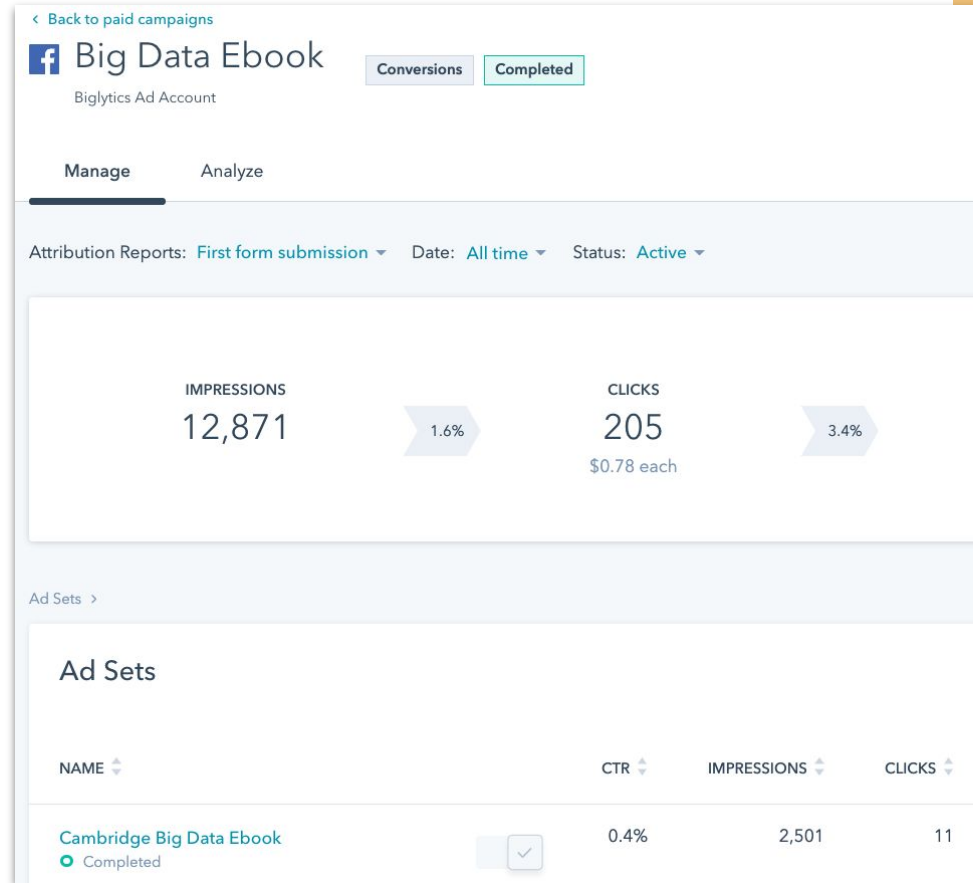
- Choose type**: A section with three radio button options:
 - Start from scratch: Start with a blank workflow and a...
 - Center on a date: Add actions that revolve around a...
 - Center on a date property: Add actions that revolve around a...
- Preview**: A section with a preview window showing a blank area.

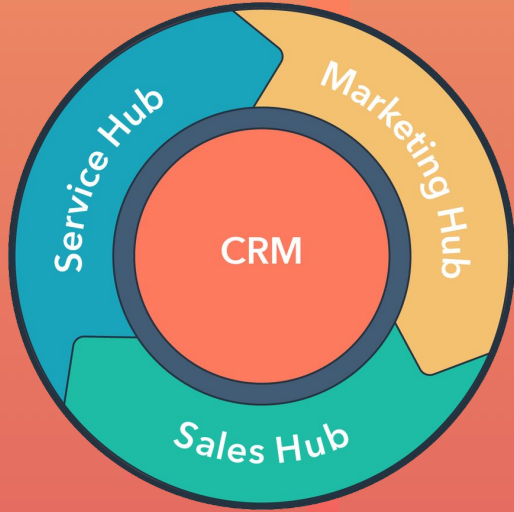
Marketing Hub:

HubSpot Ads

Using Google Ads, or advertising on Facebook or LinkedIn? HubSpot Ads lets you seamlessly sync all your leads and audiences between HubSpot and the networks.

With Marketing Hub Professional, get more spend and report on the real advertising ROI with complete precision by going a layer deeper. See how many leads, contacts, and customers your ads are generating.





Hand Over to Sales



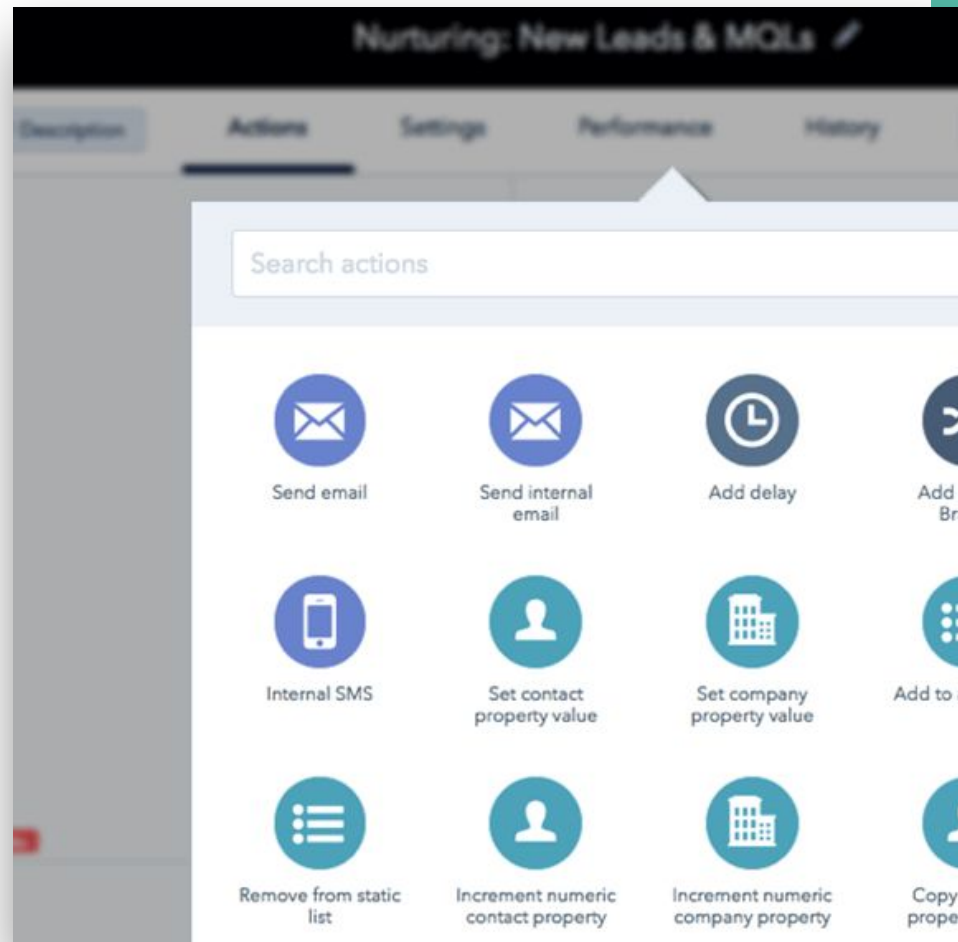
Building an Inbound Sales Process



Sales Hub:

Automation

Automate common management tasks like assigning leads, alerting reps when contacts take specific actions, creating tasks, and more.



Sales Hub

Sequences

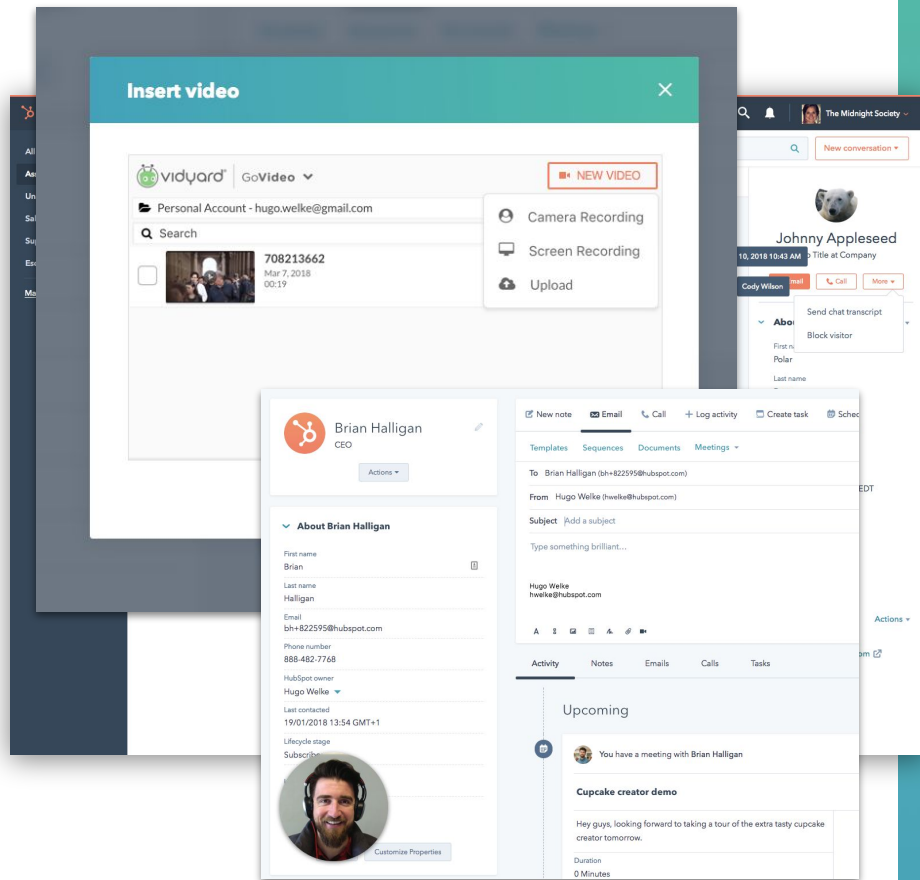
Tee up a timed series of email messages and tasks based off your templates with Sequences.

The screenshot displays the HubSpot Sequences interface. At the top, the 'Sequences' tab is active, and the sequence name 'Meeting Follow Up' is visible. A sidebar on the left shows the 'Mail' section with a 'COMP' status and a list of folders: 'Inbox (2)', 'Starred', 'Sent Mail', 'Drafts (5)', '_Outbox', 'copywriting', 'emerging le', 'Fidelity', 'GrowthSta', and a contact profile for 'Elise'. The main area shows a sequence timeline with two emails: 'EMAIL 1' (Thu 9/14) and 'EMAIL 2' (Tue 9/19). The 'EMAIL 1' is selected, and a 'Start sequence at' dialog is open. This dialog shows 'Email 1' in a dropdown menu, 'Send email on' set to '09/14/2017' at '7:10 PM', and the email content: 'Biglytics Recap', 'Hey Jeffrey,', 'Great connecting with you. We covered a lot on the call so I want links.', and a list of features: 'Biglytics - \$50/month per user', 'Custom Objects - Unlimited', 'Advanced Reporting - Unlimited', 'Advanced Permissions', and 'Unlimited Events - Unlimited usage events'. At the bottom of the dialog, there are 'Start sequence' and 'Cancel' buttons, and the recipient email 'To: jrusso@hubspot.com' is displayed.

Sales Hub:

Selling with Video

Salespeople can build stronger relationships with prospects by creating, sharing, and tracking personalized videos right from HubSpot CRM.



Sales Hub:

Playbooks

Build a library of sales best practices and resources. Use rules-based automation to surface recommended content to your sales team, right inside of HubSpot.

The screenshot displays the HubSpot Playbook interface. At the top, a teal header contains the word "Playbook". Below this, the main content area is divided into two sections. On the left, there is a "New note" form with a "Leave a note..." text input and a "New note" button. Below the form is a "Activity" section with a "Notes" tab selected. The activity feed shows two entries for "Charlotte A" dated "June 4 at 2:18" and "June 3 at 11:1". Each entry includes a profile picture, a name, a date, and status indicators for "SENT" and "DEL". On the right, the "Discovery Call Script" is displayed. It includes a title "Discovery Call Script", a description "Use this script when conducting a discovery call with new leads. Record answers for easy access later.", and a form with the question "How far out are you on making a purchase decision?". This form has three radio button options: "1-3 months", "3-6 months", and "6+ months". Below this is a "Lifecycle stage" dropdown menu set to "Lead" and a text area labeled "Add notes here". At the bottom right, there are "Save" and "Cancel" buttons.

HubSpot CRM:

Deal Management

Whether you have an established sales process or you're starting from scratch, HubSpot CRM makes it easy to create your ideal process. Add, edit, and delete deal stages and properties without help from IT. Then drag and drop deals between stages.

The screenshot displays the HubSpot CRM Deal Management interface. At the top, a dark navigation bar contains the HubSpot logo and menu items: Contacts, Conversations, Marketing, Sales, Service, and Automation. Below this, the 'Deals' section is active, showing a 'Table' and 'Board' view selector, a search bar for deals, and a 'Deals' dropdown menu. The main content area is divided into two columns. The left column, titled 'All deals', shows the current pipeline as '[*] Sales Pipeline' and includes an 'Add filter' button. The right column displays a board view with two deal stages: 'SCOPING CALL' (311 deals) and 'BUDGET SET' (1,134 deals). Each stage contains deal cards with details such as value, name, and close date. A summary row at the bottom of the board shows the total value for each stage: \$4,273,178.64 for 'SCOPING CALL' and \$9,659,683.96 for 'BUDGET SET'.

Deal Stage	Deal Count	Total Value
SCOPING CALL	311	\$4,273,178.64
BUDGET SET	1,134	\$9,659,683.96

Deal Cards in SCOPING CALL stage:

- \$50,000.00 Ruth Simonis - Wedding (Close date: August 30, 2019)
- €26,100.00 Acme - TEST (Close date: June 30, 2019)
- \$47,100.00 Silver Deal for Hahn, Morar and Von (Close date: June 13, 2019)

Deal Cards in BUDGET SET stage:

- \$3,650.00 Jaleel Jast - Test Deal (Close date: May 31, 2019)
- \$149.00 Sean Shoreman - Kangaroo (Close date: May 31, 2019)
- \$300.00 Sadye Wyman - donor (Close date: May 31, 2019)
- \$149.00 MDI Sales (Close date: May 31, 2019)

Conclusion

Q + A
Time





Thank you!

**Contact your account manager or email Diogo
diogo@providentcrm.com**

Further References

1. [10 Tried-and-True Tips for Sales and Marketing Alignment:](#)
2. [Short Course: Aligning Your Marketing with Sales](#)
3. [How We Used HubSpot to Achieve Sales and Marketing Alignment \[Customer Story\]](#)
4. [Set up Hubspot Features for Marketing and Sale Alinement](#)

