



WE ARE LIVE!

## ALIGNING YOUR BUSINESS USING HUBSPOT'S CRM PLATFORM



LIVE WEBINAR  
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# Agenda

- Definition of Customer Facing team alignment
- How big is the problem in your Business?
- HubSpot's shift to alignment first tools
- Customer examples
- Preview of some of the tools to Achieve alignment



# 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



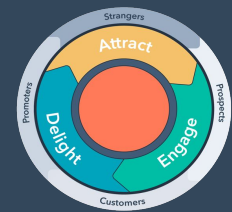
TRAINING

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HubSpot is a  
CRM Platform

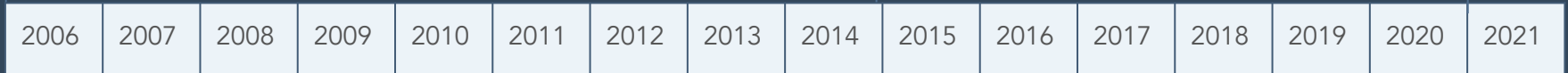


The #1 CRM Platform to help scaling companies grow better

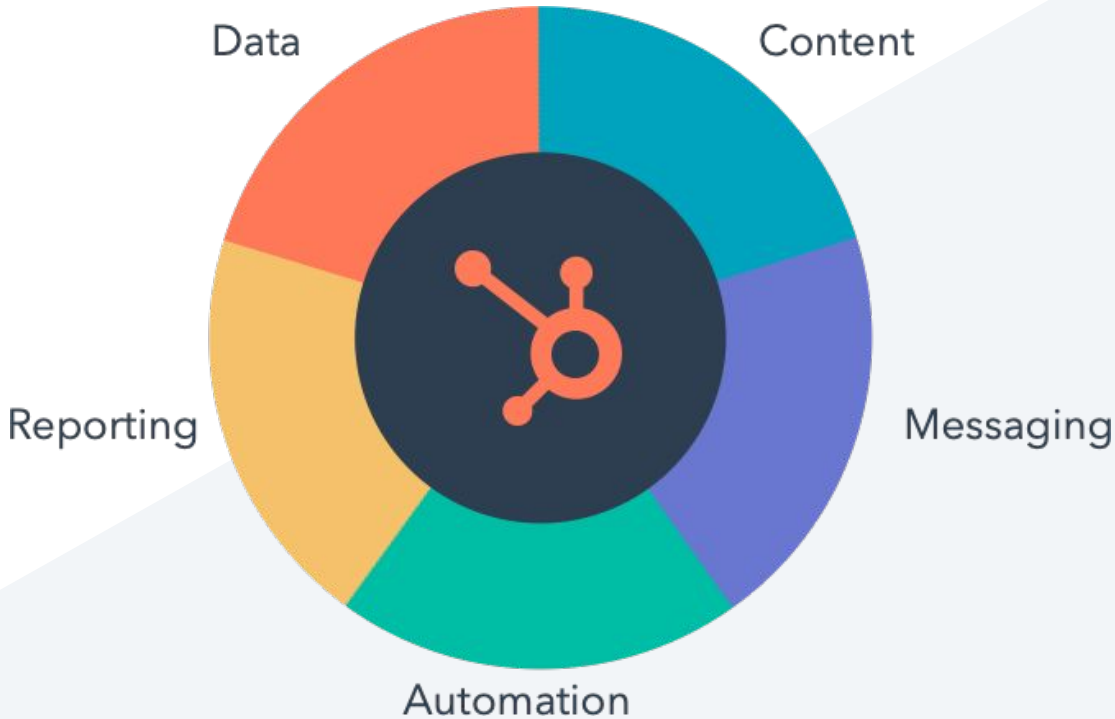


Branded as Growth Platform

Founded to help companies grow better through Inbound Marketing Software



# How HubSpot is Built Differently, on one unified foundation





apruve Care.com SOLO headspace Hamilton Beach classpass shore

talkspace ebay APPLOVIN GfK Coca-Cola BEVERAGES NORTH EAST unum zapier

SOUNDCLOUD WWF CASIO AES Stonyfield ORGANIC SIGNAVIO

netlify Course Hero Trello TikTok For Business legalzoom loom

gofundme CHARITY SUZUKI randstad The Motley Fool GE Lighting

Jack in the box AIRSTREAM wave SCHOOL of ROCK TERRACYCLE

vacasa SurveyMonkey eventbrite workable

KIO Networks ROCK & ROLL HALL OF FAME FARMERS BUSINESS NETWORK Stella USA.gov

Calm Airwallex FOLEON

vmware colt National College of Ireland snap! finance

A growing number of household names are choosing to use HubSpot.



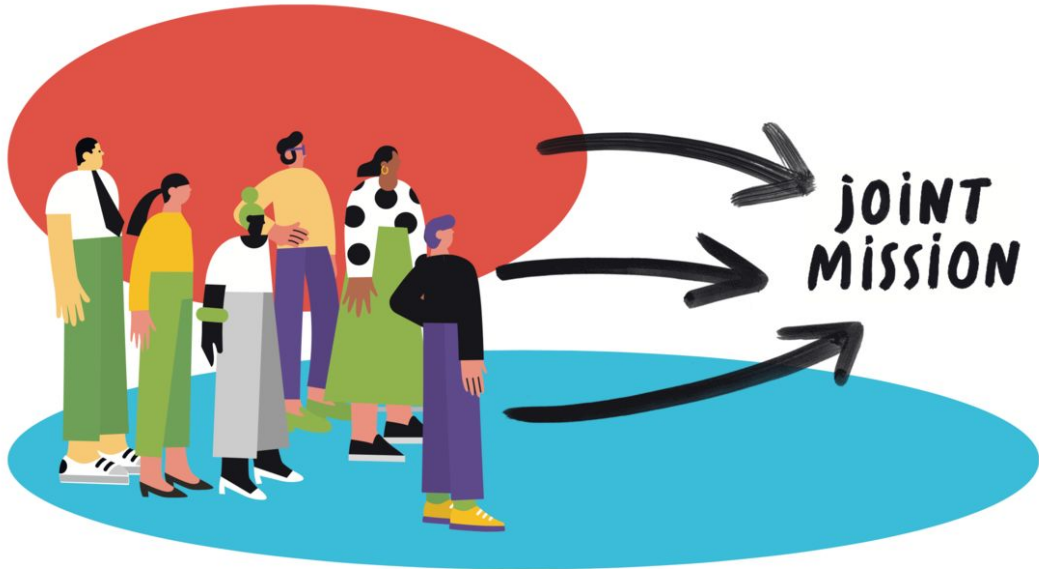


**What is the #1 thing you are going to do to drive your business forward?**

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# Team Alignment



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# The Danger of Misalignment

29%

Only 29% of employees say that **their leader's vision for the future always seems to be aligned with the organization's.**

LEADERSHIP IQ  
A MARK MURPHY COMPANY

44%

of projects fail due to a **lack of alignment between business and project objectives.**

PZ1  
PROJECT ZONE 1

10%

Roughly **10% of a company's spending is wasted to misalignment, on average.**

MINSILO

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# Alignment Case study - International SaaS

## ProvidentCRM + HubSpot

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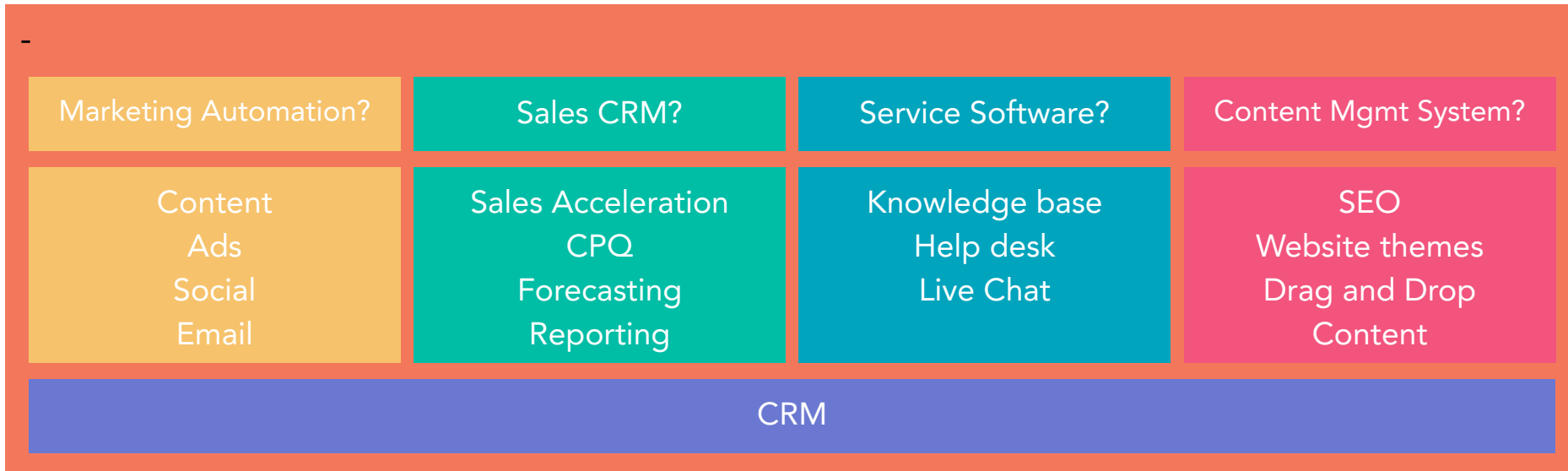


# Misalignment - Sales Marketing and Services

1. International SaaS business growing 400% per year
2. Sales using SF + Marketing using Marketo + Service using HelpScout
3. Ineffective data integration
4. Marketing had no oversight on sales leads
5. Sales had no way of seeing how onboarding of customers was going
6. Services struggled to manage onboarding with a cobbled together



# Alignment with HubSpot



# Three Challenges of Scale

Customer  
Experience

Scaling without  
sacrificing

Speed

Big and fast, not big  
and slow

Efficiency

Breaking linear  
growth

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HubSpot is built  
differently.

HubSpot's platform is **crafted**.  
Not cobbled.

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# How to better understand your customers



# All-in-one Interface

The screenshot shows a HubSpot Reports dashboard for a sales team. The main chart is a 'Deal revenue forecast by stages' bar chart with a play button overlay. The data points are \$14.1M, \$20M, \$9M, and \$8.1M. Below it is a 'Deals Closed vs Goal' chart with an error message: 'There was a problem building your report. Please try again in a minute. If the issue continues, try changing your report criteria, it might be your data set was too large to process.' A video chat window at the bottom shows a man with a headset and a 'Stop sharing' button.

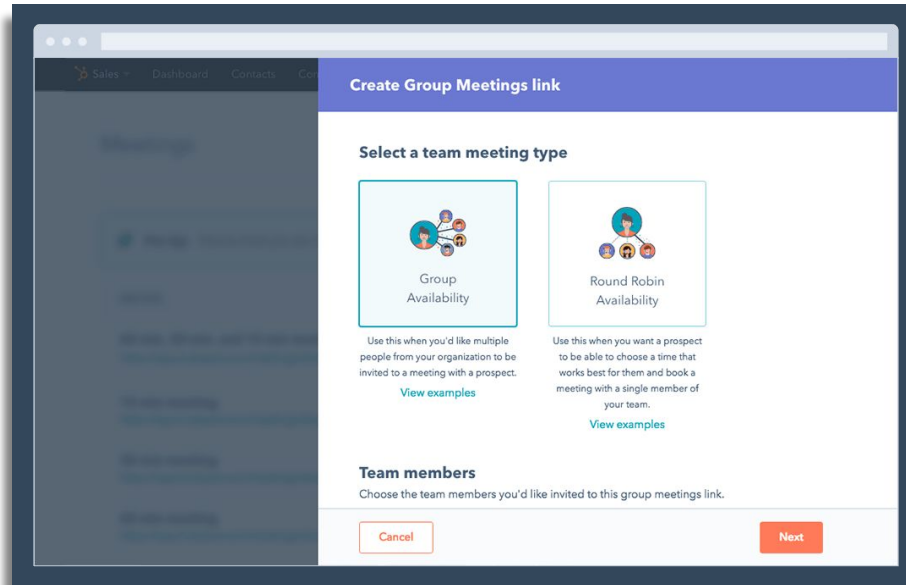
Check out this video:  
<https://hubspot.hubs.vidyard.com/watch/mzAGnc6z9ug93ZFD1e5SHY?>

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## “Magic Moments” – Meetings



[ Source: HubSpot ]

# How to build a 360 degree view of our customer



# 360 View - The Key to Alignment

The screenshot displays the HubSpot CRM interface for a contact named Morty Smith. The central activity feed is the focal point, showing a list of events such as 'List membership' and 'Morty Smith was added to...'. A large play button is overlaid on this feed, indicating a video recording of the activity. The left sidebar contains contact information, including the name 'Morty Smith', email address, and a profile picture. The right sidebar shows various relationship panels like 'Company', 'Deals', 'Tickets', and 'Attachments'. The top navigation bar includes options like 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', 'Reports', and 'Asset Marketplace'.

Check out this video:  
<https://hubspot.hubs.vidyard.com/watch/NkicCiLzVXPnrRmYeCe1Dh?>

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# How to optimize/automate the Steps in your your Customer's Journey





# Customize your customer journey with Workflows

The screenshot displays the HubSpot Workflows interface for a 'B2B Web Lead Journey'. The workflow is currently 'OFF' and is being viewed in 'Share' mode. The main content area shows a vertical sequence of steps:

- Contact enrollment trigger:** A box with a play button icon and the text 'Has [Name] from Contact Us [SALES] on Any [Device]'.
- 1. Send email:** An action box with a play button icon and the text '["Free Consultation / Schedule Meeting"] ["eBook - Competitive Market Analysis - Case - PVP1]?'.
- 2. Send internal email notification:** An action box with a play button icon and the text 'Send email "New B2B Lead - 1st Email sent" to [Email Address]'.

At the bottom of the screen, a notification bar indicates that the user is sharing their screen with a contact named 'vbrnna-alex@em...@provident.com'. A 'Stop sharing' button is visible next to the notification.

Check out this video:

<https://hubspot.hubs.vidyard.com/watch/qbjzV8ZU3nXQ3JrEWqT6f6?>

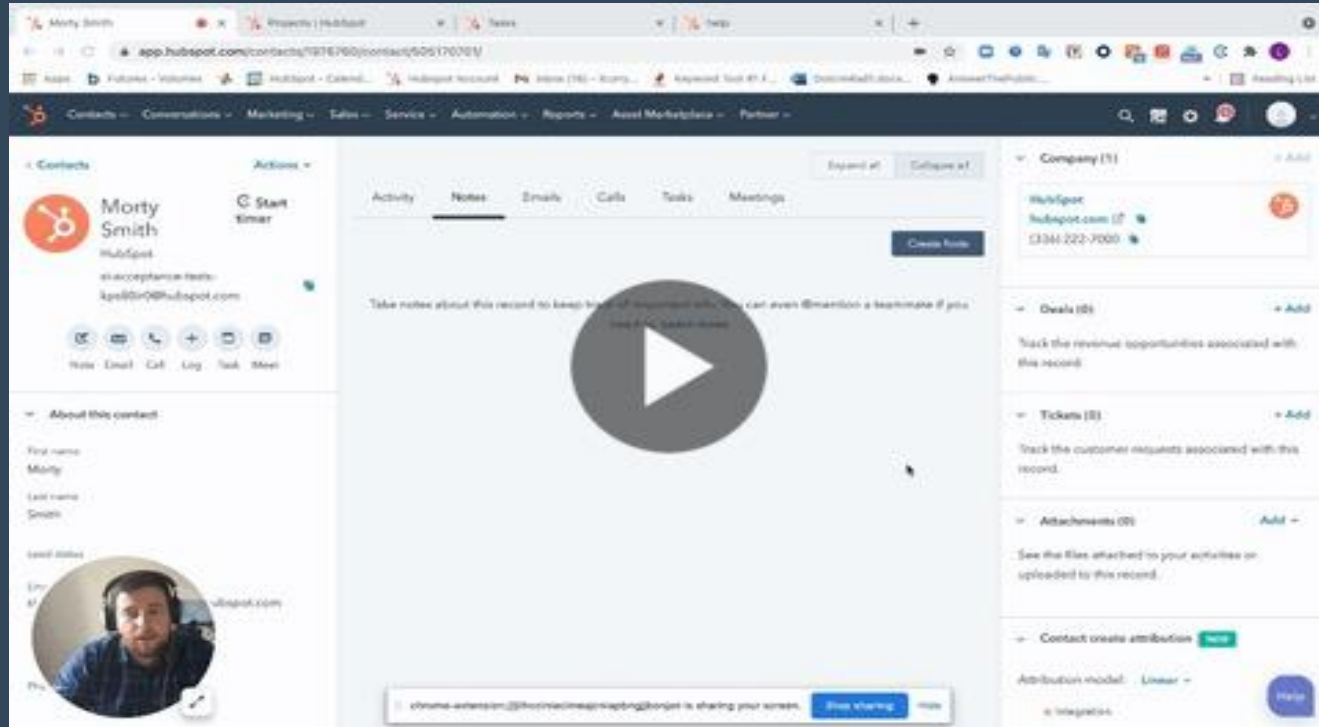
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# Collaboration Across Teams - Breaking Down Silos



# How HubSpot Fosters Collaboration



Check out this video:

<https://hubspot.hubs.vidyard.com/watch/qgFN-EcFLxc7PF7xm62u6yr?>

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# Alignment in Fragmented businesses - a Case Study: National College of Ireland



# Three Alignment Challenges in Education

Recruitment of  
students

Marketing intensive

Limited supply  
of places

Unable to expand to  
meet demand  
efficiently

Aftersales -  
Alumni

Untapped Resource for  
future growth

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# HubSpot CRM Suite Outcomes

## Recruitment of students

MArketing Automated  
and with feedback  
from the sales team

## Limited supply of places

Sales communicates to  
Marketing on dropout  
levels so Marketing  
know when to spend  
on ads

## Aftersales - Alumni

The alumni marketing  
team segment  
database based on  
location/outcomes to  
communicate with  
alumni in a more  
personalized way



# Key Takeaways

- Collaboration in front office teams is key to customer experience outcomes
- Silos are built in scaling organisations - different teams start to use different tools
- HubSpot allows Marketing - Sales and Service to view the customer in the same way
- Collaboration is made possible through the use of common view, tools and automation
- The customer should have a consistent experience when working with your company and HubSpot allow you to ensure this





# Q + A Time





# Thank you!

**Contact Sara for more information**

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