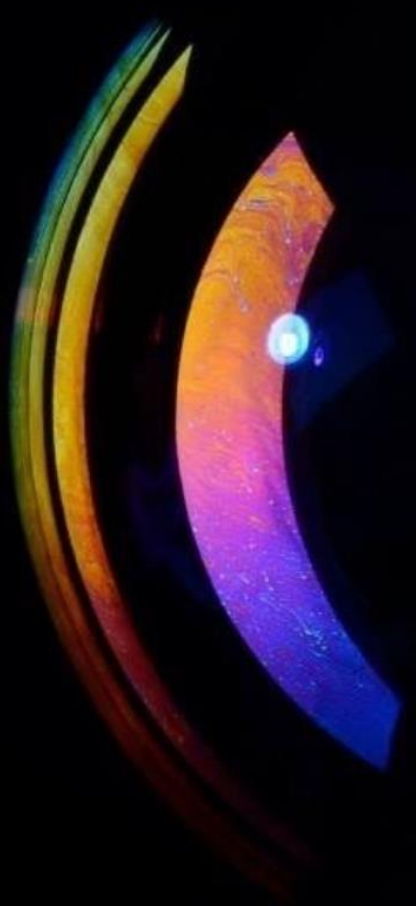
HUBSPOT SETUP GUIDE



from Data Driven Finance

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Hubspot setup guide

"Document everything as you go along – or staff will stop using it"

"Reward proper usage according to goals, e.g. 10 new deals added to Hubspot = xx reward"

1. Set up your Website

a. Connect your domain to Hubspot
b. Install the HubSpot tracking code
c. Is your website somewhere you are driving traffic to?
    i. Decide how this will work, with your marketing team
    ii. What content are you directing them to?
        1. Contact forms
        2. Blog articles
        3. Free resources

2. Invite the Team

a. Sales and marketing staff
b. Make sure they're involved in setting up *their* sections!

3. Set up your Customer data

a. Import your contacts list as a csv – consolidate from various systems and clean the data, set up your import file or
b. Integrate
    i. Google contacts
    ii. Outlook contacts
c. Customise contact records
    i. involve staff so they see what's relevant to them
    ii. set up additional fields if required
d. Connect to your email accounts
    i. For all staff
    ii. So in/out traffic is tracked

4. Set up other integrations

a. Microsoft Teams
b. Zoom
c. Google Meet
d. Slack
e. Outlook or Google calendar
f. Outlook desktop add-in
g. Salesforce
h. LinkedIn Sales Navigator
i. Other integrations

5. Set up your Sales hub

- a. Sales pipeline
    - i. Define your deal stages
- b. Set up sales dashboards
    - i. CSO – overall revenue
    - ii. Sales team – pipeline and close rates
    - iii. Marketing team – website traffic and new contacts

6. Set up your Marketing hub

- a. Set specific contacts as 'marketing' contacts
    - i. They will be targeted in your campaigns
- b. Import files for use in campaigns
    - i. Images e.g. logo
    - ii. Fonts
    - iii. Pdfs
- c. Set up campaigns with your marketing staff
    - i. email marketing
    - ii. social media management
    - iii. SEO optimization
- d. Add goals to the campaigns
    - i. Web visits
    - ii. New contacts
    - iii. Closed deals
    - iv. Revenue
- e. Add assets and content to your campaigns
    - i. E.g. images, blog posts, forms, emails, social posts, calls-to-action, web pages, ad campaigns
- f. Create tracking URLs for your campaigns

7. Set up Workflows / Automations

- a. Lead assignments to staff
    - i. Triggers = form filled out, quote request, email engagement
    - ii. Action = assign a sales rep based on e.g. client type, size of company, work request type
- b. Follow up reminders
    - i. Once assigned add in periodic reminders to the rep to follow up
- c. Engagement timing optimisation
    - i. Trigger = when a stalling prospect reads a blog on your website, likes a LinkedIn/Twitter/Instagram post
    - ii. Action = notification to rep to contact them (a 'revisit notification' – only available on the Marketing Hub)

8. Set up Hubspot's Meeting Booking tool

- a. If you don't already use Microsoft Bookings or Calendly
- b. Syncs to your work calendar (per staff member)

Biggest Hubspot setup mistakes

1. **Underestimating the time and effort required**
   a. The set up and adoption will take longer than you think
2. **Jumping in and setting up on the fly**
   a. With no clear plan for implementation or adoption you will fail
3. **Not getting full leadership buy-in**
4. **Not prioritising clean data**
   a. From the start and ongoing
5. **Not onboarding and involving the team properly**
   a. Document as you go, and involve the team as you set up, not at the end
   b. Design a rewards system for proper usage
6. **Workflow mistakes**
   a. Over-complicating your workflows (automations)
      i. The most effective workflows are simple. This is the number one biggest mistake made when creating a workflow.
      ii. Examples of effective workflows
   b. Not Understanding Suppression Settings
      i. Beyond enrolment triggers each workflow also allows for custom suppression settings to disallow certain contacts from being enrolled in the workflow
   c. Misusing (or not using) Delays
      i. Don’t overlook the delays as an extremely powerful workflow action
   d. Not Testing Your Workflow
      i. Make sure to test your workflow before implementing it
   e. Not Using Workflows
      i. Automating your internal and external processes with the use of workflows is a no-brainer. This HubSpot software will save you time and help you scale.

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Hubspot glossary

For full glossary click here

HubSpot tool	Definition
Marketing email	Tool used to create marketing emails
Files	Tool for uploading and editing files
List	Tool to segment and manage contacts
Contact record	A place to store, track, and manage information about an individual in your database
Opt-out list	A list of contacts who are not eligible to receive emails from you
Email footer	Required contact information for your company, placed at the end of your emails

Additional set up item for Pro tier and above:

Set up Lead Scoring

c. Settings > Lead scoring
d. Helps reps prioritise their time
e. Decide attributes that boost the score e.g. filling out a form, and attributes that decrease the score e.g. no engagement for x amount of time

About the author

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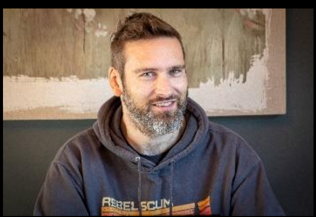

I work as a Virtual CFO for startups and scaleups

Check out my LinkedIn profile for more information on boosting your company’s sales, profits and finance skills