



How to Get Set Up for Lead Generation on HubSpot in 30 Days (or Less)

CATALYST
CRM 

Introduction

Whether you're already a HubSpot customer or are considering signing up to the inbound marketing platform, this is the guide for you.

You'd be amazed at how many people buy HubSpot with incredibly high hopes, thinking it will work as a lead generation machine, only to get nothing out of the system.

The main issue is that HubSpot is massive.

And when we say massive, we mean **MASSIVE**.

We're a HubSpot Gold Partner Agency of 6 years, have set HubSpot up for countless businesses and work with numerous others every single month to fine tune and get them results, and even we haven't used all of the bells and whistles the Inbound tool has to offer!

So how on earth are you - a new or potential HubSpot customer - supposed to know exactly how to configure the system for success?

The answer is: you're not. There's no way you could possibly know how to go about it intuitively.

Not unless you read this guide, that is 😊

Think of HubSpot as a toolbox rather than a tool: it's easy to get distracted by the exciting bits and bobs you don't need and forget about the real reasons as to why you purchased it in the first place!

Over the following pages, we're going to show you how to get HubSpot set up and configured correctly for lead generation in 30 days or less. Please note we are only detailing the essential tools you need and none of the other super features HubSpot has to offer at this stage.

We can't guarantee you'll get leads within 30 days, that depends on the quality of your output and the industry you're in. However, we can promise that following this guide will give you the structure you need to use HubSpot for lead generation.





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Days 1-4

Define

Your buyer personas are key to success in HubSpot, marketing and business in general.

Think of them as a summary of each different type of prospect you're targeting, written down for everyone in your business to see.

Working on these personas is a great opportunity not only to become more focused as a business, but also to educate everyone within your business and align your departments.

Typically, your sales team has a very good idea of who it is you're targeting as they speak to them every single day. But even within the sales team some will have different ideas to others.



That's why it's important to agree exactly who it is you're targeting across the whole business.

It's this insight which will make HubSpot a success. If you can build your whole HubSpot portal - from the content to your new landing pages, emails, workflows and everything else around your customers, your business will resonate with everyone you're trying to target.

How to go about it

Start off by breaking down the typical job roles you target and decision makers involved in the buying process.

Then, for each of these, one by one, think about the typical characteristics of each tends to have. For example, the Sales Directors you're targeting all have things in common that you can use to your advantage, such as:

Their day to day business challenges and pain points

Targets, goals & objectives

Language and phrases they use and are familiar with

Where and when they spend time online

Media they consume

Once you've got these points written down (as well as any others you can think of), you've got the basis for your buyer personas.

The best place to get this information is typically your sales and marketing teams. As they should know the problems and pain points your prospects are facing.

Your sales people likely sell into specific verticals, too, so also make a note of any industry-specific challenges they are aware of, that you can resolve (we can leverage these later).

Finally,

Don't be afraid to ask your existing customers -

from your most loyal through to the those who no longer purchase from you - a broad insight will be very valuable for you and your content.

Creating your buyer personas can be a great exercise in not only getting all of your departments on the same page, but also in showing customers that you think about them beyond the point of sale.

Days 5-15

Write

Now that you've defined your audience, you should have several different personas, each linking to the decision makers you're targeting, their challenges and goals.

With the exception of news pieces and case studies, every single piece of content you write should link directly to one of these personas and one or more of their challenges.

As we're trying to get up and running in 30 days or less, you won't have time to write content for all of them (unless of course you already have it or are ready to outsource) so pick just one persona and one challenge you want to focus on.



Long-term, you'll need to write two different types of content:

1.

Free content

This is the stuff that will generate traffic to your website. It has to focus on the challenges and pain points featured in your buyer personas without being 'salesy' and pitching your products and services.

The reason is simple: if you can genuinely help people before they purchase (or even consider purchasing) you prove that you know your stuff, build rapport and gear your website to get more traffic.

That means, when they need your services, you'll be front of mind. You also use your free content to drive people to the second type of content...

2.

Downloadable content

Technically, this content is free too, but these days, data is currency. Having people 'pay' for content with their contact details and permission to get in touch is the crux of inbound marketing. It's also a beautiful way to get warm leads.

Think about it for a moment: you came on to our website, had a look at the title of this guide, thought it sounded like something that would help you solve a challenge you're facing and downloaded it.

If that's not proof that this works, then I don't know what is!

For now, as we're trying to get set up in 30 days or less, let's go for one free piece and one downloadable piece.

How to go about it

The starting point is the title. I've heard it said in advertising that, "once you've written your headline, you've spent 90 cents of your dollar". The exact same could be said of content writing.

An example title we've used in the past would be
How to Generate Leads You Can Actually Close.

The reason we chose this title?

The challenge we're solving:

Not generating leads of a high enough quality.

The persona this links to:

Sales Directors, Directors and Business Owners who want to increase revenue.

The service this works as a conversation starter for:

Just about everything we do!

Then, you'll need to create three things:

The guide

which needs to be exported as a PDF. You can get as fancy with the design as you want, but I've seen loads of guide that are just basic, branded Word Docs exported as PDFs before, so don't worry too much about that.

Once it's complete, upload it to the [File Manager] in HubSpot and copy the unique file URL.



The form

to capture people's details. This is very easy to create in HubSpot. Just go to Marketing > Lead Capture > Forms and use the drag and drop to build your form.

Then in settings, redirect anyone who completes the form to the unique file URL of your guide. That will ensure that anyone who completes the form gets the guide.



The landing page

which will host your form. Again, this is very easy to create using HubSpot's pre-built templates. Just make sure to choose one with a form on and then choose the form you just created.



Once you've got your content written, post the free piece as a blog on your website, linking directly to your new landing page.

And **"Bob's your uncle, Fanny's your Aunt"**, you've got a piece of content, focused on a specific challenge you know your audience faces and not just a way to capture data, but a reason for prospects to give you their details.

Days 16-20

Distribute

Great content will only get you so far – you also need to make sure it's distributed and published in the right places as detailed in your buyer personas.

Some people should (hopefully) find your content organically by searching in Google. You can also drive free traffic to your post by:

- **Sending the content as an email to all of your existing contacts**
- **Sharing it in relevant groups on social media**
- **Scheduling social posts in HubSpot**

Alongside the free traffic you can acquire as mentioned above, you can also buy relevant traffic directly to your site. If you can assign some budget to create a PPC and social campaign, do it.

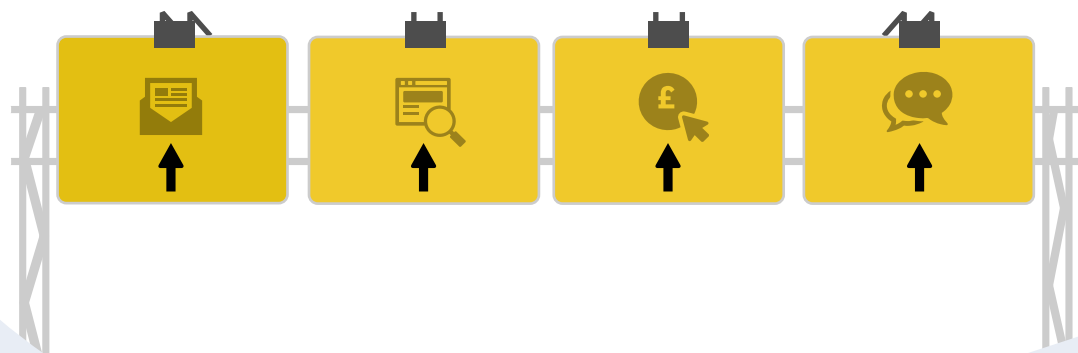


This is a huge topic which would be impossible to go into in this guide and could in fact be a guide in itself. Your in-house marketing department will more than likely have some knowledge and experience of this already.

Be aware that more spend doesn't necessarily mean more traffic: it takes time and a lot of testing to create a campaign that works.

Also note that while we've said this stage in the process should take roughly 4 days, we don't mean limit your activities to these 4 days. Instead, schedule your activity across the coming couple of weeks.

Make sure you vary your activity, too, so it doesn't become too monotonous, using different images and text whenever you share your content.



Top Tip - Although the free content is used to drive people towards the download, there's nothing stopping you from sharing the landing page and trying to get people to download directly.

Days 21-30

Connect and Nurture

People aren't always ready to be called, so use your greater judgement to decide when is right to get in touch. As a rule of thumb, leave it half a day or so to get in touch and give them time to actually read and digest your content.

That said, most people aren't always ready to buy right off the bat.

This is where HubSpot's workflows come in. They can be used to nurture people for months and months, ensuring they become educated to who your business is, what you stand for and the services you offer.

You do, of course, need more content to populate these workflows, so use these 9 days to connect with the people who have already downloaded, plan your workflows and accompanying content, too.

The trigger for your workflow will be the download of the guide, so try to keep your content relevant to that challenge as we already know it resonates with the person.

Also, best practice would suggest you connect with everyone who downloads or engages with your content on your social channels. That way, when you go to share more and more content further down the line, it's going into the news feeds of the people who matter most.

Conclusion

We haven't even begun to scratch the surface of what HubSpot can do, but this guide should give you a good idea of exactly how to set up a lead generation system in HubSpot.

It might take you less than 30 days, it might take you more. The point is that following this structure will give you something to work from and a timeframe to do it within.

It goes without saying that there's a huge difference between just doing something and doing it well and the more expertise involved in your HubSpot set up, the better.

On that note, if you'd like to consult with us on this process - or anything else to do with marketing, sales and strategy click below to get in touch.

[REQUEST A CALL](#)

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