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HubSpot Value Guide

HubSpot

CATALYST
CRM 

The Ultimate HubSpot Optimisation Guide for ROI

HubSpot is a powerful tool.

Though if you're reading this, then you probably already know that.

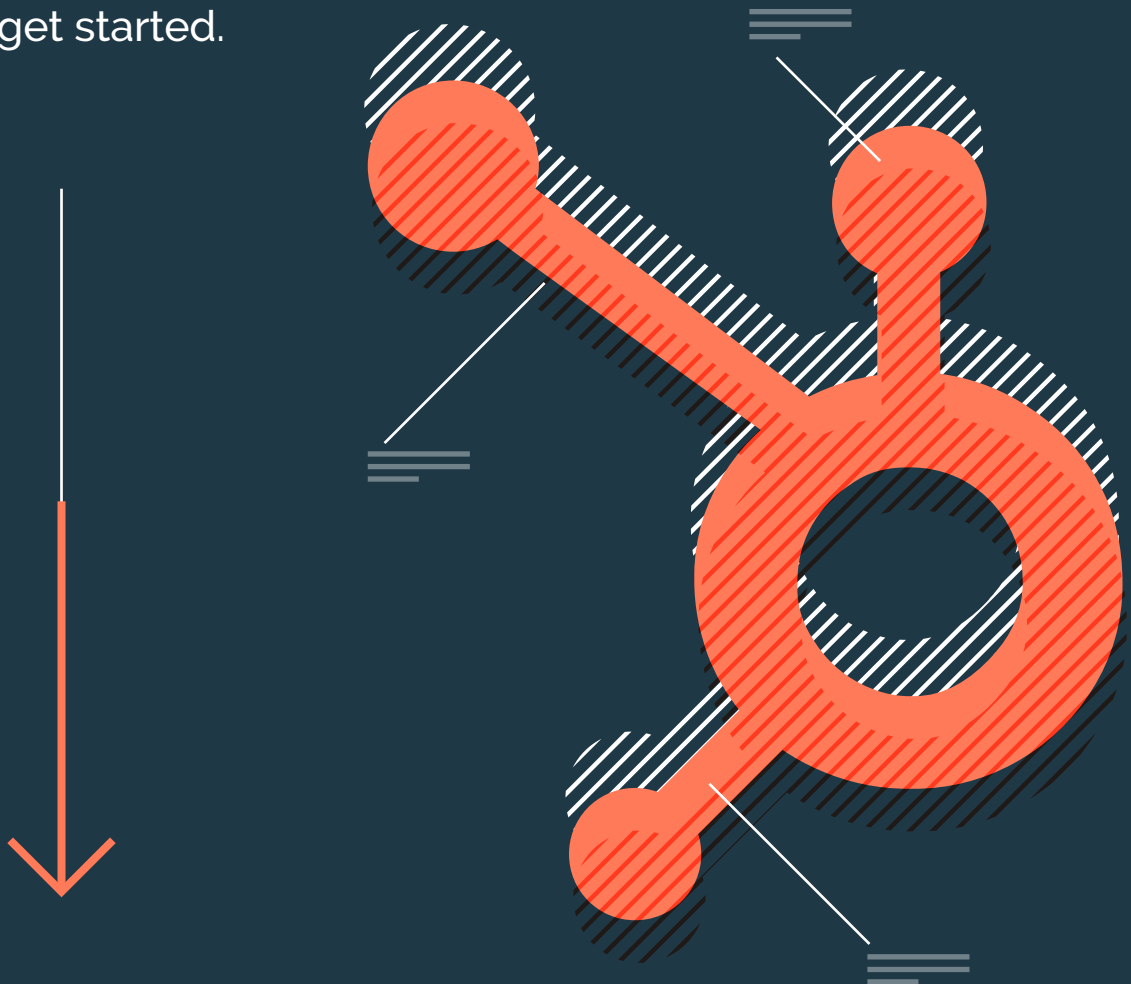
Chances are: you bought HubSpot because you can see its potential, but you've downloaded this guide because it's not changed the world like you'd hoped.

Sounds about right?

Don't worry – you're not alone.

This guide will **show you how to avoid the common HubSpot pitfalls businesses fall into, and teach you how to optimise your portals to deliver a tangible return on your investment.**

Let's get started.



The Importance of Onboarding

Good onboarding is essential. Get this wrong and you're set up to fail right from the start. This is a very common pitfall, and one that most organisations fall into.

Your onboarding should take into account three key things:



Your
objectives



Your
processes



Your customer
journey

HubSpot is extremely flexible; generic onboarding simply won't cut it, especially if you've got lots of users with various different use cases.

If you feel that you've not got a good grasp of your HubSpot, then we suggest re-onboarding. If you have never been onboarded properly, then this next step is essential.





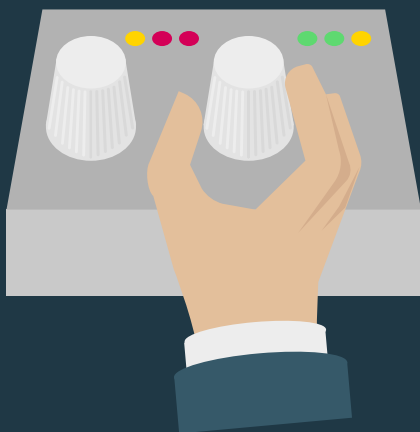
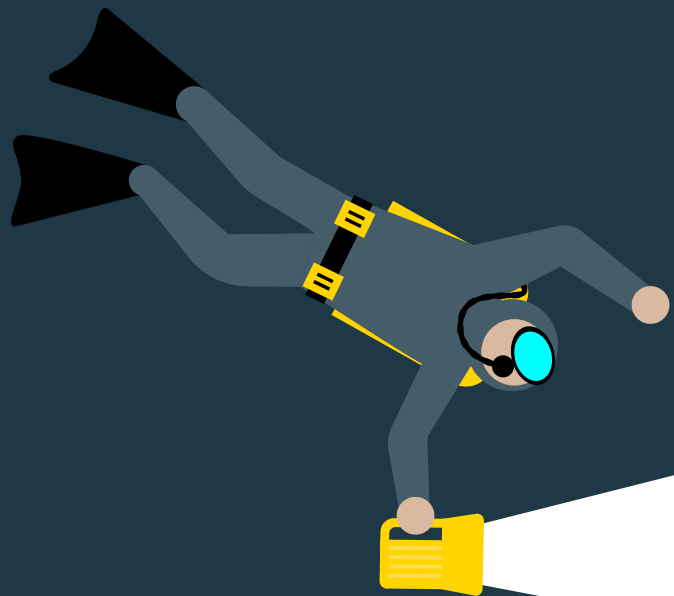
Step 1

Talk to our in-house HubSpot specialists. We're award-winning HubSpot Diamond Partners; HubSpot trust us to handle their onboarding because they know we help organisations get the most out of the platform.

Trying to figure this all out on your own is almost impossible – don't waste your time or money!

Step 2

We'll take a deep dive into your portal, looking at efficiencies, helping you to improve performance and align the platform with your objectives.



Step 3

You may need small tweaks, or you may need a complete overhaul.

Whatever happens, we'll make sure that HubSpot is aligned with your needs, and the people who need to understand it truly do.

We've re-onboarded hundreds of organisations, all of whom have been able to move forward and see some serious value out of their HubSpot.

By implementing HubSpot's inbound marketing methodology, our friends at **Purbeck** saw:



When you're ready to make the most out of your HubSpot, give our specialists a shout. We're on hand to audit your existing HubSpot to help you optimise, or to ensure your initial setup goes smoothly.

[Contact us about onboarding](#)

Creating Your HubSpot Strategy

There's no one silver bullet with HubSpot. Your strategy needs to bring together a combination of features that add together to create tangible value and results.

Here are the key things to get right, utilise and monitor in order for you to see the most value.

Lead scoring

The first, and potentially the most important feature of HubSpot is lead scoring. Despite being so essential, it's commonly missed or forgotten about.

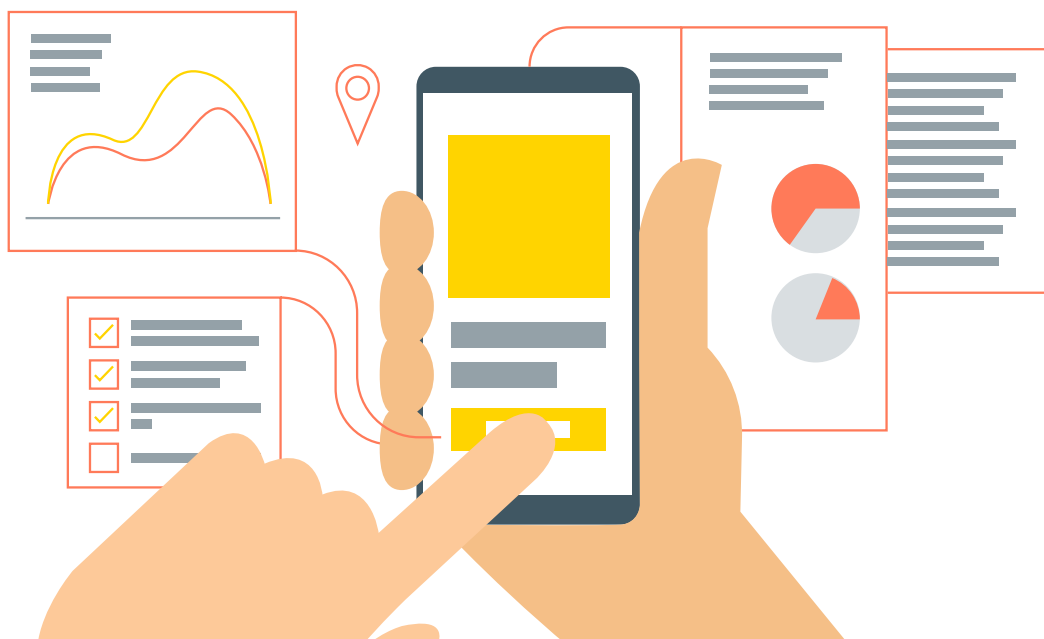
But who doesn't want to know how to engage their prospects are?

Lead scoring gives your sales and marketing team the heads up on:

- How warm a prospect is to your business
- What messages/marketing hooked them
- What types of people are genuinely interested in your business

The beauty of HubSpot is the ability to track contact behaviour, but looking at this generally doesn't necessarily tell you who to contact and when. Lead scoring solves this problem. Set it up, review it often, adjust your target audience to suit.

It's the best possible insight you'll ever get on who your target audience should be, and what messaging they respond best to.



Contacts & data

Keeping your data neat and tidy is essential to the success of any HubSpot strategy.

Fortunately, HubSpot has all the features and tools you'd ever need to ensure your data is properly structured and ready to use.

To make the most out of your data in HubSpot, we recommend answering the following questions:

1. Is all of your data in HubSpot?

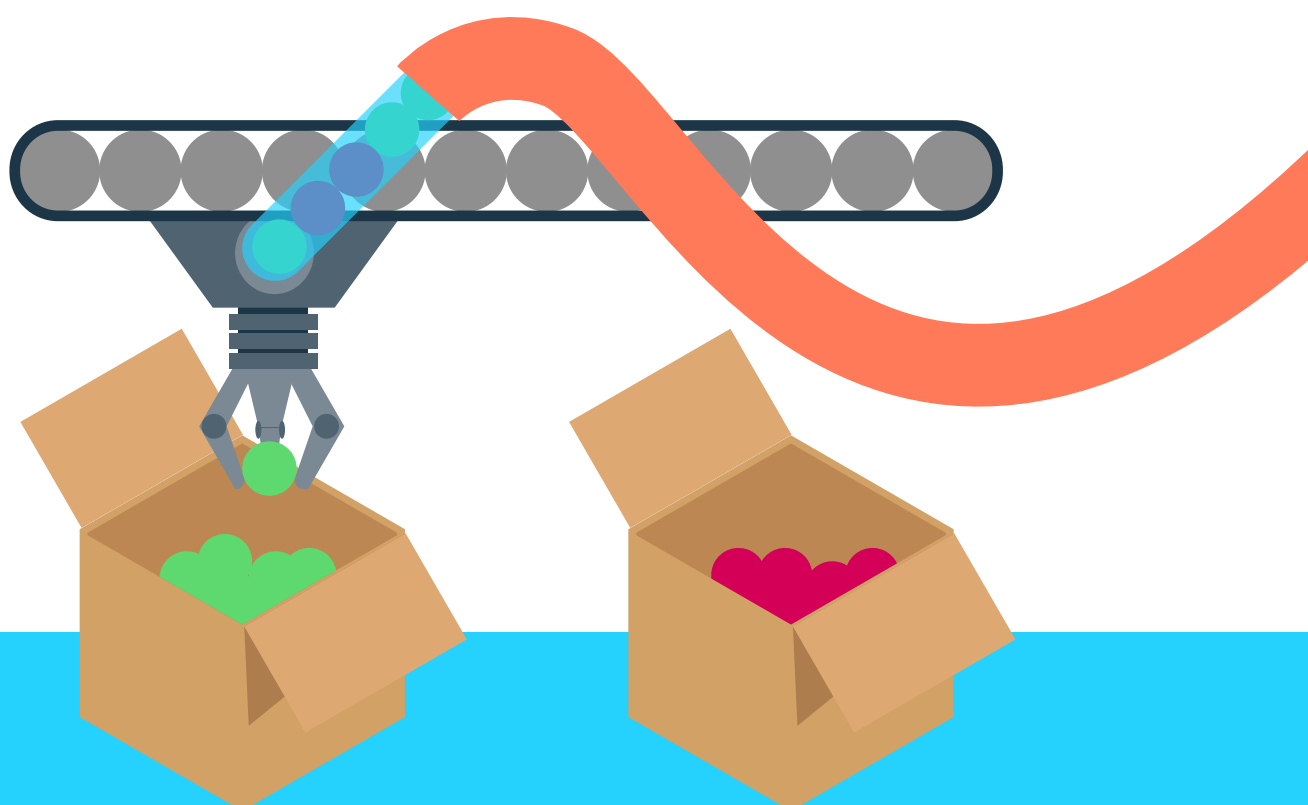
If the answer is no, why not? Ideally, all of your data should be stored in HubSpot so that everything is in one place.

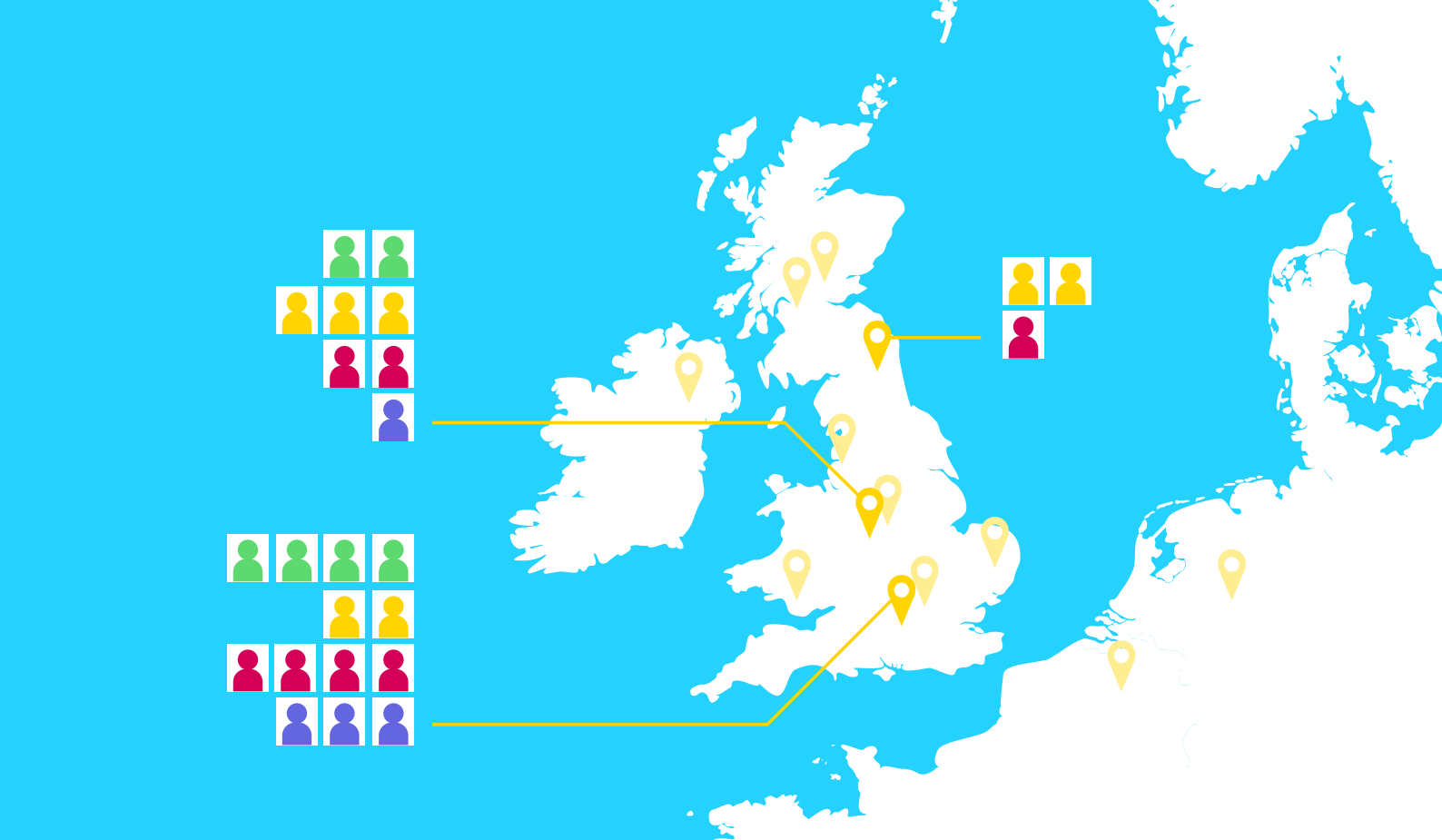
By bringing everything together, you'll gain a complete view over your data set, allowing you to make informed decisions about strategy and targeting.

2. Have you categorised your data into marketing and non-marketing contacts?

This is an essential, but often overlooked step.

You will have contacts you want to track in your CRM, but don't want to actively market to. HubSpot fees are based on the number of marketing contacts, so making this distinction will save you money AND make sure you are marketing to your key targets.





3. Have you segmented your contacts?

By breaking down your contacts based on demographics, location and behaviour, you're able to understand your customers on a deeper level, personalising the approach you take for campaigns.

This allows you to make your messaging more targeted and improve conversion rates across the board.

Enjoy higher open rates, more clicks, fewer unsubscribes and better overall engagement - what's not to love?

4. Are you using HubSpot forms?

Even if your website isn't built in HubSpot, you can still embed HubSpot forms.

This makes it incredibly easy to capture data straight into HubSpot. You can also specify (based on the form's position on your website) what lifecycle stage a prospect is at.

Contact downloads might be categorised under 'subscriber', while enquiries might be filed under 'leads'. By getting creative with HubSpot forms, you can streamline your follow-up process, ensuring every prospect ends up in the right place in your CRM.

Sales

The beauty of HubSpot is that it frees your sales team up to do what they do best: sell!

To check you're getting value from your Sales Hub, answer the following questions:

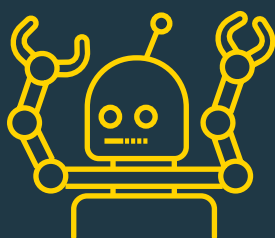


1. Are you recording deals?

One of the biggest benefits of HubSpot is that you can see everything in one place, so if you're still recording deal progress outside of HubSpot, consider migrating or integrating with your current sales platform.

The deals pipeline allows you to see all of your deals, what stage they're at and any active tasks that need to be resolved. You can change the pipeline stages to suit your unique sales process. Deals can also be associated with contacts and companies within your CRM, and the deal becomes part of the record/journey.

This ensures that nothing is lost, and any future marketing can be properly targeted, too!

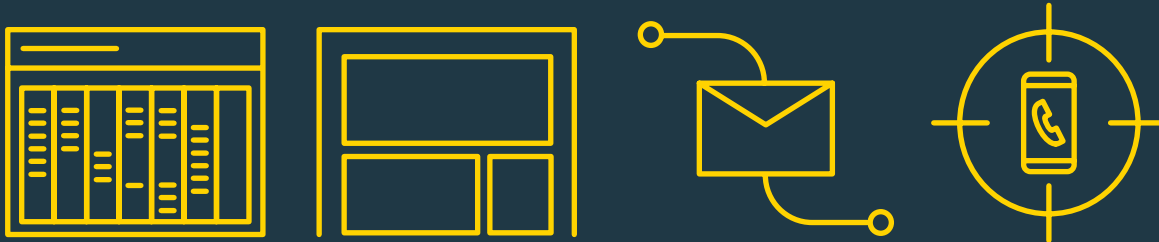


2. Are you benefitting from automation?

We're yet to find a salesperson who doesn't want help handling their endless admin.

Sequences and automated outreach emails do exactly that, sending follow-up emails and more based on the stage the prospect is at, or based on specific, plannable behaviours.

This makes your salespeople look hyper efficient and helps move prospects through the funnel in a timely manner. Never miss an opportunity again.



3. Are you using the many other sales tools HubSpot has to offer?

There's a lot to wrap your head around when it comes to HubSpot, but if you're looking to maximise the value you get from your subscription, we highly recommend using:

- **Appointment booking** - Book appointments even if you're not there. Use your calendar meeting schedule and make sure prospects aren't left waiting for you to chase them. Better service for prospects, more convenient for sales!
- **Proposal templates** - Use the proposal templates already in HubSpot, or create bespoke ones for your needs. Track when prospects have opened the document, and see how engaged with it they are. Save time by including the generic details, or create snippets that you can drag and drop into different proposal templates.
- **Email tracking** - Turn it on! This helps you to see when prospects are opening your emails, allowing sales to call just at the right time – when the prospect is the most engaged.
- **Call recording** - A great option for those wanting to listen back, learn from and improve. Call recording can also feed into your content optimisation process, providing FAQs for you to answer and proactively debunk any myths or address challenges.

This isn't everything HubSpot can do to make your sales process easier, but it's a great place to start.

Marketing

As seasoned marketers, we wish that HubSpot existed in its current form when we started out! Having everything in one place and being able to track all activity makes implementing campaigns and optimising them a lot easier. However, lots of businesses fail to do this and miss out on the benefit it brings.

The campaigns tool is often underused; being able to see how a campaign is performing at a glance is, perhaps obviously, incredibly useful!

Monitor content, emails, workflows, social posts, ads, PPC and more, all from one place. To ensure you're getting good value from the Marketing Hub, you need to look deeper into the data it provides, using it to inform your next move, which is why we highly recommend getting to grips with...



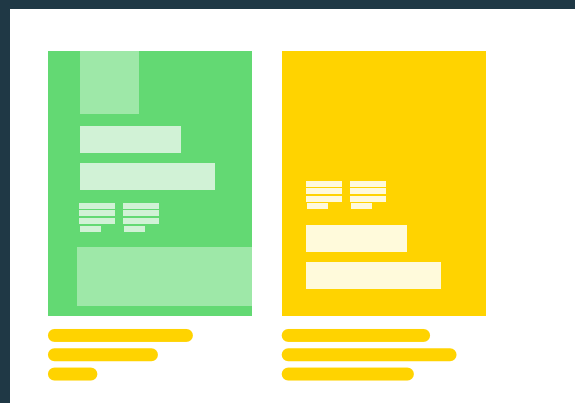
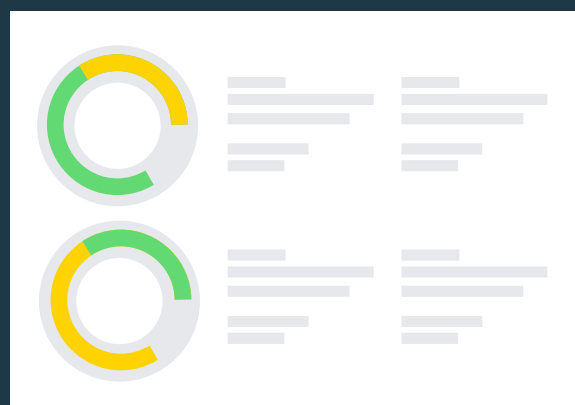
Dashboards/reporting

HubSpot's powerful dashboards and reporting features are the reason we're such big advocates of bringing everything together into one place.

If you've not customised a dashboard in HubSpot before, you may be a little intimidated, but don't worry – it shouldn't take too long to get the hang of it, and it's a step that you must not skip!

You can choose from predetermined types of dashboard, or create specific measurements that you might want to add to your dashboard.

There are loads of options to choose from, and the default ones are really good, however, sometimes you'll need a metric tracked that's specific to your business. In this instance, you can personalise your dashboard to your unique needs. The sooner you get your dashboards set up, the easier it will be to keep track of everything in the long term.

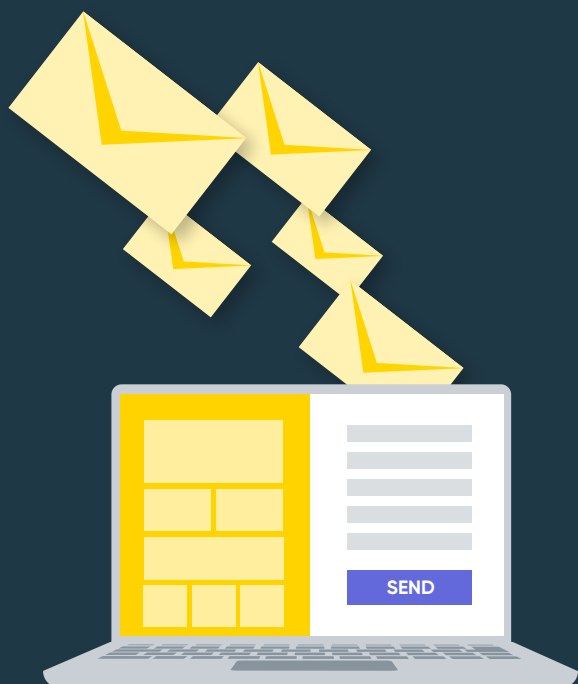


Content

How many views your content gets is a vanity metric.

Content plays a crucial part in the conversion process, whether that's SEO-based content designed to get your website ranking highly on search engines, or in-depth guides and other content made to be sent out as part of an email series.

No matter the content, it should all be tracked in HubSpot. It will show your best performing content, not just in views, but also which content has driven or assisted with conversions. This allows you to tailor any future content to ensure it's performing in a similar manner.



Emails

Are you looking at the health of your workflows and emails?

Yes, open rates and clicks are important, but do you know whether your comms are being read, skimmed or glanced at?

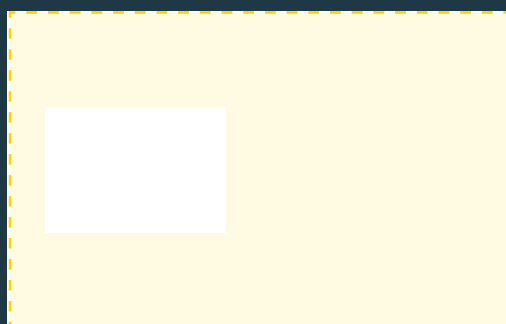
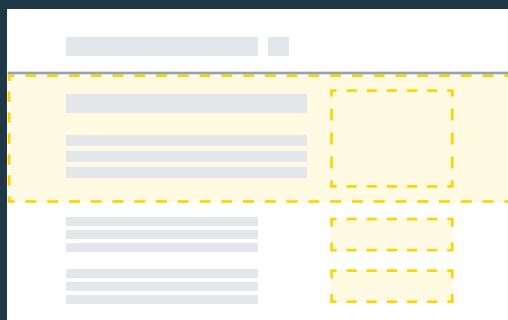
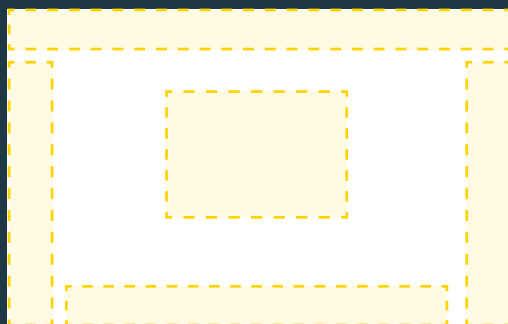
When planning your strategy, factor in HubSpot's many powerful email analysis tools. This will allow you to identify which emails drove or assisted with a conversion, and how they delivered value to your business.

Social

Social media is an incredibly powerful validation tool for any business.

However, intermittent posting and low-quality content isn't going to do the trick; the key is consistency.

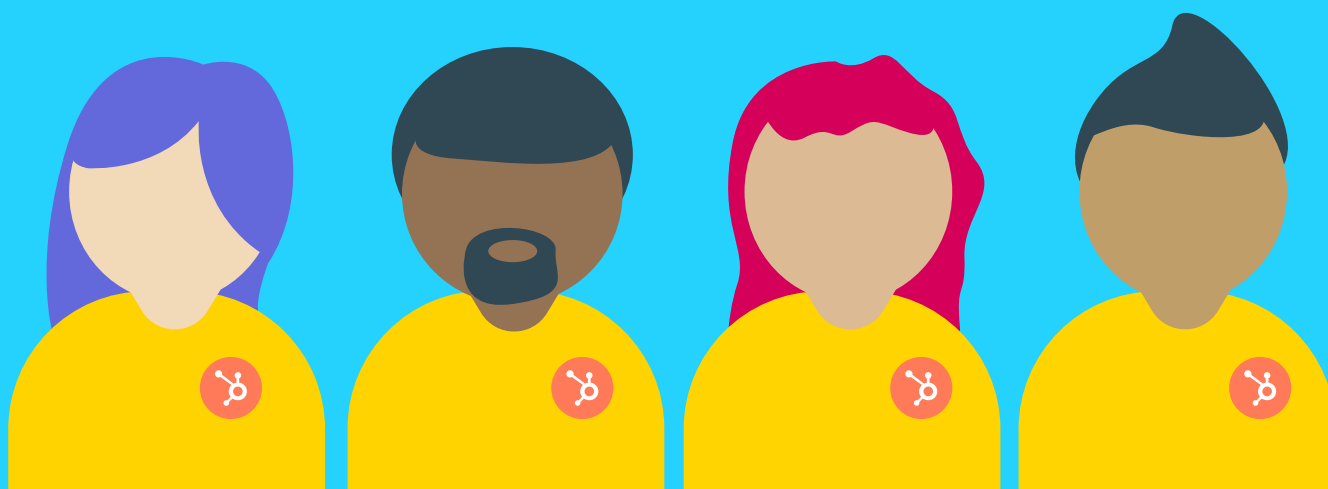
Use HubSpot's scheduling tool to plan ahead and ensure you have a stream of content locked and loaded, ready to go live. You can also see at a glance which posts are performing the best, and whether you have a standout channel where engagement is highest.



Ads

It is incredibly easy to link your ad accounts to HubSpot, but it's another thing that businesses often miss.

Again, it's always beneficial to have everything together under one roof. Why make life difficult for yourself when HubSpot can collate data for you?



Train Your Team

HubSpot success relies on full team engagement.

If your people aren't up to speed on the ins and outs, how are they supposed to use it properly?

We recommend targeted training for key employees (people who can then show others how it works).

This can help establish foundational HubSpot skills, with all sessions being created bespoke depending on your unique needs.

Our HubSpot specialists work with teams from organisations of all shapes and sizes. We'll provide your team with the knowledge they require to mould HubSpot into the perfect tool for you.

Whether you require one-on-one sessions on specific topics, or general overview training, give us a shout and we'll tailor our training to your needs.

Implement Your HubSpot Strategy

With the best will in the world, all of the requisite training and a thorough plan, many businesses fall at the final hurdle: implementation.

Often we find that people understand HubSpot, they know what they need to do, but they don't have the time required to really make the most out of HubSpot.

Sometimes all you need is a little extra resource. You guessed it – that's what we're here for!

We help pick up the slack for many of our clients, implementing processes, adding data to your CRM, planning and creating workflows, delivering campaigns and more.

Generally speaking, your team will be able to handle the day-to-day. We're here to take on the more complicated tasks that you simply don't have time to complete.

Let us handle that for you



Get Support from HubSpot Specialists

If you haven't guessed already, we live and breathe HubSpot.

We truly believe in the value it can add to your business. That's why we're here to support you in extracting that value from the platform.

Build your own perfect HubSpot support package from the following:

- **HubSpot Onboarding** – Lay the groundwork for serious HubSpot value.
- **HubSpot Training** – Get everyone up to speed with how they need to use HubSpot.
- **HubSpot Migration** – Migrate existing data into HubSpot, ensuring that nothing is missed and that you correctly map data inputs into your new CRM.
- **HubSpot Integration** - From WordPress to Shopify, Salesforce to Pipedrive, HubSpot can integrate with a wide variety of software. We'll help make sure everything works.
- **Ongoing Support** – Keep us on hand whether you need any advice, tweaks, new feature set up or anything else HubSpot related.



HubSpot is powerful, and it does deliver everything that it claims, however many businesses don't see results because they don't approach it correctly.

Don't become a statistic, get it right and see a return today.

Get bespoke advice, ask any questions or hear more about our support service by clicking the link below.

Let us handle that for you



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