

## **HubSpot Smarter:**

Strengthen Your Business with  
Integrated Marketing, Sales,  
and Service Tools



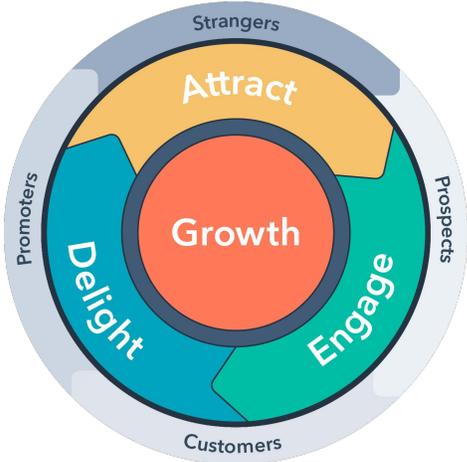
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# Get to Know HubSpot

HubSpot is a CRM platform that covers all of your marketing, sales, and service needs. Their inbound marketing approach champions the "flywheel" methodology: "The Flywheel is a model adapted by HubSpot to explain the momentum you gain when you align your entire organization around delivering a remarkable customer experience." In other words, think of HubSpot as a customer management machine that your business operates and grows around. It allows you to collect lead and customer data, launch your inbound marketing initiatives, and nurture sales and conversions all in one interconnected place.

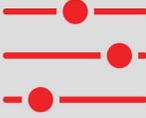
Within this document we will review all the key components of HubSpot, or its 'Hubs', centered around the CRM, and discuss how you can utilize HubSpot to optimize your business operations.



## HubSpot CRM Hub

At the epicenter of the HubSpot ecosystem is the CRM. HubSpot CRM tool is free and stores the data and lead information that power the rest of the Hubs. Tracks contact, company, and deal information, manage your pipeline, and log activity for every interaction between a lead and your company, all in one place.

### Key CRM Hub Features

<p><b>Deal Stages &amp; Pipelines</b></p>  <p>Accurately segment prospects to fit into your unique sales process</p>	<p><b>Company/Contact Record Keeping</b></p>  <p>Stay on top of your ongoing lead relationships using a comprehensive timeline</p>	<p><b>Lead Scoring</b></p>  <p>Rank the actions your leads take to measure their pipeline progress</p>
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## HubSpot Marketing Hub

Marketing Hub is an industry leading tool to help you execute campaigns and achieve your marketing goals. Marketing Hub tools allow you to engage with your target audience with an array of tactics, including email marketing, landing pages, social management, and ad development. Monitor and continuously improve upon your campaigns to achieve optimal conversions.

### Key Marketing Hub Features

- Marketing Automation
  - Develop custom, targeted workflows to automate your email campaigns, webhooks, lead scoring, and more
- Campaign Management
  - Centralize campaign management to optimize all assets, ads, and workflows in real-time for better results
- Landing Pages
  - Drag and drop your way into dynamic, user-friendly landing pages that create a customized experience for users

## HubSpot Sales Hub

Sales Hub provides your sales team with the tools they need to operate like a well oiled machine. Powered by CRM lead data, the sales team will be able to send emails and place calls from within the platform, automate follow-ups, and create and complete tasks all in one place.

### Key Sales Hub Features

- Sequences
  - Efficiently automate the prospect outreach process
- Conversation Inboxes
  - Localize email communication in one spot across team members
- Tasks & Queues
  - Organize action items and ensure timely lead follow-up

## HubSpot Service Hub

Service Hub provides your customer service team with the tools they need to efficiently problem solve and create better customer outcomes, so your brand is one that people want to come back to. Equip your team with an efficient ticketing system, customer satisfaction surveys, and help desk solutions, so your existing customers receive quality post-sale support.

### **Key Service Hub Features**

- Ticketing
  - Automate claims management to easily funnel requests to the right CS people at the right time
- Help Desk
  - Centralize support metrics tracking to provide a better customer experience using historical data
- Knowledge Base
  - Turn customer FAQs into a robust library of service articles for efficient troubleshooting

## **HubSpot CMS Hub**

CMS Hub turns content management into a collaborative, seamless process for website development. With plug-and-play website themes and drag-and-drop editors, you can feel empowered to own your website hosting and development project—with or without a developer.

### **Key CMS Hub Features**

- Drag-And-Drop Editor
  - Avoid complex, time consuming coding for speedily develop and optimize pages
- Adaptive Testing
  - Create up to 5 variations of a page and serve the best-performing automatically
- CRM Integration
  - Customize down to the individual user by leveraging existing CRM Hub data

## **Operations Hub**

Operations Hub, HubSpot's newest tool, assists with the internal operations at your business's core, whether it's integrating apps, automating your processes, or producing cleaner data. This software follows the mindset that aligned and friction-free business ops results in a stellar customer experience.

### **Key Operations Hub Features**

- Data Sync
  - Advanced app and data syncing to keep your teams aligned
- Data Quality Automation
  - Automate the process of cleaning data across business units
- Custom Properties
  - Prioritize your must-hit KPIs using custom property data and dashboards

## 5 Must-Know Tips to HubSpot Smarter

Familiarizing your company with HubSpot and its Hub software can elevate your business, but it's equally important to learn key tips to take your results to the next-level. Maximizing the symbiotic relationship between your company's internal ops and your external customer experience relies on knowing not only how to HubSpot but to HubSpot Smarter.

### 1 - Create a Goal-Oriented Game Plan

Go into the process of onboarding to HubSpot not only knowing what you want to accomplish with the platform but when it should be achieved by. Set benchmarks for the first month, three months, six months, and so on. HubSpot is great for accomplishing short and long term goals, and setting them up front will help keep you and your team on track with implementation.

### 2 - Make Your Tech Stack HubSpot-Centric

HubSpot is a one-stop-shop for all things sales, service, marketing, and ops, and it works best at the center of your company's ecosystem. However, if you have platforms within your tech stack that exist outside of HubSpot, such as your website or a different CRM, HubSpot makes it easy for you to integrate with the platform. Ensure that all your various platforms within your tech stack and sync data into HubSpot for the most seamless data organizing experience.

### 3 - Phase Out Your Approach

We have seen clients get very excited about all of HubSpot's capabilities and decide to start utilizing everything at once without a proper game plan. This can lead to not using any of the tools, especially the most important ones for their organization, to their full capacity. Avoid overwhelming your team with too many tools and tactics by first focusing on what you want to set up in the short term for your day to day operations. Then, make a plan for the 'nice to have' tools you would like to start utilizing in the near future.

### 4 - Don't Skip Out On Training

HubSpot is a big platform with lots of tools, and going into it without much knowledge of how things work can be intimidating. Onboarding your team altogether with training and resources can lessen platform anxiety and ensure they're familiar with the ins and outs of HubSpot's unique features. HubSpot's own training platform, HubSpot Academy, offers a wealth of training and tools to get your team up to speed in no time.

### 5 - Make Sure You Have A Guide | Don't Go Through The Process Alone!

Moving your business onto a large platform can be intimidating, especially if you are doing it without a guide. This is where TribalVision can come in. We have a team of HubSpot specialists ready to get your team and your business fully set up on the platform so you can achieve your set goals. To learn more about TribalVision's HubSpot implementation methods, check out our website, or reach out to us today at [info@tribalvision.com](mailto:info@tribalvision.com).

## Conclusion

As the leading marketing software company, HubSpot can elevate your business and help your marketing, sales, and service teams' customer and prospect interactions stand out from the competition. Since the platform is extremely flexible, it can meet your needs at any growth stage.

The CRM tool provides you with a straightforward way to track engagements. Through the entirely customizable deal stages, pipelines, and lead scoring, you can make the platform fit your exact needs at the proper price range. To fully utilize the sales hub, you can take advantage of sales tools like email sequences, meeting schedulers, and document tracking. While featuring best-in-class workflows, campaign management tools, and reporting functionality, the marketing hub also includes tools to support your internal processes, making the hand-off of leads/customers from marketing to sales a seamless experience. With the abundance of opportunities that the Marketing Hub has to offer, growth is inevitable. The sales hub is equipped with all of the requirements that are needed to provide one comprehensive platform. The suite of tools that your company can use is powerful and customizable. The service hub, designed to provide customer service teams the support solutions they require, fully integrates with the CRM, arming all three groups with the same customer/prospect intelligence. With the service hub, your customers' experience will be enhanced and specialized. Lastly, the CMS Hub is the best way to design and manage your company website to personalize and customize your businesses' specific needs. Overall, the CMS hub is user and beginner-friendly and would elevate your website.

HubSpot is the premier platform that brings disparate teams, sales, marketing, service, and CSM, into a single ecosystem, fostering cross-department collaboration and communication.



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### About TribalVision

TribalVision is a full-service digital marketing agency that provides outsourced marketing services to organizations looking to accelerate top-line growth. TribalVision is focused on utilizing its clients' marketing budgets as efficiently as possible – ensuring that every dollar spent maximizes awareness, drives meaningful brand engagement, and generates sales. With 10+ years in the market and a team of 65+ full-time strategists, marketers, creatives, and digital specialists on staff, TribalVision is a turn-key solution that equips organizations with the resources and knowledge needed to accelerate top-line growth and reach their full growth potential.

To learn more, visit [www.TribalVision.com](http://www.TribalVision.com).