Q&A with A&J Presents:

HUBSPOT HACKS

Tips on what your business should be doing in HubSpot to increase and/or prove your return on marketing investment.

1BoldStep

Introduction and Overview

2022

Meet the Presenters

Jennifer Jurgens
Founder and CEO

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Why We Started 1 Bold Step

We believe that everything can be more efficient; but especially the sales and marketing process. So we apply LEAN principles to create systems, order, and accountability to **generate demand, increase sales**, and prove return on marketing investment.

We believe that marketing is measurable, and therefore manageable,

VALUE-ADD

(*and not OVERHEAD*)

3 Hubspot Hacks to Prove ROMI

- ❑ Lead Source Tracking
- ❑ Automated Lead Scoring
- ❑ Campaigns to Measure Marketing-Influenced Revenue

Lead Source Tracking

The Problem

Deals are closing, but I don't know where they're coming from. I need to see what Lead Sources are bringing in revenue.

The Solution

Lead Source Tracking

Lead Source Tracking

Lead Source

The activity that brought the contact into a place where we could capture their information. It is not the way we captured the information, but what outreach happened to facilitate that transfer.

Examples

Paid Search

Trade Show

Sales Prospecting

Organic Search

Email Marketing

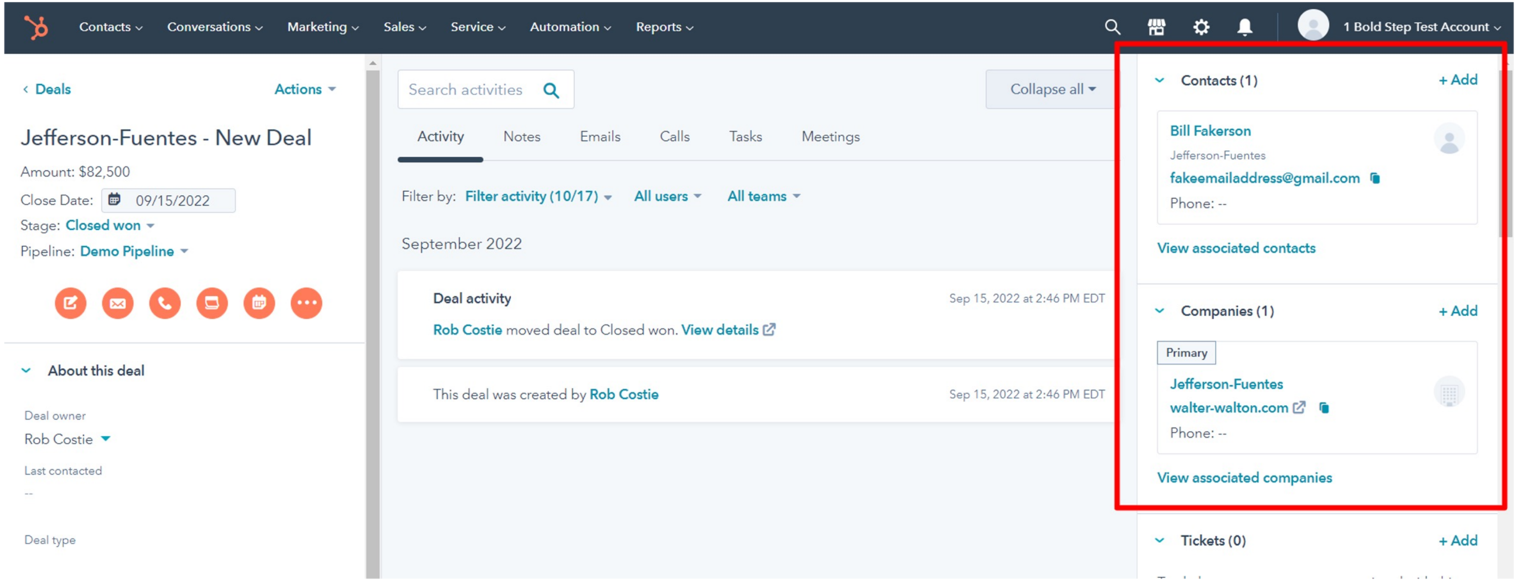
Social Media

Lead Source Tracking

- Custom property – Lead Source
- Original Source workflows
- Some lead sources will have to be manually applied as appropriate

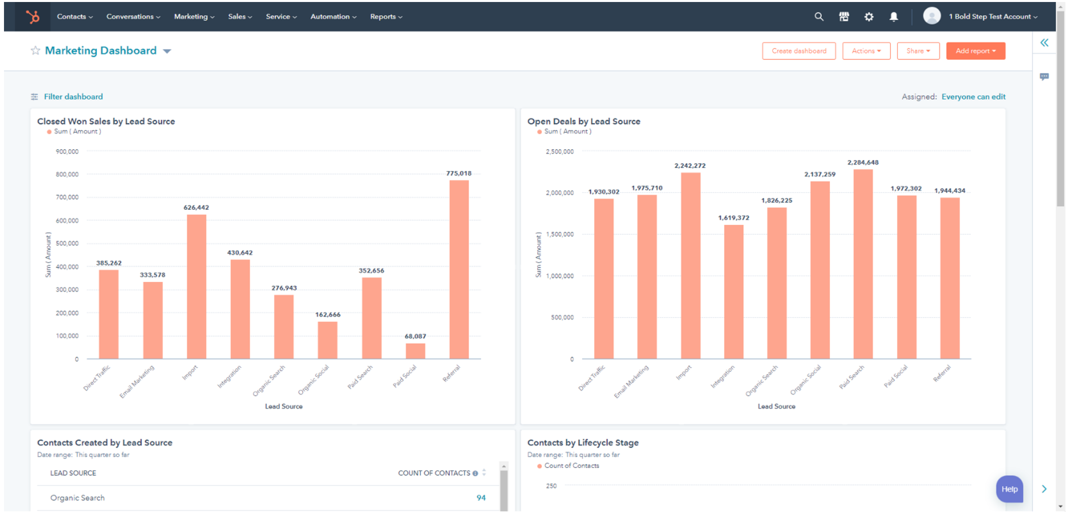
Lead Source Tracking

- Make sure every new Deal has an associated Contact and Company



Lead Source Tracking

- Set up cross-object reporting to see what Lead Sources are bringing in the most $$$
- Contact vs Company lead source reporting



Utilize Automated Lead Scoring

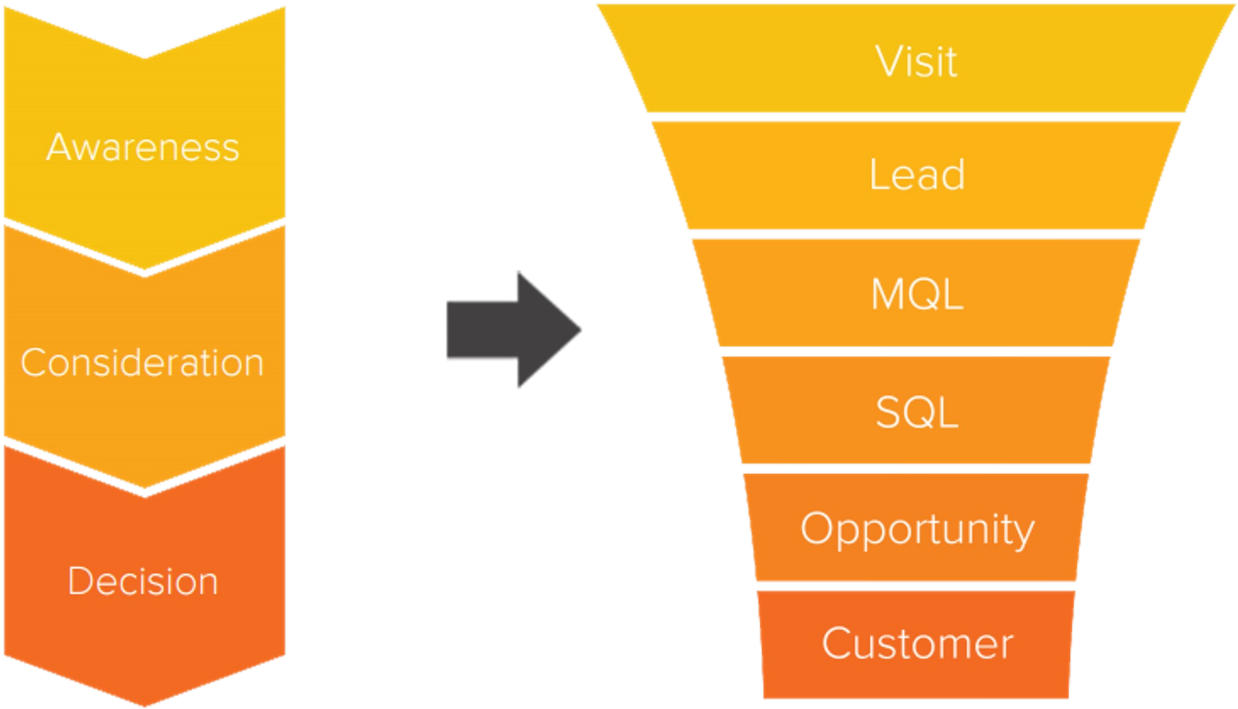
The Problem

We have all this marketing content, but our sales team doesn't know which prospects are warm and which are cold. How do I figure out who sales should reach out to?

The Solution

Automated Lead Scoring

Utilize Automated Lead Scoring



HubSpot

Utilize Automated Lead Scoring

- Automatically move Contacts through **Lifecycle Stages**
- Different scores, or “weights”, for different interactions or property updates
- Automated notifications at SQL stage

Utilize Automated Lead Scoring

- Approaches to Lead Scoring
  - Activity-based
  - Fit-based
  - The combo approach

Combo Approach Lead Scoring

Fit Rating				
Rating	Score			
A	75	**Rating**		
B	55-74	**SQL**	**MQL**	**Lead**
C	30-54	A1	A3	C3
D	1-29	A2	A4	C4
		B1	B3	D1
		B2	B4	D2
Engagement Rating			C1	D3
Rating	Score		C2	D4
1	85+			
2	50-84			
3	25-49			
4	1-24			

Use Campaigns to Measure Marketing-Influenced $

The Problem

We're spending time and $$$ on newsletters, blogs, emails, <insert marketing efforts here>, but are they making an impact? How do I know what's affecting the bottom line?

The Solution

Campaign Tracking

Use Campaigns to Measure Marketing-Influenced $

- Campaigns are “buckets”
- Keep track of landing pages, blog posts, emails, forms, lists, and other assets associated with a marketing campaign

Use Campaigns to Measure Marketing-Influenced $

- Contacts who interact with Campaign assets are tracked

Traffic

All traffic >

View tracking URLs | Create tracking URL

SOURCE	VIEWS	NEW VISITOR SESSIONS	CONTACTS (FIRST TOUCH)
Other campaigns	1,241	1,005	50
Email marketing	49	36	7
Paid search	19	11	1
Organic social	3	1	-
Report Total	1,312	1,053	58

Use Campaigns to Measure Marketing-Influenced $

- Campaign Reporting will track closed won Deal revenue associated with Contacts

Revenue Attribution

Attribution model Linear

ATTRIBUTED REVENUE	DEALS WITH ATTRIBUTED REVENUE	CONTACTS WITH ATTRIBUTED REVENUE
$257,298.33	4	4

Open attribution report builder

To Recap

- ❑ **Lead Source Tracking**

  Set up and automate your Lead Sources, then associate every Deal with a Contact and Company

- ❑ **Automated Lead Scoring**

  Automate a Contact’s journey through each Lifecycle stage with some combination of Activity-based or Fit-based scoring

- ❑ **Campaigns to Measure Marketing-Influenced Revenue**

  Track Campaign-influenced $$$ by associating assets with Campaigns

Your Questions

QUESTIONS

Your Questions

How do I show ROI when deals are disconnected from HubSpot Marketing?

Your Questions

I am the only person at our small not-for-profit Association who coordinates our marketing efforts (and I wear many other hats). I am looking for better ways to streamline our digital marketing, and free up some of my time for other projects.

Your Questions

Please explain the phases of the sales journey through HubSpot and the names/tag associated with each step.

Explain what "Lifecycle Change" a "Deal Activity" mean.

Your Questions

What is the benefit of having both Marketing Professional and Sales Professional?

Your Questions

What is a Marketing Contact?

Your Questions

Can I track visitors to my website?

Your Questions

How do I use HubSpot to forecast my sales?

Your Questions

How do I get my team to use the CRM?