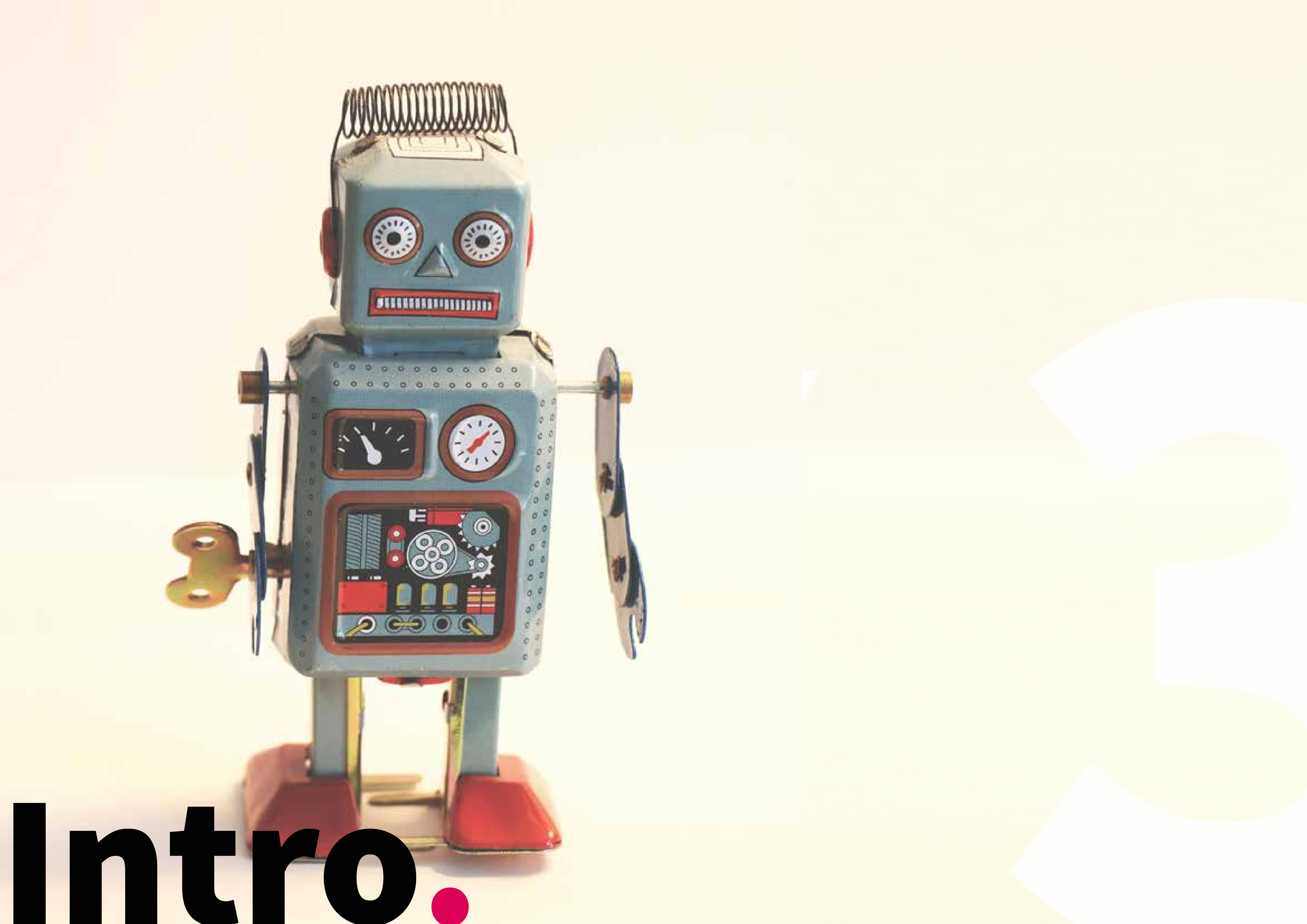
STERC.

THE ULTIMATE HUBSPOT GUIDE

Get to Know Everything About HubSpot and Discover the Power of This Next-Level Marketing and Sales Platform!



Intro.

What Is HubSpot?

Marketing Hub Sales Hub Service Hub

HubSpot is the platform when talking about the marketing, sales, and service of the future. This powerful platform focuses on all the things that allow you to connect with your audience while optimizing yourself online.

> ## Connect with your audience while optimizing yourself online

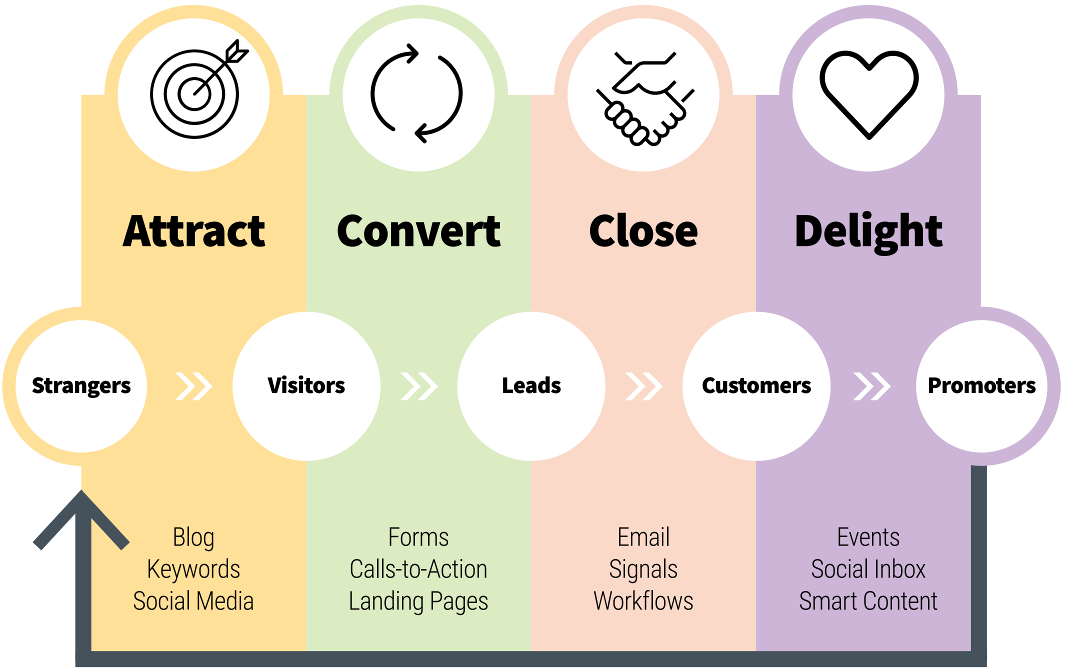
HubSpot provides you with all the tools you need to let your departments collaborate, appeal to potential candidates, create brand awareness, and personalize your digital platform. With essential tools such as personalized content, sales emails that stand out, and the best service tools around, you give your audience the attention they deserve. That's how leads become customers, and customers stay involved with your brand.

Discover HubSpot:

- Attract exciting leads and create your inbound strategy
- Save all contact data and interactions in one secure place
- Create personalized marketing activities to convert leads even faster
- Make your sales more efficient than ever and see what your customers desire
- Optimize your service and respond to your customers' needs
- Turn leads into customers and customers into loyal promoters

Do you want to get started with HubSpot right now? Request our HubSpot & MODX demo via sterc.com/hubspot-demo or scan the QR code below.

Inbound.



Almost everyone is familiar with outbound—getting your target audience's attention by making your organization appear as many times and in as many places as you think necessary. Sadly, this method isn't very effective. Instead, it interrupts every unique lead's customer journey with content they aren't looking for (yet). That's why inbound was created.

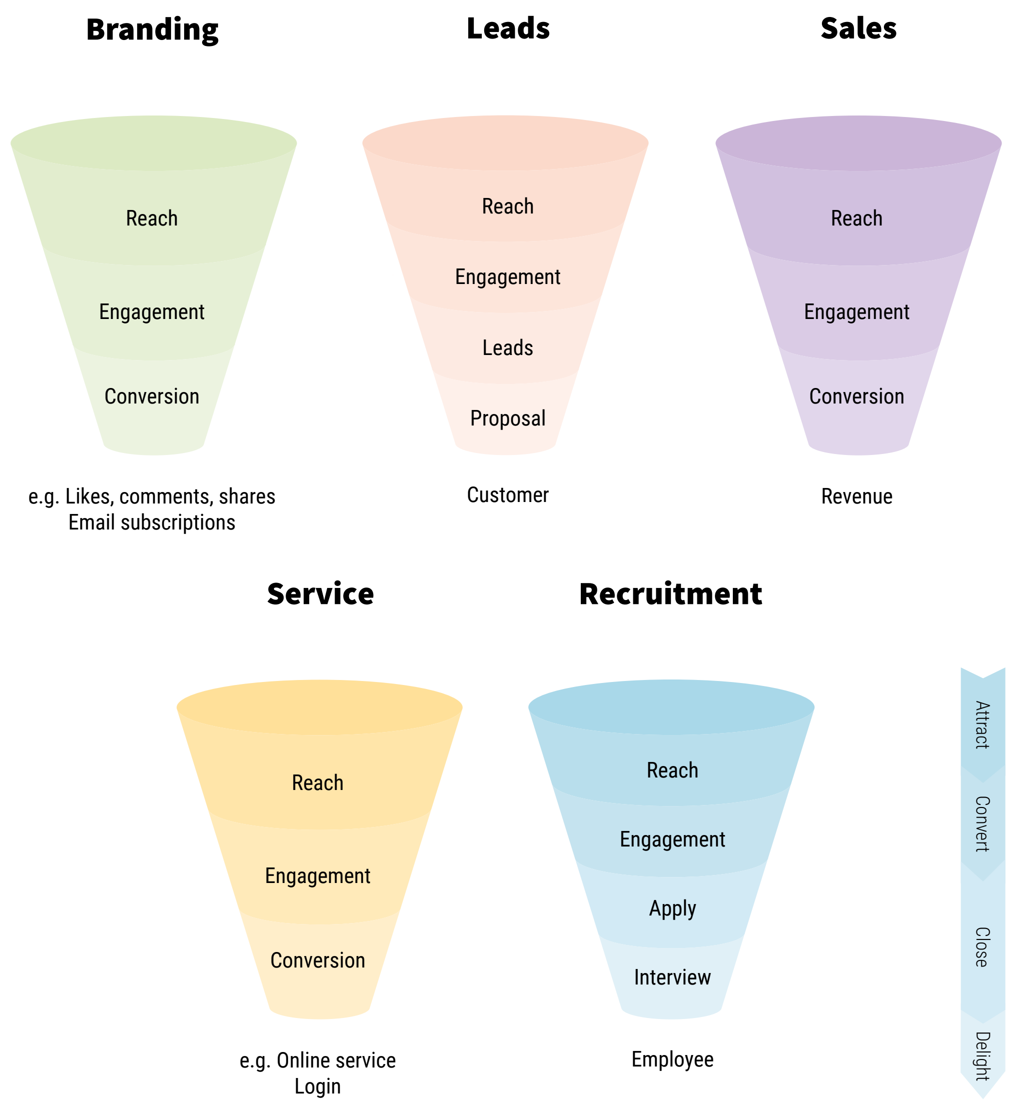
Inbound is a business method focused on attracting exciting leads and customers. With inbound, you focus on creating the content your audience is looking for instead of offering content that isn't relevant to them. You make sure the content matches the questions, challenges, needs, and issues of every unique contact at every step of their journey. You'll help solve their questions while encouraging them to come back to you and creating promoters.

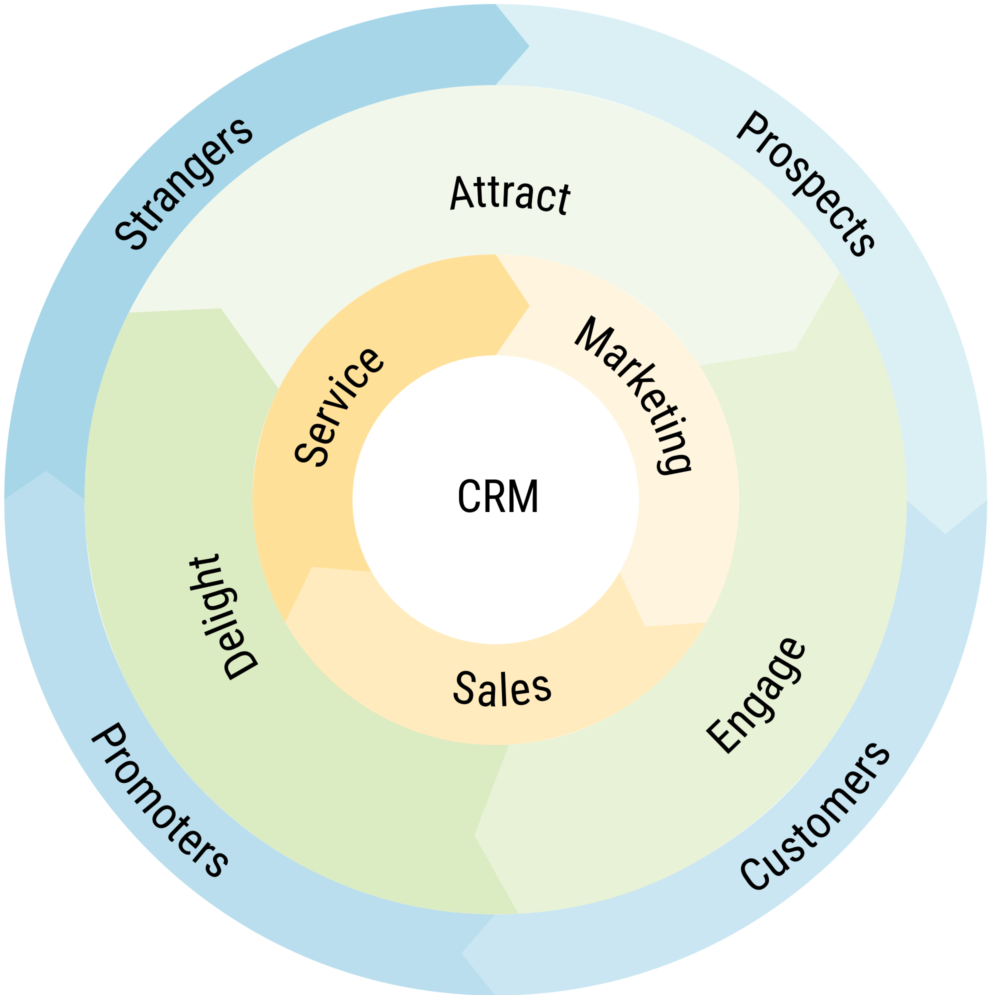
Funnels & Flywheel.

Everyone has heard of funnels. They are where visitors are turned into customers or even crowned loyal promoters.

At Sterc, we focus on five different models to help you get a clear idea of your goals: branding, leads, sales, service, and recruitment. Just like any other funnel, you begin big—you get noticed by loads of people. As these people go further down the funnel, the group gets smaller and smaller until you have just a handful of people left who want to buy something, apply for a job, or comment on your social post. An even smaller number of people become returning visitors, employees, or a follower on social media.

But what happens at the end of the funnel? Funnels aren't visualized in a way that shows the value of your customers and promoters. What if you could apply the funnel throughout your organization and reuse invested energy? That's precisely what HubSpot shows with its flywheel—it doesn't stop at the end of the funnel.





Brand ambassadors are essential for your inbound strategy. They create brand awareness by word of mouth, bringing in new fans who want to become customers. And we all know the power of word of mouth campaigns. They are more powerful than any other strategy.

But how do you turn customers into promoters and make sure these promoters stay involved? That's where you and your relevant content come in. With inbound, you make sure you help each unique lead at every step of their journey. This work is not the responsibility of marketing, sales, or service alone; it's a team effort!

Stop selling, start helping.

In this e-book, we'll show you and your teams how to collaborate efficiently through HubSpot. We'll show you all the tools you can use to create a personalized experience for every unique lead. That's how you'll turn leads into customers and customers into loyal evangelists!

Lifecycle Stages.

As you may have noticed in the flywheel on the previous page, every lead goes through different phases before becoming a customer or even a promoter. How long this journey takes is different for every lead and organization. HubSpot calls these phases (when looked at from the organization's perspective) "lifecycle stages."

To find out what each stage looks like and what convinces a lead to go through to the next stage, we'll give you a short explanation of each stage.

Visitors

Subscriber: A contact has noticed your organization and wants to know more about it. Subscribers are subscribed to your blog or newsletter.

Leads

Lead: These people are more sales-ready and think of themselves as leads. A lead has filled in a form or gotten in touch with you through chat to get answers to their questions.

Marketing Qualified Lead (MQL): The visitor's qualitative or quantitative actions convince marketing that the lead is ready for a sales follow-up.

Sales Qualified Lead (SQL): The lead's willingness to buy shows the sales team that this lead sales-ready. Sales follows up on these leads and determines the opportunities.

Opportunity: There's a real chance this lead will become a customer.

Customers

Customer: The deal is won, and the lead has become a paying customer. Because of excellent service and personalized content, you can turn this customer into a promoter.

Evangelist: These customers are the icing on the cake. They are customers who not only buy from you but also promote your brand among their network. By word of mouth, they create new fans who eventually become new customers.

Other: These contacts are wildcards that don't fit any of the above stages.

Persona.

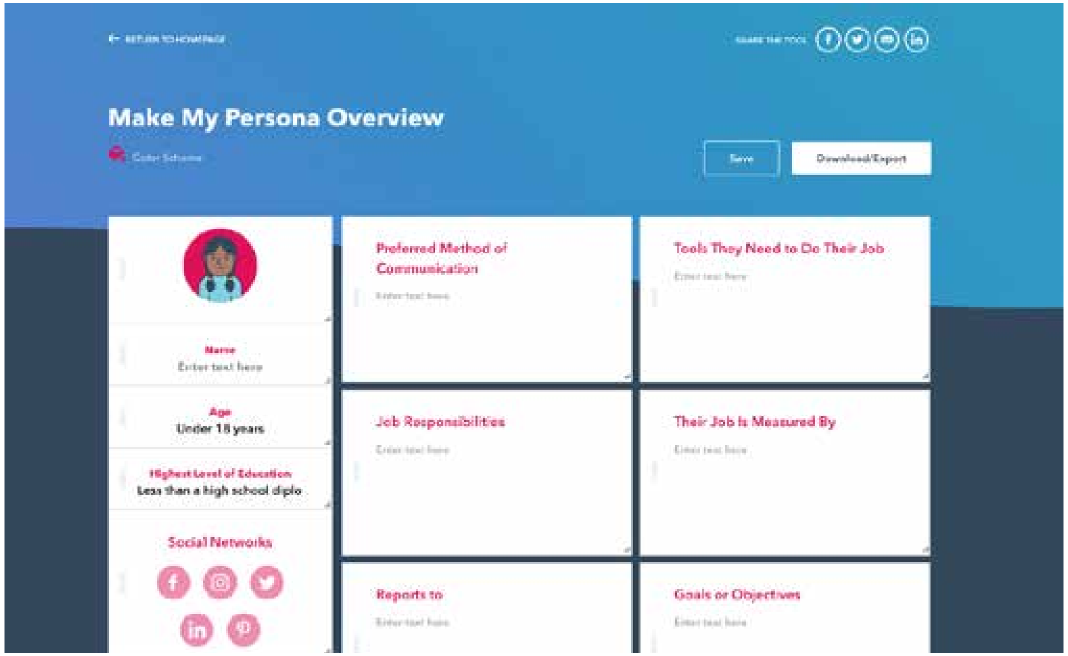
Every organization has one or more target audiences. To create the content relevant to every segment of your audience, you can create personas.

Personas are fictional people who represent your target audience as a whole or in part. With a persona, you can define the following data:

- **Demographics**: What gender is the audience? How old are they? How much do they make?
- **Geographics**: Where can we find this audience? In which country, region, or even city? What language do they speak?
- **Behavior**: What are their questions, issues, or challenges? What product or service are they looking for? What is their desired purchase frequency?
- **Attitude**: How satisfied are they with the offered solution? Are these people loyal customers? What are their preferences?

At Sterc, we like to add a little extra data:

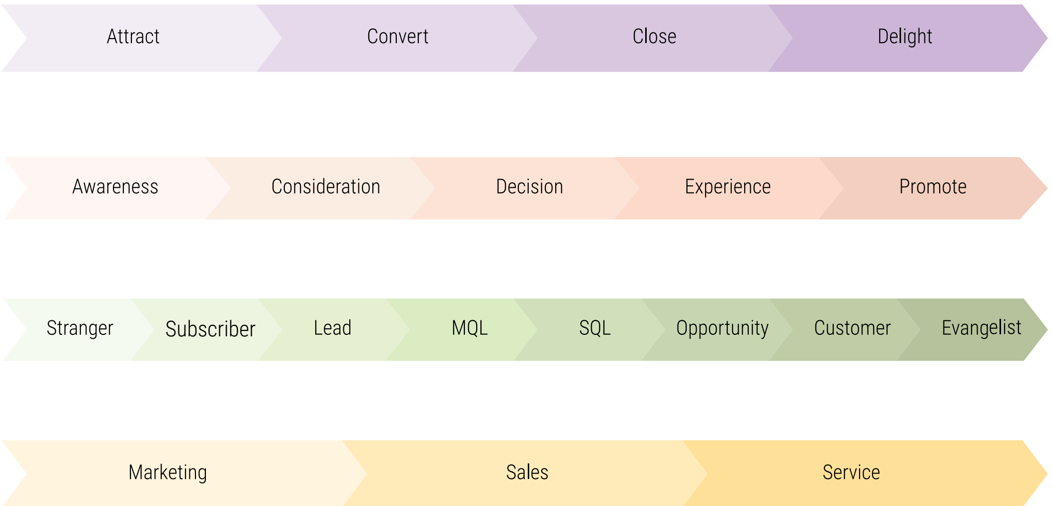
- **Motivations**: What do they value? What motivates them to buy?



Tip!

Create your own persona on hubspot.com/make-my-persona

Experience journey.



Everyone goes through a journey before they buy, apply, or visit something. This customer journey—or as we like to call it, the experience journey—brings a person with their questions, problems, needs, or opportunities for improvement via different stages to you, the solution.

These stages are parallel to the steps of the funnel, the flywheel, and the lifecycle stages. But the experience journey is viewed from the customer's perspective:

- **Awareness**: In this stage, the contact has realized they have a problem, question, or an opportunity for improvement.
- **Consideration**: The consideration stage is all about defining the problem or question.
- **Decision**: In the decision stage, the lead has found a solution, method, or approach to their problem.
- **Experience**: The experience stage focuses on implementing the chosen solution, method, or approach.
- **Promote**: The user loves the solution and wants to tell others all about it.

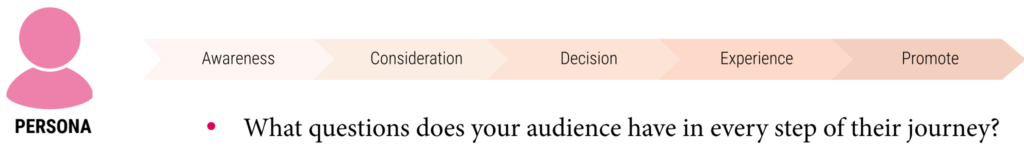
How do you make sure that every person in your target audience goes through the same steps and becomes a brand ambassador? Our experience journey framework helps you define the questions, issues, and opportunities your target audience has at every step of the experience journey. It shows you their touchpoints so that you can see what content and functionalities match. Bring these data together and create an inbound strategy that you can bring to life with HubSpot. How? That's what you will find out on the following pages!

Tip!

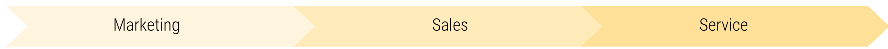
Discover the questions your target audience has with the Answer The Public tool!

Tip!

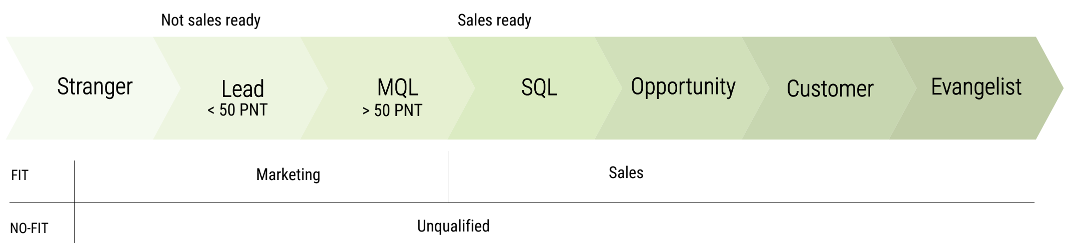
Want to create the relevant content your target audience is looking for? Download our Experience Journey Framework!



- What questions does your audience have in every step of their journey?
- Which touchpoints do they have?



- What content & functionalities fit these questions and touchpoints?
- Which keywords will they use?



Lead Scoring.

Marketing Hub Professional & Enterprise

Sales Hub Professional & Enterprise

Service Hub Professional & Enterprise

Lead scoring is one of the many ways you can use to find out if a lead is a match for your company and if they are sales-ready or not.

Lead scoring gives every action your leads can take a number of points. Think of actions such as subscribing to a newsletter, downloading interesting e-books, or requesting a demo. With this scoring, you can see that leads interested in your brand, product, or service have a higher number of points and are, therefore, a better fit with your company.

Your marketing team's job is to nurture interesting leads by sending them more relevant content and profiling new leads. When a lead has enough points and is qualified by marketing, it is up to the sales team to follow up with them.

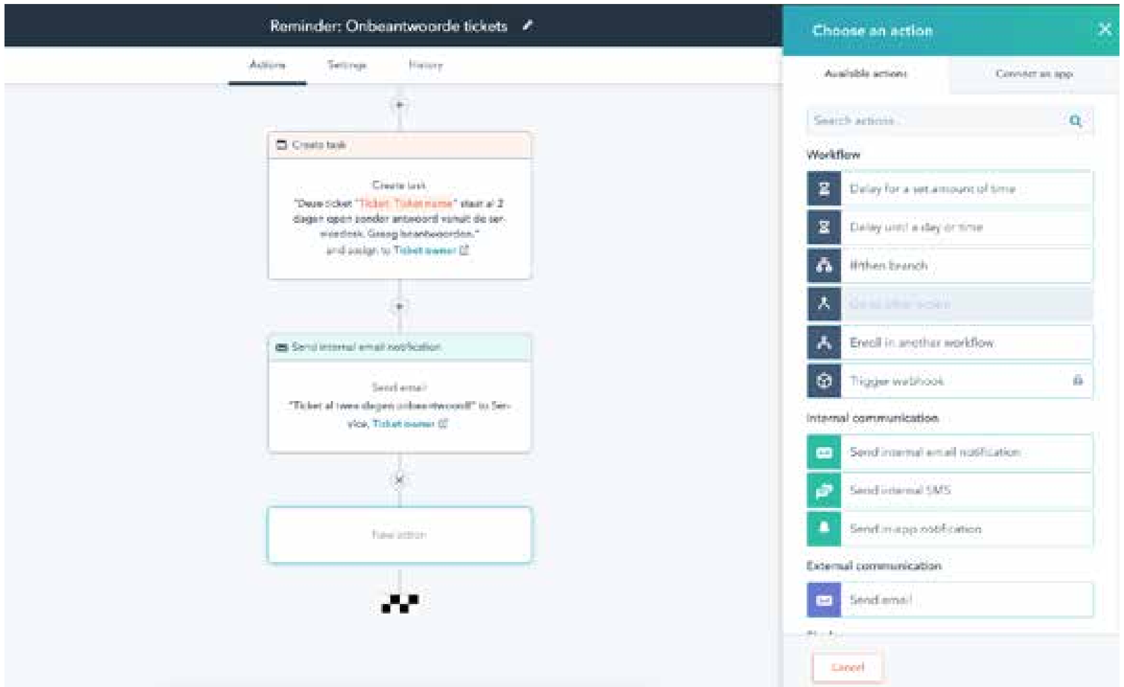
You decide how many points each action has and when a lead has enough points to get noticed by your marketing and sales teams.

Automation.

As a **marketing automation** **platform, automating marketing, sales, and service activities is crucial for HubSpot.**

You can automate actions such as follow-ups from marketing and sales, assigning and updating service tickets, assigning chatbot conversations to the right chat agent, or qualifying leads.

With HubSpot, you can automate in two different ways: workflows and sequences.



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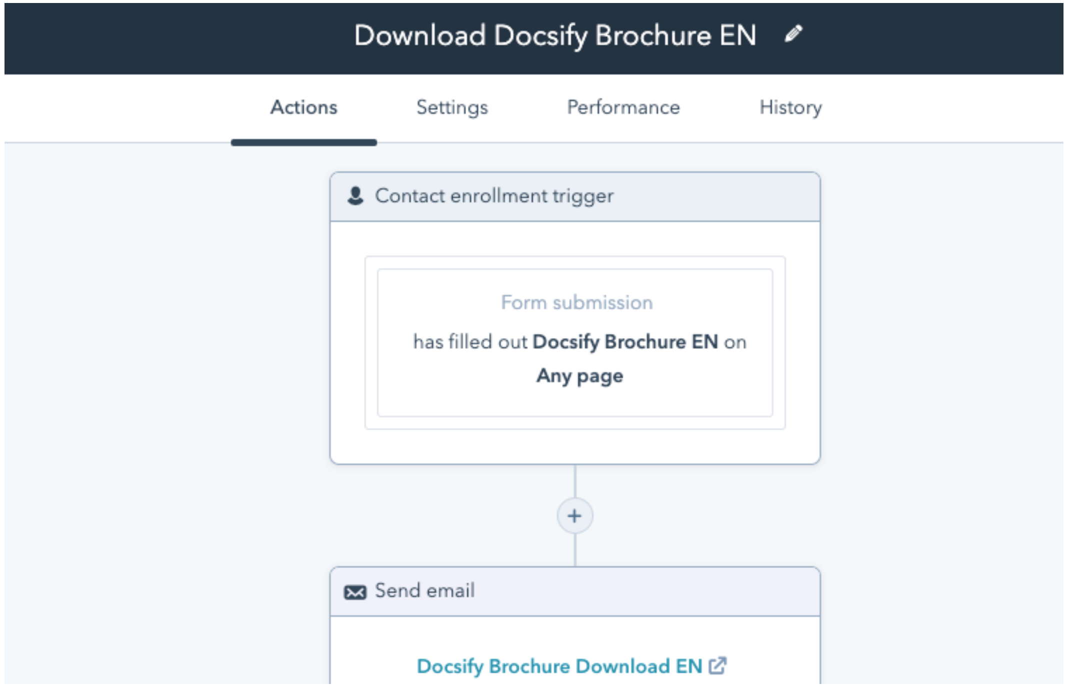


Workflows.

Marketing Hub Professional & Enterprise | Sales Hub Professional & Enterprise | Service Hub Professional & Enterprise

With workflows, you can automate almost anything, as long as you set them up correctly. Think of automating timed email follow-ups when someone has downloaded something by offering them more relevant content. That's one way for marketing to nurture leads without spending too much time on it.

You can also automatically set the ticket status when your customer support or a customer responds to a ticket or when the ticket is solved. Workflows can also assign the ticket to the right department that speaks the same language, so your customers get the help they need.

Finally, you can use workflows for sales to remind the team of open deals, when to renew contracts, or when to follow-up with leads that weren't sales-ready before.

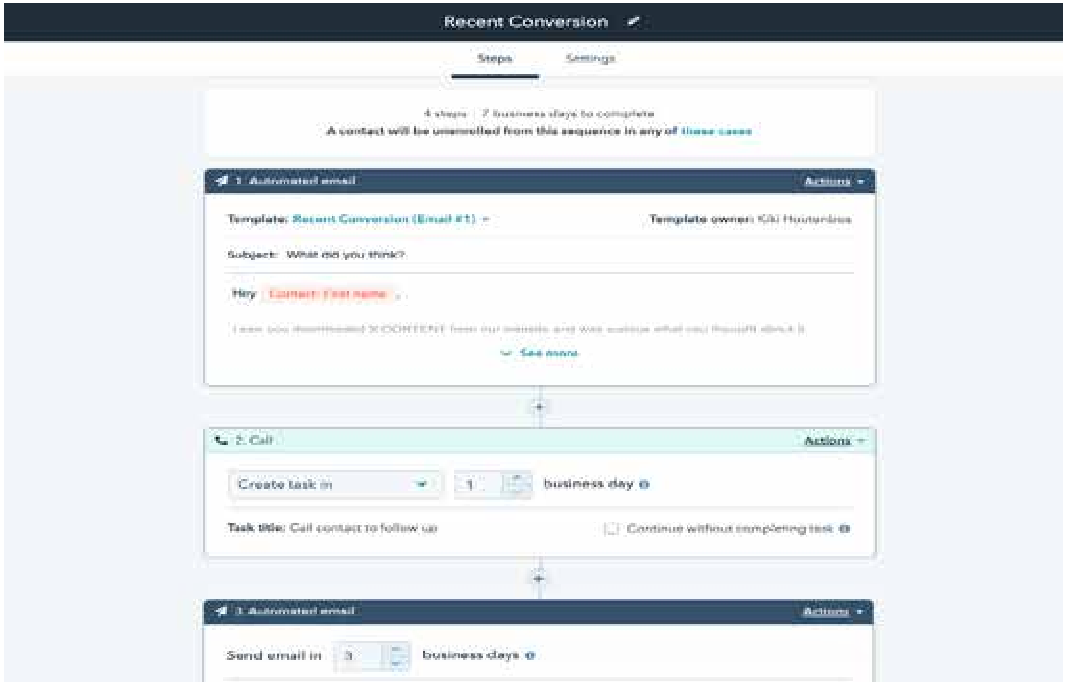
Sequences.

Sales Hub Professional & Enterprise | Service Hub Professional & Enterprise

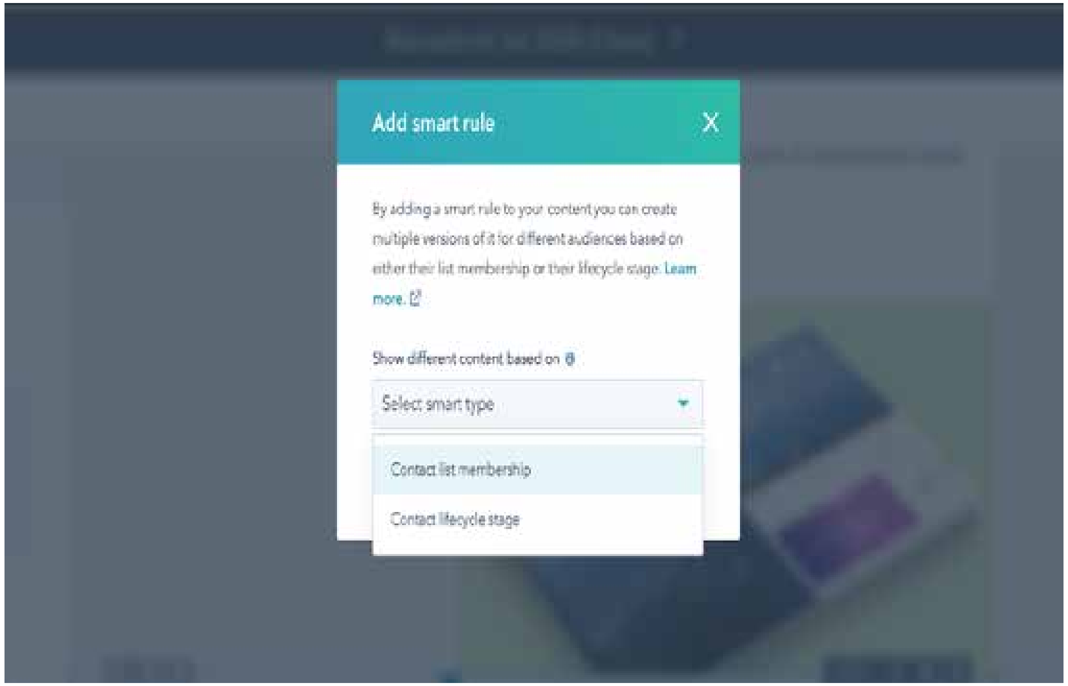
Sequences are great for your sales and service teams; that's why you'll find them in the Sales and Service Hub.

Sequences are not about bulk action but one-on-one contact and following-up on leads to turn them into customers. After marketing has nurtured all the interesting leads, your sales team has to qualify these leads and turn them into opportunities and, eventually, customers. When using sequences to do this work, you can send timed emails or create tasks automatically that remind the sales team to follow-up on a lead.

The difference between sequences and workflows is that sequences are focused on one-on-one contact. In contrast, workflows are more focused on bulk actions. Sequences are also great for not overwhelming leads with content. When someone responds to an email or schedules a meeting, they will automatically unenroll from the sequence. They have done what you wanted them to do—respond to what you're saying and take a step further in your sales funnel—and they no longer need to be helped along.



Personalization.



We've talked about getting to know your leads, but what can you do with all this data? Data is an essential part of personalizing your marketing, sales, and service activities. And it's crucial for connecting with your audience and helping them throughout their experience journey. But what do we mean by "personalization" and "contextual marketing"?

> **Improving the algorithm saves Netflix over one billion dollars each year.**

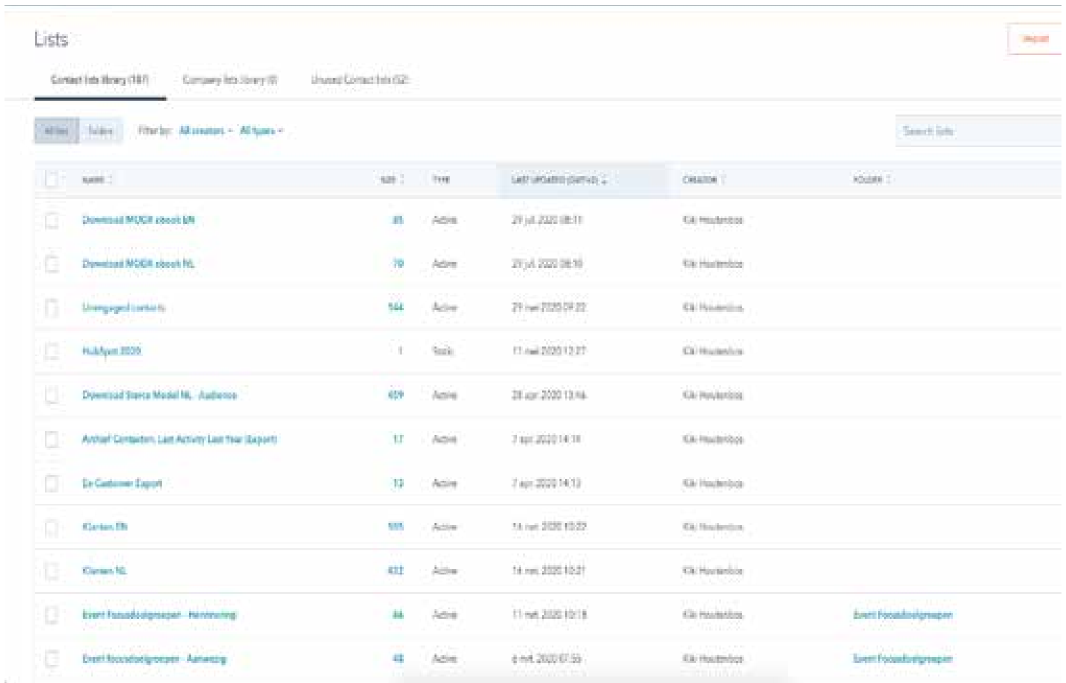
Personalization is not just a personal greeting at the beginning of an email. Personalization is customizing your digital platform to suit your audience's needs. Look at brands like Netflix, Spotify, and Amazon. They have been giving personalized recommendations for years and with great success. Improving the recommendation algorithm saves Netflix one billion dollars each year. Users can find more movies and series that match their interests, and they can find them faster[1].

CRM.

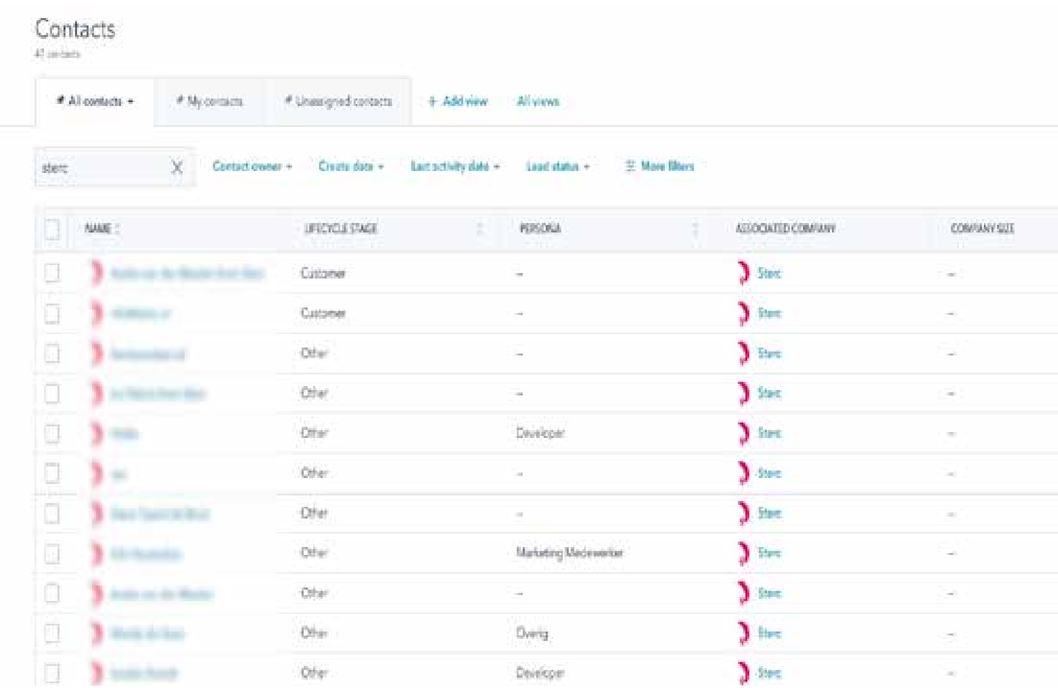
The powerful customer relationship management (CRM) tool is the foundation of HubSpot. It is where all data and interactions with all contacts and companies are saved automatically.

You never have to use multiple tools again to maintain your relationships y with your customers, and everybody on your team can access the same information. You can collaborate with your team and other teams and offer outstanding customer experiences.

With HubSpot's CRM, you can create dynamic and static lists that help you filter and segment all of your contacts. You can segment them based on the company they work for, company size, yearly revenue, the lifecycle stage they are in, and much more.



Contacts & Companies.



Within HubSpot, you can manage individual contacts, as well as the companies they work for. Every contact and company record shows your organization's interactions with them and all the data you have on them. View sent, received, opened, and clicked emails, the lists they belong to, their newsletter subscriptions, the pages they've viewed, the forms they've filled in, the deals created, and much more. You can expand this data as much as you want so that you know everything you need to implement your inbound strategy.

You can filter contacts and companies and select them to change their properties, subscribe or unsubscribe them from your newsletter, or add them to a list.

Tip!

You may find the same contact or company multiple times in your CRM. HubSpot gives you the option to merge contacts and companies so that you won't pay for duplicated contacts. When merging, keep in mind that only the contact's or company's properties you want to keep will be saved. Interactions will be merged from both records into one.

Lists.

We all know lists and their value. HubSpot lets you create two types of lists: active lists and static lists.

Active Lists
Active lists update automatically when new contacts meet the set requirements. You can use filters to see who has filled in a specific form, what industry they work in, or if they match a particular persona.

Static Lists
Static lists will only show the contacts that meet the requirements when creating the list and won't update automatically. After setting the right filters, the list will never update itself. You can manually add new contacts to this list to make it complete and usable.

Tip!
Lists are incredibly useful for events. Create an invite list for all team members using a static list. Everyone can manually add and remove the contacts they want to invite to each event. After sending an invitation email with a link to a form, interested contacts will automatically appear in an active list. It's great for seeing which contacts are coming to the event and who needs a little push or reminder. And all team members can get to know the attendees ahead of time, so you never have awkward conversations again!

Marketing.

Marketing.

The first team and, therefore, the first Hub we're going to talk about is Marketing. HubSpot has different paid plans for marketing: Starter, Professional, and Enterprise. You can also use the marketing tools for free.

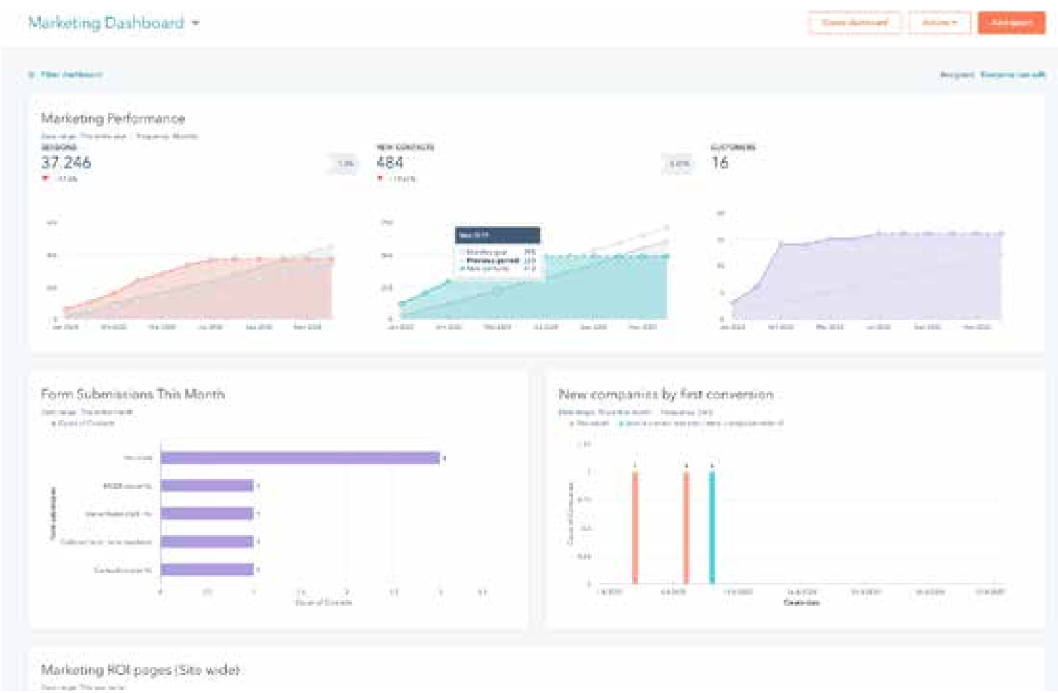
Marketing is essential for getting the flywheel spinning by attracting leads with social media posts, mailings, content pages, downloads, and much more. When you've generated leads, marketing can qualify them and send only the exciting and nurtured leads to sales.

When the flywheel is spinning, marketing can shift its focus to the less obvious marketing activities, such as personalization and contextual marketing. HubSpot provides you with all the tools you need to keep attracting new leads and help your current customers better.

Discover HubSpot's Marketing Hub:

- Get started with marketing automation and automate repetitive marketing tasks
- Nurture your leads and send them the right content at the right moment
- Discover who your website visitors are and what they are looking for and create unique experiences with personalization
- Manage your social media channels, digital ads, landing pages, and emails from one place
- Generate leads with powerful calls-to-action and forms
- Qualify leads and send only those who are sales-ready to your sales team
- Discover how your marketing activities perform and where you can optimize

Want to know all the features of Marketing Hub Starter, Professional, and Enterprise? Visit sterc.com/en/blog/marketing-hub



Dashboarding & Reporting.

If you want to see how your marketing team is performing, a marketing dashboard is crucial.

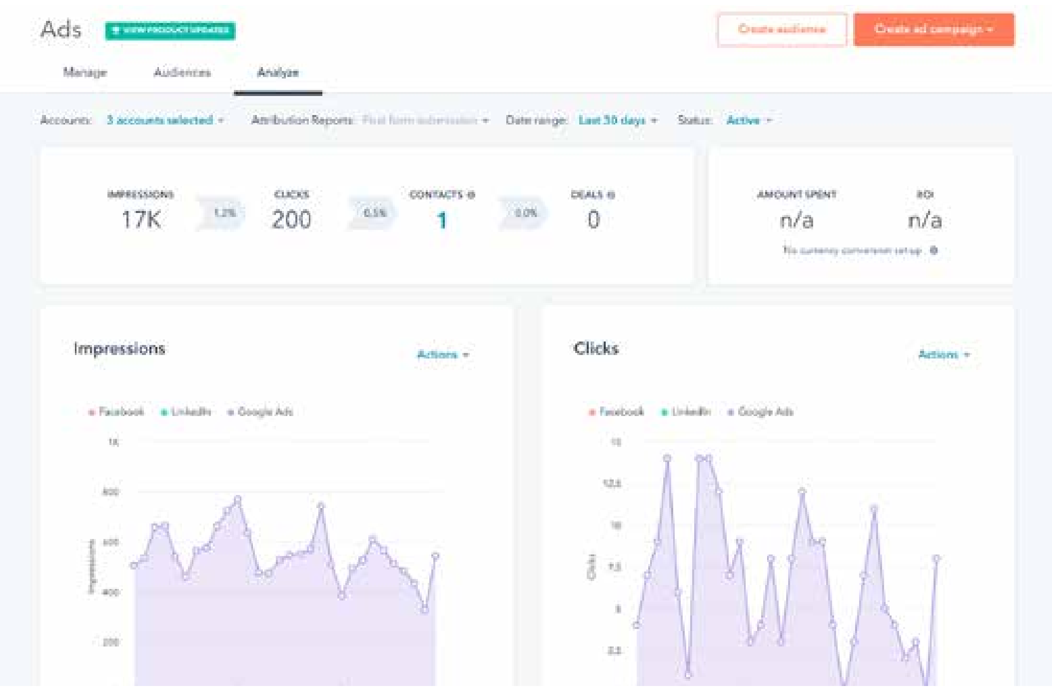
As a marketing team member, the first dashboard you'll see after logging into HubSpot is the marketing dashboard. You can add all kinds of reports to this dashboard and customize it to suit your team's needs. When the right report isn't available, you can create custom reports to show the information you need. You'll always know how your marketing performs, if it's achieving its goals, the marketing strategy, and what's happening with the marketing budget.

Examples of reports you can add to your marketing dashboard are: filled forms, downloaded e-books, marketing email performance, visitor origin, and many more!

Tip!

Getting insight into your return on investment (ROI) makes HubSpot unique. Now you can finally see what every dollar has brought to the table.

Ads.



Connect ad networks to your HubSpot account to see how your ads perform and your audiences, create new audiences, and manage your ads.

By connecting Google Ads and social ads such as Facebook and LinkedIn to your HubSpot account, you can see which ads are active and how they're performing. See ad views and click-through rates, newly created contacts, and closed deals. These reports show you what your funnel looks like and which steps you have to optimize.

You can also change your Google campaigns from within your HubSpot account: change the names, budget, and start and end times and add or remove keywords.

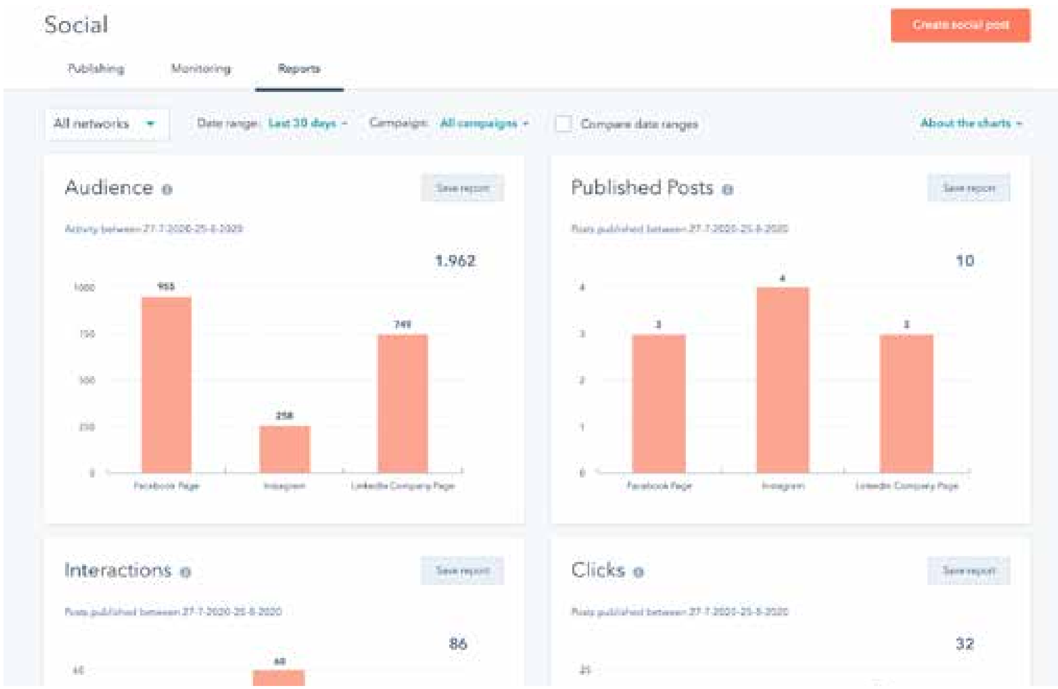
Use automation to your advantage by enrolling contacts created from Google Ads in specific lists so that you can follow-up with them with the right content.

Social.

Social media is essential to get noticed by your target audience and engage with them. You can connect your social media accounts with HubSpot and manage, create, and share your social posts.

By connecting your social media accounts with HubSpot, you'll never have to switch between accounts again. HubSpot lets you create new posts for every channel in just one click. Schedule them and see how they perform from within your HubSpot account.

You can also add social posts to your campaigns. You'll see in a blink of an eye how your social media accounts contribute to achieving your goals.

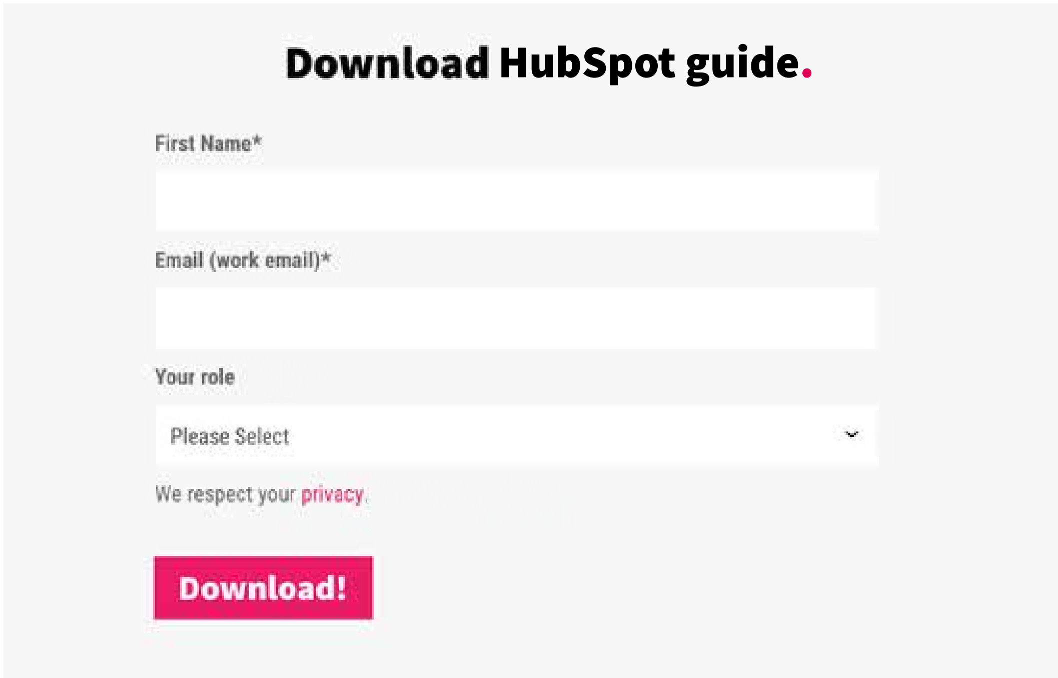


Leads Generation & Profiling.

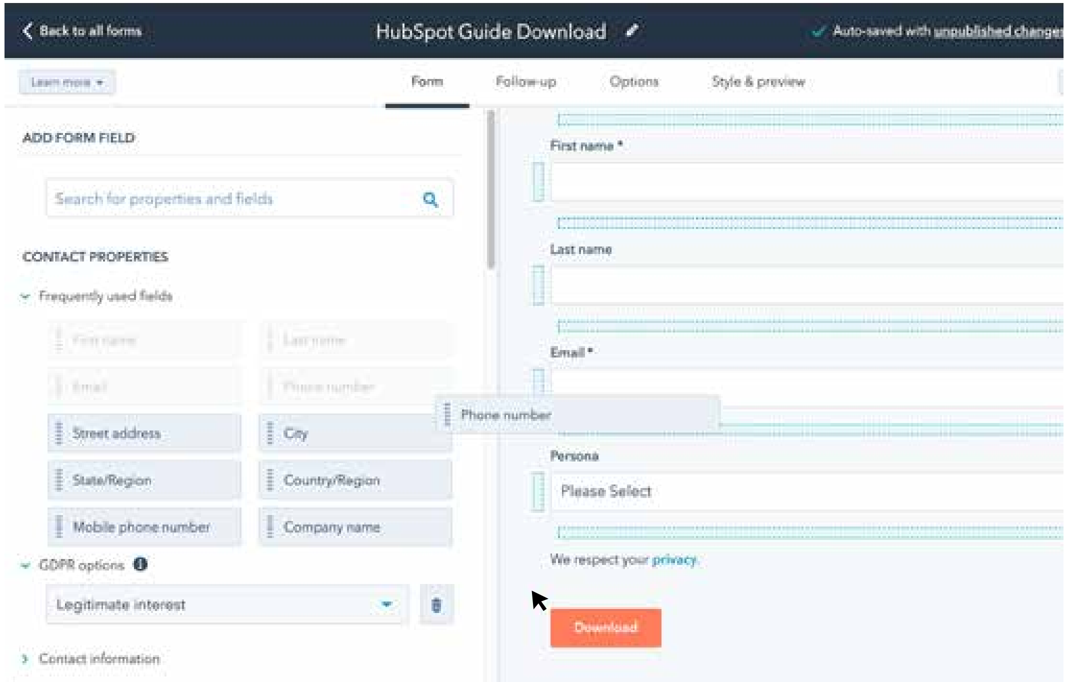
Generating and qualifying leads is an essential part of HubSpot. This platform provides you with plenty of tools to help you to turn web visitors into high-value customers.

The first step is bringing in leads. It is your moment to shine, the moment you need to show off your knowledge to help your website visitors find the answers to their questions. You can do so by offering powerful e-books, extensive pillar pages, a resources center filled with blog posts, podcasts and webinars, and FAQ pages.

Next, you need to profile those leads to improve and personalize your content to better suit their needs. Once you know who you're talking to, you'll know which leads match your organization and are ready for sales to follow-up on.



Forms.



To turn your website visitors into leads, you need a place where they can leave their contact information. Forms are the perfect way to do this, and you can use them for multiple purposes.

Examples of great ways to use forms are as a subscription form for your newsletter, a call-me-back form, a download form, or a pop-up form. Best of all, HubSpot automatically saves all data in its CRM tool. You can keep sending your leads relevant content and personalize your content to suit their needs. Your contacts will stay involved with your brand, and you can turn them into returning website visitors.

Drag & Drop

HubSpot lets you create forms in no time. Use the drag-and-drop form builder to drag and stack questions on top of each other, change the order, or remove them from your form. You can also set required questions so that you won't miss any data or create hidden fields that you fill in, such as the preferred language or lifecycle stage. HubSpot comes with ready-to-use templates to get you started, but you can also create forms from scratch.

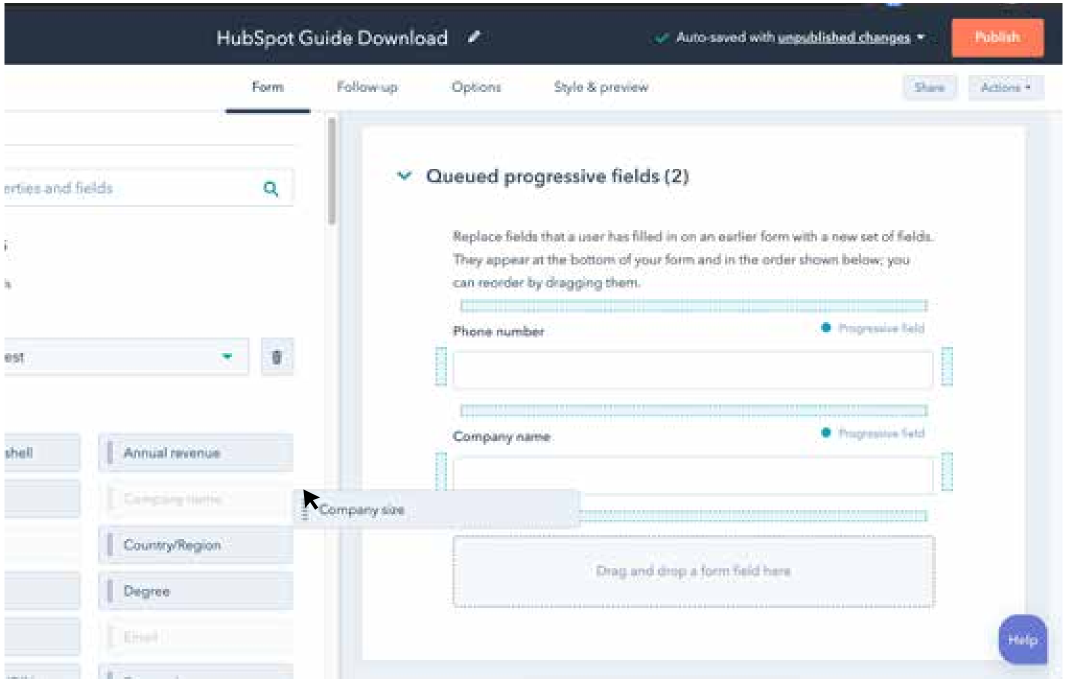
Progressive Profiling.

Marketing Hub Professional & Enterprise | CMS Hub Professional & Enterprise

The power of HubSpot's form tool is that you can make progressive forms. You can add extra form fields visible to contacts who have already answered previous questions in an earlier form.

For example, a visitor fills in a form with their first name and email address. The second time they fill in a form, these questions won't be visible and you can ask about their role on the team or what organization they work for.

With the help of progressive profiling, you get to know your leads better and better to help them as much as possible in the future, while contacts only have to fill in the same information once. Progressive form fields also help you to profile your leads. You can find out if a lead is truly interesting for your organization or if you need to shift your focus.



Pop-Up Forms.

Pop-up forms are, as the name suggests, forms that pop-up on your screen. With the same ease as creating other forms, you can create pop-up forms and add them to your website in no time.

Decide if you want your pop-up form to show in the bottom-left, bottom-right, or middle of the screen and get the attention of your website visitors. Next, you can easily create a follow-up email that provides a download or follow-up with multiple emails that show other relevant content.

Tip!
Are you also using HubSpot's chat tool? Most websites show the chat icon on the bottom-right of the screen. To also use pop-up forms, you'll need to place them in a different spot; otherwise, your pop-up won't appear at all.

CTAs.

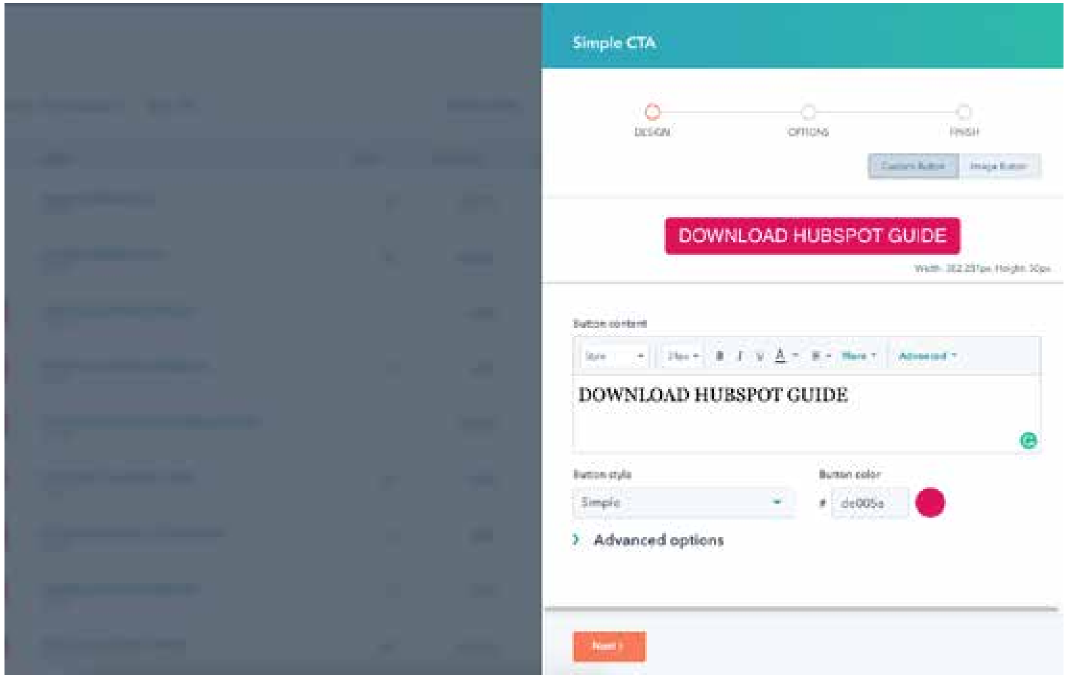
Marketing Hub Professional & Enterprise | CMS Hub Professional & Enterprise | Legacy Marketing Hub Basic

Call-to-actions are the perfect tool to make sure that your website visitors perform the desired actions. Use a call-to-action to quickly send visitors to the right web page or another place on the same page—for example, to a form.

With HubSpot, you can create CTAs in seconds. Create your own button, place a simple link, or turn an image into a CTA. After creating it, place the CTA on your digital platform.

HubSpot also offers excellent tools for personalizing and testing your CTAs. Use personalized CTAs to show different website visitors CTAs based on data such as persona, industry, lifecycle stage, company size, and much more. You can show new visitors a CTA that lets them quickly request a proposal and show returning customers a button for requesting support. Every visitor gets to the right information quickly, and that's what they want.

Don't know which CTA works best for your audience? Use HubSpot's A/B testing tool to discover which CTA works best in terms of design, text, landing page, and more.



Planning & Strategy.

Creating a detailed plan of approach for your inbound strategy is essential to become successful. The planning and strategy tool lets you work out your strategy in HubSpot, so your entire marketing and sales team know what to focus on.

Use HubSpot to create campaigns and connect all of your marketing channels to see how every channel contributes to achieving your goals. The SEO tool shows recommendations for creating new content that matches your primary subjects so that you can improve your online presence. Finally, HubSpot's projects tool helps your marketing managers by letting them create projects, add team members, and create tasks with deadlines.

The Planning & Strategy tool helps you see what every team member is working on and makes sure you never miss a deadline.

Campaigns.

Marketing Hub Professional & Enterprise

HubSpot's campaigns quickly help you to see how your marketing team is performing. Each campaign shows which goals you've achieved and where you need to focus more.

You can add any content to your campaigns: forms, CTAs, social posts, blog posts, marketing emails, landing pages, and workflows. You get a comprehensive report on how your marketing activities are performing and can see in no-time how your marketing activities are doing.

Tip!
You can only add blog posts and landing pages created in HubSpot.

Tip!
Immediately add all of your marketing activities to your campaigns so that you can analyze all data at once. You can't retrieve previously obtained data in campaigns.

Tip!
Make sure that you name your campaign correctly straight away; you can't change its name later. Add the period in which your campaign will run when using the same campaign multiple times.

SEO.

Marketing Hub Professional & Enterprise | CMS Hub Professional & Enterprise

HubSpot's SEO tool shows you recommendations so that you can optimize your online presence. View which pages you need to update, which content seems duplicated, and which pages need some expanding.

Search engines such as Google value web platforms that are organized around specific subjects. HubSpot's SEO tool shows you which content is relevant to your main topics based on your competitors' content, relevance, and popularity.

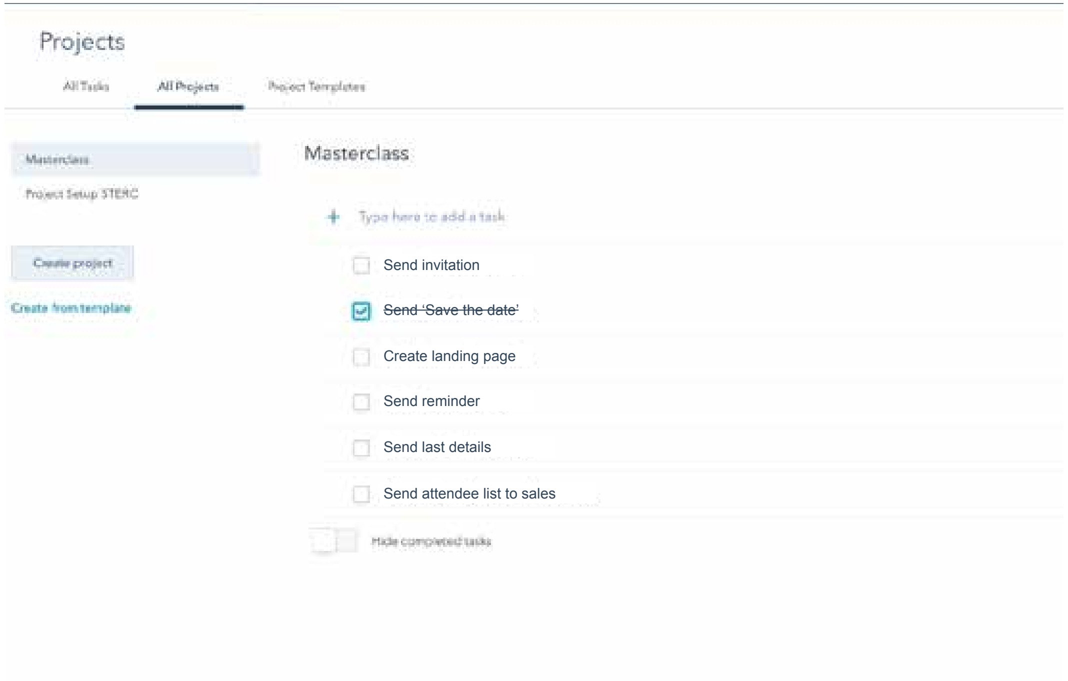
For example, at Sterc, we focus on the topics MODX and strategy, so we create expanded pages—better known as pillar pages—around these topics. These pillar pages link to other pages, such as landing pages or blog posts, that talk about subtopics. HubSpot lets you cluster this content and helps you see how your main topics are performing.

Projects.

Marketing Hub Professional & Enterprise | Sales Hub Professional & Enterprise | Service Hub Professional & Enterprise | CMS Hub Professional & Enterprise

Projects are perfect when you're collaborating with multiple people on one project. The marketing manager can keep track of every team member's activities. Create a project, add a description, the essential files, and the necessary team members, and get ready to collaborate!

Projects help you create tasks and subtasks with ease. The only thing left to do is assigning them to you or your team members, add a deadline, and start creating. With HubSpot's project tool, you'll never miss a deadline.



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ABM.
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Account-Based Marketing.

Marketing Hub Professional & Enterprise | Sales Hub Professional & Enterprise

Account-based marketing (ABM) is HubSpot's Marketing Hub's newest feature. It helps marketing and sales teams collaborate while attracting new high-value companies. If you want to get started with ABM, you don't have to worry about creating and implementing a whole new strategy. You can implement ABM on top of your inbound marketing activities so that you can create hyper-personalized content for each target account.

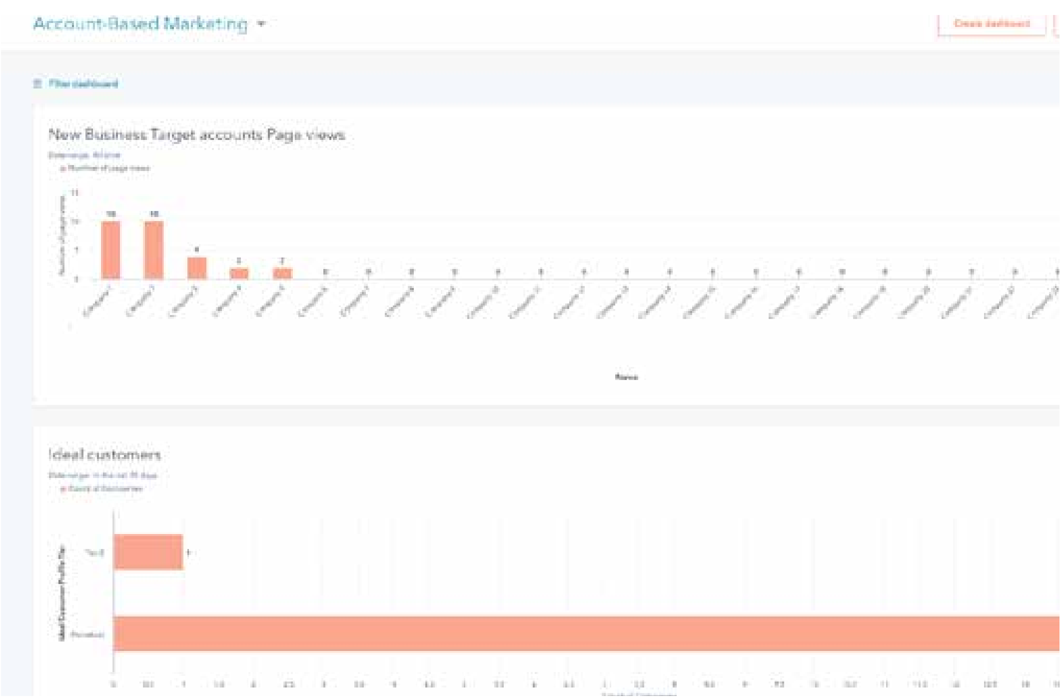
ABM is like the fishing sport. Amateur fishers go fishing and don't worry about which type of fish they are going to catch. With ABM, you focus on catching one specific kind of fish. Instead of catching first and choosing what to keep after, you decide what you want to catch.

ABM is a great tool for those who recognize themselves in one of the following situations:

- The product or service you sell costs a lot of money.
- You don't have an endless stream of prospects or customers.
- You sell only to accounts with multiple stakeholders.

Discover account-based marketing:

- Focus on high-value accounts and use reports to see how you're performing.
- Discover the interests of every stakeholder that plays a part in the sales process.
- Personalize content based on buyer roles instead of personas.
- Convince every stakeholder and turn prospects into high-value customers.



Dashboarding & Reporting.

ABM is the place where marketing and sales come together, use the same tooling, and see the same results. For marketing, sales, and management, HubSpot has created the ABM dashboard, which shows how your target accounts and your marketing and sales activities are performing.

The many reports on this dashboard show you what each target account is looking for, how your marketing and sales team are performing, and which of your current accounts match your Ideal Customer Profile. You and your teams can see and understand what each account needs, and you can use this knowledge to further optimize your processes. When you're missing an essential report, you can always create your own, so you can always see the data you need.

Ideal Customer Profile.

ABM focuses on specific accounts. To help you specify these accounts, you can use the ideal customer profile. Your marketing and sales teams create this profile together to decide who your target accounts will be.

You can create your ideal customer profile by looking at the following points:

- What high-value accounts are you already attracting via your inbound channels?
- What open deals do you want to move through the sales process faster or make the sales cycle shorter for ?
- What are the ten biggest deals you recently closed? Can you add even more value to these deals?
- What characteristics do your most successful accounts have in common? Can you find even more companies with the same properties?

In the end, it's all about demographic, firmographic, and technographic data.

Next, you can use HubSpot's prospects tool to find other organizations that aren't customers but match your ideal customer profile. Using IP addresses, you can find out how many times employees within these organizations have viewed your website.
HubSpot's data also shows how much revenue a company makes per year, so you'll know if they are ready for sales and have the budget to buy your product or service.

Watch out!
Use HubSpot's data with caution because it doesn't show correct data for all organizations. The data is best for American companies but less reliable for companies in other parts of the world. If you focus on, for example, the Dutch market, try to find out if HubSpot's data is correct.

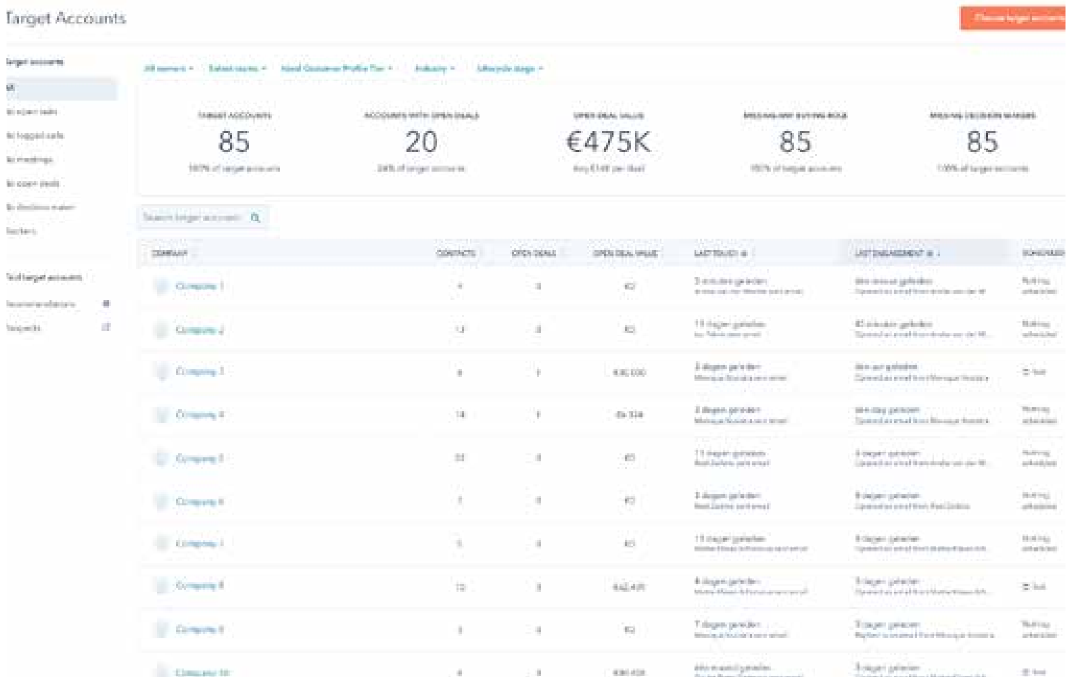
Tier Accounts.

When you've decided who your target accounts are, you can determine how well a company matches your ideal customer profile. You can define this match by choosing between tiers 1, 2, and 3.

Tier 1 is a company that is an excellent match for your products and services, and tier 3 is a lesser match and is, therefore, less of a priority for your team.

Tip!

You can automate this process. When you define the value, for instance, of an account based on how much revenue they make, you can use workflows so that organizations are automatically put in the right tier.



Buying Roles.

You can define the different types of stakeholders in the sales process. This function is great because you can only start personalizing your communication when you know who you're talking to.

These so-called buying roles are the following:

- **Influencer**: The influencer is often a junior member of the team and is assigned to explore the various possibilities. They don't have the budget or authority to make the final decision but can influence the decision-maker. The influencer is often the person you talk to and who calls in all necessary stakeholders throughout the sales process.
- **Blocker**: A blocker is mostly the same person as the influencer. The only difference is that the blocker stops talking to you at a particular step in the sales process. Your calls go unanswered, emails are unopened, and deals get stuck.
- **Champion**: Unlike the blocker, the champion helps you sell your product or service. Champions are experts on a certain subject, they know all about the purchase criteria and are the ones who will connect you with the decision-maker.
- **Decision-Maker**: This person makes the final decision. They are often found in the C-suite and are the ones who sign contracts, allocate budgets, and assign influencers. The decision-maker sometimes does the research themselves. When this happens, you need to seize the opportunity and let them tell you what they are looking for and what they desire.
- **Budget-Holder**: The budget-holder is the one who maintains the budget. Budget-holders always want to know how much a new product or service is going to cost.
- **End-User**: End-users are the ones who will use your product or service. Often, this person is the one who initiates the sales process because they have a specific need for something new or improved.
- **Executive Sponsor**: This person is on a management or project team directly involved in your solution.
- **Legal & Compliance**: These people are the ones who check all the conditions and benefits that a product or service comes with from a legal perspective.

Sales.

Sales.

When marketing has generated leads, nurtured them, and qualified them, it's the sales team's job to follow-up with them through emails, proposals, and personalized solutions. HubSpot offers some great tools for this work!

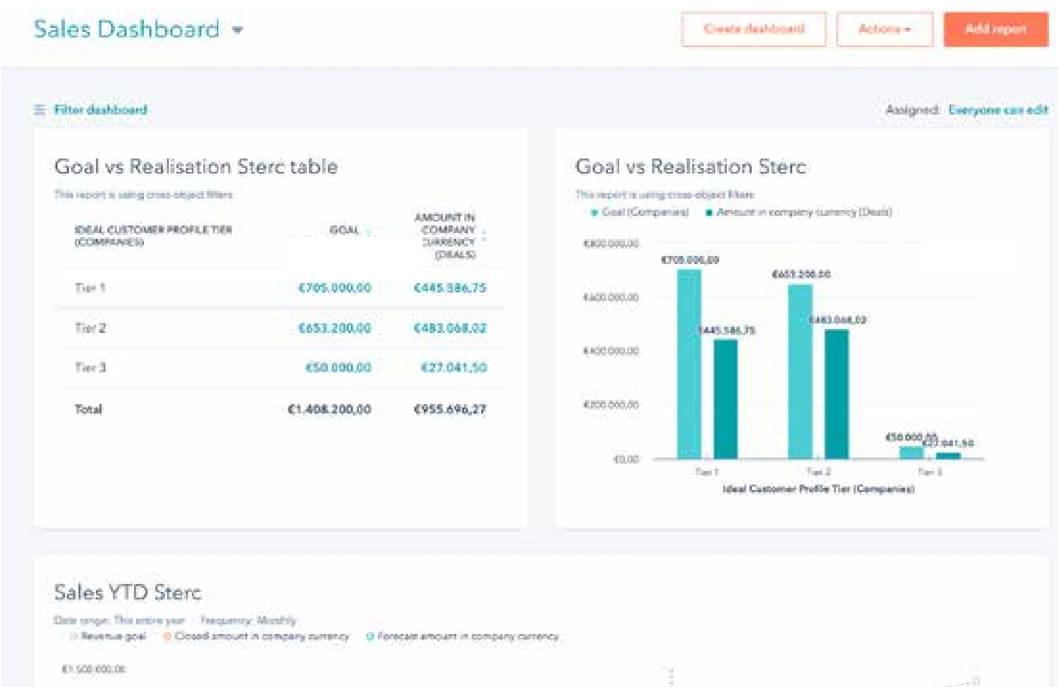
Sales is an essential team that turns marketing qualified leads into customers. Because your marketing team has already selected and profiled the most exciting leads, sales knows what each lead is looking for and can offer personalized experiences and proposals that leads can't say no to.

Of course, organizations sometimes don't have the budget or aren't ready for a sales follow-up. You can easily show this status in your CRM so that you and the marketing team know that there's a little more nurturing to do. Don't forget to set a reminder to follow-up with the lead in a few months!

Discover HubSpot's Sales Hub:

- Follow-up on the leads marketing has nurtured and respond to their needs
- Discover where deals get stuck and how much revenue you can expect in the future
- Check off all your easy-to-do tasks at once and never miss a deadline again
- Forget endlessly sending emails back and forth to schedule a meeting with HubSpot's meeting planner
- Turn repetitive emails that have proved their power into templates and keep your communications consistent
- See how your sales team performs and where you need to optimize

Discover all the features op Sales Hub Starter, Professional, and Enterprise at sterc.com/en/blog/sales-hub



Dashboarding & Reporting.

HubSpot's sales dashboard shows you in a blink of an eye how your sales team performs, if goals are getting accomplished, and which deals need a little push to close.

These reports show you how the sales process is progressing and where you can further optimize to create a great and flawless experience for your leads.

HubSpot has already created many reports you can use to see how much revenue your sales team makes, which meetings are booked, which tasks are still open, and any other action your team has taken.

With these standard reports, you'll know which prospects enter the funnel and which customers need some extra attention.
In addition to HubSpot's standard reports, you can create your own so that you can analyze all data you need to help you grow your business.

Deals.

Deals are essential for any B2B sales team. They show you which customers you've brought in, the price you've set, and what you're going to do for them.

With HubSpot's Deal Pipelines, you can estimate the amount of revenue you can expect in the future and which deals will be stuck. You can improve your sales process to close even more deals in the future.

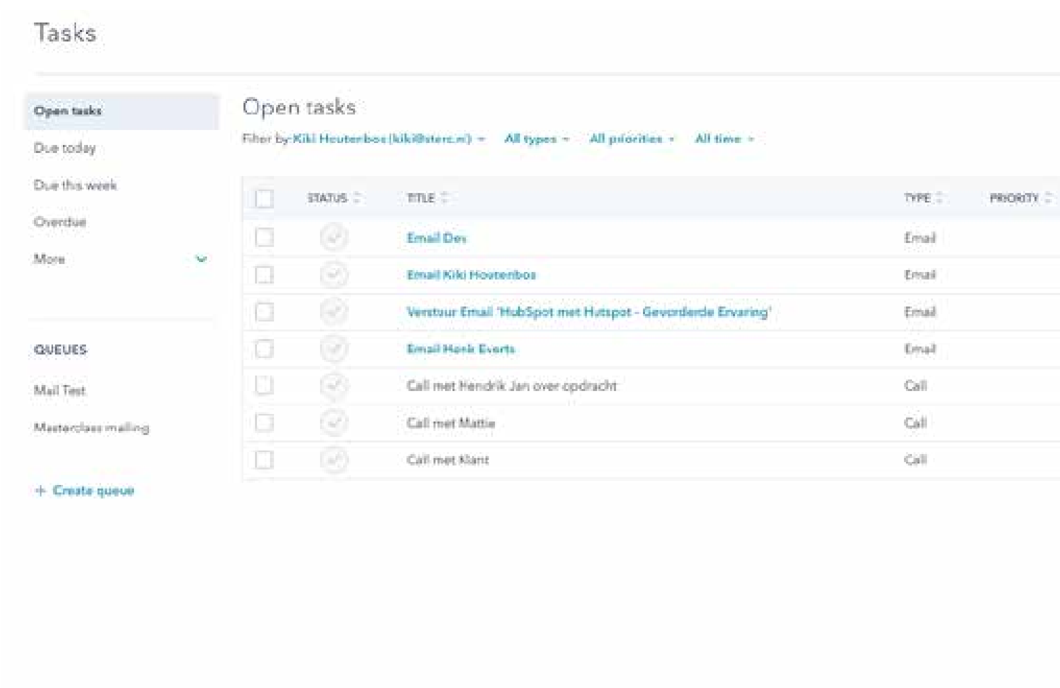
You can use HubSpot's sales pipeline or create your own. Set a percentage for each stage that shows the chance you have of closing the deal so that you can get a clear idea of how far a deal is in the sales process and how great your chance of closing it is.

Creating a deal is a good idea whenever you feel like someone wants to become a customer. Associate this deal with the company and contacts so that everyone on your team can see what's happening in this deal, which emails have been sent, and what needs to be done.

Tip!
Use the settings to set the required properties to fill in in every deal stage. Your sales team will never forget to fill in an essential property again.

Tip!
You can automate deals. Think of automatically creating new deals when someone schedules a meeting or requests a proposal. Or automatically create a task when a sales rep hasn't been active on a deal for a while, and the deal is approaching its close date.

Tasks.



Keep track of your to-do list from within HubSpot! HubSpot lets you create new tasks quickly and notifies you when your deadline is approaching.

Create a task from a contact record to know who is associated with the task or create it from the task dashboard. You can also automatically create a follow-up task when sending an email to the contact, for example.

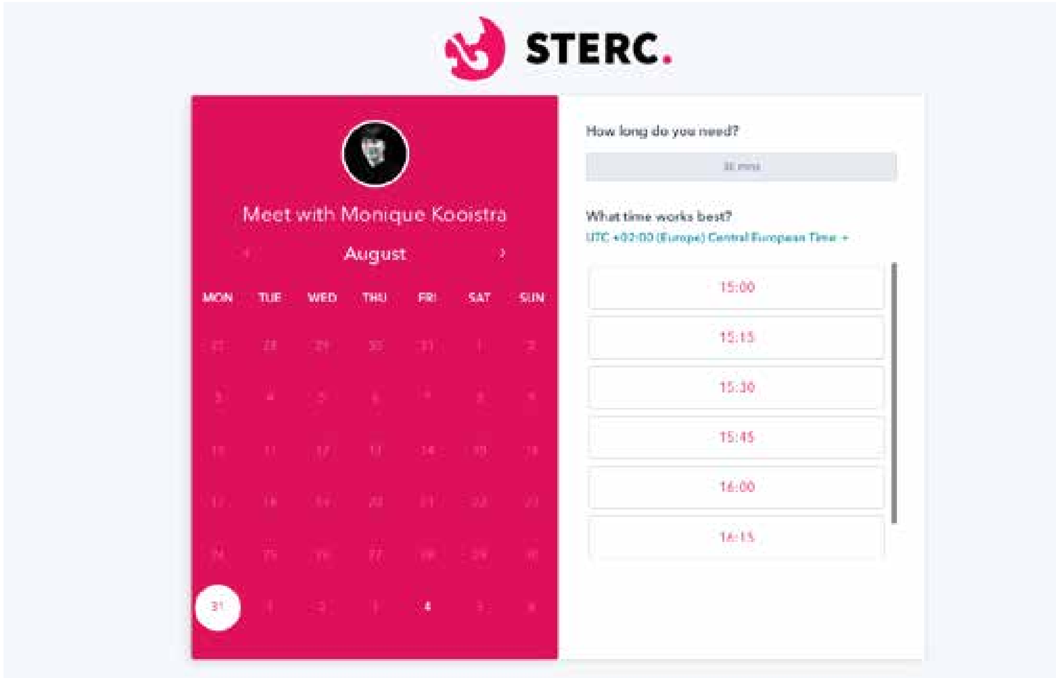
HubSpot's tasks more than a great to-do list; you can check off multiple tasks at once with a queue. You will only have to schedule an hour to follow-up on all interesting prospects and go through your tasks queue. HubSpot will automatically go to the next task in your to-do list and the associated contact record. Task queues are super-efficient and make sure that you don't get distracted during your sales activities.

Meetings.

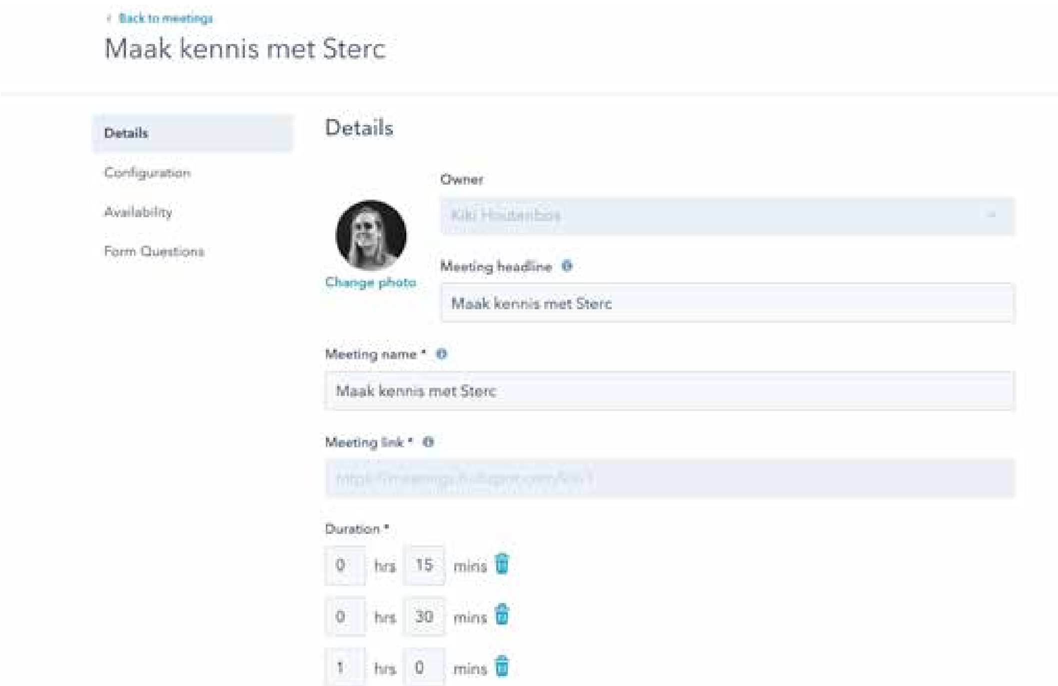
We've all experienced it: the endless cycle of emailing back and forth to schedule a meeting. With HubSpot's meeting planner, this scenario is a thing of the past.

Create calendars that show only the time and date that you're available to meet. Scheduling meetings has never been easier!

When you create a meeting planner, you can choose how long you want your meeting to be or let your visitors choose if they want to meet with you for fifteen, thirty, or forty-five minutes or even longer. You can also decide what questions need to be asked before the meeting can take place so that you can start a meeting fully prepared.



Team meetings.



If you're not the only person present during the meeting, you can create group meetings in HubSpot. Group meetings are calendars that show the availability of all people involved.

When you want your visitors to have a little more freedom and let them decide who they want to meet with, you can create round-robin meeting planners. These planners let your visitors decide which sales rep they want to meet with and the time that suits them best.

You can place meeting planners on your digital platform and put them in emails. You can quickly schedule any meeting, whether this is a demo call, an introductory meeting, or a brainstorming session.

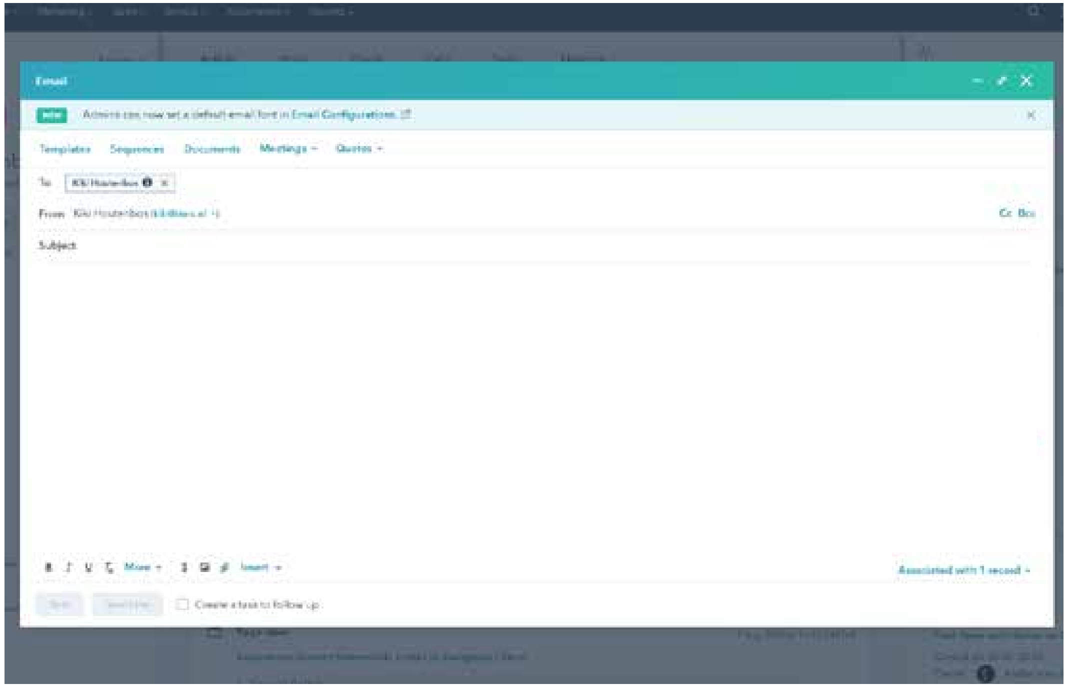
HubSpot automatically sends an email to both you and the people you've scheduled the meeting with and gives you a link to add the meeting to your personal calendar.

Mailings.

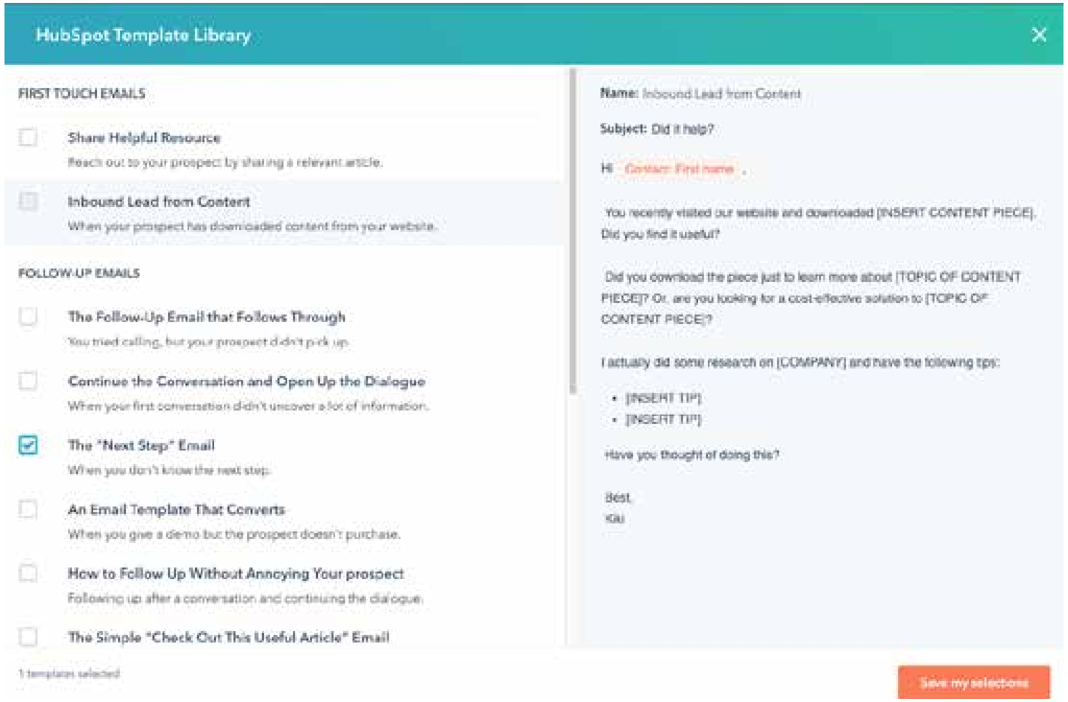
One-on-one emails are essential when connecting with your leads and customers. HubSpot automatically logs and tracks all emails you send from a contact, company, deal, ticket record, or straight from your mailbox.

HubSpot's one-on-one emails have the same functionalities as marketing emails, such as adding personalization and CTAs. You can also add meeting links and one-on-one videos, choose from any template, and automatically send timed emails with the help of queues or sequences.

Templates and snippets are repetitive pieces of text or emails you can use to quickly send a similar text to prospects, customers, or colleagues. Queues and sequences are automated emails that simplify your sales process and decrease workload. Now you can focus on what's important: attracting new customers and keeping existing customers involved.



Templates & Snippets.



Templates and snippets are significant HubSpot features that let you send emails more efficiently.

Templates let you turn standardized emails into templates you can use multiple times. You can also create a template for your colleagues to keep your communication consistent and help them send the same email to numerous prospects and customers. Think of introduction emails, invitation emails, or follow-up emails sent after a meeting or call. After choosing your template, you can adjust it to personalize it to every unique contact.

Snippets are short, reusable pieces of content that you can place in sales emails, chats, notes, or any contact, company, deal, or ticket record. Snippets can be easily put into your text using a # and the snippet's name, or you can select them in the bottom of any email.

Queues & Sequences.

Sales Hub Starter, Professional & Enterprise

Service Hub Starter, Professional & Enterprise

Queues and sequences are an essential part of automating your sales activities.

Queues let you create a queue—more like a playlist—of tasks. With queues, you can check off all of your simple tasks in an hour, such as sending follow-up emails or inviting customers to your masterclass. When you check off all your quick tasks at once, you won't be distracted by them in the middle of your meetings or during other sales activities.

Sequences are automated timed emails you can use to follow-up on your leads and customers so that your organization stays at the top of their minds. When you've enrolled a contact in a sequence, and they respond to your email or schedule a meeting, they will automatically be unenrolled because they've done what you wanted them to do.

You can also create tasks automatically in sequences. When a contact doesn't respond to your emails, it's your cue to find out what went wrong. This contact may not have the time to look at your proposal, or the organization doesn't have the budget for it.

Maybe the contact thinks you're moving too fast, and you need to change your strategy and mailings. It always helps to take a good look at your sequence from time to time. Find out if you can help your contacts without being too pushy.

Tip!

Do you want your sales team to be able to invite opportunities and customers to masterclasses quickly? Create an email template and put it into a sequence. The only thing left for your salespeople to do is select the contacts they want to invite and choose "Enroll in sequence." They can send the same email to every invitee. Still, it's better to personalize each email based on earlier conversations with them or other data. With the help of sequences, your sales team doesn't have to spend too much time sending invites while still giving every contact the attention they deserve.

Service.

Service.

Service is an essential department to complete your inbound strategy. Service makes or breaks your whole organization, and it's good to know that HubSpot provides you with all the tools to turn customers into valuable promoters.

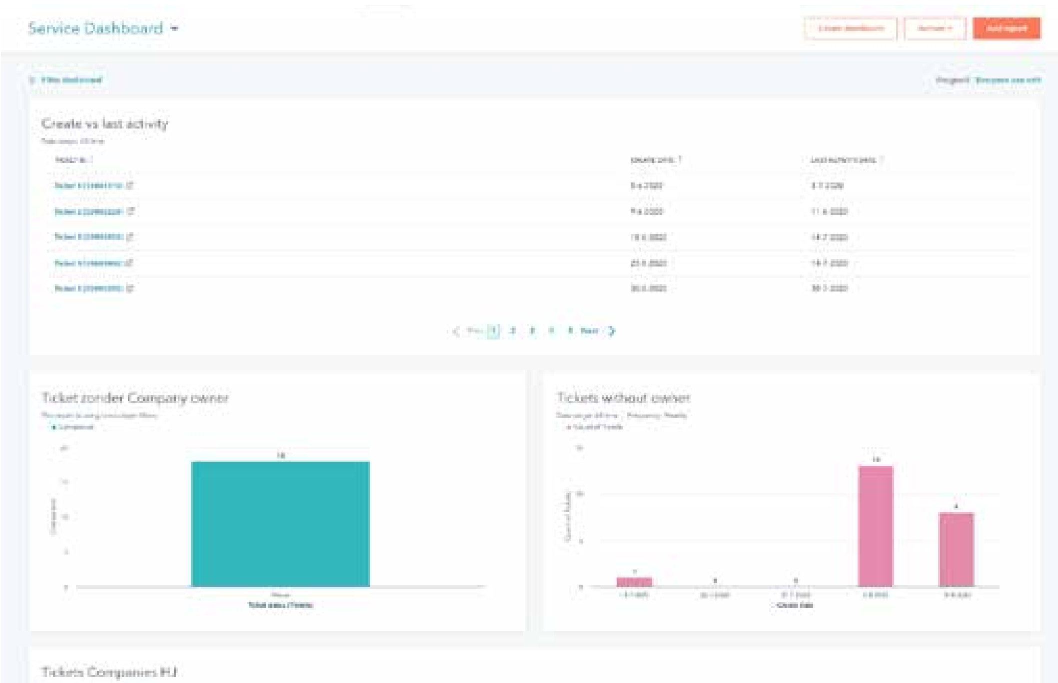
Word of mouth may be the best communication strategy ever. But how do you get people to talk about your organization? By offering excellent service. Offering the best solution quickly and helping customers when needed turns ordinary people into promoters. No wonder the top businesses value the way they offer support.

HubSpot's Service Hub provides you with tools such as live chat, chatbots, a knowledge base, and feedback surveys to further optimize your service activities.

Discover HubSpot's Service Hub:

- Let your audience get in touch with you quickly with the help of live chat
- Offer 24/7 support with conversational chatbots and send visitors to the right content or chat agent
- Allow your visitors to find their answers supersonically fast in a knowledge base without having to contact you
- Discover how to bring your service to the next level with feedback surveys and turn customers into promoters
- Find out how every service rep performs and see where to optimize

Discover all the features of Service Hub Starter, Professional, and Enterprise at sterc.com/en/blog/service-hub.



Dashboarding & Reporting.

HubSpot's dashboarding tool shows you how your service team is performing and where you need to optimize. Create a service-focused company and turn customers into loyal fans of your organization.

The service dashboard shows you how every service rep is achieving the team's goals. Who is assigned to which chat conversations, and how fast are they closed? Which service tickets are open, and which companies are associated with them? Which knowledge base posts are viewed most, and did they answer the questions asked?

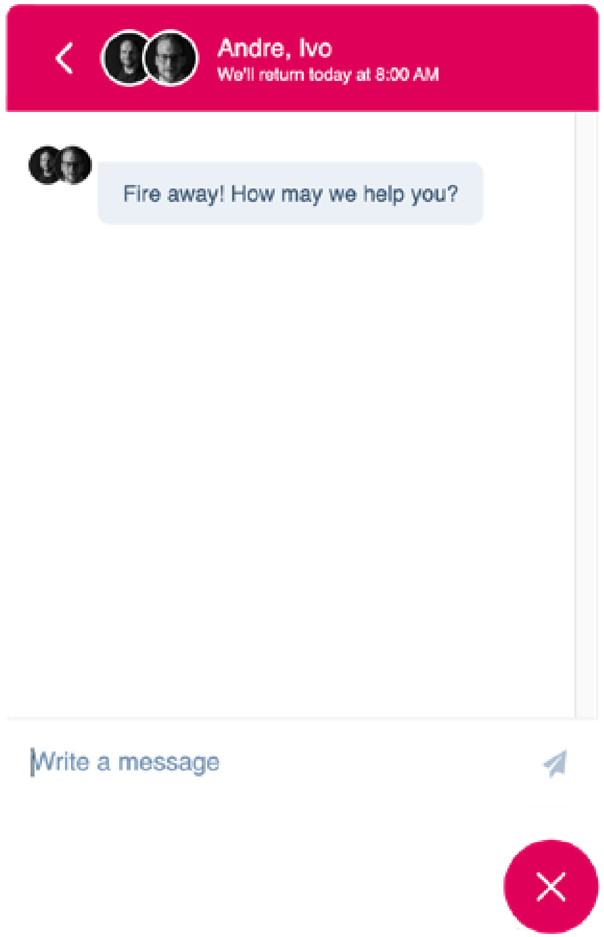
The most critical data about all of your service activities can be found in this overview. In addition to the great reports HubSpot has already created for you, you can also create custom reports.

Chat.

Chat is an essential tool in helping your web visitors in the best way possible. Chat lets visitors ask their questions through a tool they're familiar with, and you can help them through live chat or let your chatbot send them to the right content or chat agent.

With HubSpot, you can get started with live chat and a conversational chatbot to help your leads and customers 24/7. You decide where, when, and how your chat icon appears on your screen and what questions your chatbot will ask.

Every visitor will always find the right person to talk to, and you will answer their question in the best way possible.



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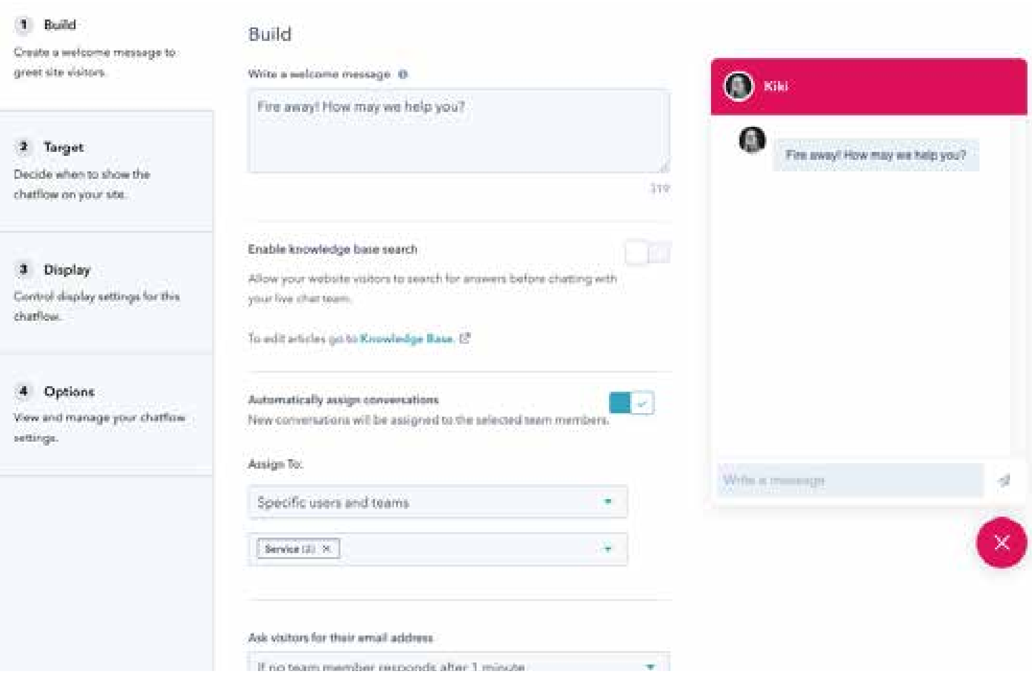
Live chat.



A live chat is a chat tool most platforms use. A small icon at the bottom of the screen lets visitors quickly chat with your organization. Visitors can ask any question, and the organization helps them to find the right solution fast.

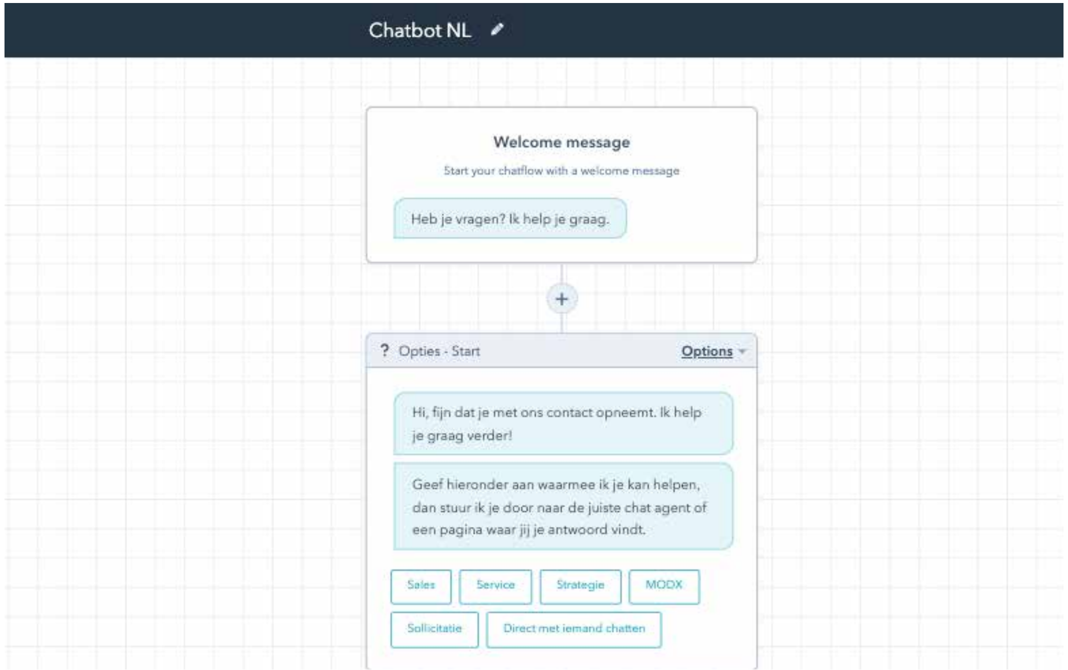
You can quickly create a live chat in HubSpot. You decide how your chat looks, which pages it will appear on, and who will see it. You can set a different chat for each language your platform is available in, and you can create a new chat for each specific page, topic, or persona. You will immediately know what your audience is interested in, and they will always get routed to the right department to have their questions answered quickly.

Chatbot.

HubSpot lets you create conversational chatbots so that your conversations are as human as possible, even when talking to a robot!

With the help of flows, you decide which questions your chatbot asks and where it routes your visitors to. Your visitors will always end up at the right content or with the correct department.

Choose where, when, and how your chatbot appears on the screen, and make sure your chatbot isn't too pushy and asks the right questions. A chatbot helps your visitors 24/7 quickly and efficiently.



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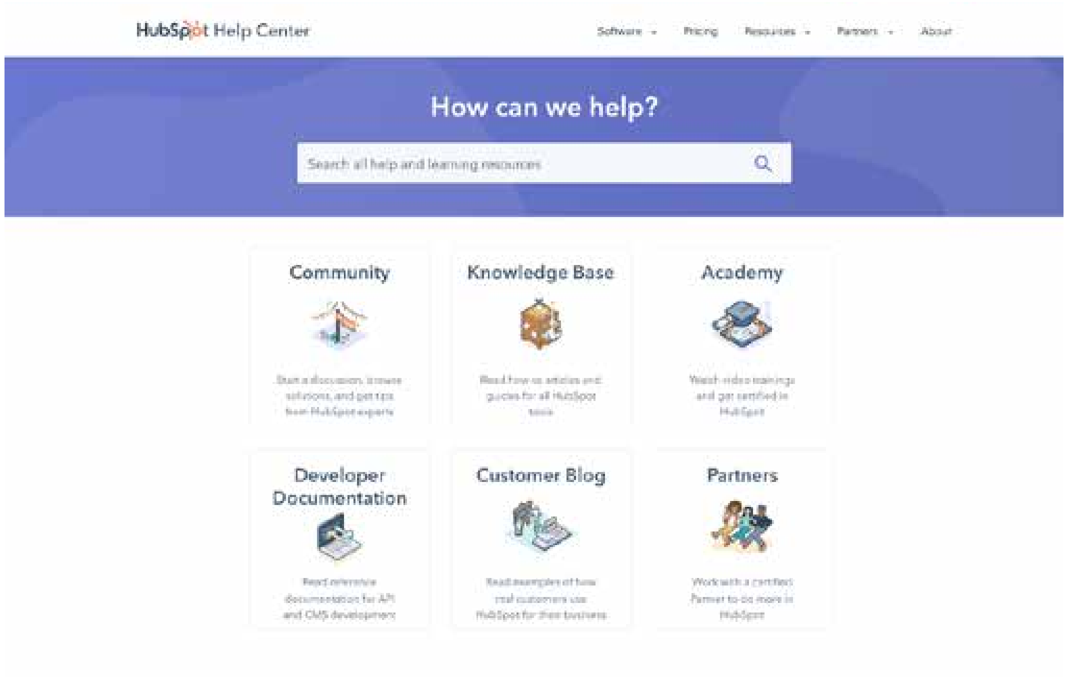
Knowledge Base.

Service Hub Professional & Enterprise



A knowledge base is perfect for both your organization and your visitors. Visitors can quickly find the answer to their questions. Your team doesn't have to answer frequently asked questions repeatedly and can focus on helping your customers.

Within HubSpot's knowledge base, you can decide what your knowledge base looks like with the help of templates. Turn frequently asked questions and tickets into knowledge articles and documents and divide these pieces of content into categories so that visitors can easily find their way.

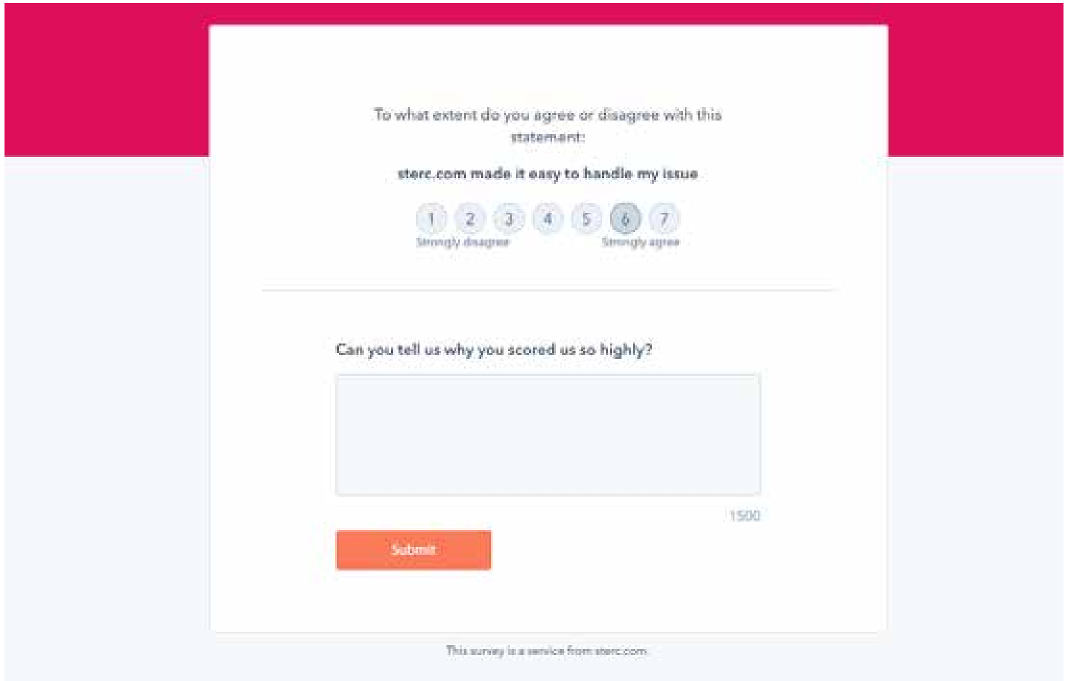
Optimizing your posts is also incredibly important, and HubSpot helps you do that. Analyze if an article has helped your visitors answer their questions and improve your current posts or add new ones. Best of all, t your chatbots can help send visitors to the right knowledge article quickly.

Feedback Surveys.

Service Hub Professional & Enterprise

Do you want to know how your organization performs and if your support is sufficient? HubSpot's feedback surveys can help you find the answers you need! Use feedback surveys to find out what your leads and customers think of your organization or the support you gave them.

With HubSpot, you can create Net Promoter Score (NPS), Customer Effort Score (CES), and Customer Satisfaction (CSAT) surveys to find out how satisfied your customers are. You can easily send these surveys to your customers via email or place them anywhere on your digital platform. Optimize the parts of your processes that need some improvement and create happy customers that stay with you.



HubSpot & MODX.

HubSpot & MODX.

MODX and HubSpot, two powerful platforms that we can flawlessly integrate.

The MODX Content Management System gives you the freedom to create unique digital platforms. Simultaneously, the next-level marketing and sales toolkit HubSpot provides you with all the tools to personalize this digital platform for your audience. Take these two platforms together, and you achieve your goals, turn leads into customers, and customers into evangelists.

Integrate MODX and HubSpot in two ways

- **HubSpot API**: The flexibility of the MODX CMS allows us to integrate HubSpot with MODX fully. The HubSpot API lets you add chat, meeting planners, forms, and CTAs to your platform and get started with personalization and contextual marketing, right from within the MODX CMS.
- **HubSpot Extra**: The MODX plugin allows you to add HubSpot tracking to your MODX platform.

Combine HubSpot and MODX

- Get a powerful collaboration of strategy and technique
- Create content in a reliable multichannel platform that integrates with all software packages for CRM, ERP, PIM, and much more
- Discover a next-level marketing and sales platform for CRM, email marketing, personalization, social media management, ads, and automation
- Create personalized and unique experiences on a fast, secure, findable, and scalable platform
- Manage all digital products in one place, such as websites, web shops, intranet, and digital signage
- Achieve your goals, turn leads into customers and customers into promoters

Experience HubSpot in MODX with our HubSpot demo! Schedule your HubSpot demo at sterc.com/hubspot-demo.

HubSpot API.

The HubSpot API allows you to integrate HubSpot with MODX fully so that you can benefit from HubSpot's features within the MODX CMS. Get started with live chat, chatbots, forms, meeting planners, and CTAs and personalize your MODX platform with all data saved in your CRM.

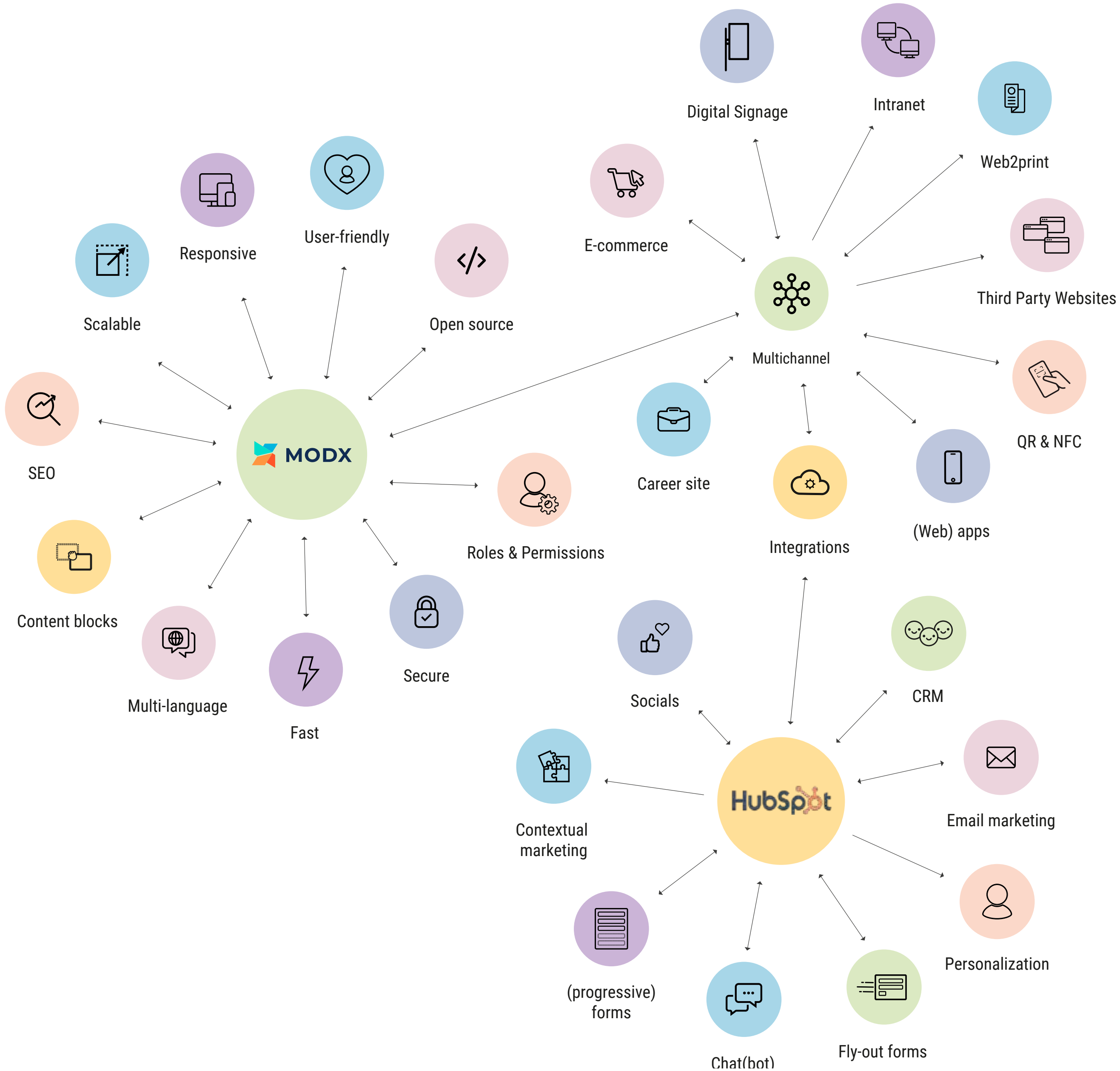
Use this data to help leads and customers in the best way possible and get them to the right content quickly. Personalize pieces of content or complete web pages. You can show specific CTAs based on your visitors' lifecycle stage or personalize content based on the visitor's weather and location. Show a menu with summery cocktails when it's sunny, and show your best teas when it's raining.
You can personalize content based on the visitor's lifecycle stage, lead status, location, persona, and much more. The HubSpot API lets you decide what you want to show each unique visitor. You'll turn leads into customers or promoters while working with the powerful MODX CMS.

HubSpot Extra.

In addition to complete integration with HubSpot, we've also created a MODX extra that lets you add HubSpot tracking to your platform. This plugin is called the HubSpot for MODX Extra.
Discover which pages people visit and find out which content is important to each unique visitor. Track anonymous visitors on any platform and in any language until they're loyal customers.

Find out more about MODX extras on our MODX Extras-page. But be warned, it could get pretty technical there!

HubSpot ❤ MODX



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More HubSpot?

We would love to tell you more! Call Bas on

+31 6 485 515 71

Or send an email to

bas@sterc.com

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