PENGUIN STRATEGIES

A Guide to

GETTING STARTED WITH HUBSPOT SALES HUB

INTRODUCTION

In today's fast-paced business world, sales teams need to be efficient and effective to succeed. They need to be able to track and manage their leads, deals, and contacts seamlessly while also analyzing their performance metrics to identify areas of improvement. This is where HubSpot Sales Hub comes in.

HubSpot Sales Hub is a powerful sales software that helps sales teams manage and automate their sales processes.

HubSpot Sales Hub Key Features include:

- Email Templates
- Email Tracking
- Document Management & Tracking
- Conversation Intelligence
- Call Tracking
- Sales Automation
- Meeting Scheduler
- Payments (US Only)
- Live Chat
- Sales Management Playbooks
- Quotes
- Sales Analytics and reporting
- Mobile CRM App

Getting started with HubSpot Sales Hub can be an exciting and rewarding experience for sales teams looking to streamline your processes and boost productivity. But setting it up correctly can be a daunting task if you are new to the platform. Especially since setting it up incorrectly can lead to confusion, inefficiency, and missed opportunities.

But fear not! This guide will break down the steps to getting started with HubSpot Sales Hub so that you and your team streamline your sales operations, improve productivity, and close more deals.

STEP 1

Align On Internal Processes

One of the most critical steps to getting started with HubSpot Sales Hub as an SDR or sales team leader is to align internally on your sales process generally. Before you even log into HubSpot, it's essential to get everyone on the same page and using the tools in the same way. Otherwise, you risk introducing friction into your sales process and compromising the quality of your data.

To achieve alignment, start by discussing what information is important to capture and how that data will be populated into the CRM. Here are some questions to help start the conversation:

- What is the process we follow when we set up a call or meeting?
- Will we have an introductory call before a discovery call?
- What are the most important questions to ask during each call?
- What is the process for follow-ups after a call or meeting?
- How will our team manage handoffs between SDRs, BDRs and AEs?
- What materials (ie product datasheets or pricing sheets) will I need to provide prospects throughout the sales process?
- What HubSpot properties will we use to capture the data we collect?
- What are the potential roadblocks or bottlenecks in our process? How will we resolve them?

It’s vital to get everyone on board with these details and ensure that they’re using the same standards for setting up calls, collecting data, and entering it into the system.

At Penguin Strategies, we’ve found that the best way to train SDR and BDR teams and ensure standard operating procedures are followed is to produce a guide that documents the process with screenshots and video clips so that salespeople know exactly what to do. This way, everyone is trained consistently and can reference the guide whenever they need to refresh their memory or onboard new team members. Updating this document as you go will help ensure that everyone is up-to-date and aligned with the latest processes.

In addition to aligning on data collection, you’ll want to establish good practices for handing off contacts from one salesperson to another. This ensures that your sales prospects have a great experience and that you’re not duplicating efforts or creating confusion within your team.

Once everyone is aligned on the process, you’ll have a solid foundation in place to use Sales Hub to its fullest potential.

Pro-Tip

Don’t skip this step! As tempting as it can be to assume everyone on your team knows your process, they probably don’t! Taking the time to align on internal processes and standard is crucial.

STEP 2

Establish a Process To Keep Your CRM Data Clean

Once you've aligned internally on how your team will use HubSpot Sales Hub, the next step is to keep your CRM data clean. This may seem like a small detail, but it's crucial to the success of your sales efforts. When your data is clean, accurate, and up-to-date, you can make more informed decisions, target your outreach more effectively, and provide a better experience for your prospects and customers.

To keep your CRM data clean, there are a few best practices to follow:

Automate Your Data Cleaning:
In addition to manual updates, it's a good idea to automate your data cleaning efforts wherever possible. This can include using features like duplicate detection and merging, workflows, as well as integrations with other tools that can help you keep your data up-to-date automatically.

Document Data Entry Standards:
The sales process discussed in step 1 should include details around the definitions for the HubSpot properties you are using, when data is entered into the system, and what data is considered essential and what's optional.

Regularly Review and Update Your Data:
Set up a recurring calendar reminder (or HubSpot task!) to de-duplicate records, correct errors and fill in missing information. The more regularly you perform these tasks, the easier they'll be to manage, and the cleaner your data will be overall.

Make Data Cleaning Part of Your Culture:
It's essential to prioritize data cleanliness as a team effort. When everyone on your team is committed to keeping the CRM data clean, it becomes a part of your team culture, and you'll be able to achieve more consistent and accurate results.

By establishing data entry standards, regularly reviewing and updating your data, automating where possible, and making it a team effort, you'll be able to ensure that your data is clean, accurate, and up-to-date, and you'll be able to provide a better experience for your prospects and customers as a result.

STEP 3

Integrate Your Tech Stack With HubSpot Sales Hub

Now that you've aligned internally and cleaned up your CRM data, it's time to integrate HubSpot Sales Hub with the other software in your tech stack.

To do this you will need to:

- Analyze what software you're currently using and which integrations make the most sense for your team.
- Identify any gaps or inefficiencies in your current workflow and find software that can help fill those gaps.

With over 1,000 integrations available, HubSpot Sales Hub can connect to almost any software you're using, from marketing automation platforms to telephony systems. That said, there are a few integrations we recommend starting with:

- Integrating your Outlook or Gmail inbox allows you to log every conversation you have automatically, saving you and your team massive amounts of time.
- AirCall is a phone integration that allows you to make and receive calls directly from Sales Hub. This not only saves time but also allows you to log call details and recordings automatically, giving you a complete picture of every conversation you have with prospects and customers.
- Gong is a conversation intelligence platform that analyzes your sales calls and meetings. As you log your calls in HubSpot Sales Hub, Gong will analyze the calls and provide insights into things like how much the salesperson spoke during the call, how well they handled objections, and more.

Integrating Sales Hub with the other tools in your tech stack is a crucial step in maximizing the value of the platform so you can streamline your workflow, save time, and improve your team's performance.

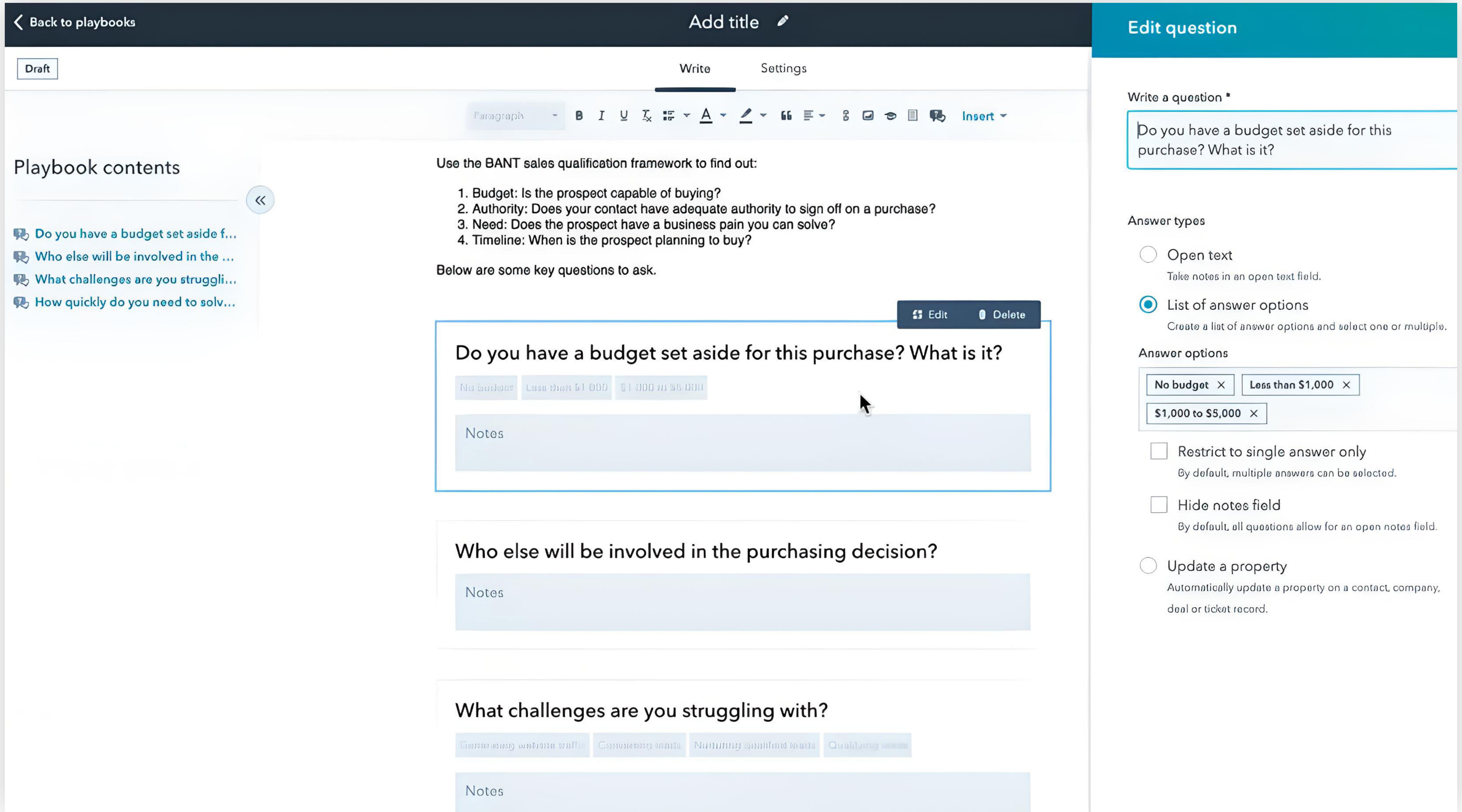
Pro-Tip

Ask your accounting department for a list of all the software apps to which your company is subscribed to see your entire tech stack.

STEP 4
Create Your First Playbook(s)

Now that you have documented your sales process in Step 1, it's time to turn that process into a series of playbooks that will allow you to create a standardized structure for your outreach efforts. Playbooks ensure that everyone on your team is following the same framework, using the same messaging, and presenting a unified front to potential customers. Tailor your playbooks to your specific needs and use them in a structured yet flexible way.

Sales teams typically use Hubspot Sales Hub Playbooks to guide their conversations with potential customers. It is essentially the list of questions that the team has decided are the appropriate questions to ask and the order in which they should be asked. With a HubSpot Enterprise license, you can tie the responses to HubSpot properties so that as you collect information on sales calls, you can update the CRM as you go.



Playbooks for New Hires

While Playbooks are an essential tool for salespeople at all levels, they can be particularly helpful for new hires, as they provide structure and help ensure that new team members are following the same process as everyone else. By providing a clear set of guidelines and best practices, playbooks help new hires get up to speed on the sales process and begin contributing to the team's success.

Playbooks Tailored To Your Needs

Depending on your business, you may need to create tailored playbooks to meet your specific requirements. By doing so, you can ensure that your team is using the most effective messaging and approach for each situation.

Here are some examples of situations where you may want to tailor your playbooks:

Playbooks per sales stage:
You can create different playbooks for each stage of your sales process, from initial prospecting to closing the deal. For example, many companies create different playbooks for the first call, the discovery call, and the proposal call. This can help ensure that your team is following the same process at each stage and can help identify areas where improvements can be made.

Playbooks per industry:
If you sell to different industries, you may want to create separate playbooks for each industry. This can help ensure that your team is using the right messaging and approach for each industry. For example, the questions you would ask a CMO in the medical sector might be different from the questions you would ask a CEO in a tech startup. By tailoring your questions to the specific industry, you can ensure that your conversations are more relevant and effective.

Playbooks per product:
Similar to industry-specific playbooks, you may want to create playbooks for each of your products or services. This can help your team understand the unique value proposition of each product and how to position it effectively to potential customers.

Before you get started, consider these tips from our HubSpot Onboarding team:

- **Start small:** We recommend starting with just one or two simple playbooks at first and then adding more as needed.
- **Involve your team:** Playbooks are most effective when they're developed in collaboration with the team members who will be using them. Get input from everyone involved in the process to ensure that the playbook reflects their needs and preferences.
- **Keep it simple:** Playbooks should be easy to understand and follow. Use clear, concise language and avoid jargon or technical terms that might be confusing to some team members.
- **Include open-ended questions:** Try to avoid yes or no questions. Open-ended questions can help you gather more information and have more engaging conversations with potential customers.
- **Focus on quality over quantity:** It can be tempting to include as many questions as you can think of in your playbook, but don't fall into that trap. Instead, sit down with your team and identify the most essential questions. Also, keep the questions organized and have a good flow to the conversation.
- **Use interactive questions:** Use interactive questions to make it easier for your sales team to quickly collect information which will automatically update HubSpot properties. When you set up interactive questions, you can input common answers as buttons. This way, when you are on the phone with a prospect, you only have to click a button—instead of typing it into notes.
- **Continuously improve:** Playbooks should be treated as living documents that can be updated and refined over time. Encourage team members to provide feedback and make suggestions for improvements to the playbook as they use it in their day-to-day work.

Overall, HubSpot Playbooks are a powerful tool for standardizing your sales process and improving the efficiency and effectiveness of your team. By creating playbooks that are tailored to your specific needs and using them in a structured way, you can ensure that your team is using the most effective messaging and approach for each situation.

For more information on creating playbooks, check out our conversation with HubSpot's Title, Kyle Jepson, Principal Marketing Evangelist: [HubSpot Hacks: Playbooks]

STEP 5

Create Your Templates

HubSpot Sales Hub allows you to create templates for emails, documents, and other materials that are used in your playbook. You can use these pre-designed assets to create new content quickly and efficiently to streamline your sales process. They also ensure that everyone is using the same messaging and branding, and reduce the risk of errors or inconsistencies.

The three templates you should start with are: email templates, proposal templates, and contract templates.

Create **email templates** for the types of emails that you send frequently, such as prospecting emails, follow-up emails, and meeting confirmation emails. This will save you tons of time spent re-typing the same messages and ensure that you and your team are consistently using a professional and effective tone in your communications.

Create **proposal templates** in the quotes tool to provide standardized, professional-looking proposals that are tailored to a prospect's specific needs. Your templates should be set up so that you can quickly create a proposal that includes information about the prospect's company, their pain points, proposed solutions, and pricing.

Create **contract templates** to help you quickly produce consistent and legally compliant documents like service agreements, sales agreements, and non-disclosure agreements.

We recommend including placeholders for personalization tokens so that you can easily personalize emails and other content with prospect and customer information. This can help your team to create more relevant and effective communications that resonate with your audience.

From a design perspective, keep your templates simple, easy to read, and consistent with your company's branding. Make sure they are mobile-friendly as many people prefer to read email on their mobile devices.

STEP 6
Write Your Snippets

HubSpot Snippets are pre-written 'canned' messages that you can use in your emails, chat, or other communication channels. They are similar to templates but are designed for shorter messages that you use frequently. They can be inserted into your messages with just a few clicks and ensure consistency in communications.

You'll want to start by **identifying common messages** that you and your team send repeatedly. These could be responses to frequently asked questions, follow-up messages, or even introductions.

Once you **begin writing the snippets**, remember to keep them brief and as personal and engaging as possible. Avoid using long paragraphs and technical jargon and include personalization tokens to insert contact-specific information into your messages.

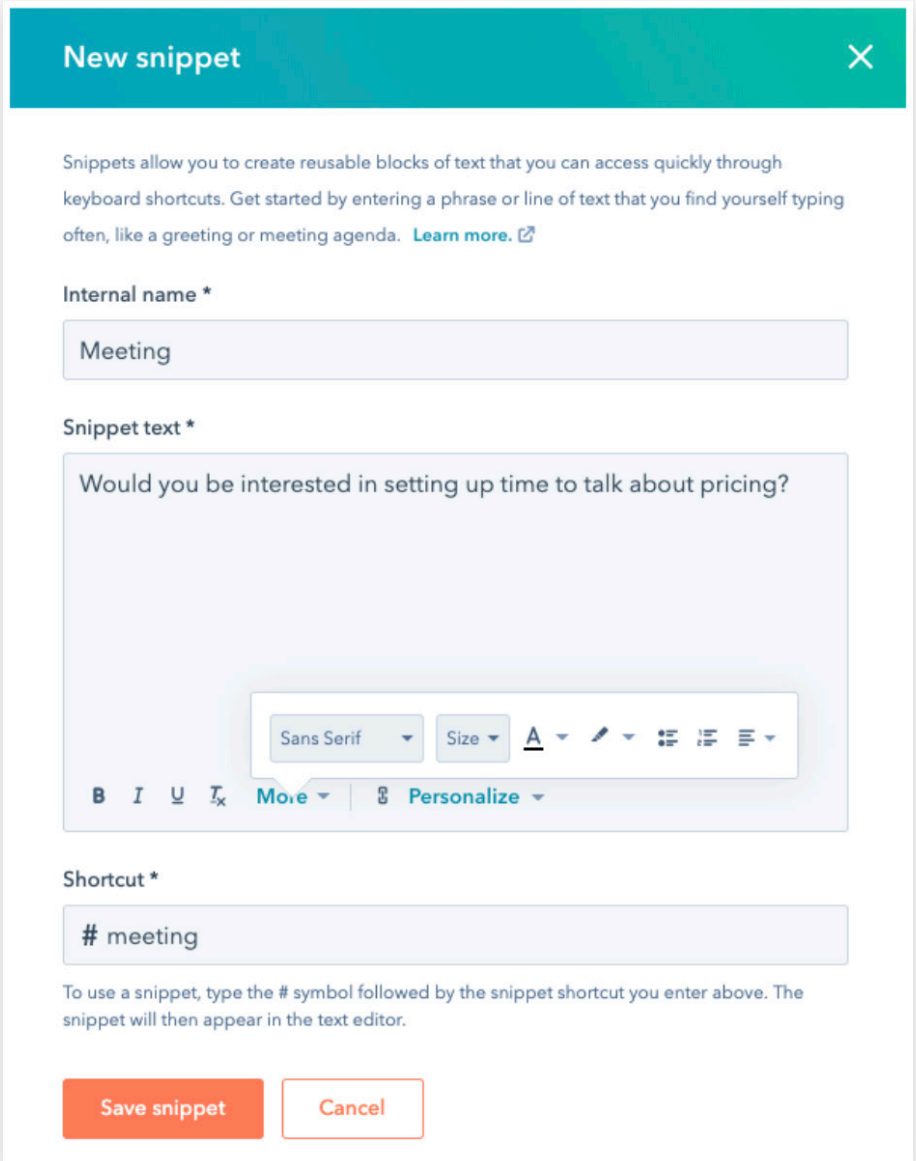
Next, to get the most out of snippets, it's important to **organize them effectively**. Group your snippets by category or use case. For example, you could organize them by stage of the sales process or by industry. This makes it easier for you and your team to find the right snippet for each situation.

To keep your snippets organized, it's important to **establish naming conventions** that make it easy to identify the purpose of each snippet.

It's also crucial to **keep them up-to-date** so that you're not using outdated materials. As your business evolves, your messages will need to evolve too. Regularly review your snippets to make sure they are still relevant and effective. One way to do this is to manage snippets on a team or BDR level, so that an update in one place is reflected for everyone.

Once you've created your snippets, **test them** out with your team and refine them based on feedback. This will help you create a library of effective messages that you can use to improve your communication and save time.

For detailed instructions on how to create snippets in HubSpot, check out the [HubSpot Knowledge Base].



STEP 7
Build Your Email Sequences

HubSpot Sequences are a series of pre-written emails or tasks that are sent to prospects over a period of time. They're designed to help automate and streamline the sales process. They deliver personalized content and reminders to prospects at key points in the buying journey.

Here are some best practices for setting up:

- **HubSpot Sequences:** Understand your buyer's journey: Prior to setting up a sequence, it's crucial to grasp your buyer's journey and identify the pivotal interactions that are likely to propel them forward in the sales process. By mapping out the buyer's journey, you can create a sequence that delivers the right message at the right time.
- **Segment your audience:** HubSpot allows you to segment your audience based on a variety of criteria such as industry, company size, or location. Use these segments to create more targeted sequences that speak directly to your prospect's needs and pain points.
- **Personalize your messages:** Personalization is key to the success of any sales strategy. Use merge tags to automatically populate emails with the prospect's name, company, or other relevant information. This will make your emails feel more personalized and increase the likelihood of a response.
- **Use a mix of content:** HubSpot Sequences allow you to mix and match different types of content such as videos, case studies, and blog posts. Use a variety of content to keep your prospect engaged and interested in your offering.
- **Test and refine:** No sequence is perfect right out of the gate. Use A/B testing to experiment with different subject lines, messaging, and timing. Use the data you gather to refine your sequence and improve its effectiveness over time.

By following these best practices, you can create HubSpot Sequences that are highly effective in moving prospects through the sales process and closing more deals.

STEP 8

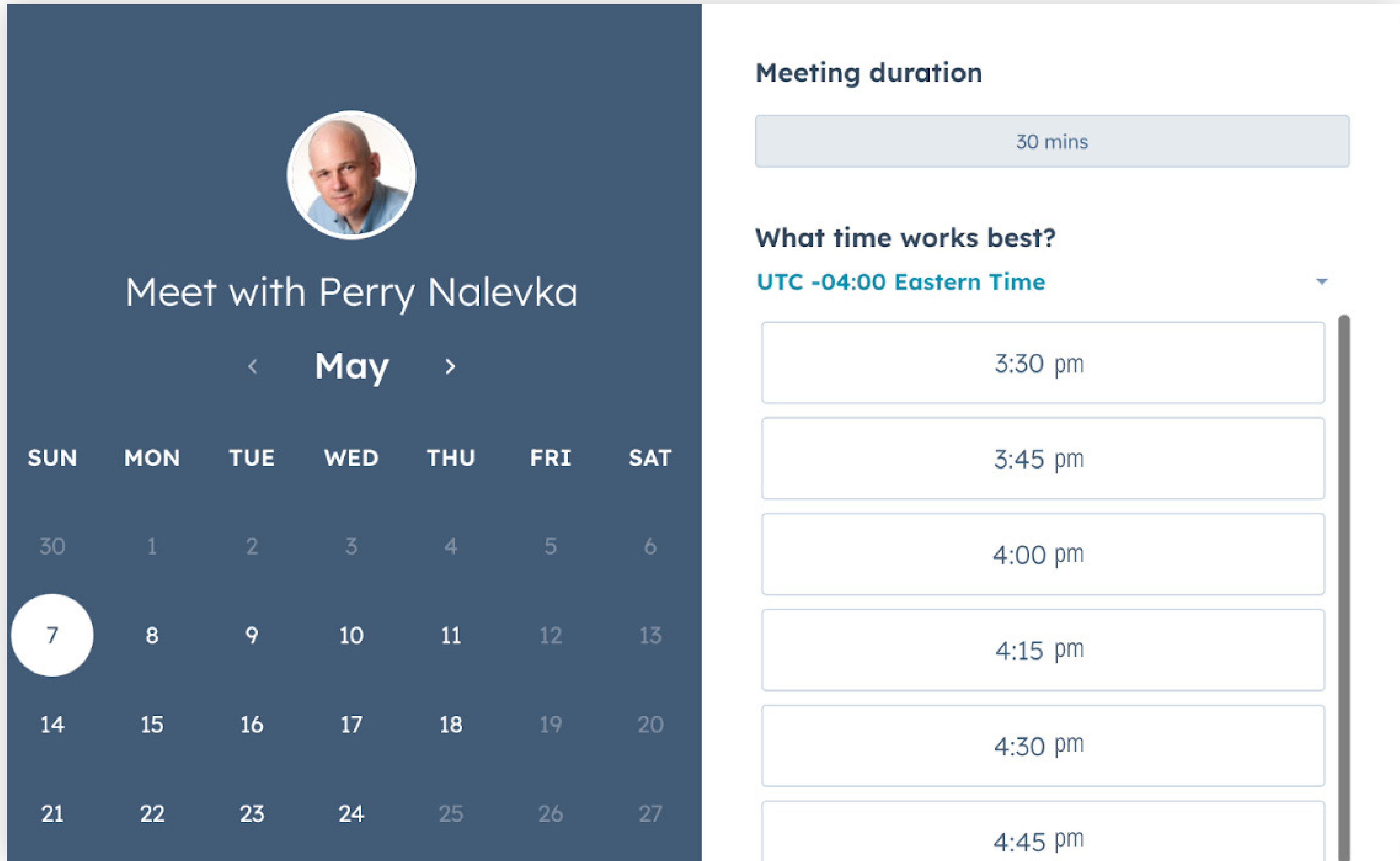
Add a HubSpot Meeting Link To Your Email Signature

Next, you are going to want to make it incredibly easy for your prospects to schedule a meeting with you.

By using HubSpot's Meetings tool, you can include a meeting link in your email signature, so that prospects can book a meeting with you with just a few clicks. This removes the time-consuming task of emailing back and forth and eliminates the friction that could potentially deter some prospects from scheduling a meeting altogether.

Follow the instructions from HubSpot on how to create a scheduling page with the meetings tool. Make sure to include your Zoom link and any other important details in the meeting settings. Once you have created the page and connected it to your Outlook or Google Calendar, you can add the link to the page to your email signature block.

This simple step not only helps BDRs and SDRs like you manage their schedule more effectively but also helps increase the number of meetings scheduled; ultimately leading to more closed deals.



STEP 9

Set Up Your Views

Views in HubSpot are customizable displays of your contacts, companies, deals, and other data in a table format. They allow you to filter the data to see the information that is most important to you, and make it easy to organize and prioritize your outreach efforts.

You can set up personalized use views to manage your sales pipeline, track progress, and prioritize your daily tasks based on certain properties, such as deal stage, company size, or last activity date. For example, a sales rep can create a view to show all deals in the "proposal sent" stage, allowing them to follow up with those prospects and move them to the next stage. You can quickly access the information you need without having to manually search through your entire database.

This helps you and your team identify new opportunities and stay on top of your sales pipeline, allowing you to take action and close deals faster.

Hubspot views also allow sales managers to gain insights into their team's activities and performance, and provide guidance and support where necessary.

To set up your views, start by determining which HubSpot properties that make sense to you and your business. Here are some you may want to consider:

- Account status (active/inactive)
- Deal property (closed/lost, deal originated)
- Ratings (AI-generated)
- Last activity date
- Recent conversion (B2C)

Once you decide which properties you want to filter on and or/display in your view, you can customize the columns that appear in your table to display the data that is most important to you. For example, you might choose to display columns for contact name, company, job title, last activity date, and deal status.

When setting up your views, keep them organized and use clear naming conventions. This will make it easier for you to find the views you need and ensure that your team is using the same terminology.

Regularly review and update your views to ensure that they remain relevant and useful.

STEP 10

Get Comfortable With The Mobile App

Frequent travel to trade shows or client offices means that busy sales reps live life on the go.

The Hubspot mobile app is a powerful tool that allows you to stay connected with your leads and opportunities wherever you are. With the app, you can scan business cards, access important lead and account information, make and receive calls, and send and receive emails from your phone or tablet. The app also allows you to create new contacts, deals, and tasks, making it easier for you to stay organized and productive while away from your desk. This way you can respond to important leads and opportunities in real time and all of that activity is captured in the CRM.

Additionally, the app's push notifications and alerts can help ensure that you don't miss important tasks and activities, even when you are not actively using the app.

Download the app on your mobile device and start getting comfortable with the navigation and available features.

STEP 11

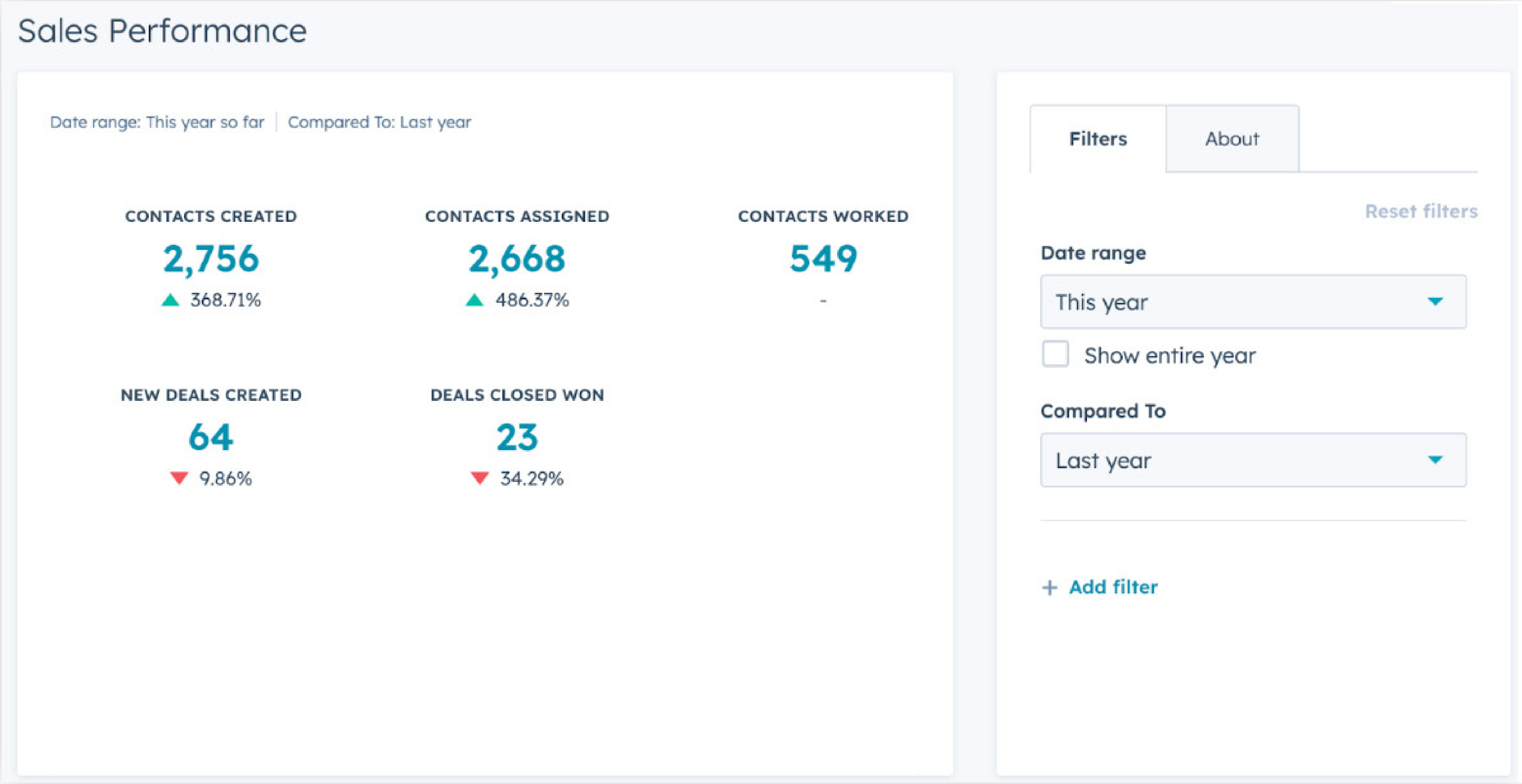
Build Your Analytics Reports And Dashboards

The last step in the process is to set up HubSpot Analytics to track and measure the performance of your sales team.

You should create a sales dashboard to get an at-a-glance view of the key performance indicators you want to track. Each team and business model will be different, and the reports that HubSpot is capable of creating is endless, but here are a few key reports that we suggest you start with:

1. Sales Performance Report:

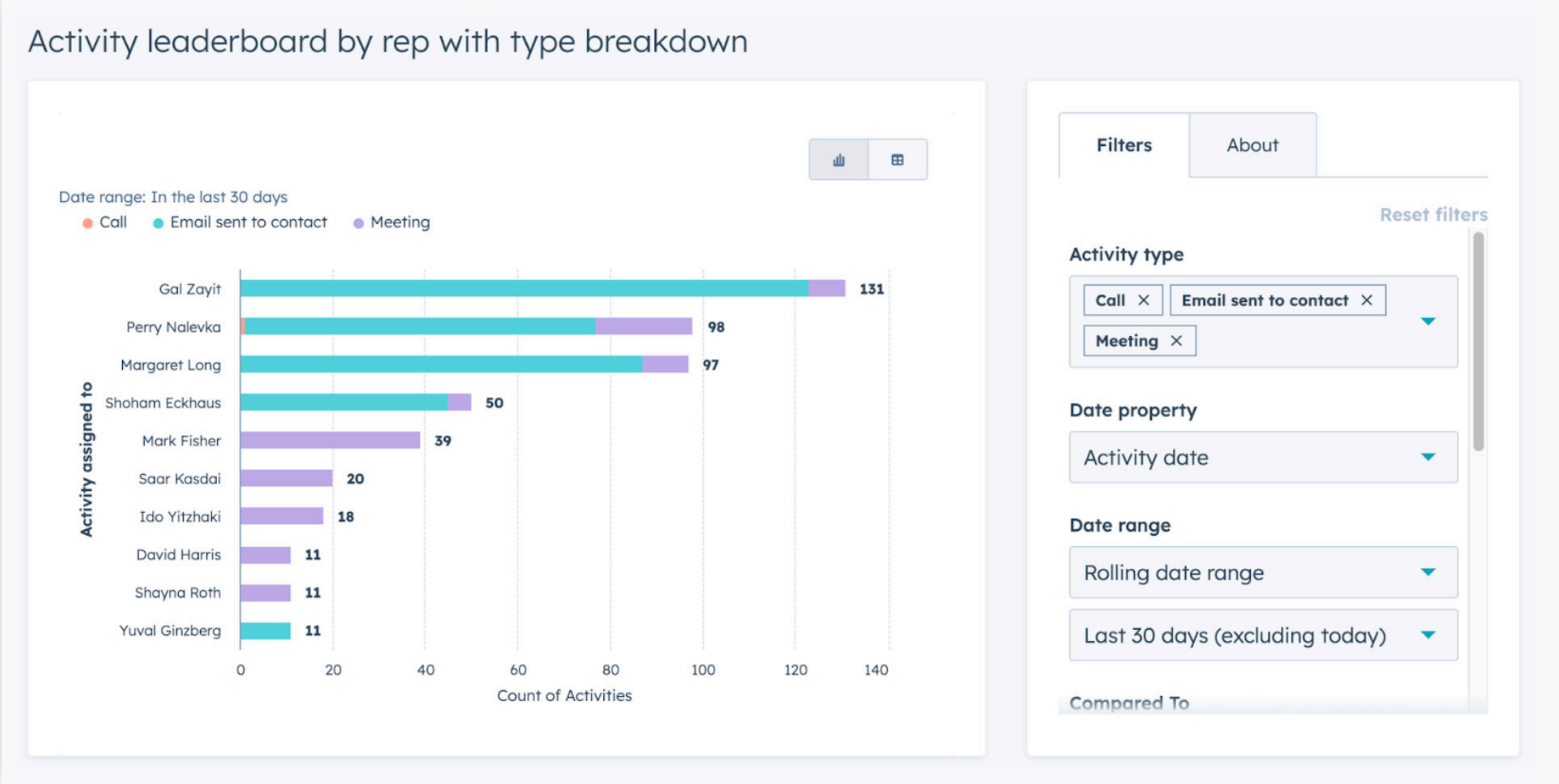
The Sales Performance Report provides sales managers and executives with insight into the performance of their sales team. Many sales leaders look at this report first thing in the morning to track daily activities. The report includes key metrics such as the number of new contacts created, assigned, and worked. It also includes the number of new deals created and deals won. You analyze this on a daily, weekly, monthly, quarterly, or annual basis by adjusting the date range.



2. Sales Leaderboard Report:

In addition to the Sales Performance Report, the Sales Leaderboard Report is an essential tool for sales managers to monitor and incentivize their team's performance. The report tracks and displays individual and team-level performance metrics in real-time, allowing managers to identify top performers and areas for improvement.

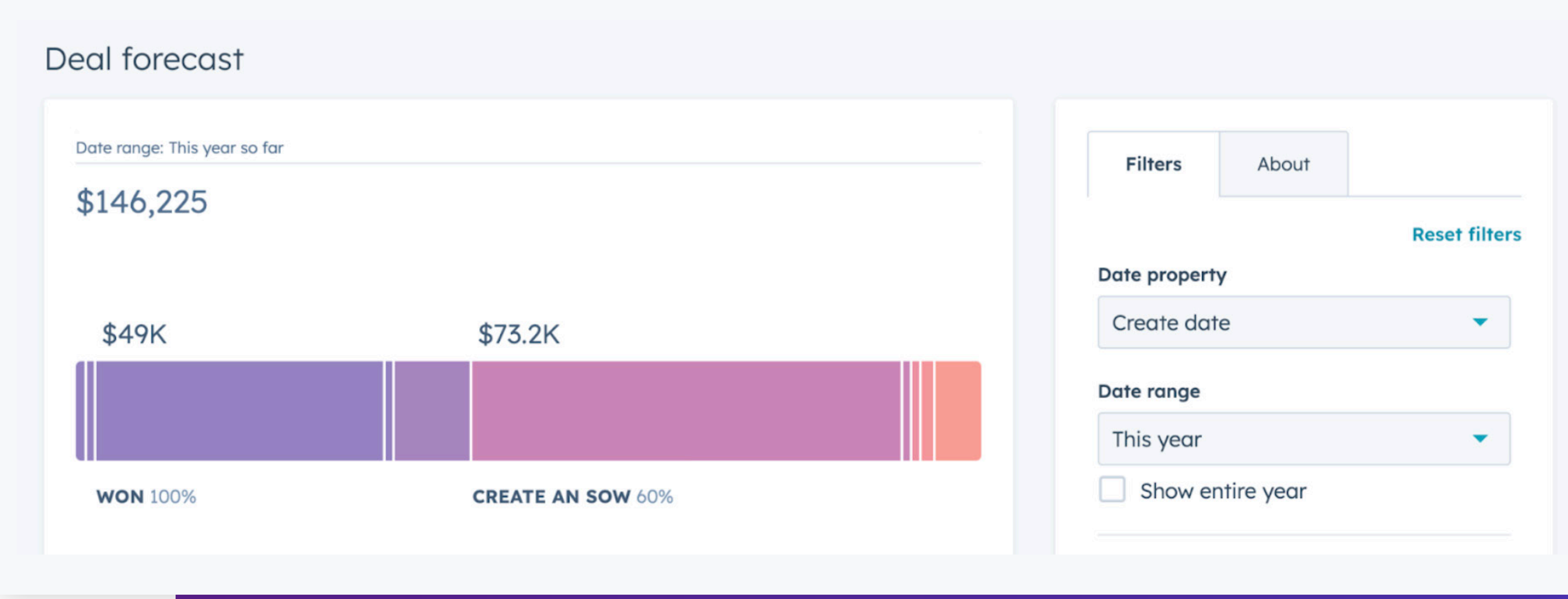
You can customize the metrics tracked in this report to suit the specific needs of your team, including total deals closed, revenue generated, call volume, and more. By providing a clear and visual representation of performance data, the Sales Leaderboard report provides transparency, enabling team members to track their own performance and see where they stand relative to their peers. It motivates team members to increase their productivity and reach their sales goals.



3. Deal Forecast Report:

The Deal Forecast Report will help you gain insight into your future revenue based on the deals in your pipeline. This report gives you a visual representation of the deals that are likely to close over a given period, typically a quarter or a year. Its also shows the potential revenue from those deals, and any risks or challenges that may impact the sales forecast.

With this information, you can adjust your sales strategies, allocate resources, and make informed decisions to meet or exceed your sales goals.



4. Deal Stage Funnel Report:

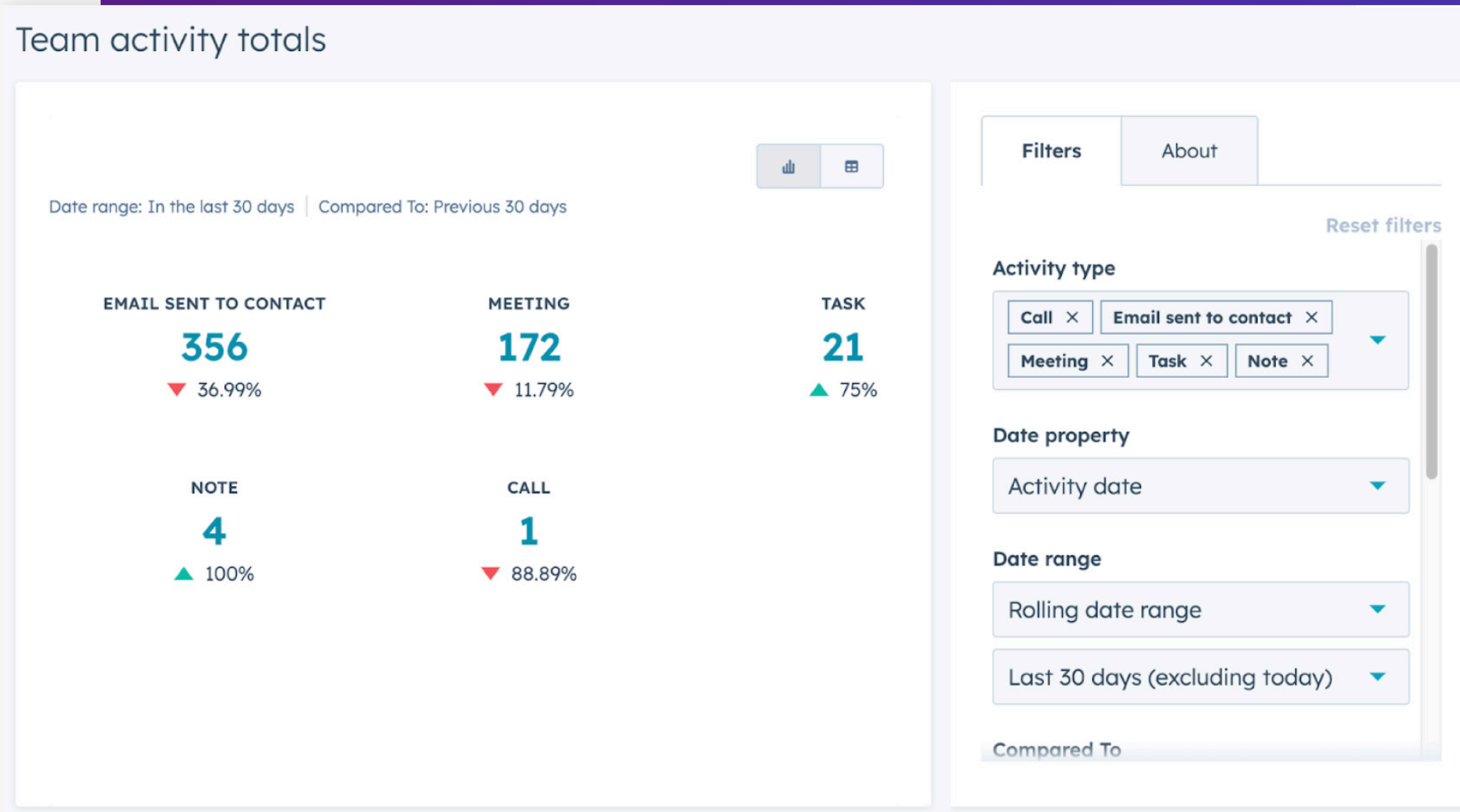
The Deal Stage Funnel Report provides a visual representation of the sales pipeline and shows how many deals are at each stage of the funnel. The report helps sales managers to identify where deals may be getting stuck in the pipeline and take action to move them forward. The report also allows you to set specific goals for each stage of the funnel and track progress towards those goals. This helps to ensure that the team is focused on the right activities at the right time and is moving deals through the pipeline efficiently. You can use this to identify areas where you may need to adjust your sales process or offer additional training to your team.

One advantage of this report is that you can customize the stages of your sales process, create custom filters to view specific sets of deals, and add custom goals to track progress towards specific targets. You can also segment by sales rep, team, or by deal owner, allowing you to get a clear view of the performance of individual team members. This information can be used to identify top performers and to coach team members who may be struggling.

5. Sales Activity Report:

The Sales Activity Report provides a detailed breakdown of the sales activities that your team has performed over a specified period. It's an excellent way to monitor the overall sales performance of your team and individual sales reps. The report can show you the number of calls made, emails sent, and meetings scheduled, along with the associated outcomes, such as the number of deals closed and the revenue generated. By looking at the report, you can identify which activities are most effective and adjust your strategy accordingly. For example, if you notice that emails are generating a lot of positive responses, you may want to focus on crafting more effective email templates.

You can also view the number of activities completed by each sales rep and drill down into the details to see which activities are generating the best results. Use this to provide targeted coaching and support to individual reps, helping them to improve their performance over time. Furthermore, you can set goals and targets for each sales rep and track their progress in real-time.



6. Sales Pipeline Velocity Report:

The Sales Pipeline Velocity Report allows you to track the performance of your sales pipeline over time and make data-driven decisions to optimize the process. It provides valuable insights into how quickly your deals are moving through your sales pipeline.

The key metric provided in this report is the average time deals spend in each stage of the pipeline. This metric tells you which stages are taking longer than others and work to streamline the process. You can also track the conversion rates between stages. This helps you understand the average amount of time it takes for a deal to move from one stage to the next and identify bottlenecks that may be slowing down your sales process.


Date range: In the last 30 days | Frequency: Monthly

CLOSE DATE	AVERAGE TIME IN STAGE - ACTIVELY PROSPECTING	AVERAGE TIME IN STAGE - CREATE AN SOW	AVERAGE TIME IN STAGE - EXPECTED LESS 30 DAYS	AVERAGE TIME IN STAGE - CLOSED LOST	AVERAGE TIME IN STAGE - WON	AVERAGE TIME IN STAGE - ENGAGEMENT ENDED
Apr 2023	5.1 days	38 days	25.4 days	0	0	0
May 2023	0	0	6.1 days	0	0	0
Report Total	**5.1 days**	**38 days**	**19 days**	**0**	**0**	**0**

FINAL THOUGHTS

HubSpot Sales Hub offers a powerful set of tools and analytics to help your sales team improve your processes and increase productivity. By leveraging the features and best practices discussed in this guide, you can streamline your workflows, effectively manage your pipeline, and track your performance.

Whether it's setting up playbooks and snippets to guide sales conversations, creating views to easily manage and prioritize contacts, or utilizing various reports to analyze sales activity and pipeline health, HubSpot Sales Hub provides a comprehensive solution for sales teams. By regularly reviewing and optimizing their processes with the help of these tools, your team can not only improve your individual and collective performance but also ultimately drive more revenue and growth for your organization.

If you're ready to take your sales game to the next level with HubSpot Sales Hub, but need some help getting started, don't hesitate to reach out to us. Our team of experts can provide personalized guidance to help you optimize your use of HubSpot Sales Hub and achieve your sales goals.

Contact us today to schedule a consultation!