PENGUIN STRATEGIES

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eBook

HUBSPOT'S OPERATIONS HUB

Actionable Use Cases for
Marketing, Sales and Service

1 | INTRODUCTION

HubSpot is a CRM created by CRM users for CRM users.

The Operations Hub is testament to the company's dedication to continually deliver exactly what users want and need. Their newest Hub allows you to connect almost any other service with an open API from within workflows.

It allows CRM managers to integrate and synchronise data with other email or CRM platforms much more effectively.

It allows you to automate any process and ensure that your data is clean, consistent, manageable, updated and relevant.

Essentially, it allows you to be more brilliant at your job, freeing you to go way beyond even advanced CRM management.

Penguin Strategies', Mark Fisher, shares examples of use-cases we have built and executed to give you a taste of what HubSpot's Operation Hub lets you do.

> "I should have kept a note of all the cases where I had to say, 'No it can't be done in HubSpot.' Because now it can."
>
> **Mark Fisher, Managing Partner, CTO, Penguin Strategies**

2 | USE CASE:
A/B TESTING IN AUTOMATIONS

Setting the Scene

Your name is Mary (it doesn't have to be Mary). You're the marketing manager at a tech company (or the person assigned to running marketing workflows). You want to implement a new email nurturing campaign that is highly-relevant to each stage of one of your segment's buyer's journey.

Challenge

You can't run A/B tests in workflows and you want to test a number of different emails. You can't use Simple Branches or If/Then branches because you want a random test instead of basing it on specific criteria. You also don't want to test one version and then test another in 30 days. Instead, you want to test them while the contacts are pouring through the workflow.

How-to fix it

1 Create a Custom Code that assigns a number at random (1, 2, 3, or 4) for each enrolled contact and runs them through the corresponding branch.

2 Then you can use Split Branches to split up the test based on the assigned number.

3 No properties were created or harmed in the making of this solution

Solution

You activated HubSpot's new Operation's Hub to access the Custom Code action within workflows and assigned random numbers. For example, Joe got 1, Kyle got 2, and Mark got 3. (Number options are not limited.)

You can create different emails for each branch in the Split Branch.

Over time, you can test the performance of these emails, check for trends in the characteristics of the contacts and test new emails.

3 | USE CASE:
DECAY IN LEAD SCORING

Setting the Scene

Your name is Danny. You're the RevOps manager at a mature tech startup. You believe that lead scoring has a lot of potential to accurately measure how qualified a contact is and when they are ready to progress down the funnel, but there is no time decay functionality to update a contact's score over time.

> According to **Salespanel,** lead scoring data such as an individual lead's website activities like page visits, button clicks, media views, and email reads can help Sales actively gauge a lead's interests and motivations to **close more deals.**
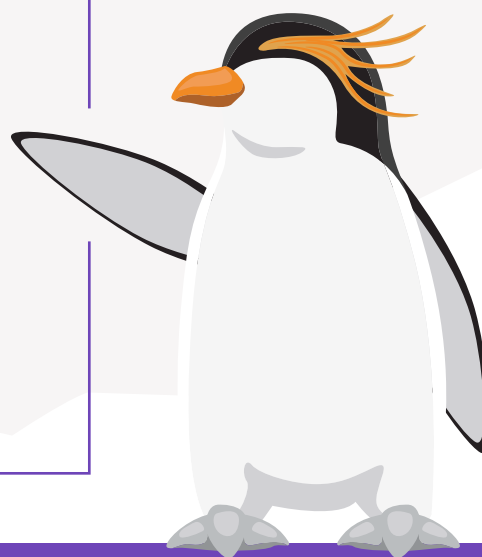
Challenge

Lead scoring doesn't have a time decay. It can't differentiate between someone who visited your product and pricing pages 5 times in the last 3 days or 5 times in the last 6 months. It can't tell you how engaged they are with your recent emails.

This means that Mary (remember her, your Marketing Manager) could be over-engaging with unengaged contacts when really she should be toning it down. Or Lindsay, your SDR, could be investing a lot of time on cold leads instead of hot ones.

How to fix it

1. Create 2 additional scoring properties – call them Days Between Last Engagement and Days Between Last Email

2. Create a new workflow that runs each day and re-enrolls each lead

3. Create a Custom Code action. This Custom Code can subtract between Last Engaged Date and today and the last email opened/clicked date and today.

4. Output the values to the properties you created in Step 1

Solution

You created the code. Now when Mary looks at high-scoring contacts, they will be those who engaged recently and not a long time ago. She will see the last time each contact engaged with an email or other asset, whether it was yesterday or 9 months ago. This crucial data will help Mary determine her next steps. If the contact has not engaged in 9 months, she can move him into an unengaged campaign or change strategy. She will definitely stop sending them the weekly newsletter!

Lindsay looks at her contact, Jill. She sees a pretty high lead score. Everything looks good. But she takes a second to look at the decay, Days Between Last Engagement, and sees that Jill last engaged 6 months ago. She sends Jill back to marketing and moves on.

4 | USE CASE:
ENRICHING DATA FOR MARKETING

Setting the Scene

Your name is Mary (yup, we're back to Mary). You're the marketing manager at a growing tech company. You have an active engaged audience and you want to send a really personalised video email to your MQLs to engage them further or to try push them to SQLs.

Challenge

You believe that forms should be short. You also realize that gated content adds unnecessary steps (Welcome to the future!). You don't have a lot of data points on your contact and you are missing the properties you need to make a properly personalized video, but you do know how to classify your MQLs. You don't want to manually choose which contacts need these personalization tokens nor do you want it to go to everyone; it's expensive.

How-to fix it

1 You create a workflow that triggers when a contact becomes an MQL

2 Create a Custom Code action before the emails you want to send

3 Write the API call to wherever in order to get the right data – Zoominfo, Clearbit, the personalised video url, etc

4 Pull in the properties or tokens necessary to get the information

5 Create a delay for about 20 minutes

6 Send the emails

Solution

You contact a developer to write the javascript API that matches the contacts in the workflow to the database you need and to pull the specific information. You make sure that only MQLs get triggered into your workflow.

These contacts now have everything they need for you to send a great personalised video email. No more manually updating or uploading CSV files. And you only paid for the contacts you needed.

5 | USE CASE:
ENRICHING DATA FOR SALES

Setting the Scene

Your name is Danny. You're the RevOps manager at a growing tech company. It's your job to make sure that all contacts have the right data, especially if they are to be qualified as an SQL. You want to make sure that there are no surprises for Lindsay (your SDR) and that only qualified contacts, people within the right industry, etc, get sent to her.

Challenge

Like Mary, you've realised that you are missing the properties that you need to know whether this contact actually fits your target persona. You could create a workflow to task the SDR to manually research whether the top engaged contacts are a good fit. You could download the information from Zoominfo (not a sponsor) or the like. But that will cost you a lot of money as you scale.

How-to fix it

1 Create a workflow with your defined enrollment rule

2 Create a Custom Code action before the lifecycle stage assignment action

3 Write the API call to wherever in order to get the right data – Zoominfo, Clearbit, etc

4 Create a delay for about 20 minutes

5 Pull in the properties or tokens necessary to get in the information

6 Send the emails

Solution

You did something similar to Mary. You created a workflow that enrolled any contact labelled as an MQL with high engagement. You contacted a dev who built the Javascript API call to Zoominfo in the workflow and pulled in the additional information.

You chose to use lead scoring to make it simpler to decide if the contact should be redefined as an SQL and sent to an SDR. Trevor (your colleague on the RevOps team) doesn't really like lead scoring so much, so he advised using If/then branches.

The result is that only specific contacts get enriched (read: not so costly) while You, Mary, and Trevor get the data you need. This helps determine if a contact is a good fit for the company and acts accordingly.

6 | USE CASE:
ASSIGNING A CUSTOMER SERVICE PERSON

Setting the Scene

Now you're Trevor (Danny is busy with something else). You're a member of Danny's RevOps team at this lucrative tech company. The pipeline is getting full and the salespeople are busy (Thanks Mary, you're doing a great job!). More deals are coming in and you need to assign them effectively.

Challenge

HubSpot - did we mention that you are using Hubspot? – can only rotate deal assignments randomly or based on specific rules. But you need to prioritise deal rotation to the salesperson with the least amount of open deals at the moment. Lindsay is getting way too many deals assigned to her. But Simone can handle a few more.

How-to fix it

1. Create a Workflow triggered on a new deal

2. Create a Custom Code action

3. Write Custom Code that counts the amount of deals a sales member has and assign it to the one with the smallest amount.

Solution

You created the workflow as indicated. Suddenly, a lot of the new deals got assigned to Simone. Lindsay stopped complaining. And everything balanced itself out.

7 | CONCLUSION

HubSpot's Operations Hub lets you create rules and code to customize your workflows pretty much any way you need to, want to, or dream of. Mark Fisher says he wishes he kept a note of all the cases where he had to say, 'No it can't be done in HubSpot.' Because now it can.

If you need help getting started with the Operations Hub or aligning your systems, give us a call. Ask for Mary. (Mary doesn't actually work here.)