Our workshop will start soon..

Free CRM for Maria 01 startups & 3 year discount plan (50-90% off)

maria 01

Getting the most out of your CRM

Set your CRM up for success, leverage free tools & learn from best practices

HubSpot for Startups

Hi, I’m Ragini

Startup Program Lead, Nordics

My Goal:

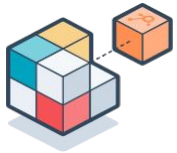
Help startups grow better with the right knowledge, tools and connections needed to scale.

About my background...

- Global Partnerships @ Industry-leading Startup program
- B2B Sales @ Social Impact startup
- High-impact program development & delivery in Education sector

Education Resources and Tailored Training

Workshops, masterclasses, resources, tools, and templates to help founders and startup teams acquire and retain more customers.



Integrated Platform for Entrepreneurs

Access to 1000+ integrations as well as the opportunity to build an integration of the HubSpot platform.

50-90% Off HubSpot Software

Access to a full suite of software for marketing, sales, and customer service, with a completely free CRM at its core at an entrepreneur-friendly price.

Today’s Agenda

1. CRM Foundations
2. Marketing, Sales & Service tools to leverage in your CRM
3. Best practices for Startups

Today's Agenda

1. **CRM Foundations**
2. Marketing, Sales & Service tools to leverage in your CRM
3. Best practices for Startups

Import your data & use custom properties

Imports

Import or sync your data to HubSpot

Import

Import contact, company, deal, ticket, or product information into HubSpot.

Start an import

Two-way Sync

Sync contact and company data between your HubSpot account and over 200 apps using PieSync from HubSpot

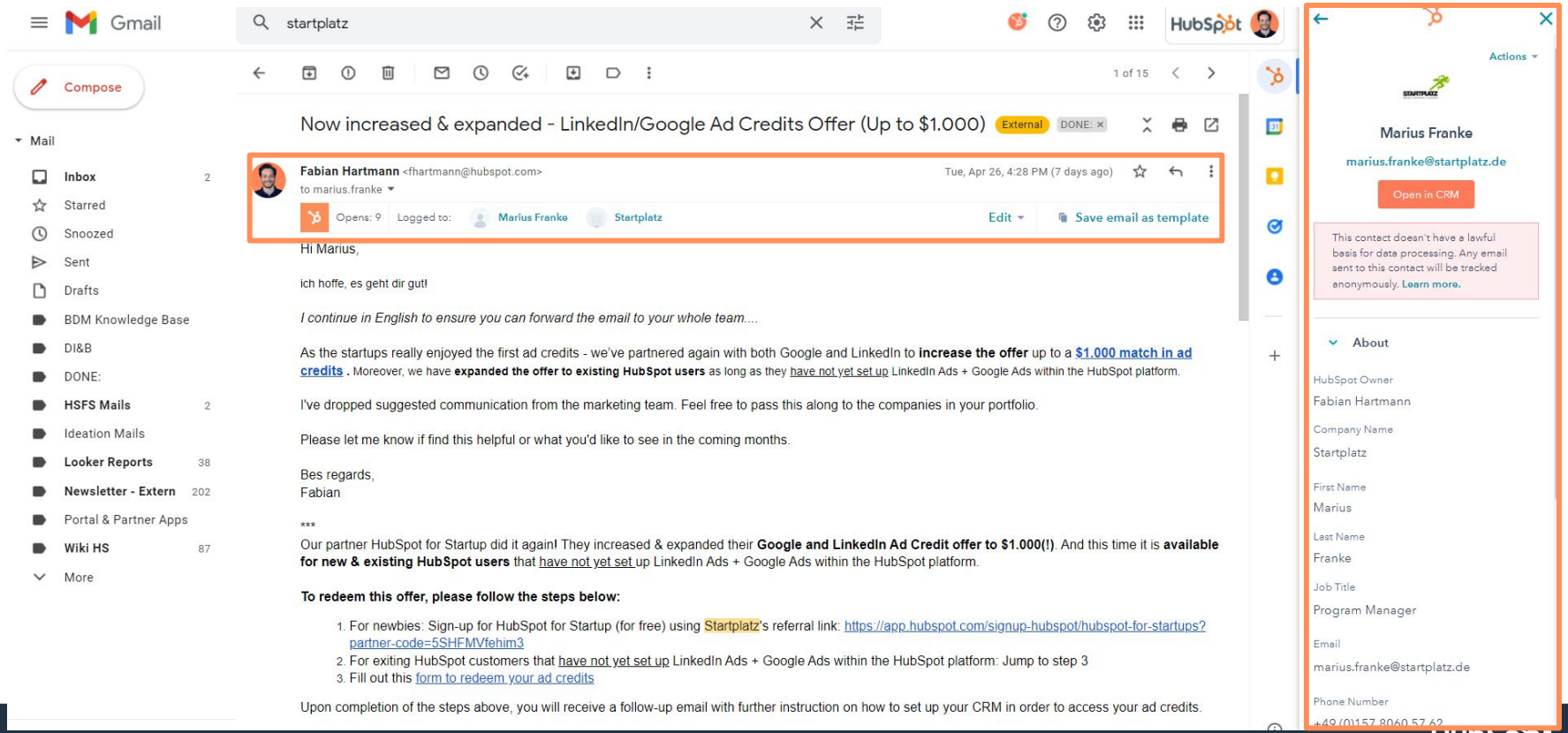
Start a free 14-day trial

Past imports

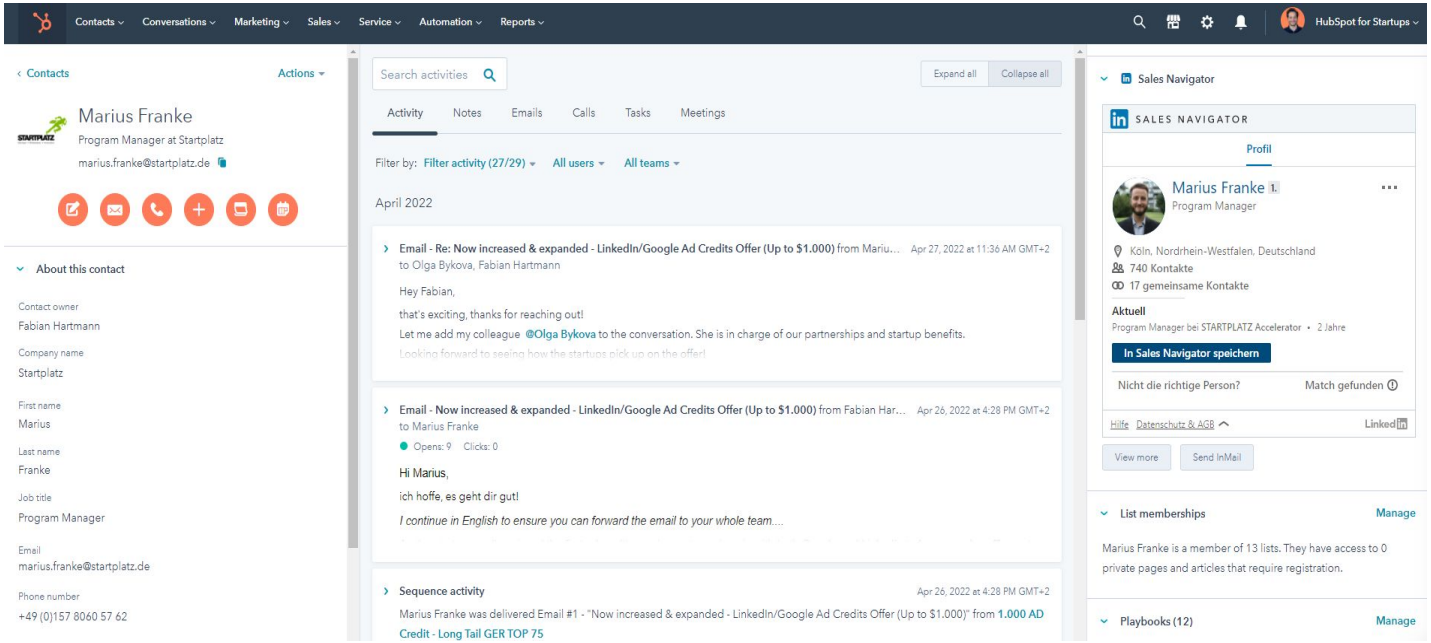
NAME	NEW RECORDS	UPDATED RECORDS	ERROR COUNT	SOURCE	USER	CREATED
MOCK_DATA (1) Contacts	500	-	0	File	Jose Martins jmartins@hubspot.com	10/15/2019 9:19 AM

Prev Next

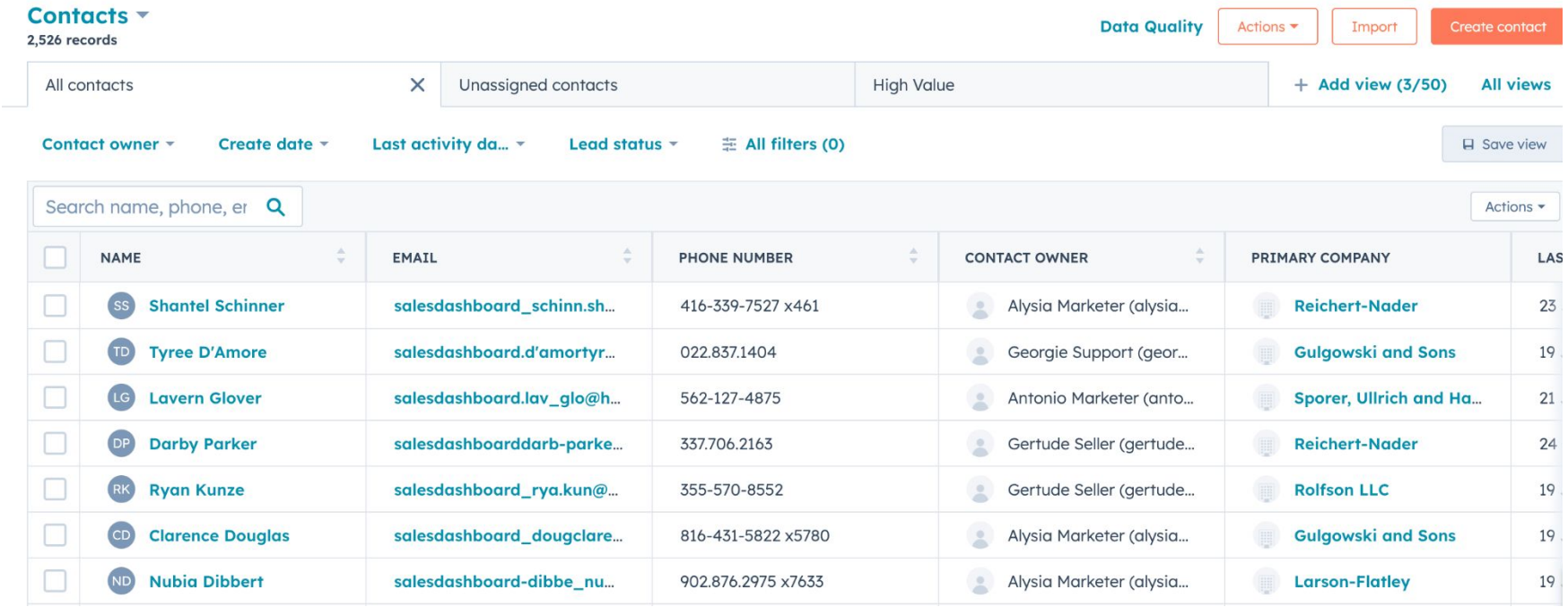
Connect team & individual emails to your CRM



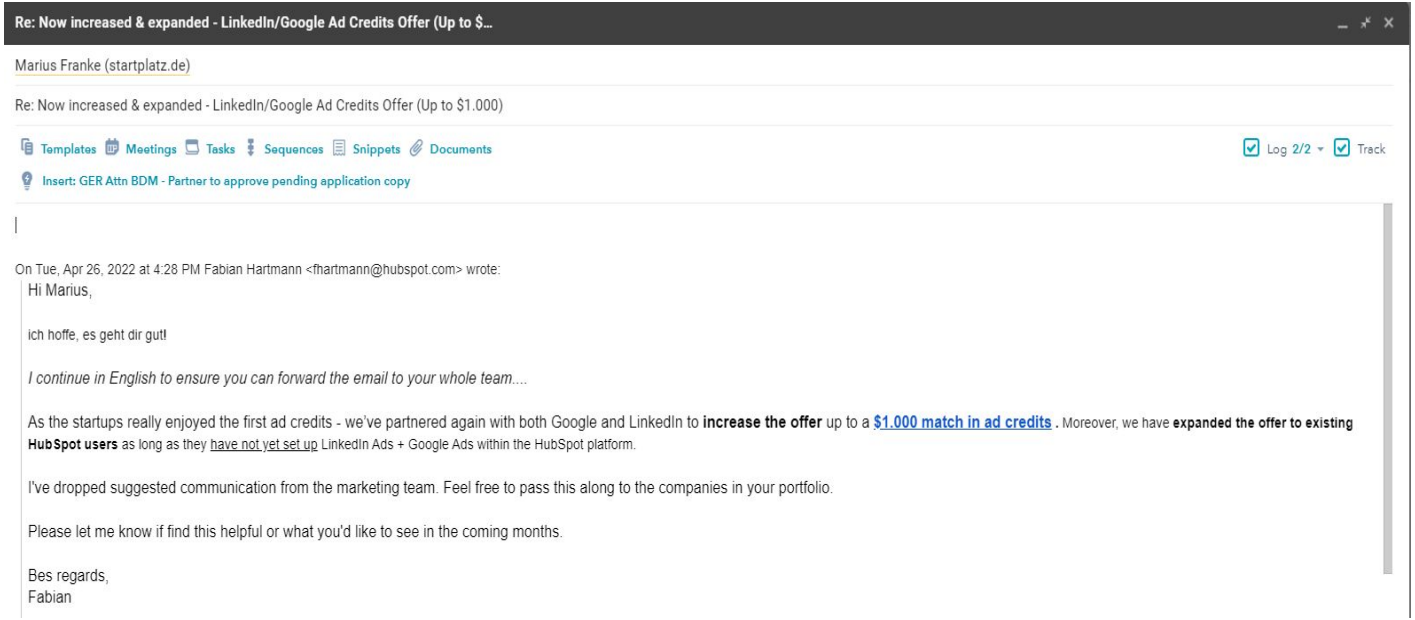
Now you're set to capture information and start working with your CRM



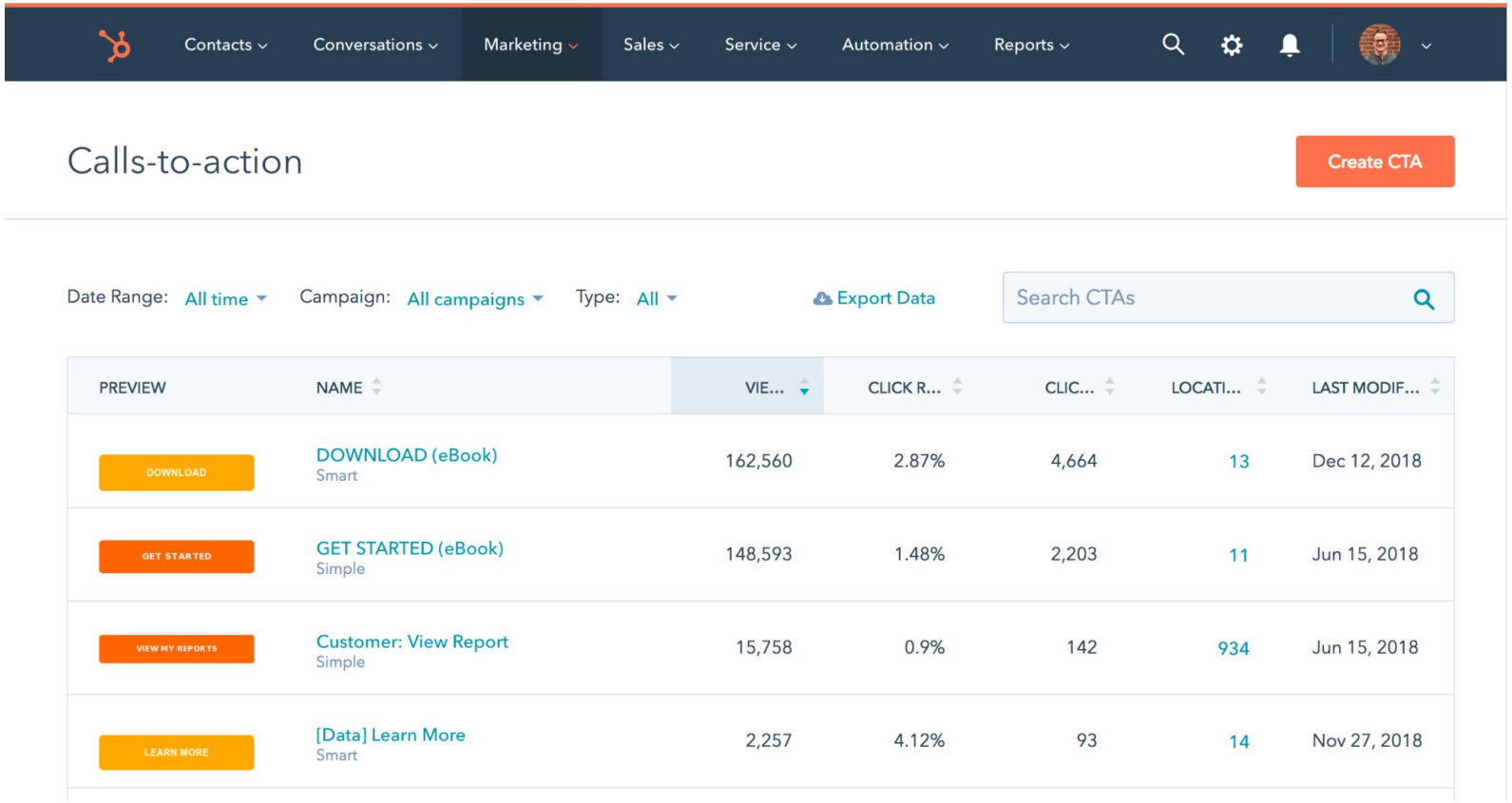
Set up filters you need regularly and save as views



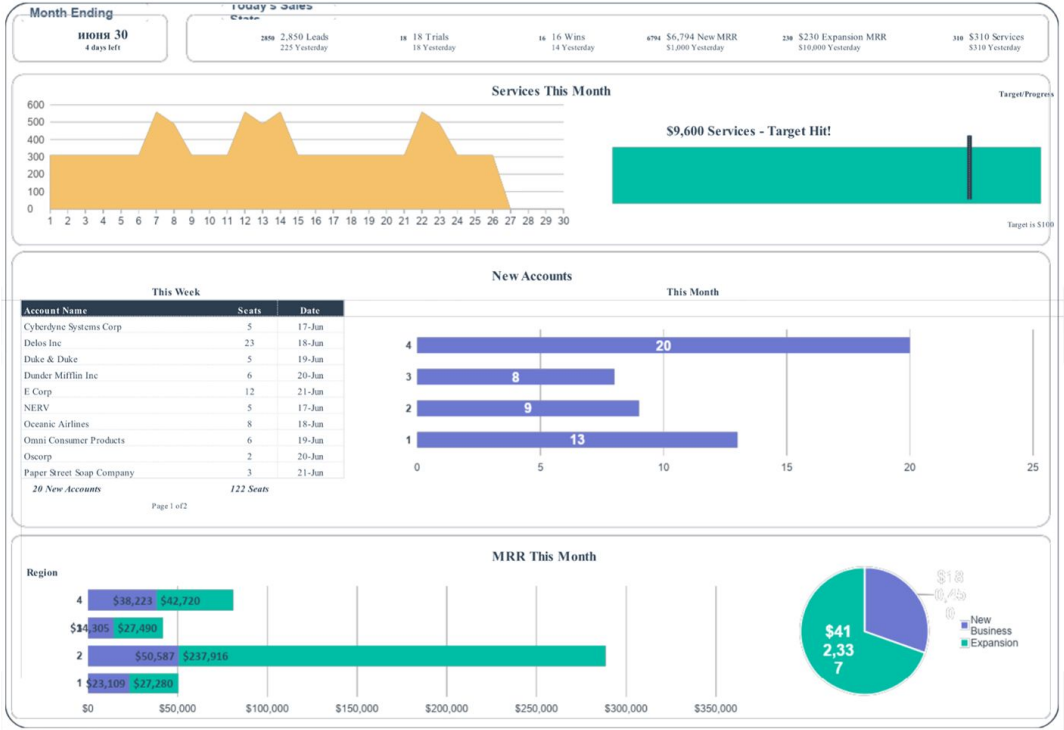
Set up 5 email templates and snippets that your team needs regularly



Build a standard CTA



Create a Summary Dashboard that updates monthly for you/your team



Data Quality

If you have already imported data into your CRM, check for quality regularly by reviewing:

- ✓ Flag incomplete contact information as tasks for account owners
- ✓ Set up syncs between Contacts → Companies & Vice Versa
- ✓ HubSpot automatically de-duplicates records for Pro+ plans
- ✓ Free text vs Drop down for properties
- ✓ Identify properties that are not being used/have no value assigned
- ✓ Set property validations (Numerical only or max 5 characters)
- ✓ Removing contacts that bounce

Properties to review

These properties might have one or multiple issues. Properties to review are added **everyday** at **1:00 AM**.

Search for a property | 1 issue | All Objects

NAME	ISSUE	OBJECT	PROPERTY UPDATED	UPDATE SOURCE	FILL RATE (%)	USED IN
WhatsApp Phone Number Single-line text	No data Unused	Contact	--	--	0%	0
What are you most excited to learn? Multi-line text	No data	Contact	--	--	0%	1
Upsell Score Number	No data Unused	Contact	--	--	0%	0
Upsell Opportunity Dropdown select	No data Unused	Company	--	--	0%	0
Type Radio select	No data Unused	Company	--	--	0%	0
Twitter bio Single-line text	No data Unused	Company	--	--	0%	0
Transaction Source Single-line text	No data Unused	Contact	--	--	0%	0
Time Known Single-line text	No data Unused	Contact	--	--	0%	0

Name 1607

Email

Filter by issue: All issues

- [ ] First and last name are the same
- [ ] First and last name may be combined
- [ ] Contains unexpected URL or domain
- [ ] Fewer characters than expected
- [ ] Missing or unexpected capitalization
- [ ] First and last name may be swapped
- [ ] Includes common placeholder text
- [ ] Contains text not commonly recognized as Name
- [ ] Unexpected spacing or punctuation
- [ ] Contains unexpected number

Today's Agenda

1. CRM Foundations
2. **Marketing, Sales & Service tools to leverage in your CRM**
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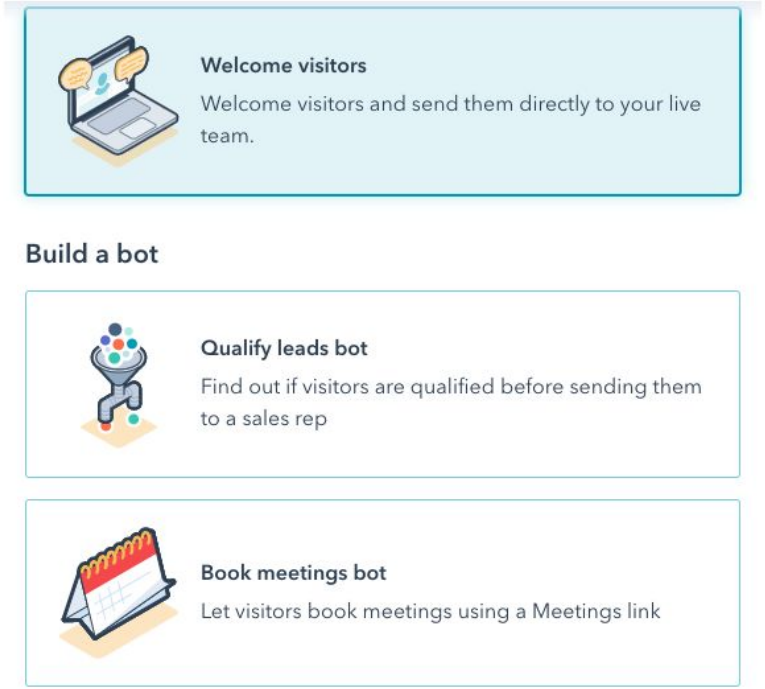
Free Marketing tools

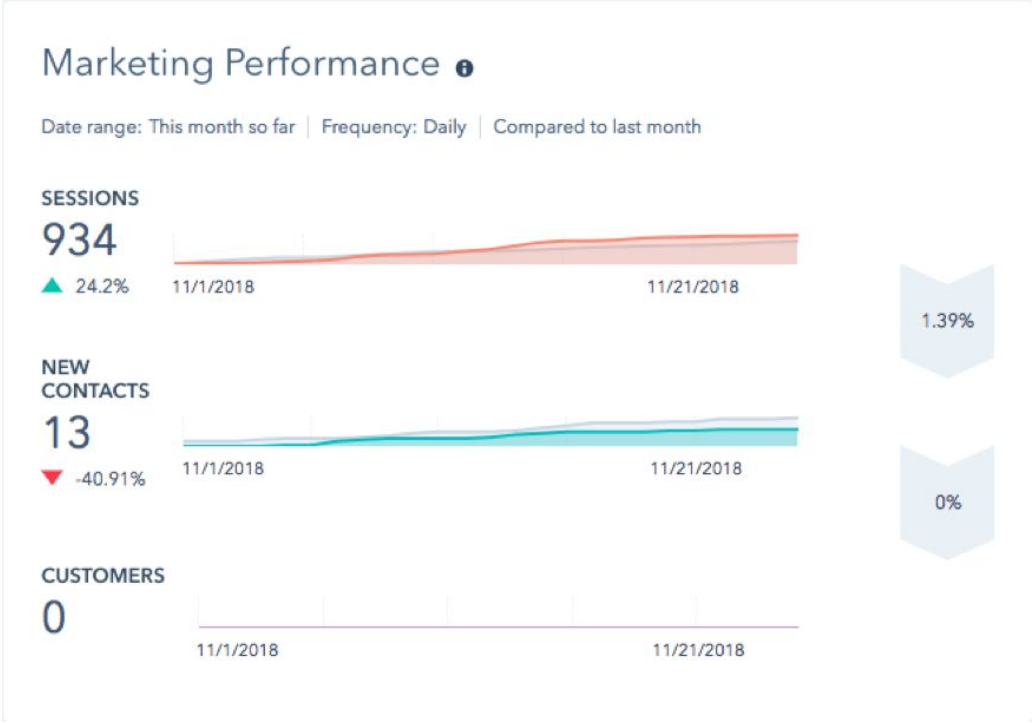
Attract & convert leads with live chat

Free chat bot to qualify leads, welcome visitors and direct prospects to a meeting page - if/then branch logic possible on starter tier & above.



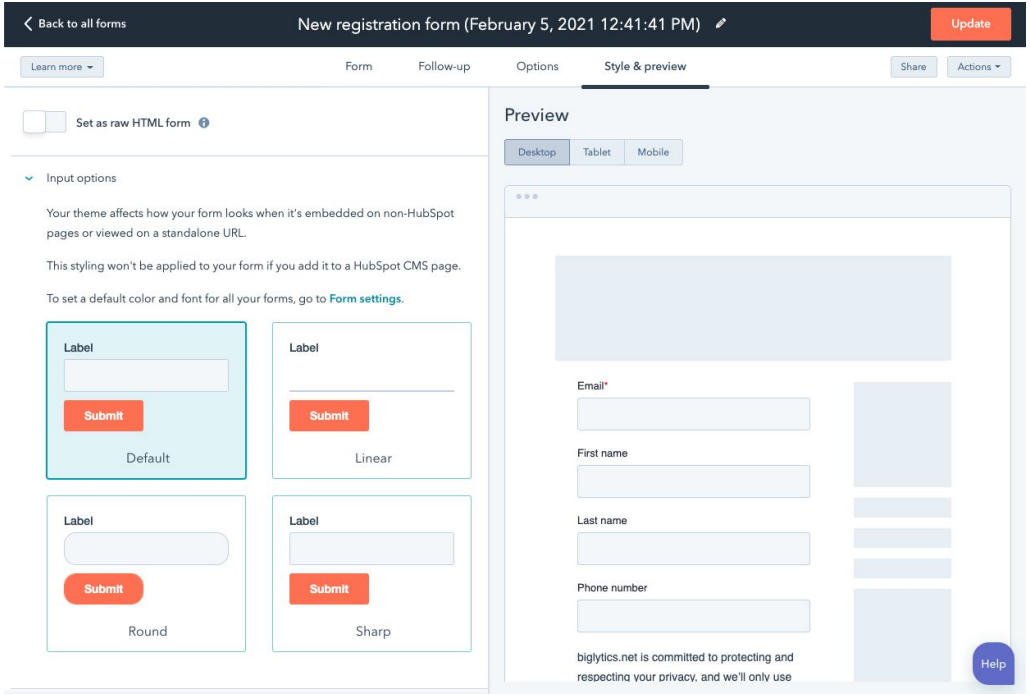
Report on Marketing ROI

Build one Marketing Dashboard with free tools to test your campaigns and see what's working with your audience



Leverage forms for lead capture

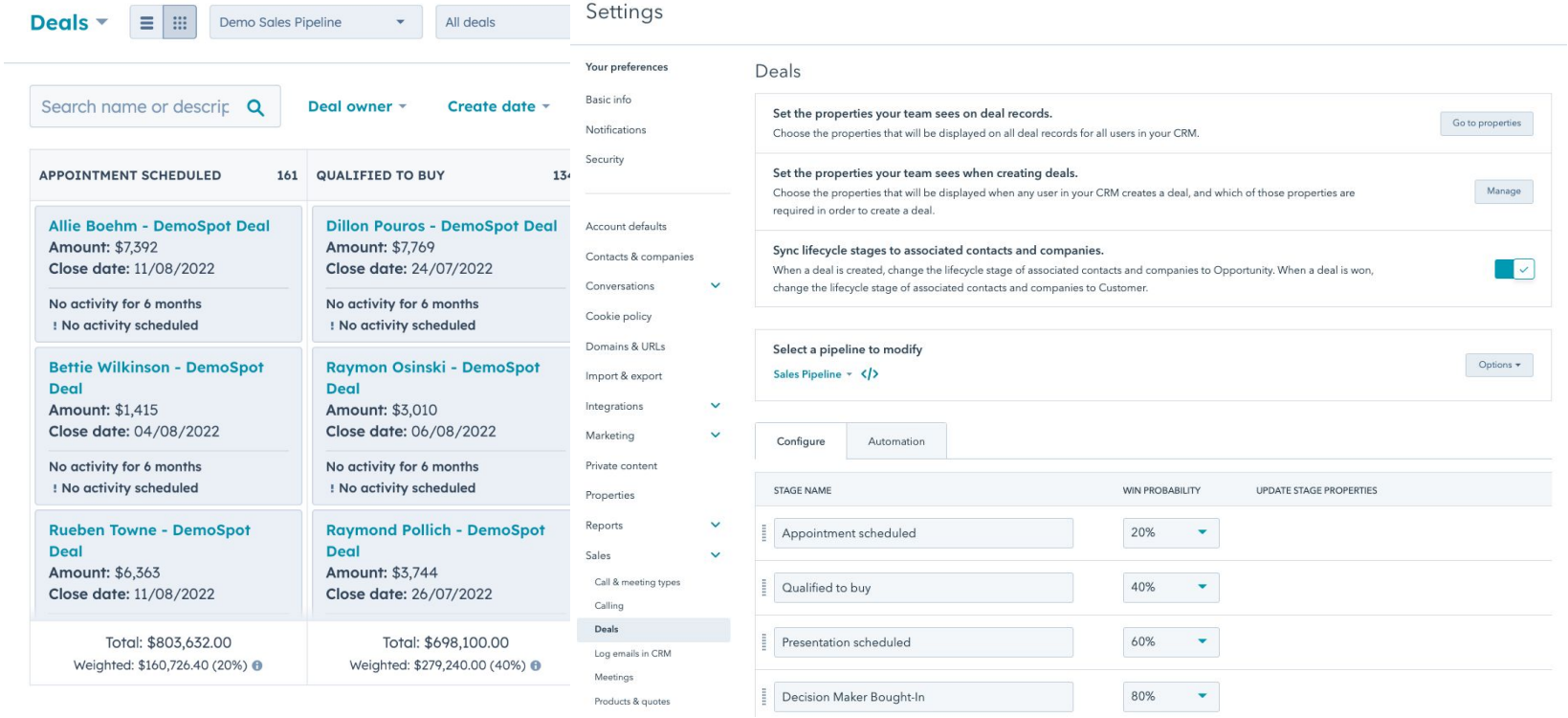
Capture valuable information on leads through forms, set them up in minutes and adapt forms based on the web page your prospects are visiting.



Free Sales tools

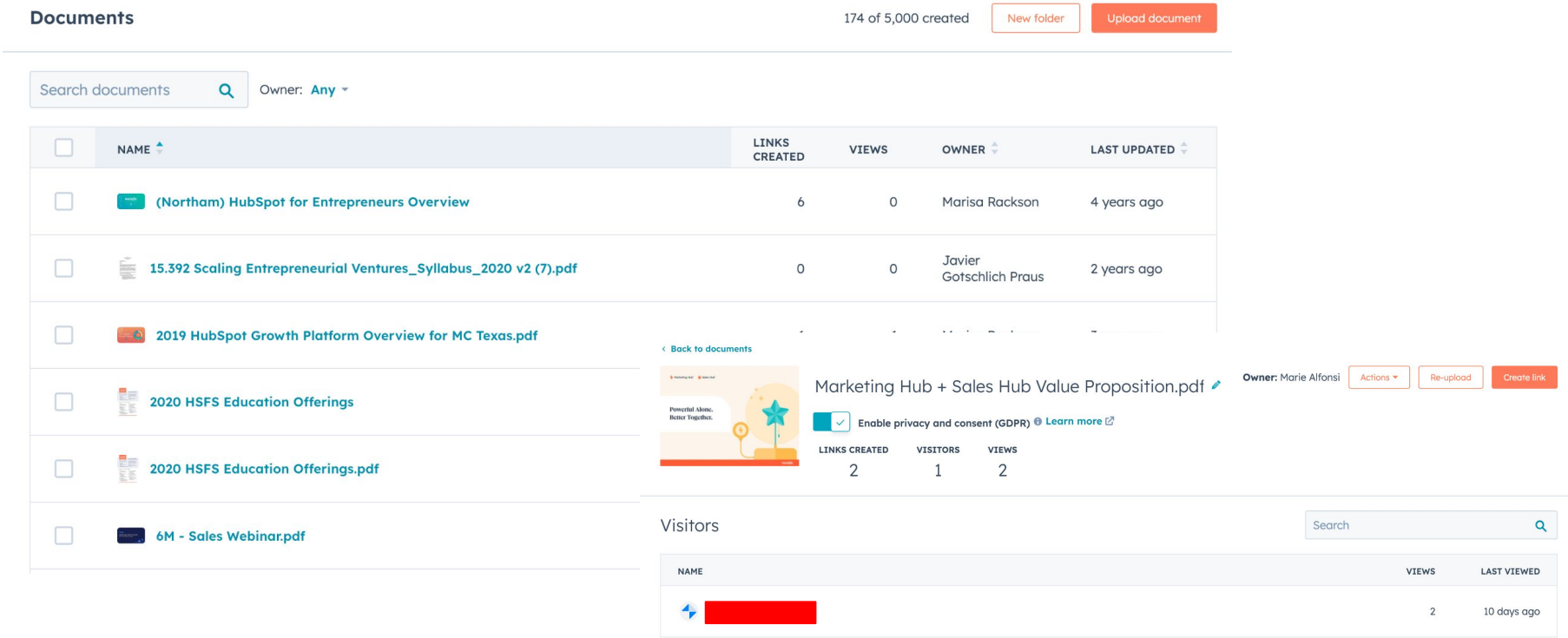
Pipeline Management

Customize your deal stages and win probability for your pipeline - update/change as often as you need to



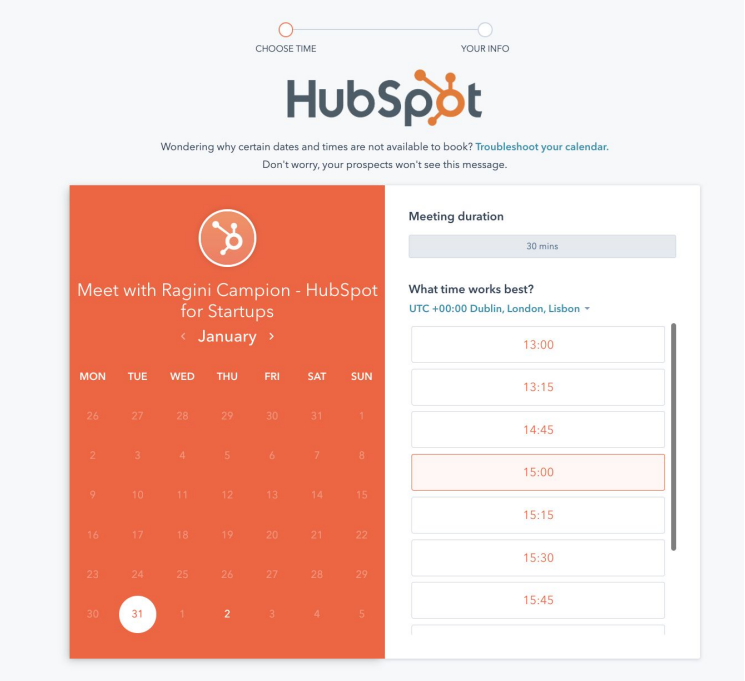
Documents

Build a library of resources and collateral that you can easily share with contacts.



Meetings tool

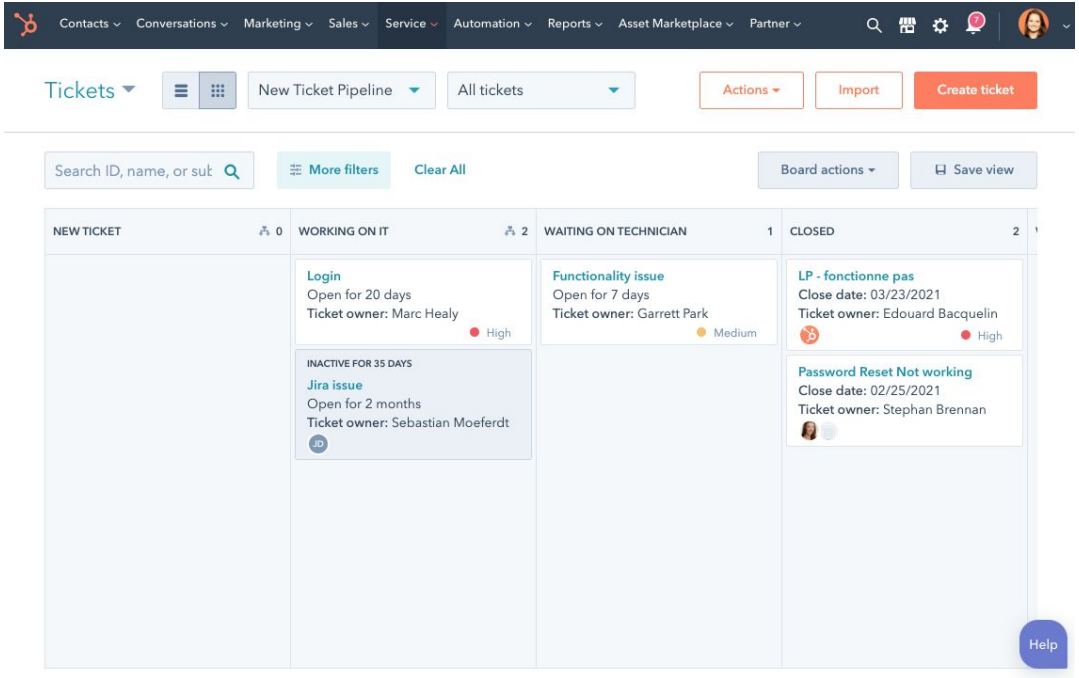
Leverage the powerful meetings tool to save time and let prospects book time directly with you



Free Service tools

Ticketing

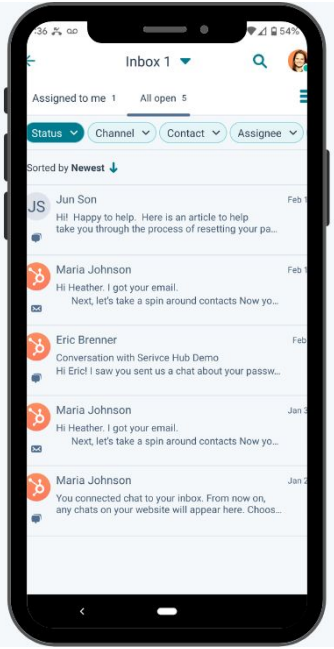
Keep track of customer service requests in one shared inbox. Organize your team, prioritize incoming requests, and optimize for more effective service. 93% of customers are likely to make repeat purchases with companies that offer excellent customer service.[1]



[1] HubSpot Research

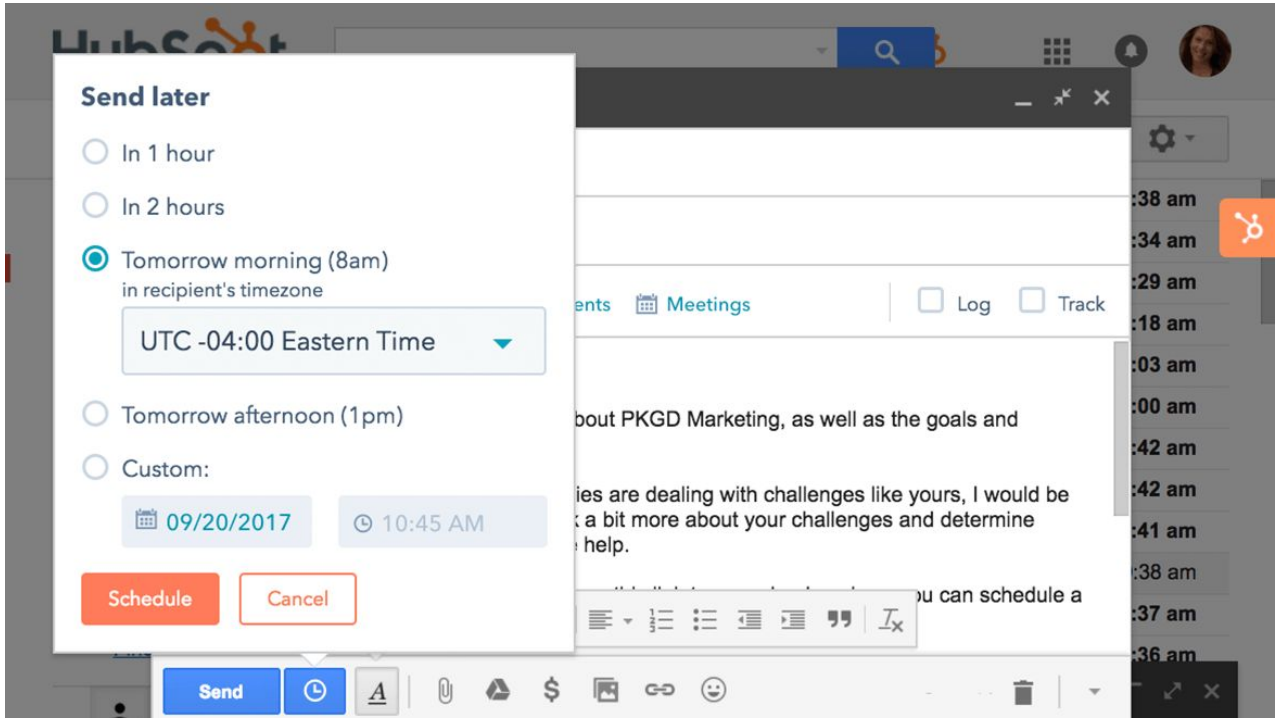
Mobile Inbox

The new 'Mobile Inbox' feature means support reps can now help customers on the go and respond rapidly through snippets or attach documents and knowledge base content.



1:1 Email Scheduling

Connect with your customers 1:1 at critical points - ahead of their renewal date or when a new product feature is made available to them and schedule the emails for the perfect send and receipt time.



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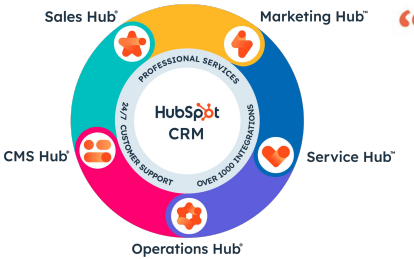
Minimize the friction from using point to point solutions

Our startup customers like Peakflo (2021 Singapore based SaaS company), reported a 400% increase in Sales efficiency after deciding to run their Marketing and Sales from the same platform to allow seamless integration. Identify the cost, friction points and assess which tools you can integrate and which ones you can replace with a platform solution.

You know that you should send an email newsletter...	email marketing tool.
You see ads everywhere, so you should try them too...	ads software.
You know that you need leads from your website...	Forms plugin, pop-up tools
Live chat is the next big thing, right? Let's try that too...	Live chat software
You have Facebook, but no way to engage buyers there...	Social media messaging bot.



"What we really find value in is the seamless handoff of leads and information between the marketing and sales teams. It helps the sales team contextualise the information to convert a lead and then pass on additional information to the marketing team for further engagement."

ADITYA
Regional Director of Business Development

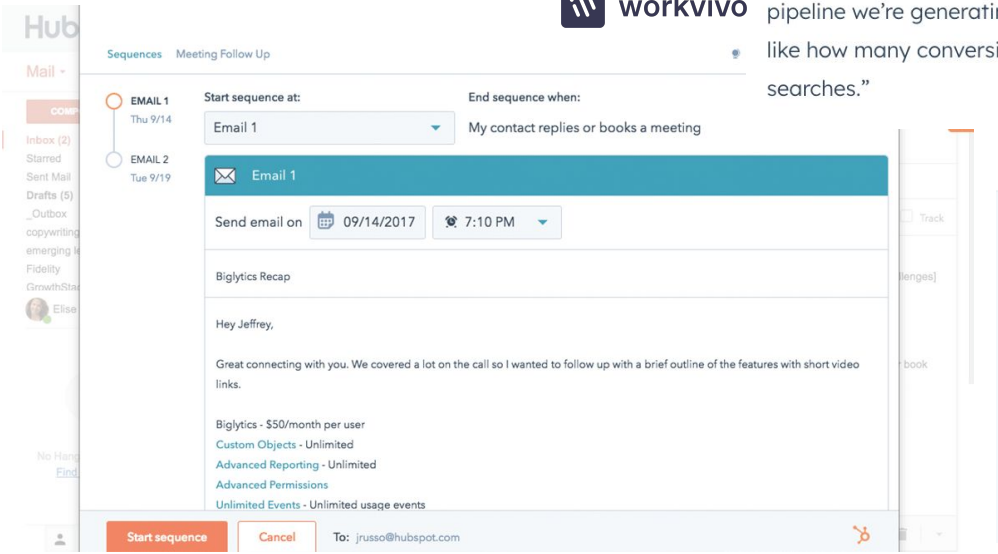
peakflo

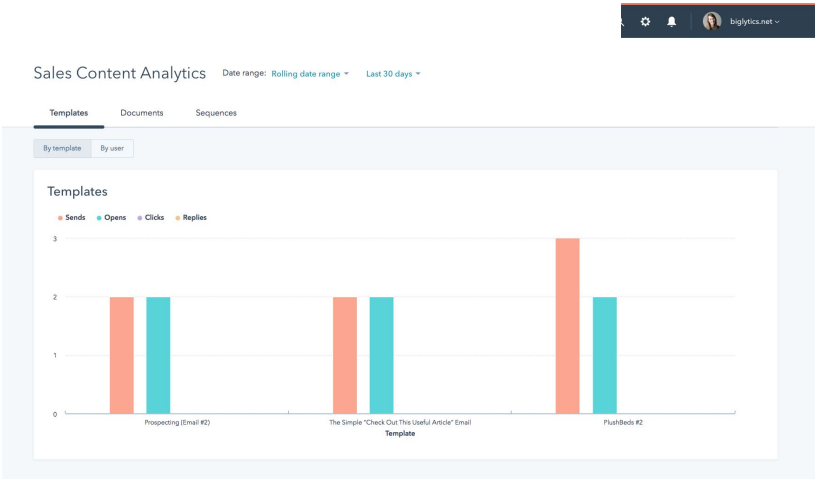
Consider implementing mini-pilots

When creating a new Sales outreach sequence or implementing a set of workflows to improve lead assignment, run a pilot with one or two people on your team or a subset of leads so you can assess impact. Similar to A/B testing!

workvivo

"I can see how much we're spending on Google Ads this quarter and how much pipeline we're generating off the back of that," says Barry. "We can also see things like how many conversions came from branded versus non-branded Google searches."





Encourage CRM-upskilling in your team

CRM platforms and features are improving all the time so it's good to keep your team up to date with training. Some CRMs need dedicated implementation teams but others have free online knowledge bases and certifications you can leverage like HubSpot Academy. As Startups scale, we also see 'Head of CRM' and 'CRM Manager' roles becoming more common.

Cost-effective ways to do this as a Startup

- Find free online courses and certifications such as those on HubSpot Academy
- Set up a Certification day where your team completes courses together
- Best practice sharing on how the team is using the CRM - new templates, workflows, custom properties
- Assign a CRM lead
- Choose a CRM that is easy-to-use!

+245%
Increase in HubSpot usage

+426%
Increase in lead generation

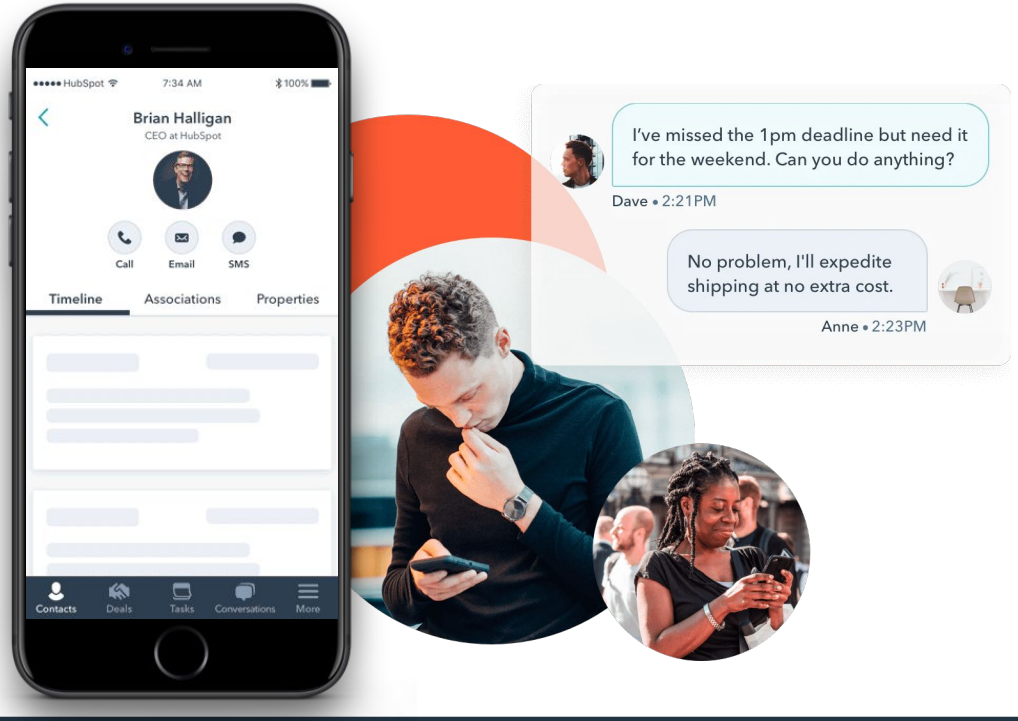
+39%
Increase in sales Q/Q

Note: Results after individuals complete a 4-week self-paced CRM Implementation Course

Enable your team to work from anywhere

Your team is meeting investors, prospects and customers in person, digitally and using hot-desks, taking calls from trains, airports - allow your team to work on the go with CRMs that have mobile functionality so nothing slips through the cracks.

- Quickly send sales assets in any app with the new HubSpot keyboard
- Close more deals with faster emailing and meeting outreach
- Understand who's calling you with a detailed caller ID screen
- Be on top of communications with live chat from anywhere



Leverage your first-party data

Advertisers are learning the importance of creating an online presence that covers the entire customer journey. This is a powerful way not only to generate a positive brand perception and increase awareness, but it's also the best strategy to collect first-party data, which is becoming essential for any future-proof marketing strategy.

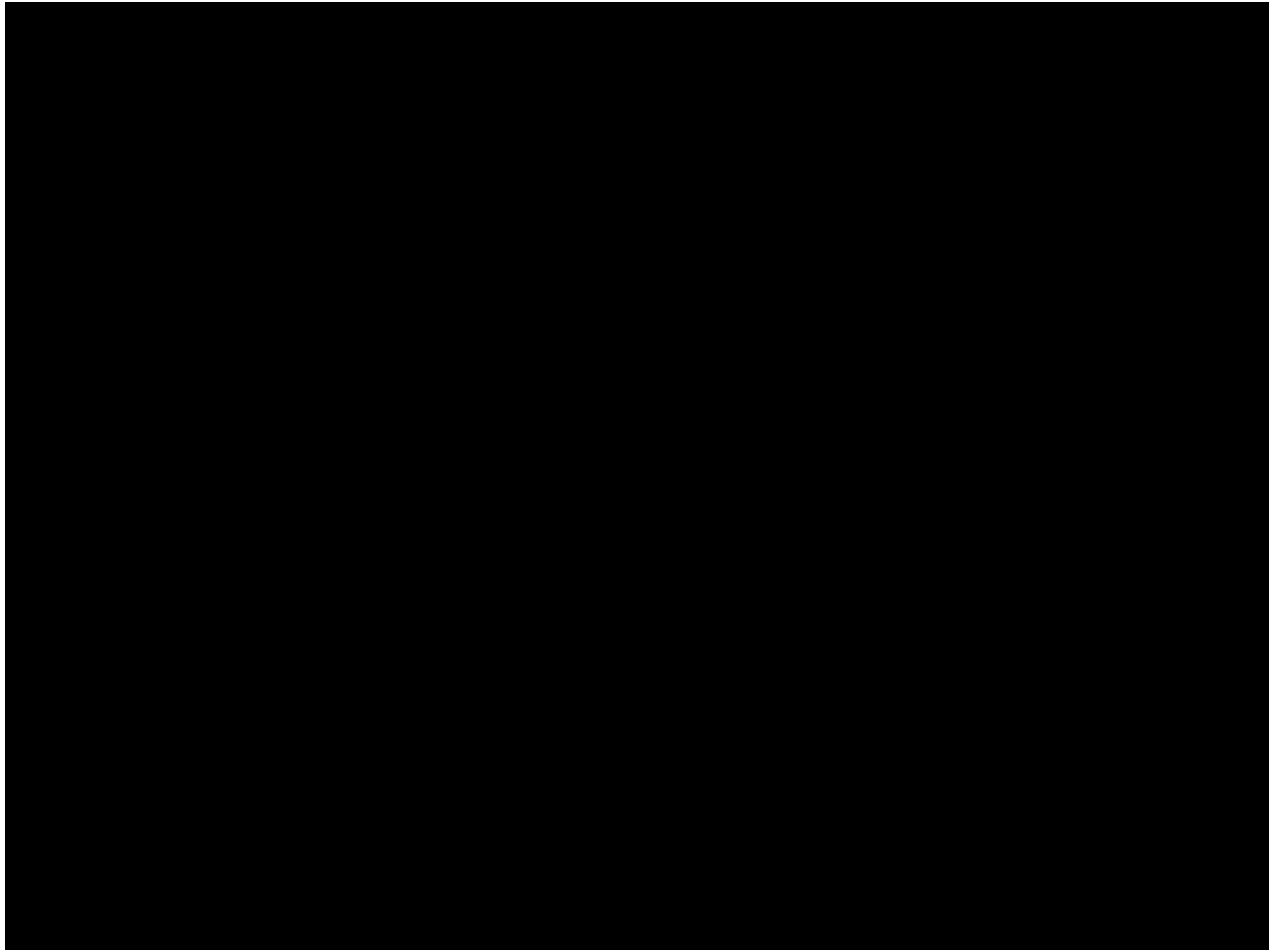
- **Create an owned channel with great content across the customer journey**
  You can no longer rely solely on "rented land" - PPC, SEO, Social Media
- **Privacy-oriented data collection strategy**
  Future proof your data collection by following privacy best practices and GDPR laws
- **Increase relevance**
  Your prospects/customers are more likely to engage when messaging is targeted, contextual and reads like you *know* them.

A key benefit of using HubSpot CRM was being able to sync data from the Make Influence app.
Rasmus says, "We turned every bit of data from our app into properties that we could import into HubSpot. Our developers used Operations Hub to build custom objects and create a complex structure that allowed us to sync info from both our business and influencer type of accounts."

With the custom integration, every member of the Make Influence team could leverage user data within the HubSpot platform.

"We work completely in HubSpot all day. It's so nice to have it all structured together. For us, data is king."

make influence



What we covered

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Q & A

Thank you