Definitive Guide to setting Up Hubspot Sales Hub

Abridged step-by-step guide for SME's

REVIO

Introduction to Hubspot Sales Hub

HubSpot Sales Hub needs to be setup and configured correctly so you can gain the most out of it.   It's not just a CRM database with Bells and Whistles - it's much, much more than that!

We've onboarded more than 75 companies with Hubspot sales Hub, so we know how to get the best out of Hubspot and can quickly tailor it for your business.

Setting Hubspot up in the correct logical order can also save you time.

The following guide takes you step-by-step through the technical setup, best practices, tips and tricks and gets your sales teams up and running using your customised sales pipeline.

Do you want to gain the full potential from HubSpot Sales?

STEP #1 Technical setup

Hubspot Technical setup checklist

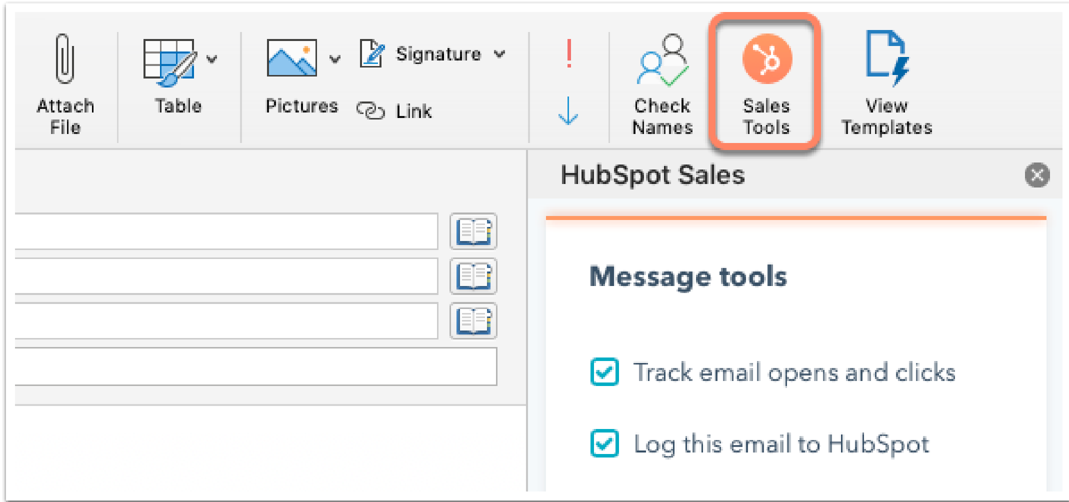
All these settings can be found in the Account setup screen by clicking on the 'cog' icon in the top right hand side of the Hubspot dashboard screen

1. Setup Account defaults - Branding, security settings, currency etc
2. Add Hubspot users and assign to your Sales Hub licences. Assign super admin users that require full access.
3. Install Javascript tracking code on your website. (If you are using wordpress, or other CMS systems, there are plugins that you can install to do this)
4. Connect your domain to Hubspot. This is only applicable if you are using Hubspot for your blog, landing pages or building your website.
5. Connect your emailing sending domain. This is a must to ensure reliable email deliverability and to whitelist email links when sending emails from Hubspot. It will involve creating CNAME DNS records for your domain.

STEP #2 Connect your Email Inbox to Hubspot

1. Go to the General and the Email tab.
2. Connect your personal or business email. You can choose from Office 365, Gmail or POP/IMAP email accounts.
3. Next install the Hubspot Sales add on.
4. Choose one of the following extensions for Gmail, Office365 or Outlook.

These Extensions work with your Email client to track email opens, log emails in your CRM automatically, and use email emplates from your inbox. This allows you to view Hubspot contact data from your Email client and track emails and log contacts into Hubspot from your Email client.



STEP #3 General Data Protection Regulation (GDPR) Setup

If you need to comply with EU regulations for data protection regulation, then you will need to enable GDPR tools in Hubspot.

1. First, goto 'Privacy & Consent' and enable GDPR tools.
2. Select the 'Consent Options' Tab
3. Edit and abbreviate the content sections for 'Legitimate interest', 'Privacy Policy and 'Consent to Communicate'. These GDPR content fields will show on enquiry forms and as the default text is very long, it looks very cumbersome so I advise shorteningto the following:

Legitimate interest
XXXXXXX requires your contact information to help assist you with further information about our services.

Privacy Policy
Read our Privacy Policy here.

Consent to communicate
I agree to receive communications from StartaDesign.

STEP #3 General Data Protection Regulation (GDPR) Setup...

Consent to process data

Explicit consent content

To provide you the content requested, we need to store and process your personal data. Please tick the checkbox below to confirm.

Implicit consent content

By clicking submit below, you consent to allow XXXX to store and process the personal information submitted above to provide you the content requested.

STEP #4 Connect Team Inboxes

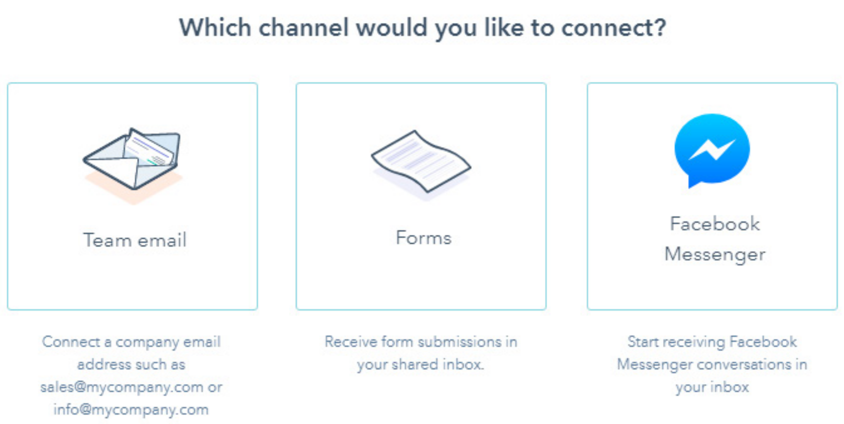
Here you can connect various channels to Hubspot allowing you to manage your communications in one place.

a. If you want a common team email connected to Hubspot, (eg. sales@company.com), you can connect it here.

b. You can receive form submissions into your shared inbox

c. You can also receive Facebook messenger conversations in your inbox.

d. Connect the live chat and chatbots here.



STEP #5 Define Your Sales Pipeline Steps

At this stage we dive into more detail and define the deal stages within your sales pipeline. You can use deal stages to categorise and track the progress of your ongoing deals in HubSpot. Each deal stage has an associated probability that indicates the likelihood of closing deals marked with that deal stage.

It's important to understand the lifecycle stage in Hubspot and what they mean before creating the deal stages. More information can be found here on lifecycle stages and their meaning.
https://knowledge.hubspot.com/contacts/use-lifecycle-stages

Converting your sales process into deal stages

Your deal stages should give a clear indication of how close a deal is to closing. When it comes time to forecast your monthly revenue, you want your deal stages to take away as much of the guesswork as possible. In order for this to work, every deal stage needs to have these three characteristics:

Factual - A step is factual if it's based on actual actions that have been taken rather than a feeling or intuition you or the buyer might have.

Inspectable - A step is inspectable if there's some sort of record that can be used to prove that the action has been taken.

Buyer-centric - Ultimately, it's the buyer's actions that will close the sale. The sales rep is just there to help. So as much as possible, base your deal stages on actions the buyer takes. (example: Buyer approved quotation')

STEP #5 Define Your Sales Pipeline Steps...

The first stage of the deal pipeline by default is called **'Appointment scheduled'.** This is when there is a clear opportunity and your prospects are ready to engage and discuss your products or services. To get to this point, you may have sent several sales emails, made several telephone calls and they will likely have engaged and viewed content on your website.

All businesses have different sales processes, so it's important to gather your sales staff together and outline your sales steps from sales opportunity to closing the deal.

When a contact/prospect is classed as an 'opportunity' (eg. when it's been pre-qualified with a phone call or has), it's good practice to create a deal. When you create a deal, the lifecycles tage is automatically changed to 'opportunity'.

I often use **'Pre-qualified Leads'** as the first deal stage and create a deal when certain conditions are met. For example, if the prospect has been contacted and deemed a right fit for your products or services, I would recommend creating a deal and positioning them into this 1st deal stage. They could also be entrered into the pipeline automatically- in this situation an automated workflow would create a deal when the propsect has filled in a sales form, or has reached a specific Hubspot score from engaging with your content (only applicable to Hubspot Sales Professional Edition)

Nows the time to automate where needed. You may want to send auto task reminders or send internal emails for back office tasks, when the deal reaches a specific deal stage.

STEP #5 Define Your Sales Pipeline Steps...

A typical Sales Pipeline may look like this:

STAGE NAME
Pre-QualifiedLeads
Meeting / Demo arranged
Quotation Sent
Client Approved Quote
Work Order / Invoice Sent
Closed won
Closed lost

STEP #6 Create Custom Fields

This should ideally be done before importing your data and creating your lead enquiry forms. If you are migrating from another CRM system, this is a good time to look at a sample data export files (xlsx files).

1. Define what information you want to capture - from lead enquiry forms or manually input.

   If you are importing contact and company data from another system, then look at what information/ fields you would like to use in Hubspot. If there is no built in Hubspot property, then create them.

2. Categorise this information into the relevant Hubspot objects: contact record, company record or deal record.

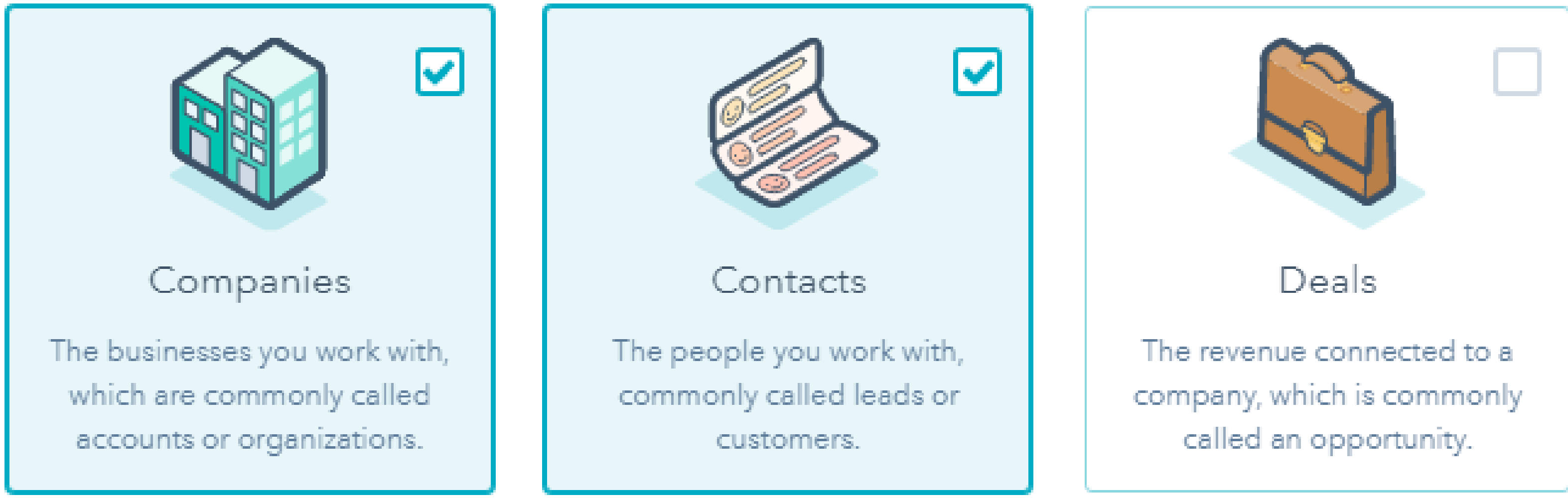
3. Create the custom contact properties in Hubspot in the relevant object.

STEP #7 Clean Data and Import Contacts, Companies & Deals

Next, prepare a sample import file of your data.

You can import multiple files at the same time. For example a contact file and a company file with associated data or one single file with data from multiple objects like contact and company data, seen in this example. You will be asked to map the columns to your Hubspoit fields. A list will automatically be created after the import, so you can view these contacts and easily bulk edit them.

* when importing companies, the website domain of a company (e.g., example.com) is required when



STEP #8 Create Lead Enquiry Forms

Now you can create your lead enquiry forms. (Although this is classed as a marketing task, this is includ-ed here as it's crucial to receicing leads into Hubspot. There are several types of forms; standard forms to embed on your website, popoup forms, slide in forms etc

Creating a form

1. First add all your fields. Mark the fields you would like to be mandatory
2. Add GDPR fields if required.
3. Next, select the follow up' tab and create a follow up email. This will also add a captcha to the form automatically. If you are using the professional edition, you can insterad create the followup emails from an automated workflow, and the captcha will not be required.
4. Next, set your options. Display a thankyou mesage or redirect to another page.

5. Next, style your form; lables, font sizes and buttons. Form styling is limited. I normally use smaller text for the GDPR text so it takes up less room. (font-size:11px works well)

6. If you want to custom style your forms, you can set the form as 'raw HTML form' (You will need the marketing professional edition for this functionality)

** You can also integrate with existing form technologiesusing 3rd party Hubspot apps from the market place or the Zapier platform.*

STEP #9 Define your lead status: How to use them, best practices and what not to do!

Lead status relates directly to the specific actions your sales team is taking when a contact is in the Sales Qualified Lead (SQL) lifecycle stage.   HubSpot has default options and you may decide to further customise these options based on your sales process.

I've audited and worked with numerous Hubspot accounts and come across over complicated processes and poorly implemented Hubspot systems. A few pointers for various scenarios on what not to do, and suggested solutions

Setting up and defining your lead statuses for an organisation is one of the most important tasks to get right and requires some thought.   Get the sales department and marketing team together and work as a team to define the lead statuses.   Before I recommend how to customise your lead statuses, here are a few guidelines, DO's and DONT's to get you started.

A. Don't Create More Lead Statuses than Necessary

Don't Abuse Lead Statuses. It's easy to get carried away and create too many lead statuses. Often this is the contact property that becomes the default for all situations. For example, on some occasions I have seen over 30 lead statuses.

STEP #9 Define your lead status: How to use them, best practices and what not to do....

B. Make the names Obvious. What's in a Name? (Lead Status name)
May sound like an obvious one, but I've seen some very generic and ambiguous lead statuses where people have even used acronyms as lead statuses. Ensure that the lead status names are obvious and easy to understand.

I propose changing the default lead statuses to something like this. This will create smarter better lead management in HubSpot CRM.

New (Inbox)
This is the Inbox that should be checked and cleared every day. No contact should live in this status for more than 3 business days.

Connect & Qualify (Actively Working)
This is the Connect & Qualify Queue. These are the prospects that are being actively researched. The Sales staff are currently attempting or are in contact with the prospect. The goal here is not to generate a sales opportunity, but to determine if there is an opportunity.

Open Deal
This status removes the lead from the Connect & Qualify Queue, and should reflect the current open deals.

STEP #9 Define your lead status: How to use them, best practices and what not to do....

Check Back Quarterly
There could be an opportunity here someday. Accounts with this status should be checked on each quarter.

Dead Opportunity
Accounts where a deal falls through, but could have happened should live in this section and "re-prospected" from time to time.

Bad Fit
For whatever reason, the prosppects are not a good fit for your business, so no need to keep on chasing. Don't waste time onthese prospects – maybe add them to a email sequence as a final good bye.

Current Customer
This is to avoid accidentally working on current customers

Read the full article on Lead Status here >

STEP#10 Create Filters / Views

Hubspot filters allow you to quickly view a segment of your database right from the contacts, companies, deals, or tickets dashboard.

You can use any default or custom property in your HubSpot account to segment your contacts using saved filters.

Contacts will be added or removed from saved filters automatically based on whether or not they currently meet the criteria you've set.

These are some of the most common filter examples that we have come across when dealing with Hubspot clients. Click here to view 15 Useful Hubspot Filters >

https://f.hubspotusercontent40.net/hubfs/4601842/Hubspot%20Guides/15%20Useful%20Hubspot%20Filters.pdf

STEP#11 Create Your Sales Email Templates

Now it's time to write your Sales Emails: followup emails ,chase emails, setup meeting etc

1. Think about the different scenarios and communications required for the steps from enquiry to closed sale.

2. Look at your existing sales emails and use these as a starting point.

3. Use the Hubspot template library for ideas and tailor them to your needs.

4. Ensure to personalise your emails with first name, and any other relevant information.

5. Make sure you add your meeting link and any other links to appropriate pages, brochures, website pages.

STEP#12 Create Email Sequences for Automation

Close more leads with sequences and workflows while your prospects get nurtured automatically.

Sequences are used to:

1. Personalise and tailor your automated sales emails.
2. Save your sales emails from becoming impersonal.
3. Use personalsation tokens to tailor your sequence emails with contact and company context from HubSpot CRM. Then add specific details to each message to connect with your prospects like only a human can.
4. Increase your response rates by creating manual email steps that let you write details before automation continues.

STEP#12 Create Email Sequences for Automation...

1. Goto Automation on the top menu and select 'Sequences'. (You will need to be assigned a sales professional license to see this option)

2. Create your sequences. I recommend using the built in sequence templates to get started.

3. Edit the emails in the sequence and set Follow up, Todo and Call tasks, and set the delays inbetween the emails.

4. Try to include questions in the email to illicit a response and a reply. Make sure you include a call to action and your meeting link in the emails.

* If a contact replies or books a meeting from any of these emails, the contact will be removed from the sequence.

STEP#13 Perform an End-to-End Test from Enquiry to Closed Deal

Now it's time to test your Hubspot configuration, automated workflows, email sequences and sales pipeline automations.

Create a test contact and move your contact through the pipeline and check that you are happy with your whole sales process.

Check for any errors in your automated workflows.

STEP#14 Update Your Contact Record & Deal Record View

One of the ways to make your contact and Deal view more effective is to update the contact and Deal properties you see in the "About this Section." HubSpot provides a default view for you, but you know what matters to your company the most.

You can easily update this by going into your settings and setting the properties your team sees on contact records and Deal Records.

STEP#15 Setup Your Sales Reports & Dashboard

Coming Soon...

Optional Tasks and Help Guides

These are optional but recommended before rolling out Hubspot to your Sales team members.

1. Define you Buyer / User personas and define scenarios.

2. Map you Sales content, revise your Email templates based on the Buyer personas.

3. Define then stages of your Sales and Marketing Funnel, lead qualification beween Marketing and Sales.

Help Guides:

How to Define the Stages of Your Sales & Marketing Funnel
https://f.hubspotusercontent40.net/hubfs/4601842/Hubspot%20Guides/How%20to%20Define%20the%20Stages%20of%20Your%20Sales%20&%20Marketing%20Funnel.pdf

Marketing Automation Guide
https://f.hubspotusercontent40.net/hubfs/4601842/Hubspot%20Guides/StartaDesign-Marketing-Automation-Guide.pdf

Hubspot Sales Enablement Process Steps
https://f.hubspotusercontent40.net/hubfs/4601842/Hubspot%20Guides/Hubspot%20Sales%20Enablement%20Process%20Steps.pdf

Need assistance with Hubspot Sales Hub

Contact our experienced Hubspot consultants and get help with setting up Hubspot the right way.

Arrange a Call

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Hubspot Certified Specialists