# HubSpot CRM and Sales Tools Guide



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## 1.0 Introduction

Hello there! This document is designed to give you an overview of the HubSpot CRM and HubSpot Sales tools - tools that you at your business may be considering moving to in the future or have already decided to implement. You may also simply be curious as to what these solutions can offer, and how they can be leveraged. Either way, this brief guide will give you insights and instructions on using and understanding the HubSpot CRM and Sales tools solutions.



Just in case you're unfamiliar with the acronym, CRM stands for **Customer Relationship Management**, and businesses utilize CRM platforms to manage and analyze customer interactions/data with the end goal of improving business relationships with customers and driving growth.

**Note:** This document is written from the perspective of a team member who functions as an administrator, meaning that they receive more permissions and can edit various items that other users will not have permission to edit.

# 1.1 Getting Started

Once you've gotten the HubSpot CRM platform, the best way to get the ball rolling is to add any sales team users and set up various user permissions.

Navigate to the **Settings** tab, which is the farthest tab to the right on the navigation menu at the top of the screen. Next, look for the **Settings > Team** option on the left hand side of the page. Clicking the **Invite and Manage Users** button will bring you to the page in which you can change user permissions as well as add users. See screenshots below.

Settings		
Contacte		
Companies	Team	
Deals		
Team	Need to make some changes?	
Import & Export	Add, edit, and remove team members. Adjust portal-wide permissions.	Invite and manage users
Configuration		
Notifications	Read more: How do I add users to the CRM?	
Gmail and Outlook		
Sales Extension		
Mobile Apps		
Profile		
Payments/Billing		

Settings			
My Profile	Sales Pro Management		
Products & Add-ons	User Management		Add Salesforce users Add user
ther admin tools	Edit permissions	All roles	Q Search

# 1.2 User Roles

You might be wondering the **differences between user permissions** in HubSpot CRM: Here's a quick reference for each user role and the set of various permissions direct from HubSpot.

- Administrator: can access all parts of the HubSpot sales tools, add and remove other sales users, delete records, and set portal default properties
- **Manager:** can access all parts of the HubSpot sales tools, delete records, and set portal default properties.
- User: can access all the HubSpot Sales Tools and delete records, but cannot set portal default properties.

#### 1.3 Advanced Permissions

For each user, admins will be able to set the following permissions:

- CRM Features (Access to Companies, Deals, and Tasks, as well as CRM mobile app): Enabled, Disabled
- View: Everything, Owned and Unassigned only, Owned only
- Edit: Everything, Owned and Unassigned only, Owned only
- Bulk Delete: Enabled, Disabled
- Import: Enabled, Disabled
- **Export:** Enabled, Disabled
- Edit Property Settings: Enabled, Disabled

These permissions can be mixed and matched on a per-user basis to make the configuration that works best for a specific team. Users can also separate view and edit permissions. For example, a manager might let their reps see everything, but only edit the records they own.

#### 1.4 HubSpot Sales Extension

We want to confirm that the sales extension is installed for use in Google Chrome. This powerful extension allows the HubSpot CRM to harvest many types of information from both websites while prospecting and even various emails in gmail or outlook. First, install the sales extension from the <u>Chrome Web Store</u>. Following installation, you want to make sure that two specific selection buttons are checked to the "on" setting. In **Settings**, navigate to the **Sales Extension** menu tab. Both "Contact profiles on the web" and "contact profiles in gmail" should be checked in the on position. Feel free to consult the screenshot below.

汝 Sales 👻	Dashboard	Contacts C	companies	Deals	Tasks	Sales Tools -	Settings		Search		(•)		Hub ID: 166694
S	Settings												
c	ontacts ompanies	ŝ	Sales Ex	tensior									
D	eals eam	(	Contact Pro	ofiles									
In C	nport & Export		<b>~ )</b>	Contact	profiles or	n the web							
N	otifications mail and Outlool	k		Get conta more.	ct profiles (	on any web page to	discover conta	cts, related compa	inies, and add lead	s to your CRM i	n seconds.	Learn	
S	ales Extension Iobile Apps		<ul> <li>•••</li> </ul>	Get conta	orofiles in ct profiles i	Gmail in Gmail and discov	er detailed cont	act information and	d add contacts to y	our CRM in sec	conds.		
P	rofile Payments/Billing												

The sales extension can save reps' valuable time in data entry and updating contact records by **pulling information directly from emails or websites** - simply look for the side panel on the right of Gmail or the **sprocket logo** that pops up in the top right corner when browsing prospective websites.

In the screenshot below, Notice the HubSpot Sales extension (right side) pulling contact information directly from an email that was received.



In addition, the extension allows us to add email templates to the CRM directly from your email client. For example, if you've written a *great* email to a lead or prospect, you can easily add it to the CRM by clicking the orange "+" button within your inbox. Save time and effort by utilizing the email extension!

#### 1.5 Other Settings

Before diving into the platform, there is a few other settings that we recommend should be configured while in the **Settings** menu.

First, check the **Configuration** tab to ensure these items are filled in. Each of these should have been automatically populated.

Second, configure your email client for HubSpot sales to allow for powerful email tracking and logging in the CRM by following the 5 steps given. HubSpot CRM will guide you through these steps, and when you're finished, this menu tab should look like the screenshot on the following page.

#### Settings

Contacts	
Companies	Gmail and Outlook
Deals	
Team	Your authorized accounts
Import & Export	When enabled, HubSpot will automatically sync your email interactions with these accounts.
Configuration	G pbuono@newbreedmarketing.com
Notifications	
Gmail and Outlook	How to disconnect an authorized account.
Sales Extension	
Mobile Apps	Connect an account
Profile	$\sim$
Payments/Billing	$\checkmark$
19	You're all set up.
	You're ready to start using HubSpot CRM in your email inbox.
	+ Add additional email account Step 5 of 5
	Q

Lastly, HubSpot offers mobile apps for use while on the move. We're often asked, "why would I want a mobile app, exactly?" Great question!

The HubSpot mobile app, which is currently only available for iOS (sorry Android fans) allows reps to work remotely with ease from their phone, and is great for finding contacts when away from the computer or laptop. It even has a nice user interface that is quite similar to the desktop version! The app can be downloaded to an iPhone from the app store.

#### 1.6 Free Versus Paid Versions

HubSpot CRM, like many solutions today, offers both free and paid versions of their platform. The Free version is referred to as "HubSpot Sales Free" while the paid version is called "HubSpot Sales Professional". The free version has many useful features, but as one might expect, the paid version offers significantly more tools that can streamline the sales process even further. In fact, the entire **Sales Tools** drop down menu is only usable by HubSpot Sales Professional users (the

#### 2.0 Dashboard



Now that we've gotten things set up and ready to go, it's time to truly dive into HubSpot CRM and Sales Tools. This document is ordered in a such a way that it follows the same order that the top menu navigation tabs of HubSpot CRM do.

As such, we'll start with the **dashboard**. This easy-to-read screen has quick insights into various sales activities that are occurring within your organization. The dashboard has a **Deal Forecast** panel, a **Productivity** panel, a **Pipeline** panel, and a **Recent Activity** timeline. In this section, Each of these panels will have a brief description and a screenshot of what it looks like.



#### 2.1 Dashboard Panels

The **deal forecast panel** shows a weighted total and breakdown by deal stage. It also includes a quota as well as percentages for each deal stage.

			Lt.	All 👻	1111	This month
• \$221,131						
				we \$68	ібнті 6,6	ed total 24.46
\$104K	\$177K	\$24	.1K \$63.4K	\$25K		
FINAL PROPOSAL 70%	PROPOSAL DELIVERED 50%	D M B IN	OPEN - ON HOLD 25%	CL - ON H 10%		
	<ul> <li>\$221,131</li> <li>\$104K</li> <li>FINAL PROPOSAL</li> <li>70%</li> </ul>	\$221,131           \$104K         \$177K           FINAL PROPOSAL         PROPOSAL DELIVERED           70%         50%	<ul> <li>\$221,131</li> <li>\$24</li> <li>\$104K</li> <li>\$177K</li> <li>FINAL PROPOSAL</li> <li>PROPOSAL DELIVERED</li> <li>D</li> <li>50%</li> <li>M</li> <li>B</li> <li>IN</li> </ul>	\$221,131         \$104K       \$177K         \$104K       \$177K         \$63.4K         FINAL PROPOSAL       PROPOSAL DELIVERED         70%       50%         B       25%         IN	• \$221,131 WE \$68 \$104K \$177K \$25K \$104K \$177K \$63.4K FINAL PROPOSAL DELIVERED D OPEN - ON CL 70% D OPEN - ON CL M HOLD - ON B 25% H IN 10%	• \$221,131 WEIGHTE \$686,6 \$104K \$177K \$25K \$104K \$177K \$63.4K FINAL PROPOSAL PROPOSAL DELIVERED 70% \$0% D OPEN - ON CL M HOLD - ON B 25% H IN 10%

The **productivity panel** shows valuable items such as Calls Placed, Emails Sent, Meetings Held, and Tasks Completed, while comparing them to previously calculated benchmarks. Clicking on any of the aforementioned items brings the viewer an expansive look into each item. For example, if you click on "calls placed", you are given a drill-down into exactly who has been making calls, who received the call, the call date, and even notes that each rep can log during/after the call.

Productivity				
🕼 CALLS I	PLACED	EMAILS SENT	MEETINGS HELD	© TASKS COMPLETED
52 -	80%	306 - 66%	147 - 42%	401 - 20%
Date	✓ Ass	ociated with	Owner	Notes
09/12/2016	-Q	Chris Harrington	Cory Albert	no answer
09/08/2016		Ben Nooney	Ben Tacka	
09/08/2016		Carolyn Cheng	Taylor Clark	Spoke with Carolyn and MaribelCall Mood: A -
09/08/2016		Chantelle Marchionda	Ben Tacka	
09/07/2016		Scott Taylor	Cory Albert	not interested
09/07/2016		Chantelle Marchionda	Ben Tacka	Need a reference for moving forward.
09/07/2016	0	Shawn Rosenberger	Cory Albert	voicemail

The **pipeline panel** shows a left-to-right breakdown of how many contacts are turning into deals, with percentage comparisons to previous stats (yep, just like the productivity panel). This particular panel shows how many contacts are assigned to specific reps, **if contacts have been contacted, the number of deals created, and the number of deals won.** Again, similar to the productivity panel, clicking on one of the 4 items gives the viewer a breakdown of each item. Below, the screenshot shows the "contacted" breakdown.

Pipeline					
* assigned 518 - 44%	*	0NTACTED 3 - 50%	® deals c 35 <del>+</del> 9	58%	® deals won 14
Date 👻	Associated with			Owner	Туре
09/29/2016	joan shappard			O'Keefe Foster	Meeting
09/27/2016	G New Breed - Benio	ff		Taylor Forest	Meeting
09/27/2016	Melissa Andrews			Andrew DuPrat	Meeting
09/26/2016	😂 Lynn Herman			Patrick SQL Pending Acc	e Meeting
09/26/2016	Jonathan Burg			Chelsea Camarata	Meeting
09/23/2016	Ben Nooney			Ben Tacka	Meeting
09/23/2016	G New Breed - Living	Room		Spencer March	Meeting

In case you were wondering, the contacted breakdown does indeed factor in meetings that have not yet happened. Whenever a meeting is scheduled, the CRM logs that activity, even if it is in the future.

Finally, on the right side of the dashboard, there is a Twitter-like **recent activity timeline**. This timeline shows anyone who comes to the HubSpot CRM dashboard what the reps have been doing within the CRM. You can see emails that reps sent (with a preview of the text!) and what calls have been made. Clicking on the "view" button will expand each activity for examination in further detail. Below's example shows a few emails that one of our reps, Ben, was sending out.



#### 2.2 Filters

At the beginning of this section, you may have noticed that there are two dropdown menus at the top right corner of the sales dashboard. These menus are - you guessed it - filters! These filters allow users to customize date ranges for insights and even to drill-down by sales rep or employee. Drilling down by employee can give quick and easy insight into which reps are your best and how you can improve those who are falling behind in the sales process.



The filters apply to all three panels and can be leveraged in many ways to understand how the sales process is going. Filters will not change the recent activity timeline, however, which will remain updating itself based on rep activity.

## 3.0 Contacts

To begin this segment about **Contacts** in HubSpot's CRM, it's worth it to note that HubSpot CRM shares its database with that of HubSpot's marketing automation platform. As such, any contacts that exist in the marketing side of your HubSpot instance will also be available for use in your HubSpot CRM (if your organization leverages HubSpot's marketing solution).

The contacts tab is, essentially, an aggregated view of all contacts that HubSpot has information on. Based on the columns that you decide to use, (see gear tab in the top right of the window to edit these) various information can be viewed in the contacts tool.

All contacts	• br	eed			+	Add contact
50 contacts · Standard view	- 0	NB, Tyler Brennick	tbrennick@newbreedmarketing.com		New	05/28/2015
All contacts		NB, William Spiro	wspiro@newbreedmarketing.com	6178230384	New	05/28/2015
+ Add filter	0	NB, Jeremy Valance	jvalance@newbreedmarketing.com		New	05/28/2015
		NB, Curt Echo	cecho@newbreedmarketing.com		New	05/28/2015
		NB, Blair Diehl	bdiehl@newbreedmarketing.com		New	05/28/2015
		Alex Kavanagh	akavanagh@newbreedmarketing.com		New	05/28/2015
		Zane Gundersen	zgundersen@newbreedmarketing.com	802.655.0800	New	04/14/2015
		Andrew Fosbrook	afosbrook@newbreedmarketing.com	5187965217	New	03/30/2015
		NB, Andy Reagan	areagan@newbreedmarketing.com		New	03/17/2015
View options		Peter Emerson	pemerson@newbreedmarketing.com	802-655-0800	New	02/10/2015
Clone this view	0	NB, Aubyn Keefe	akeefe@newbreedmarketing.com		New	01/13/2015
Make this view default		Taulor Forest	forest@newbreedmarketing.com	8026550800	New	11/00/0014
Create report from view			100 \$			Q Help

There is a useful search bar on top, and note that in New Breed's HubSpot CRM we have opted to show the Name, Email, Phone Number, Lead Status, and Create Date fields as columns in our default view.

Utilizing the contacts quickview pop-out panel can be great to get an easy idea of lead information without leaving to the contact record entirely. Hover over the contact name and you'll see a small eyeball. **Clicking the eyeball** brings the contact quickview into the window.



#### 3.1 Example Contact: Properties, Activity Timeline, And More

We will now move forward into examining a specific contact record. This first screenshot is referenced repeatedly throughout this subsection.

	Pat Buono	0 -	Start typing to le	🔀 Email	🕅 Call	+ Log activity	⊗ Create task	© Schedule
Some of this conta their IP address. Learn more	ct's activity has been excluded based	d on	BIU Ø	' 11 <del>-</del> Hel <sup>•</sup> Discard	vetica Neue	• • <mark>A</mark> • ≡	⊨ = • %	θ
ABOUT PAT     HubSpot Owner	Patrick Biddiscombe (pbiddi 🔻	٥					Filter tin	meline (15/24) 👻
ABOUT PAT  HubSpot Owner Lifecycle Stage Lead Status Reason for Disqualification	Patrick Biddiscombe (pbiddi • Evangelist • New •	•	SEPTEM	IBER 2016 Pat Buono was Trade Show Tip and Follow-Up	sent a ma ps to Help	rketing email Free I You Crush Lead C	Filter tin Guide: 09/02/201	meline (15/24) 🗸

The top left shows a contact picture, name, job title, and company. Just below that is a collection of contact properties that allow us to see all that we know about each contact. These properties allow for the creation of certain filtered contact **views** (to be addressed later) and have many other functions. They can even be mapped over for syncs with Salesforce, should your organization utilize Salesforce as well. Below is an image that shows many of the custom fields/properties that New Breed utilizes for contact records. Many of these contact properties can be harvested by the HubSpot sales extension and will automatically be updated. They can also be populated when contacts fill out a form, enrolls in a workflow, or are entered manually by users.

11

▼ ABOUT PAT		0 +
HubSpot Owner	Patrick Biddiscombe (pbiddi 🔻	
Lifecycle Stage	Evangelist -	
Lead Status	New -	
Reason for Disqualification		
Persona	·•	
LinkedIn Bio	±.	
Role		
Job Title		
Email	pbuono@newbreedmarketing.cc	ď
Phone Number		
Mobile Phone		
State/Region		
Twitter Username		
HubSpot Score	30	
Number of times contacted	0	
Number of Sales Activities	1	
New Breed Blog Email	Daily -	

The **gear in the top right corner** allows the admin user to select which properties are shown to other users, but reps can also customize their own contact records to show items in the order that they prefer during their personal process.

The more contact properties that are filled in accurately, the more robust the contact can be considered. A **best practice is to ensure that reps are filling out as much information as possible throughout the sales process** - that way, all of the information about a given contact is available in the HubSpot CRM in one convenient location.

These properties are powerful not only in filtering, list membership, and workflows, but also for prospecting leads. The properties can help reps answer questions like:

- Is this contact a decision maker?
- Do we have a phone number for them?

- How many times have we contacted them?
- What content have they downloaded?

As you can see, the contact record is integral to the sales process and can be leveraged in a variety of ways.

Continue scrolling down and you'll run into the associated **company record** for any given contact.

	eedmarketing.com	
HubSpot Owner	Patrick Biddiscombe (pbiddi 🔻	
Account Name	New Breed Marketing	
Associated Contacts	42	
Description	We are a marketing + sales company that builds	
LinkedIn Company Page	http://www.linkedin.com/compa	ď
Crunchbase Company Page		
Year Founded	2002	
Industry	*	
Annual Revenue	10,000,000	
Employees	50	
<ul> <li>Total Money Raised</li> </ul>		
Is Public	false	
State/Region	VT	

This company record also has many fields that are populated from the Hubspot Sales extension and those "contact profiles" settings that we enabled at the beginning of the guide. This record looks just like a contact record, and gives users a quick look into information about the organization. Again, these properties can aid in qualifying and prospecting leads. Consider questions such as:

- Does this company need my organization's offerings?
- Have they interacted with our website?
- Where are they located?
- Is this company a good fit for us?
- How many employees do they have?

Next, we'll move to the top right area of the window, we see one of the **most useful features of HubSpot CRM**. This pane allows the sales rep to **write notes** about a contact, **email** a contact, **call** a contact (once calling has been enabled for your account), **log activities**, **create a task** (and assign it to yourself or others) and **schedule events**.

This collection of features enables sales reps to streamline their process of interacting with leads and all the while HubSpot CRM is **logging activities** and tracking the contact's activities.

Next, we can look at the **contact's activity timeline**. Do you recall the **recent activity** section of the dashboard? Do you like Facebook or Twitter? Maybe both?

If so, this activity timeline is quite similar to each of those. Rather than showing what activity reps have been doing, though, this timeline shows what **contacts** have been doing on your website. Some things that are tracked and displayed include:

- Emails the contact has received, opened, and clicked
- Tasks that employees are assigned relating to each contact
- Forms they've submitted
- Content they've downloaded
- What contact properties have been updated and when they were updated

As you probably guessed, this timeline makes it easy for reps to understand what a contact is interested in and can aid in **reading their digital body language.** For more on digital body language, check out <u>this awesome blog post</u> written by New Breed's CEO!

Finally, to close out this examination of a contact record, let's scroll to the bottom left of the page. You'll notice three more panels as you scroll downward: **List Membership, Workflow Membership,** and **Salesforce Sync.** These panels are fairly straightforward. List membership shows which lists a contact is a part of (in HubSpot's marketing platform), while workflow membership shows each workflow a contact is a part of (again, in Hubspot's marketing side). These can be helpful when prospecting because a rep can quickly and easily see other contacts that may have some similarities to a given prospect (through the lists tool).

Salesforce sync shows the user when the last sync with Salesforce CRM was - which can help identify gaps in which HubSpot CRM may have more records than your organization's Salesforce instance, or vice versa. From this panel you can head to your Salesforce instance easily by clicking the link. This information can be good to know, espcially when examining field mappings between HubSpot and Salesforce CRM's (see Section 8.0 for more on mappings).

▼ LIST MEMBERSHIPS		
20 View all		
Search for static lists	▼ Add	
WORKFLOW MEMBERSHIPS		
7 View all		
Search for workflows	•	
▼ SALESFORCE SYNC		
View contact in Salesforce I		
C Last synced at September 2 2016	6 3:33 PM EDT.	

#### 3.2 Contact Views

Contact views offer customizable **views** for each user that can be useful for visualizing selected pieces of information about contacts as well as filtering your contact database in useful segments.

If you're familiar with HubSpot's marketing tool that we've referenced throughout this document, it's somewhat similar to the **Lists** tool.

First, let's touch on the filtering capabilities. HubSpot CRM allows users to **filter** by a variety of different items. Naturally, filters can be implemented by contact properties, Salesforce fields, social media activity, analytics, conversion information, and more. Simply click the "add filter" button and enter any desired criteria. In the example below, we are looking at a view that removes those contacts with Gmail email addresses (criteria: email does not contain "@gmail").

All contacts -	new	new breed + Add contact • -									
45 contacts · Standard view		Name	Email	Phone Number	Lead Status						
Save this view Reset		NB, Beth Abbott	babbott@newbreedmarketing.com	3157607900	New						
All contacts		Pat Buono	pbuono@newbreedmarketing.com		New						
×		NB, Kevin Thibault	kthibault@newbreedmarketing.com		New						
Email does not contain "gmail.com"		G New Breed - Living Room	newbreedmarketing.com_2d333130323034303		New						
		Spencer march	smarch@newbreedmarketing.com		New						
(+) Add filter		Kevin Johnson	kj@ibm.com		New						
		G New Breed - Benioff	newbreedmarketing.com_2d363435383938313		New						
	0	G New Breed - Page	newbreedmarketing.com_2d363336373433363		New						
View options		jdavis@newbreedmarketing.com	jdavis@newbreedmarketing.com		New						
Create view Clone this view		Ben Tacka	btacka@newbreedmarketing.com	8173198038	New						
Make this view default		Joe Shmoe	loe123@ibm.com	8025784855	New						

A feature that many admins and reps alike find particularly useful is the **Shared Views** option.

Just above the filtering area is a blue button entitled "share this view". This button will save views that users find useful such that other users can utilize them.

By creating shared views, users are enabled to speed up their workflow by preventing reps from creating views over and over again - many useful views made by admins or co workers have already been created and saved!

Q Search	
STANDARD VIEWS	SHARED VIEWS
My contacts	My deals
All contacts	My SQLs
My uncontacted	Call by persona
My recently assigned contacts	All contacts
Call Queue	All contacts
	Korey's Contacts (Reassign)
	Non-MQL Follow Ups
	Prospects
1 Frida mear	

This view tab can be located directly left of the search bar. These views can include desired filtering criteria and any columns/column order that the view creator implemented.

If desired, users can create views that are only visible to themselves, and set default views as well. You can also edit a view once using it, but be wary if you change and save a shared view!

#### 3.3 Using the "Me" Filter in Shared Views

The **Me** filter in shared views sometimes creates pain points for reps. Consider the following:

Someone creates a shared view with the intent of showing their teammates what leads are assigned to the view creator. They choose the filter criteria, "HubSpot Owner is 'Me'" and share the view.

HubSpot Owner is any of "Me"

The "me" property in HubSpot's CRM is dynamic in the way that it will consider anyone who uses the shared view as the "me" in each instance. For example, if you, (named **Michael Scott** for this example) create a view, the "me" view shows **all contacts who are assigned the hubspot owner of "Michael Scott"**. When your coworker, **Dwight Schrute**, views this shared view, the filter will now show his leads with the **HubSpot** owner of **Dwight Schrute**, **NOT Michael Scott (the view creator)**.

In this way, the "**Me**" filter can be quite useful but also tricky to use. Remember to double check filters when sharing views with team members.

If you want to show your team which contacts are assigned to **you**, always utilize the filter in which you select **your own name** rather than the **me** filter.

HubSpot Owner is any of "Pat Buono (pbuono@newbreedmarketing. com)"

At this point, you should have a solid grasp on the Contacts tab. Coming up next is the companies tab, but first we will touch on one final feature of views.

#### 3.4 Cloning Views

In closing this section, we will briefly cover the **cloning** feature. Cloning views makes it easy to create useful shared (or personal) views while ensuring a quick and efficient process. The link to clone a given view is on the bottom left of the contacts page and is directly below the area where filter criteria can be added.

View options
Create view
Clone this view
Make this view default
Export all in view
Create report from view

Cloning views can be used to efficiently view contacts or prospects that have various overlapping properties. For example, if a sales rep wanted to target only contacts from the Software as a Service (SaaS) industry for a few hours, they could do so. By cloning this view, they can adapt the view into any industry they desire or add more filtering criteria without losing the view they created initially.

## 4.0 Companies

If you've reached this point, you should have just finished up learning about the **Contacts** tab and how it can be leveraged in a variety of different ways.

#### Good news!

The **Companies** tab in HubSpot CRM functions exactly like the contacts tab, with the main discrepancy being that reps **cannot** make a call or send an email directly from a **company record** (HubSpot plans to add this feature in coming updates).

All companies • Standard view	Sea	rch all companies in this view	H	H Find prospects + Add company						
		Name	Create Date +	First Contact Create Date						
曲 All companies		Cloud8 Technologies Inc.	09/21/2016	iii 09/21/2016						
+ Add filter		Blum Shapiro	09/21/2016	09/21/2016						
		mohitvermablog.com	09/21/2016	iii 09/21/2016						
		BOOSTER ACADEMY	09/21/2016	iii 09/21/2016						
		Enquiron	09/21/2016	09/21/2016						
		Trinckle	09/21/2016	iii 09/21/2016						
		Cogent Communications	09/21/2016							
	0	Cogent Communications	m 09/21/2016							
View options		Epay Systems	09/21/2016	09/21/2016						
Clone this view		myowndoctor	m 09/21/2016	m 09/21/2016						
Make this view default		inter of another	(III)	(m)						

The company record is also very similar to a contact record. The unique properties on the company record are called company properties and can be used in list creation, workflow enrollment, filtering, and more. (Note the lack of call/email options in the top right panel).

<ul> <li>ABOUT NEW BREED MARKETING</li> <li>HubSpot Owner Patrick Biddiscombe (pbiddi *</li> <li>Account Name New Breed Marketing</li> <li>Associated 42</li> <li>Contacts 42</li> <li>Description company that builds high-</li> <li>Linkedin Company Page</li> <li>Crunchbase</li> <li>Crunchbase</li> <li>Crunchbase</li> </ul>	B °	ew Breed Marketing newbreedmarketing.com	0 <del>.</del>	Start ty	w note + Log ac	tivity	♂ Create task	() Schedu	ıle
HubSpot Owner       Patrick Biddiscombe (pbiddi *       Save note       Discard         Account Name       New Breed Marketing       Image: Contacts       42       Filter timeline (7/12)         Associated       42       Filter timeline (7/12)       SEPTEMBER 2016         Linkedin       http://www.linkedin.com/compa       Image: Contacts       Image: Contacts       Image: Contacts         Company Page       Crunchbase       Image: Contacts       Image: Contacts       Image: Contacts         Company Page       Image: Contacts       Image: Contacts       Image: Contacts       Image: Contacts         Company Page       Image: Contacts       Image: Contacts       Image: Contacts       Image: Contacts         Company Page       Image: Contacts       Image: Contacts       Image: Contacts       Image: Contacts         Company Page       Image: Contacts       Image: Contacts       Image: Contacts       Image: Contacts         Contacts       Image: Contacts       Image: Contacts       Image: Contacts       Image: Contacts         Contacts       Image: Contacts       Image: Contacts       Image: Contacts       Image: Contacts         Image: Contacts       Image: Contacts       Image: Contacts       Image: Contacts       Image: Contacts         Contacts       Image: C	ABOUT NEW BR	REED MARKETING	0 -	B I	<u>U</u> Ø 11 - H	Helvetica N	leue 👻 🔥 👻		<b>.</b> ∽ °₀
Associated 42 Contacts 42 Description We are a marketing + sales company that builds high- Linkedin Company Page Crunchbase Company Page Company Page Crunchbase Company Page Company Page Compan	ubSpot Owner Account Name	Patrick Biddiscombe (pbiddi • New Breed Marketing			note Discard				
Description     We are a marketing + sales company that builds high-     SEPTEMBER 2016       LinkedIn     http://www.linkedin.com/compa     Image: Company Page       Crunchbase     Image: Company Page       Company Page     Image: Company Page	Associated Contacts	42							Filter timeline (7/12) -
Linkedin Company Page Crunchbase Company Page	Description	We are a marketing + sales company that builds high-			SEPTEMBER 2016				
Crunchbase Open - On Hold	LinkedIn Company Page	http://www.linkedin.com/compa	ď	(3)	Deal New Breed N	Aarketing	- IR   IPS   LM n	noved to	09/12/2016 at 4:58 PM EDT
Company rage	Crunchbase Company Page				Open - On Hold				
Year Founded 2002 Deal New Breed Marketing - IR   IPS   LM created 09/12/2016 at 4:58 PM	Year Founded	2002			Deal New Preed N	Aarkating		roated	09/12/2016 at 4:58 PM EDT

# 4.1 Similarities to Contacts

To reiterate, the Companies tab follows the same conventions as the Contacts tab in many ways. The main company page can be organized by changing which columns are visible, various views can be created/shared/cloned, filters can be applied, and there is a search bar to quickly find desirable company prospects.

Clicking to any given company record, one can quickly see that the layout is, (you guessed it) quite similar to a contact record. The top left gives a company name and logo if available. The follow section, which can be seen above, contains all of the default company properties that the admin has chosen to display. Users can select their own order based on personal preference by clicking the small gear within this section.

Top right is the panel in which reps can log activity, make notes, create tasks, and schedule events. Each feature is similar to contact records and fairly straightforward.

If you have any doubts while navigating the company tab, simply consult **Section 3** and follow along while working within the Companies tab rather than the Contacts tab. For those familiar with

Salesforce CRM, the companies tab in HubSpot is the translated version of the **Accounts object in Salesforce**.

## 4.2 Differences

While much of this section has outlined and reinforced the similarities between the Contacts and Companies records, it is important to point out a few differences between the two.

First of all, the activity timeline on the company record shows different items than the ones within the contact record. The company activity line shows various deals that have occurred with companies your organization works with, as well as calls that were made and changes in deal stage.

		Filter timeline (7/12) -
	SEPTEMBER 2016	
6	Deal New Breed Marketing - IR   IPS   LM moved to Open - On Hold	09/12/2016 at 4:58 PM EDT
6	Deal New Breed Marketing - IR   IPS   LM created	09/12/2016 at 4:58 PM EDT

Next, as the user scrolls down the page, they will soon come to the associated contacts panel. Each company record lists out a selection of contacts that HubSpot associates with a given company. The panel also has a link to **view all contacts** from the organization that the user is viewing.

#### CONTACTS AT NEW BREED MARKETING



Lastly, there is a panel banel below the associated contacts panel that lists any deals that your organization has made with a given company and the respective stage of each deal. This type of information is often pulled from Salesforce CRM, but the HubSpot CRM has the ability for deal tracking as well (and will be discussed at length in Section 5.0).



When prospecting, the company tool can be valuable in segmenting and targeting based on a variety of company properties - ones that often are unique to a firm and wouldn't be available on a person's contact record. Utilizing the companies tab and the contacts tab simultaneously allows reps to harvest, organize, and visualize vast amounts of data - **enabling** reps by giving them a more robust look at leads as well as the companies that they work for.

## 5.0 Deals

Now that we've covered a companies and contacts, it's time to move into the **Deals** tab. From this tab, users can manage their own deals, view company-wide deals, add deals, and get insights. In many organizations, **deals are often termed "opportunities"**, so it's helpful to be aware of this discrepancy in vernacular.



Let's start with managing deal views. At this point, you're certainly comfortable in understanding how to manage and manipulate views in the **contacts and companies** tabs - **deals can be manipulated in the exact same way**! Filters can be applied and views can be shared with peers. Don't forget to be careful with the "Me" filter when sharing views!

All deals 9 deals • Standard view	*		
Save this view Rese	t		Deal na
			◎ te
③ All deals			© Ţ
	×	0	্র চ
HubSpot Owner is any of "M		্র চ	
	×		্র চ
"Closed Lost", "Closed Won"			۹ T
	-		<u>ه</u> ج
Close Date is "This month"			ত চ
A did filter		۵ T	
- Add liller			© Ţ
		-	

For example, imagine a larger enterprise setting. If you were trying to "cut out the noise" of various coworker deals, you could select the filter criteria in the screenshot above. These criteria allow you to examine any deals that are **closing** within the month but **are still open**.

**Deal views** can be manipulated to show in a list format or a convenient drag and drop board view. This view is easily switched by hitting the buttons just left of the search bar - many reps find the board view quite satisfying!



Utilize the **settings gear** to edit any columns in the pane, edit deal stages, edit properties, and manually import deals that do not yet live in the HubSpot CRM.

# 5.1 Adding Deals and Deal Records

If your organization decides to implement HubSpot CRM as the main platform that reps will be working in, reps will have to enter deals (or opportunities) that they have grown throughout the sales process.

Adding a deal is a quick and easy process in the HubSpot CRM. Simply navigate to the blue "Add Deal" button and fill in the necessary fields.

Deal Name	
HubSpot - New Deal	
Deal Stage	
Needs Analysis	•
Amount	
1000	
Close Date	
30/11/2015	
HubSpot Owner	
Sophie Higgs (shiggs@hubspot.com)	•
Create Date	
Company	
HubSpot	-
Contact	
Geoff Daigle (gdaigle@hubspot.com)	•

The **Deal Record** follows similar conventions to the company and contact records. There are deal properties (which can be used as filter criteria when creating views), a panel for the company that the deal has been made with, an activity timeline, and a panel where reps can log notes, schedules events, create tasks, and log activity. In the top right, the deal amount and close date is displayed.

Below the associated company panel is a list of contacts associated with the company/deal in question. Again, these can be quickly accessed from this location, just like the company record. Finally, the activity timeline is similar to contact and company records as well.

iovember de	Ball /			\$10,000 /	05/11/2014
	APPOINTM	ENT SET			
		807	THAT QUALIFIED TO BUY		
ABOUT NOVEMBER DE	AL 0 -	07 M	iew note 🗕 🕂 Log activity 🛛 Create task 💿 Schedule		
Deal Stage	Appointment Set	Star	t typing to leave a note		
Amount	\$10,000				
Close Date	05/11/2014 19:00 EST	в	😰 🍠 0 • Helvetica Neue • 👗 • 🖽 🗐 🕮 • %	,	
HubSpot Owner	Sophie Higgs (shiggs@hu		Decard		
Create Date	25/11/2014 04:46 EST		A CONTRACTOR OF CONTRACTOR OFO		
Closed Lost Reason					
Last Modified	08/10/2015 15:51 EDT			Filter timeline *	
Notes Last Updated	28/08/2015 13:48 EDT		NOVEMBER 2015 No events matching current litters for November 2015		
File upload			OCTOBER 2015		
Mana	kae properties	۲	Deal moved from appointment, scheduled to Appointment Set	06/10/2015 at 15:51 ED?	
			SEPTEMBER 2015		
CONPANY		¢	Vev made a call	103-09-0015 at 13:30-6017	
<b>60</b>	×		Presentation discussed on the call		
HubSpot is the	world's leading inbo		Edit Delete		
http://hubsp	oot.com G*		Deal movied from appointmentscheduled to	17/09/0015 /rr 13:35 EDT	
	Hubbleot Company Insights D		appointment, schoduled		
Name	Hubspot	0	Www.fuel.a.meeting	15/08/2015 at 13:00 EDT	
Company Domain Name	hubspot.com		test conference		
Industry	Computer Software		View or join the call; https://www.uberconference.com/shiggs		
Account Phone	+1 888-482-7768		Dial-Is number: 401-203-3558 PIN: 56345		

# 5.2 Deal Stages

Deal stages are powerful for forecasting revenue from the pipeline as well as organizing data. These stages can help attribute which reps are having good or bad months, what kind of "bandwidth" each rep has, and more. Stages have associated probabilities that indicate the likelihood of closing within each stage. Below are the defaults as outlined by HubSpot in their knowledge database.

By default, the CRM includes eight **Deal Stages**:

- 1. Appointment Scheduled (20%)
- 2. Initial Contact (30%)
- 3. Qualified to Buy (40%)
- 4. Presentation Scheduled (60%)
- 5. Decision Maker Brought-In (80%)
- 6. Contract Sent (90%)
- 7. Closed Won (100% Won)
- 8. Closed Lost (0% Lost)

You can also customize these deal stages/probabilities so that they are unique to your sales process. These should be outlined and finalized **before** reps begin adding deals to the CRM and their pipelines.

Deal stages are easily displayed on the top of each deal record with a green "bar graph" style horizontal line that grows longer left-to-right as the deal advances through the stage process.

## 6.0 Tasks

As you might imagine, sales reps have a lot going on. In order to keep organized and on top of incoming leads, deals, and more, HubSpot CRM has a **task** functionality. This feature also has the option for a list or board style view, similar to the deals tab.

Recall the panel that exists on company, contact, and deal tabs. (Screenshot below from a contact record.)

Ø	New	not	Ð	~	Ema	ail	🕻 Ca	əll		+ L	og act	tivity	0	Cre	ate tas	ĸ	٩	Sched	ule	
Assi	ign t	0:	Me (s	shigg	js@h	ubspot	.com)					•		04/	24/201	5	1	10:00	AM	
Des	crib	e the	e task.																	
В	I	U	Ø	11	Ŧ	Helvet	ica Neue	*	A	Ŧ	≔	123	≣.	*	90					0

Tasks can be created and assigned from these panels as well is in the tasks dashboard itself. Once a task has been assigned, it has a variety of stages, which can be seen below when in the board view.

Search all tasks in this view									
Not Started	0	In Progress	0	Waiting	0	Completed	0	Deferred	

Once again, tasks can be filtered by criteria that the user decides. Typically, reps utilize the task view to see their own tasks that are in progress. There is also an agenda view if the user wants to examine what they have to accomplish for a given day. Unlike deals, contacts, or companies, task views **cannot** be shared with team members.

Note: if your organization uses Salesforce CRM, tasks in that platform can be pushed over to HubSpot CRM if desired.

# 7.0 Sales Tools

The HubSpot CRM offers many features in the free version. Everything discussed up to this point Now, however, we will diverge into the **HubSpot Sales Tools** tab. All features in this tab **require** the paid subscription to HubSpot CRM Professional in order to be fully utilized. Some of the tools can be used in the free version but are restricted (i.e, Templates will only allow 5 free templates).

# 7.1 Notifications

The notifications tab brings the user to an **Activity Stream** menu. The HubSpot Sales Extension **must be running** in order to have notifications functioning.

**Notifications** will appear much like other notifications on your desktop or laptop. They pop up whenever a contact opens an email, clicks a link, or visits your website. See below to check out what they look like (if you haven't seen them already!).



The activity menu offers quick insight into how contacts are interacting with emails, clicks, and site revisits. In addition, there's a quick and easy meetings tool. Many organizations use Google Calendar or other calendar solutions, but if desired, meetings can be set with contacts directly from the HubSpot CRM. The screenshot below shows a view into an activity stream just following set up. The notifications tab allows users to quickly view an aggregate of activities that are happening on a variety of items. While this information is available in the contact record activity stream, the notifications panel offers a bird's-eye view of the collection of contacts interacting with your emails or visiting your site.



# 7.2 Templates

Consider for a moment how many emails sales reps are sending out each day. We already know that HubSpot sales allows us to track activity and interactions with emails (notifications feature), but pairing that capability with the **Templates** tool allows an even more efficient and powerful sales process.

HubSpot sales templates enable reps to utilize and share their *best* emails with teammates. Even better, though, is the fact that HubSpot CRM is tracking the performance of these templates - allowing for useful analysis that can be drilled into for further insights.

There are options for further reporting in the templates tab, which require the paid subscription as well. Note the "view all reporting" links in the top right corner of each of the following panels.



Top Users	☑ <sup>®</sup> View all reporting				
NAME	SENDS	OPEN RATE	CLICK RATE		
Ben Tacka (btacka@newbreedmarketing.com )	150	76%	6%		
Cory Albert (calbert@newbreedmarketing.com )	89	79%	5%		
Mike Morelli (mmorelli@newbreedmarketing.co m)	64	82%	24%		

Email templates can be edited and organized from the same page and are located just below the top two panels of insights. A best practice is to keep templates organized into folders based on the templates' subject/use case. Templates can be easily searched in the search bar up top.

NAME	CREATED BY	DATE CREATED	DATE MODIFIED
1.0. Marketing			-
2.1 - BDR   First Contact			
2.3 - BDR   Follow Up			
2.4 - BDR   Discovery Call Booked     Edit     Delete	]		

The panels introduced earlier also have the ability to dynamically change based on filter criteria. Users have the ability to change timeframes as well as drill down into particular users and examine template usage as well as performance.

#### 7.3 Sequences

**Sequences** help automate the sales process even further by streamlining reps' follow up process. This tool helps create "email drips" that contact prospects repeatedly over time.

You may be concerned that these follow up emails will be too clearly "generic" or "automated", but this tool emphasizes personalization and works directly with the templates tool. The templates utilize personalization tokens and can even pull company or contact details from Salesforce CRM as well.

Each sequence can be **custom tailored** to each prospect. Sales reps are already hard at work learning everything they can about a lead - they are the perfect ones to customize their sequence. Reps use their knowledge of a contact to decide how frequently they should send emails and what each email should contain.



By examining the activity stream in **Notifications** or a quick glance at a contact record, reps can determine if their prospects have been interacting with emails in the past. In essence, your team already knows if a lead has and can now reach out and follow up to these leads with an automated process.

Cheers to efficiency!

# 7.4 Documents

While many organizations utilize Google Drive for document storing and sharing, or have their sales teams save their documents locally, HubSpot Sales Tools offers a solution for this aspect of the sales process as well : the **Documents** tool.

The Document library allows your organization to build a library of shared and up-to-date sales content. Like the **Templates** tool, this documents page allows users to store, edit and share documents. These documents can be shared externally to clients or partners as well!

The document performance panel offers a quick look into what documents have been shared and how many times, the visits, and the average visit time. Filtering options can be found in the top right corner of the panel, while more reporting (available only for Pro users) is below the average visit time display.

Documents			Search documents	Get more documents
Document Performance		at All ▼ 🛗 This Month ▼	Top Documents	
			FastPencil - Initial Recommendations.pdf	MEDIAN VISIT TIME 12:52:54
17 SHARES	85	1:43:39	FurstPerson Inbound Marketing & Website Assessment.pdf	12:08:11
			FurstPerson Inbound Marketing & Website Assessment 9.15.16.pdf	9:32:58
		View all document reporting	View rep	orts by top documents
Documents				
				Q Help

Top Documents shows which of your documents are being viewed the longest by users. Again, more reporting is available with the Pro subscription level.

Below these two panels are where the selection of documents in the library all can be found. The documents tool can be best utilized if your organization's sales process is built around reps remaining entirely in the HubSpot CRM - One platform provides efficient and intuitive navigation through the reps' workflow. Switching platforms/solutions constantly throughout the day can slow down their process significantly and even accrue large costs when an organization finds themselves paying for many different solutions.



# 7.5 Prospects

All visits	• Se	Search all visits in this view							
19,032 visits · Standard view			Name		Domain	Number of Page Views	Number of Visitors		
All visits			Sabanci University	+	sabanciuniv.edu	4	4		
+ Add filter			sky 3D SKY COMPANY, INC.	+	sky.com	1414	922		
S Manage Notifications			Kunde & Co	+	kunde.dk	6	4		
			Johnson & Wales University	+	iwu.edu	13	11		
	0		YouSee	+	yousee.dk	169	59		
			Kessenick Gamma & Free Llp	+	kgf-lawfirm.com	11	4		
			Monigle Associates	+	@ monigle.com	4	3		
			Aerosoft Cargas Areas	+	@ aerosoftcargas.com.br	14	4		
View options	0		Virgin Media Ireland	~	virginmedia.ie	184	104		
Create view	0		.S. C.C.S (Leeds) Ltd.	~	@ ccsleeds.co.uk	43	36		
Clone this view Make this view default Export all in view			<< 1 2 3 4	1 5	6 7 8 9 10 11	> >> 100 \$			

Clicking the prospects tab brings us to a familiar looking page...

Do you notice what's different here when comparing to the company or contact pages?

While this page functions essentially the same as either the company or contact tabs, the **Prospects** tool offers users a glimpse into which *companies* have been **visiting** your organization's website.

	Name	Domain	Number of Page Views	Number of Visitors
슙	University of Vermont 🗸	@ uvm.edu	2097	412
슙	VSC Vermont State Colleges +	vsc.edu	66	31
삷	State of Vermont +	vermont.gov	197	63

Above we have an example of three organizations that have made contact with New Breed's website. You'll notice either a **check mark** or a **plus sign** to the right of each organization name. This allows the user to see if the organization is in their respective HubSpot database. In this case, "University of Vermont" is already in our company database, while "Vermont State Colleges" and "State of Vermont" are not.

What the user can do here is quickly add these companies to the database by clicking the check mark. If desired, you can grab a quick view of the information that will be pulled into the database by clicking the name itself. It will bring up a quick-view panel on the right of the page.

Sta O in L Ad	ate of Vermont vermont.gov LinkedIn d company
ADOUT STATE	
ABOUT STATE	OF VERMONT
Name	State of Vermont
Domain	vermont.gov
Industry	Government Administrati
Number of Employees	5k - 10k
Annual Revenue	\$250M - \$500M
First Seen	
Description	The Official Website of the State of Vermont -
State/Region	VT
City	Montpelier
Postal Code	05620 Q Help

In addition, you can click the "add company" button to add the organization to your database right from the quick-view panel.

Like most tools in HubSpot CRM, there are filtering options here in the **Prospects** tool.

Save this view	Reset
All visits	
Phone Number is k	nown
Add filter	
Manage Notifications	

In this case, we've decided to examine all prospects that the database has a phone number associated with. This way, hypothetically, sales reps can make a quick outreach call to these prospects if they desire, or lists/workflows can be built to examine these prospects in more granularity.

Yet again, views can be saved and shared amongst teammates. If a rep or admin builds a view that they feel will be of use to their peers, it can be saved for later use by themselves and others.

# Prospect views can be cloned, made default, and exported just as contact and company views can.

If desired, the prospects tool can give you real time **notifications** and a **daily email summary** of which prospects have visited your website and when. Click the **"Manage Notifications"** link below the filter criteria and check off the desired options.

aily Email		
eceive a daily summary sited your site	of the companies in this view that	
evisit notifications		
et a notification when a	company in this view visits your	

Lastly, clicking the settings gear in the top right corner enables users to edit columns being seen in the window.

# 7.6 Meetings

If you've used Google Calendar or other calendar solutions, then you're already familiar with the idea behind the **Meetings** tool. Undoubtedly, at some point in your career, you've tried to line up a time to connect with a lead or client. Reps can often waste valuable time exchanging emails or playing phone tag trying to find the best time to meet.

HubSpot meetings allows your leads to book your HubSpot users directly with times that work for them. Users, on the other hand, can set their own availability - they can pick who can book them, when, and for how long.

The tool even gives a personalized link for booking! It can be added to an email signature or shared at the user's leisure. The meetings tool can even **integrate** with Google Calendar or Office 365 such that your organization won't have to move entirely to a new calendar solution.



Find a time to meet Jackie

How long do you need?



Timezone: American/New York \*

What day would you like to meet?

[7]		28	DEC 20	DEC	DEC 31	JAN 2	[7
Vhat	t time	works	best?				

### 7.7 Call Queue

Last in the Sales Tools section is the **Call Queue** tool. Arguably one of the best features within the Sales Tools tab, this powerful feature lets a sales rep set a list of contacts that they wish to call.

Call Queue - 0 contacts · Standard view	v	Start calling Se	arch all contacts	in this view		+	Add contact
		Call status	Name	Email	Phone Number	Lead Status	Create Date
					2		
				(	110		
					$\sim$		
				Call	me, maybe,		
		Make	short work of a	long list of calls	by lining up contacts a	and working your way	down.
		mano		Lear	more about calling	and monang your may	
				Lean	r more about calling		

Contacts can be added to the queue from the call queue window itself, or from the contacts view. A great approach to this process is to segment contacts by desirable criteria (utilizing the filters or shared views) and add leads that appear desirable to the queue. Technically, the Call Queue resides within the Views section of the Contacts Tab. Don't worry - it can be reached from either location.

My contacts -	Search all contacts in this view
Q Search	
STANDARD VIEWS	SHARED VIEWS
My contacts	My deals
All contacts	My SQLs
My uncontacted	Call by persona
My recently assigned contacts	All contacts
Call Queue	All contacts
	Korey's Contacts (Reassign)
	Non-MQL Follow Ups
	Prospects

If a rep has a good idea of exactly who they want to call without the use of the contacts tab, more power to them! They can use the "add contact" button on the Call Queue page to manually add contacts to the list.

Columns that display certain contact properties can be displayed and changed by clicking the gear icon in the top right corner. Contacts can also be manually uploaded into the queue from other sources, such as an excel file.

Contacts already enrolled in the queue can be searched for by using the search bar.

**The most effective way** to utilize the Call Queue is to use various filtering criteria, column selection, and the search bar in an all encompassing approach. This way, reps can segment and target contacts, add them to the queue, and call them in a streamlined approach. Notice that when contacts are checked, the options appear above them to delete (trash can), add to call queue (phone/plus logo), assign contacts, and "more".

5 sel	ected	Î	۴	Θ	More -	new breed	+ Add contact	۰.
	Nam	е				Email	Phone Number	Lead Sta
		Testi	ng Test	ing		mattforclearcare@gmail.com		New
	NB,	NB, Beth Abbott				babbott@newbreedmarketing.com	3157607900	New
		wendy virginia				anotherventer@gmail.com		New
	Pat Buono			Pat Buono		pbuono@newbreedmarketing.com		New
	NB,	Kevir	n Thiba	ult		kthibault@newbreedmarketing.com		New

The call queue, like the contacts window, allows for a quick-view into contact information that the CRM already has. Simply click the small eyeball logo within the contact's name to cause the popup to appear on the right side of the window. This can be extremely useful when calling many contacts through the call queue - reps can have information ready to talk about during each call! See below.



<

pbuono@newbreedmarketing.com

	Pat Buono	ions Associate, keting
Some of this co excluded based Learn more	ontact's activity has d on their IP address	been i.
ABOUT PAT BI	JONO	nha ( 🔻
ABOUT PAT B HubSpot Owner	UONO Patrick Biddiscon	nbe ( 🔻
ABOUT PAT BI HubSpot Owner Lifecycle Stage	UONO Patrick Biddiscon Evangelist	nbe ( 🔻
ABOUT PAT BI HubSpot Owner Lifecycle Stage Lead Status	Patrick Biddiscon Evangelist New	nbe ( 🔻 T
ABOUT PAT BI HubSpot Owner Lifecycle Stage Lead Status Reason for Disquailfica	UONO Patrick Biddiscon Evangelist New	nbe ( • • •
ABOUT PAT BI HubSpot Owner Lifecycle Stage Lead Status Reason for Disqualifica Persona	UONO Patrick Biddiscon Evangelist New	nbe ( * * *

#### 8.0 Integrations

HubSpot's solutions allow for a number of **integrations** with other common software platforms. These integrations, while useful, require a bit of setup as well as maintenance once implemented.

**Note:** This section is useful for those in administrator roles, but is not as applicable to users who are sales reps themselves. Presumably, reps will not be adding or changing settings of the various integrations, but **administrators will be.** This section uses **Salesforce's** integration as an example.

To find Hubspot's integrations, navigate to the drop down menu accessible by clicking on the user's profile image. There should be a small, downward facing triangle there as well.



Clicking Integrations brings us to the menu shown on the next page.

HubSpot Integrations Featured Integrations	Integrations built and supported by HubSpot Extend the power of HubSpot with these integrations developed by HubSpot and supported by HubSpot's all-star support team.			
Resources Partner Directory Find a partner for your specific integration needs. Developer Documentation Learn about developing and designing for HubSpot.	salesforce	Sync leads in real time. Set tasks, trigger automation, and keep your sales team informed with lead intelligence from HubSpot. It's all possible with the native HubSpot-Salesforce integration.         • Integrated       Settings       Overview video       Documentation		
Set your integration featured Find out how to get an integration eatured here. Set your HubSpot API Key Access your data through the HubSpot API.		Wistia         Measure the true impact of your video content with the Wistia-HubSpot integration. Segment, nurture, and score based on video view activity. Keep your sales team informed on how individual prospects are interacting with your videos.         Integrated       Settings       Overview video       Documentation		

By scrolling through this page, we can see which **third-party solutions** have been integrated with your organization's HubSpot instance. This is also where we view the settings of each respective integration. HubSpot also provides overview videos for each integration as well as useful documentation to help answer questions you might have in setting up these integrations.

For the sake of this guide we will look at New Breed's integration with Salesforce.

Clicking into any of the integrations' settings brings the user to a new window where we can see if the integration is enabled and a collection of options that affect how the integration works. Essentially, in the Salesforce integration settings, the user is choosing what exactly is being synced between Salesforce and HubSpot and how these are functioning. On the left side of the window is where an admin comfortable with Salesforce can choose which fields are being mapped between HubSpot and Salesforce, and set rules for when these properties are updated. There are both **Standard** and **Custom** mappings. Standard fields cannot be deleted, but can be edited. Custom fields can be either deleted or edited.

HubSpot Integrations				
Featured Integrations				
Salesford	9			
Settings				
Contacts	Field Mappings			
Company	y Field Mappings			
Sync Erro	ors			

To edit the mapping rules, simply click the gear icon on the right of each mapping.

City	City	Use most recent value	Created: Mar 9 2015 3:50 PM	- Q
city (string)	city (string)		Updated: May 4 2016 4:28 PM	

**Update rules** change how/when properties are updated on HubSpot's contact records. They can be set to any of the following:

- Use most recent value, I want the most recent data from either system to populate that field
- Use Salesforce value unless blank, if Salesforce already has the data, leave it untouched
- Use Salesforce value, I only want Salesforce data to update the HubSpot property
- Disabled -- do not update value, data will not pass between these fields

As you can see, these rules are fairly straightforward to understand and utilize, and HubSpot gives a brief description of what each one will do to help when setting up mappings.

These mappings can be applied to **Companies** in addition to **Contacts.** Choose your mappings wisely!

#### 9.0 Conclusion

**Congratulations!** You made it to the end of the HubSpot CRM guide! At this point, you should have a fairly solid grasp on utilizing this solution for organizing data, finding leads, contacting leads, sifting through company information, and a myriad of other useful functions.

If you're ever stuck, feel free to check back and page through this guide. In addition, **HubSpot** offers a useful **Help Button** that is usually available in the bottom right corner of any page in the CRM.

Clicking the button lets you search HubSpot's knowledge database for articles, submit a help ticket to support, or have support call you directly. HubSpot has a large team of dedicated support staff that look to aid and respond to inquiries quickly. You can also opt to call HubSpot support directly at **1-888-482-7768.** 

The HubSpot CRM and Sales Tools are both powerful solutions for enabling sales reps to streamline their workflow and make prospecting easier. Learning a new software solution can be tough, but your effort will be rewarded in **saving time and resources**.

Happy prospecting!

# 10.0 References (These are also useful links!)

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