HubSpot CRM and Sales Tools Guide

NEW BREED
Unified Marketing + Sales™

Fall 2016

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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.

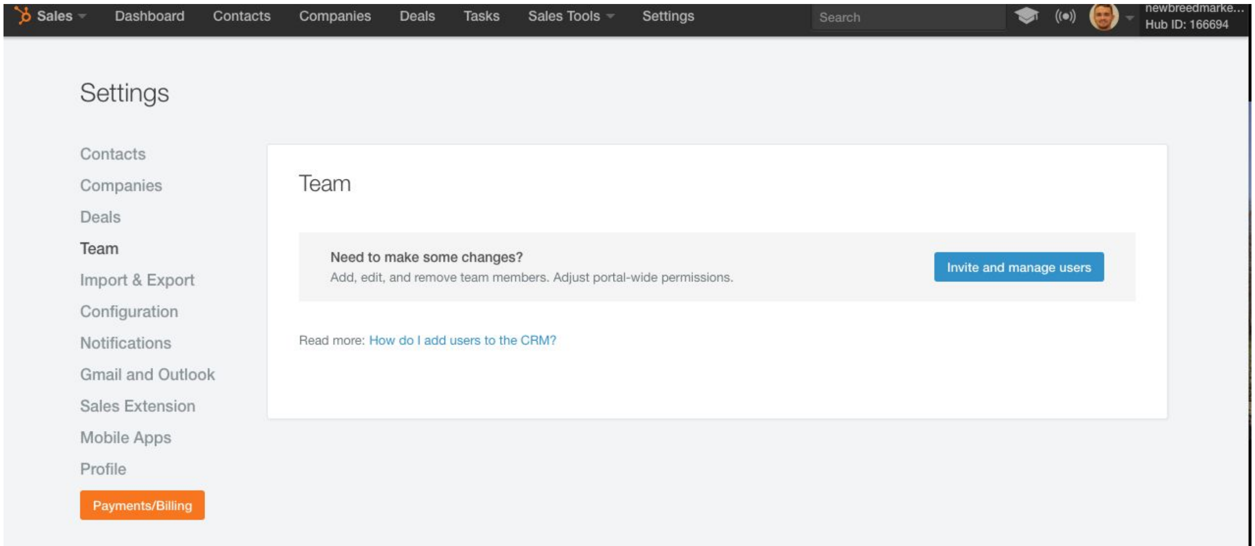
Just in case you're unfamiliar with the acronym, CRM stands for **Customer Relationship Management**, and businesses utilize CRM platforms to manage and analyze customer interactions/data with the end goal of improving business relationships with customers and driving growth.

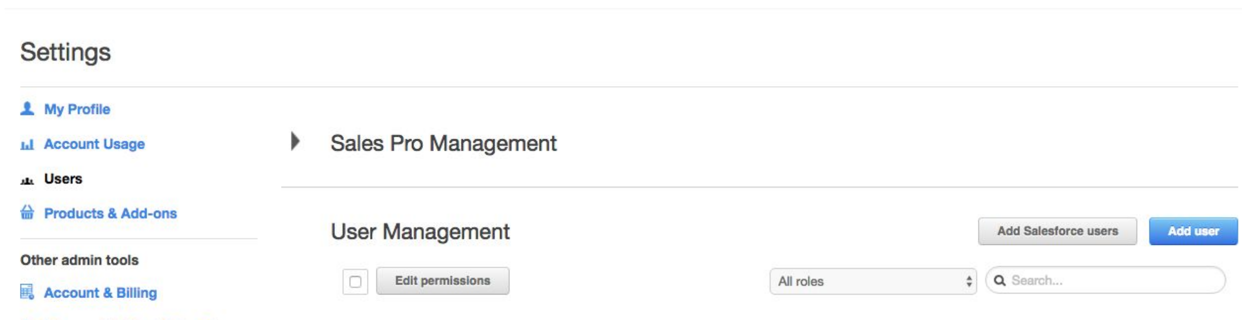
Note: This document is written from the perspective of a team member who functions as an administrator, meaning that they receive more permissions and can edit various items that other users will not have permission to edit.

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.





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

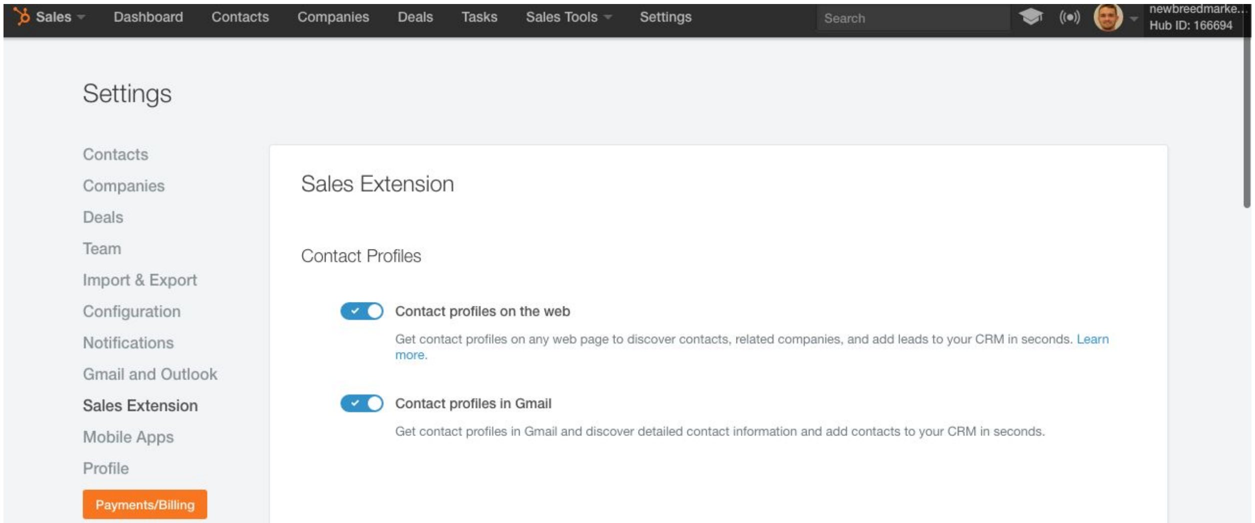
For each user, admins will be able to set the following permissions:

- **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.

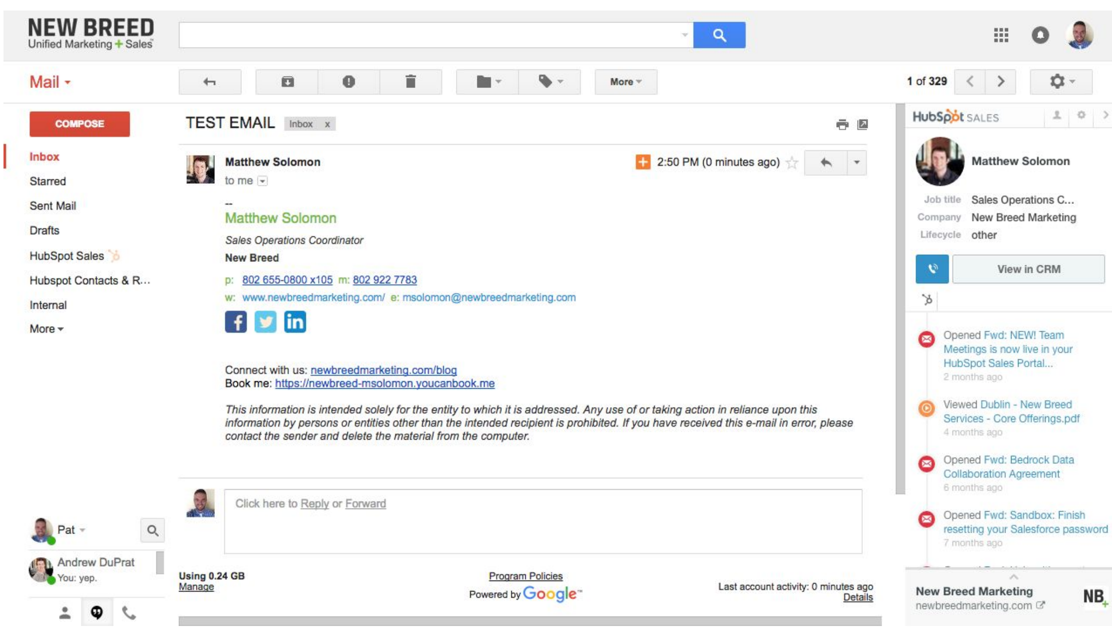
1.4 HubSpot Sales Extension

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 Chrome Web Store. 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.



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.



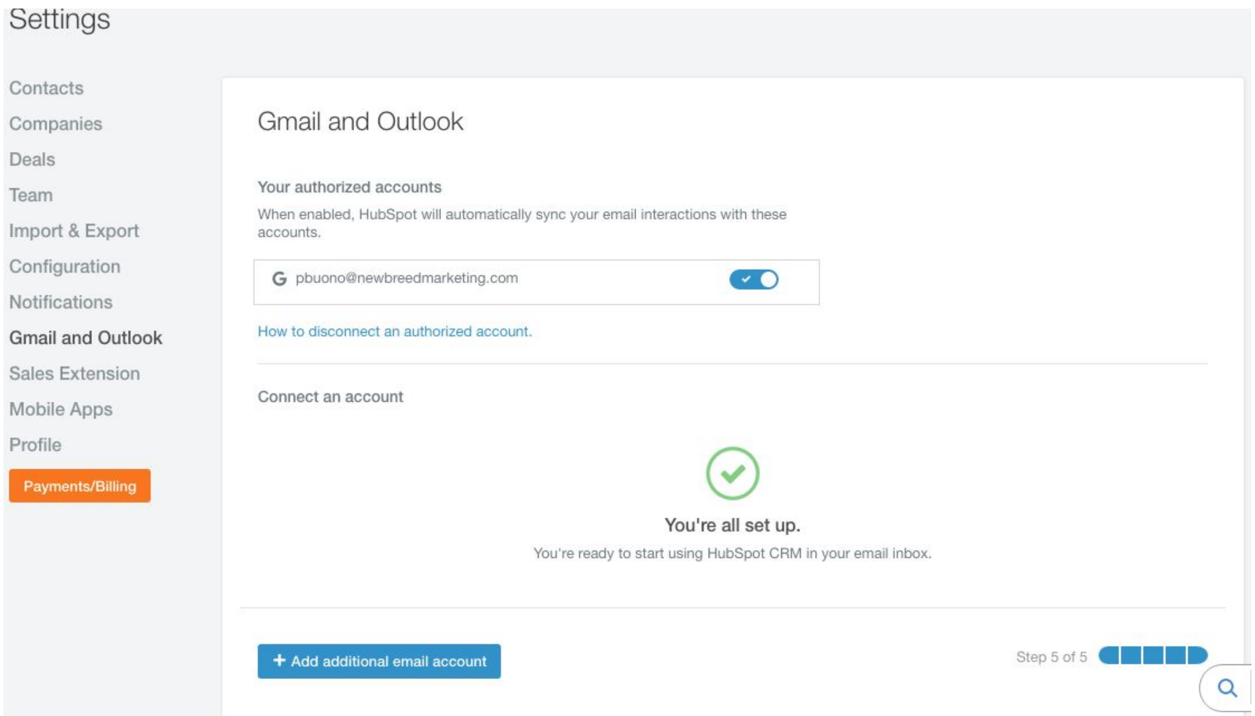
In addition, the extension allows us to add email templates to the CRM directly from your email client. For example, if you've written a *great* email to a lead or prospect, you can easily add it to the CRM by clicking the orange "+" button within your inbox. Save time and effort by utilizing the email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



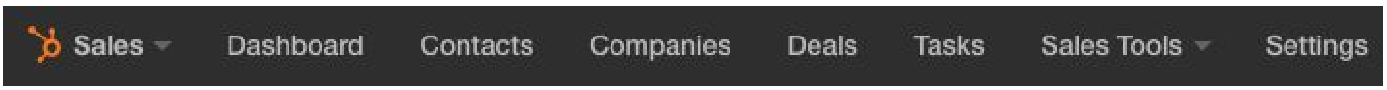
Lastly, HubSpot offers mobile apps for use while on the move. We're often asked, **"why would I want a mobile app, exactly?"** Great question!

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 paid version).

2.0 Dashboard

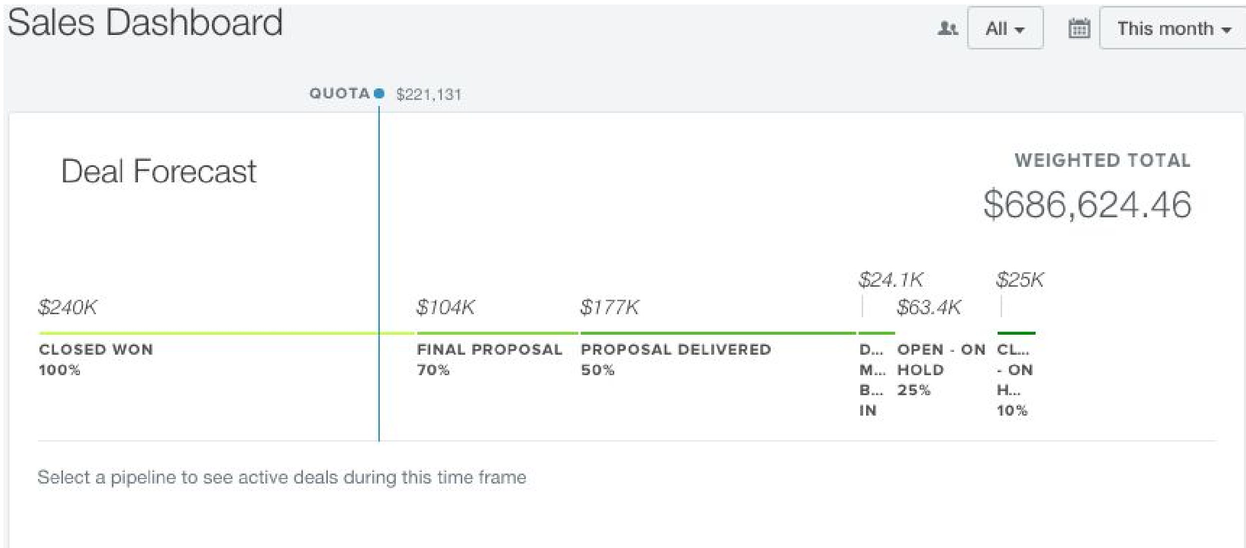


Now that we've gotten things set up and ready to go, it's time to truly dive into HubSpot CRM and Sales Tools. This document is ordered in a such a way that it follows the same order that the top menu navigation tabs of HubSpot CRM do.

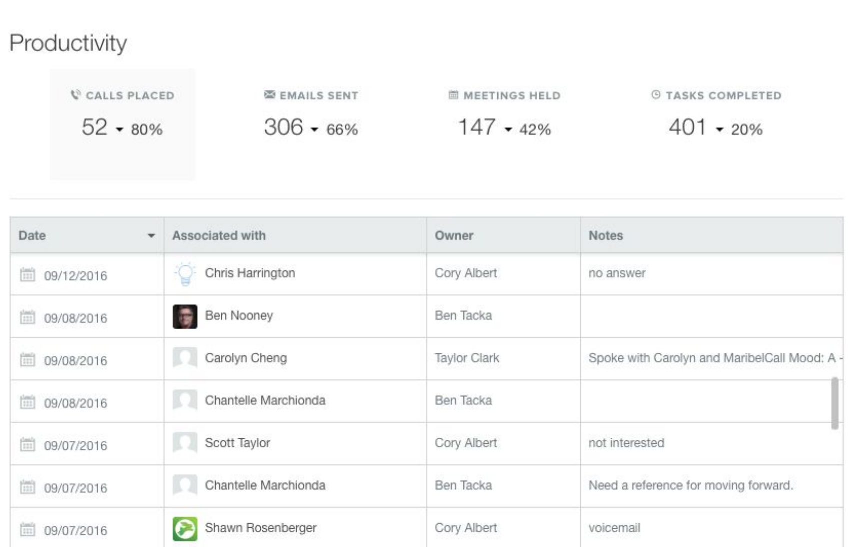
As such, we'll start with the **dashboard**. This easy-to-read screen has quick insights into various sales activities that are occurring within your organization. The dashboard has a **Deal Forecast** panel, a **Productivity** panel, a **Pipeline** panel, and a **Recent Activity** timeline. In this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

2.1 Dashboard Panels

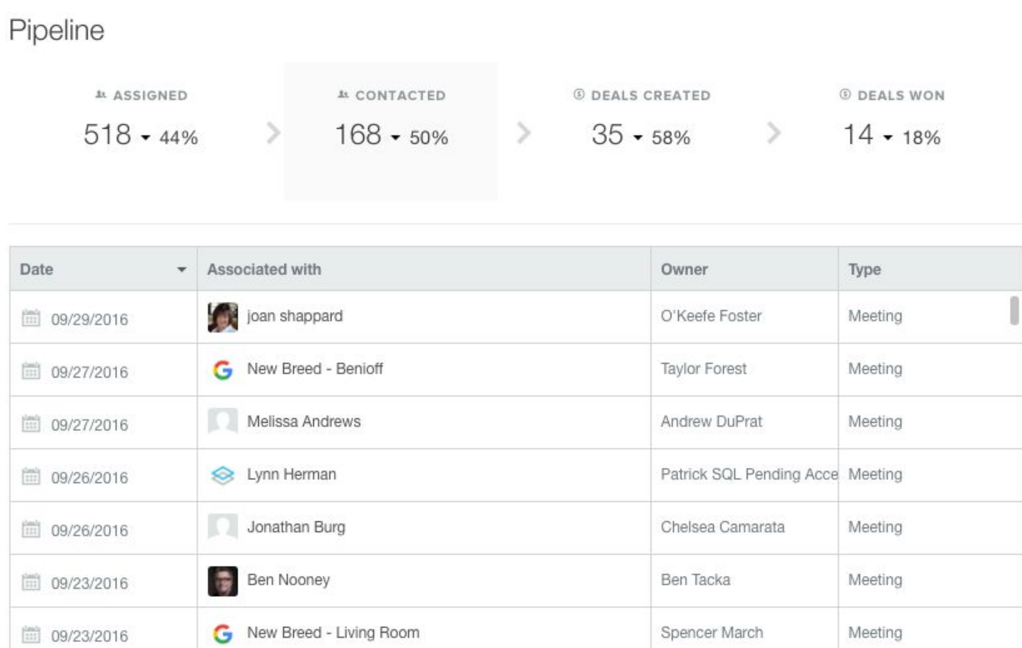
The **deal forecast panel** shows a weighted total and breakdown by deal stage. It also includes a quota as well as percentages for each deal stage.



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.

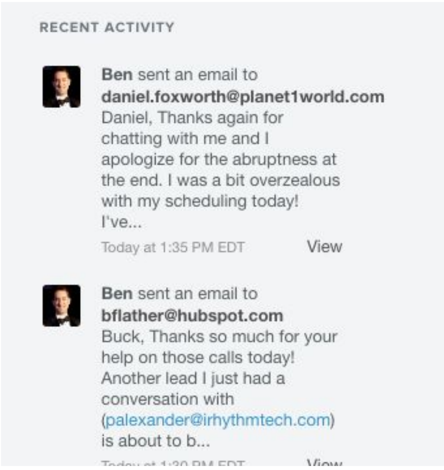


The **pipeline panel** shows a left-to-right breakdown of how many contacts are turning into deals, with percentage comparisons to previous stats (yep, just like the productivity panel). This particular panel shows how many contacts are assigned to specific reps, **if contacts have been contacted, the 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.



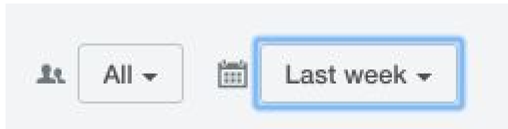
In case you were wondering, the contacted breakdown does indeed factor in meetings that have not yet happened. Whenever a meeting is scheduled, the CRM logs that activity, even if it is in the future.

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.

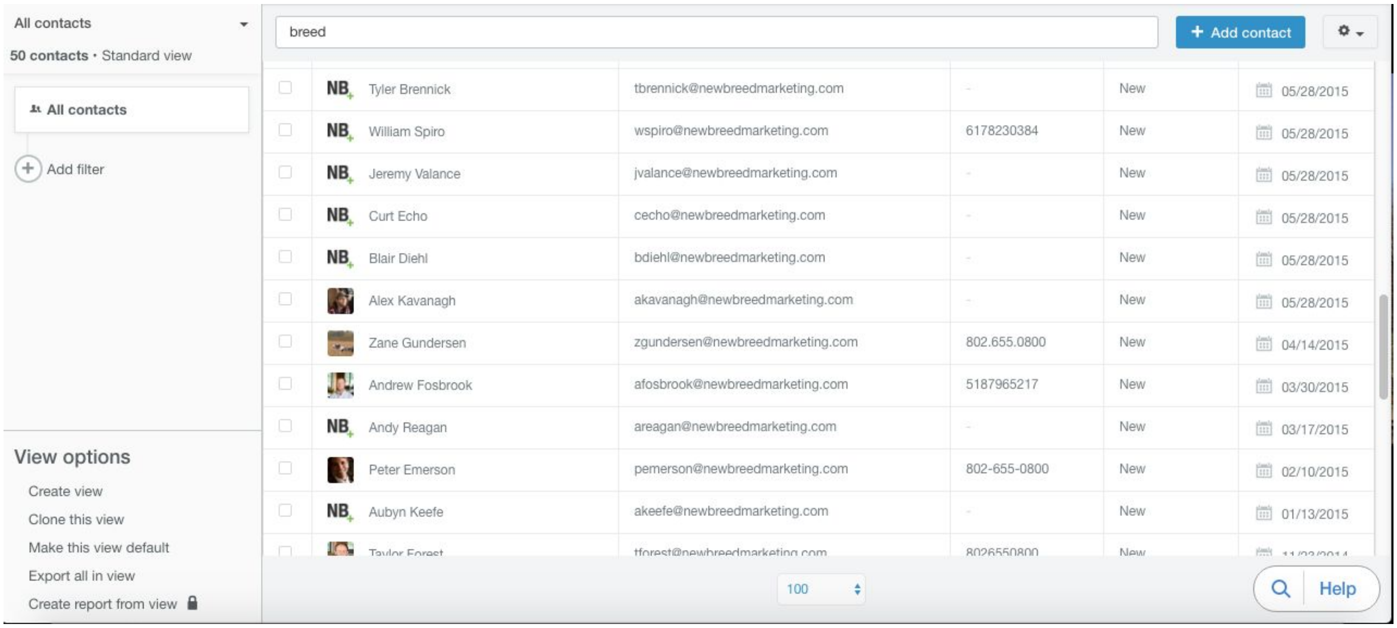


The filters apply to all three panels and can be leveraged in many ways to understand how the sales process is going. Filters will not change the recent activity timeline, however, which will remain updating itself based on rep activity.

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.

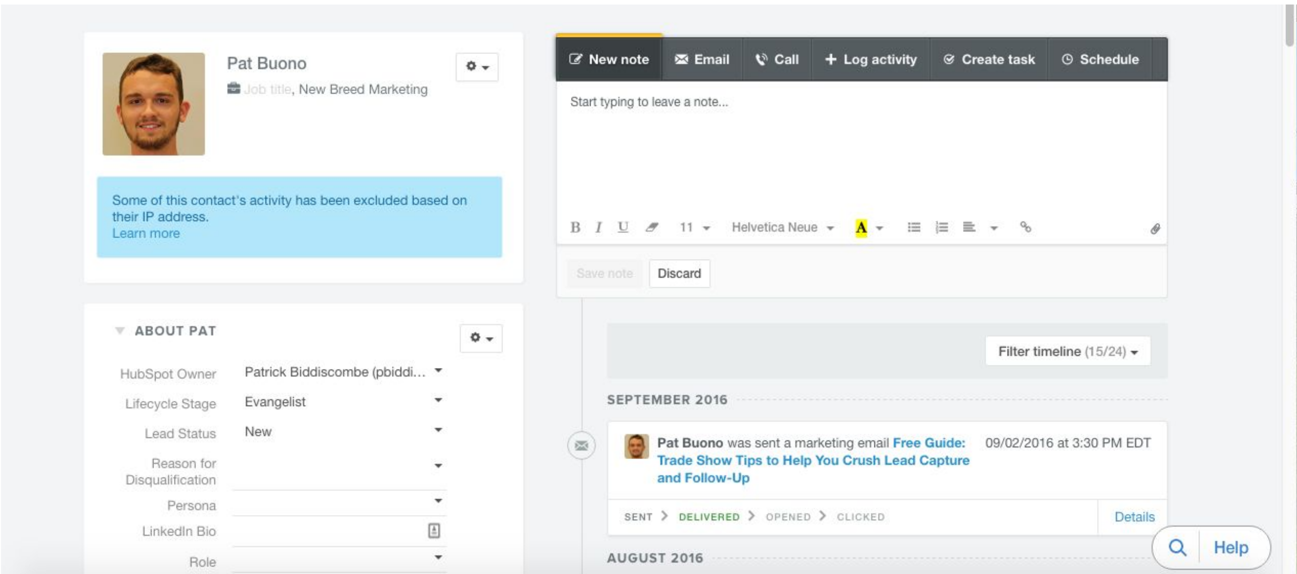


There is a useful search bar on top, and note that in New Breed's HubSpot CRM we have opted to show the Name, Email, Phone Number, Lead Status, and Create Date fields as columns in our default view.

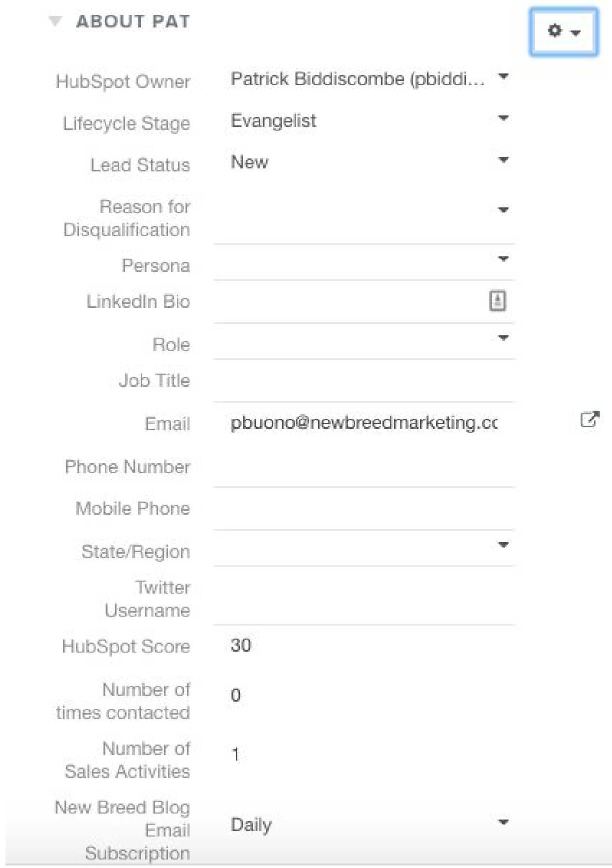
Utilizing the contacts quickview pop-out panel can be great to get an easy idea of lead information without leaving to the contact record entirely. Hover over the contact name and you'll see a small eyeball. **Clicking the eyeball** brings the contact quickview into the window.

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.



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.



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.

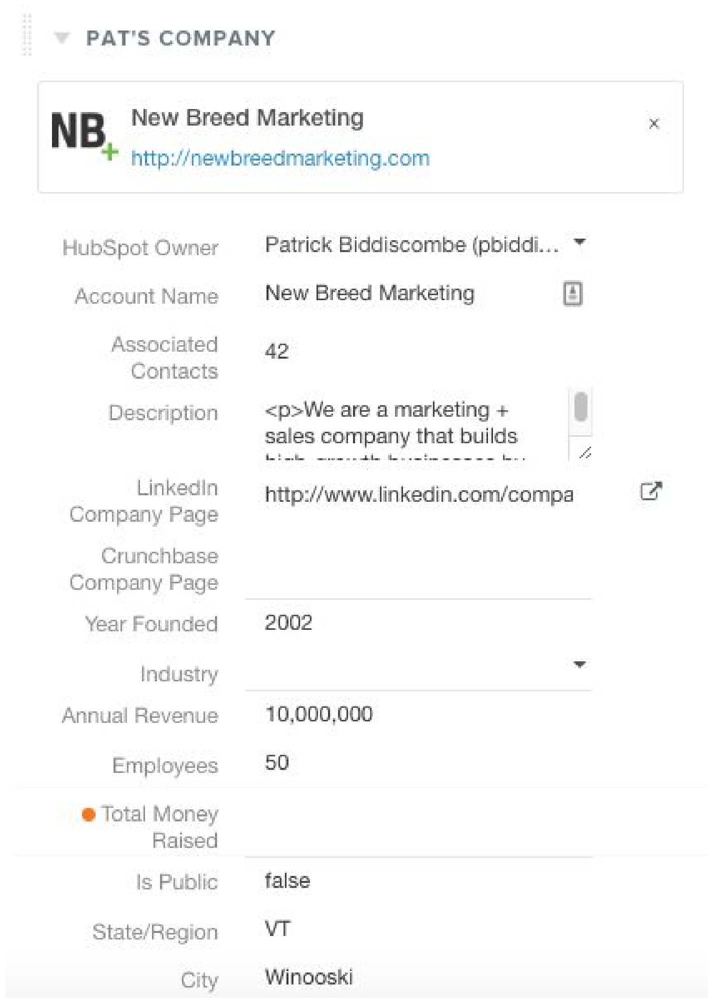
These properties are powerful not only in filtering, list membership, and workflows, but also for prospecting leads. The properties can help reps answer questions like:

- 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.



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?

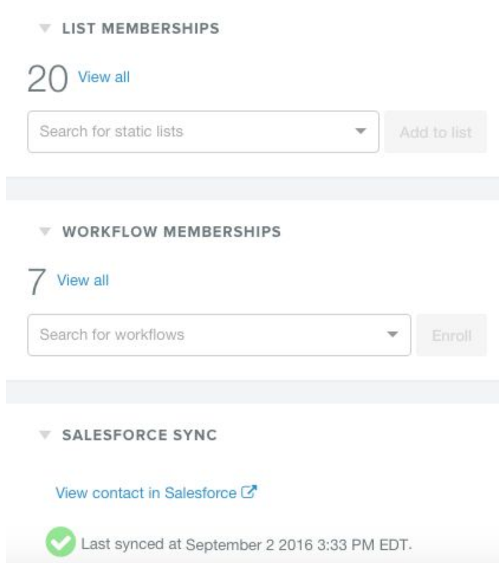
If so, this activity timeline is quite similar to each of those. Rather than showing what activity reps have been doing, though, this timeline shows what **contacts** have been doing on your website. Some things that are tracked and displayed include:

- 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 this awesome blog post 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).

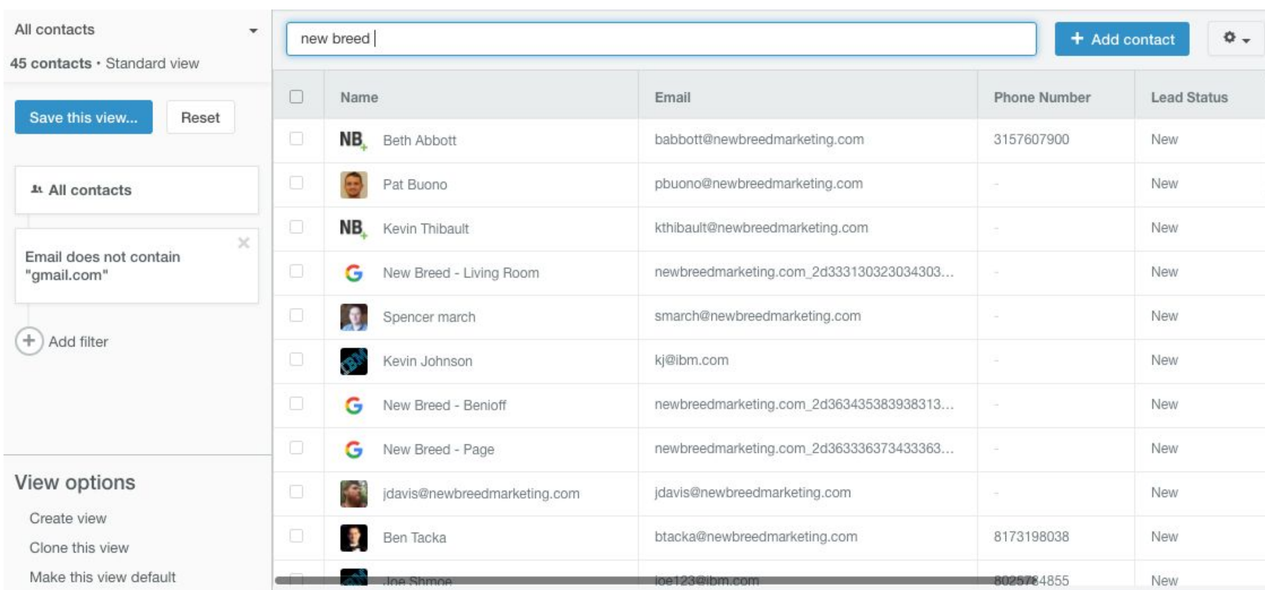


3.2 Contact Views

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.

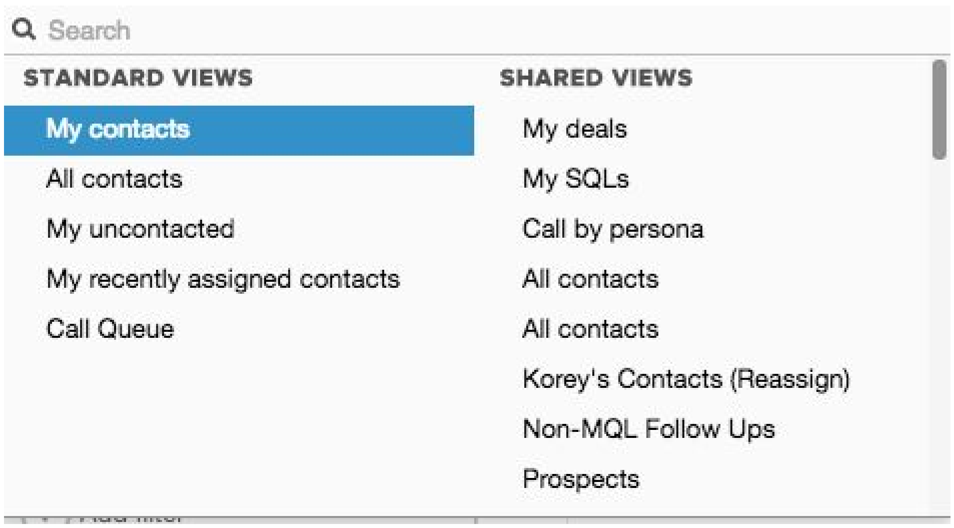
If you're familiar with HubSpot's marketing tool that we've referenced throughout this document, it's somewhat similar to the **Lists** tool.

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").



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!



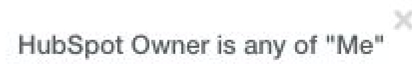
This view tab can be located directly left of the search bar. These views can include desired filtering criteria and any columns/column order that the view creator implemented.

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.



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).**

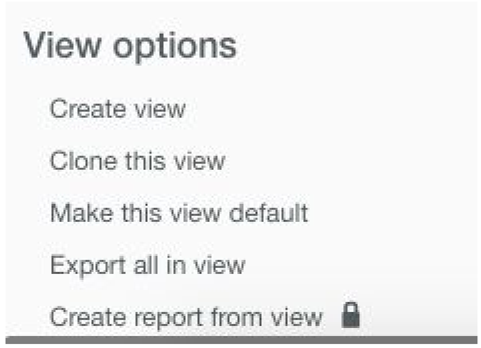
In this way, the “**Me”** filter can be quite useful but also tricky to use. Remember to double check filters when sharing views with team members.

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.

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.

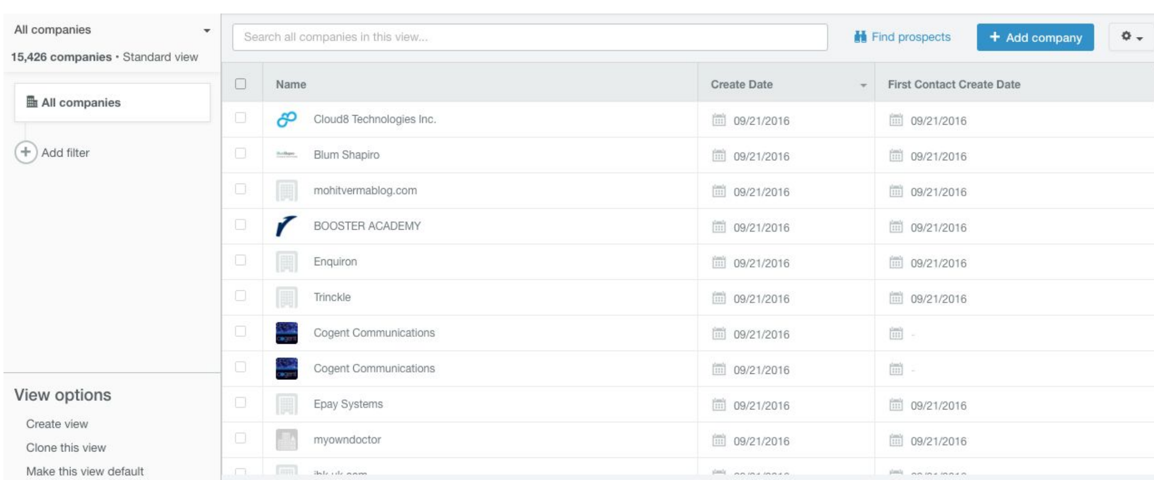


Cloning views can be used to efficiently view contacts or prospects that have various overlapping properties. For example, if a sales rep wanted to target only contacts from the Software as a Service (SaaS) industry for a few hours, they could do so. By cloning this view, they can adapt the view into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

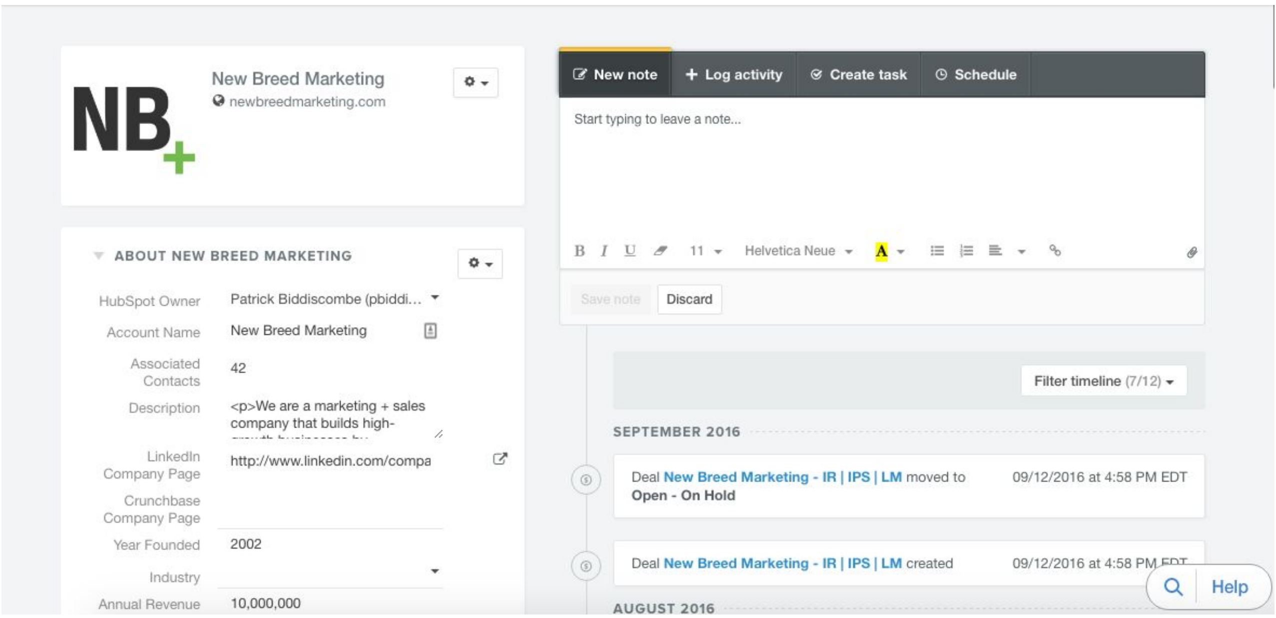
4.0 Companies

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).



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).



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.

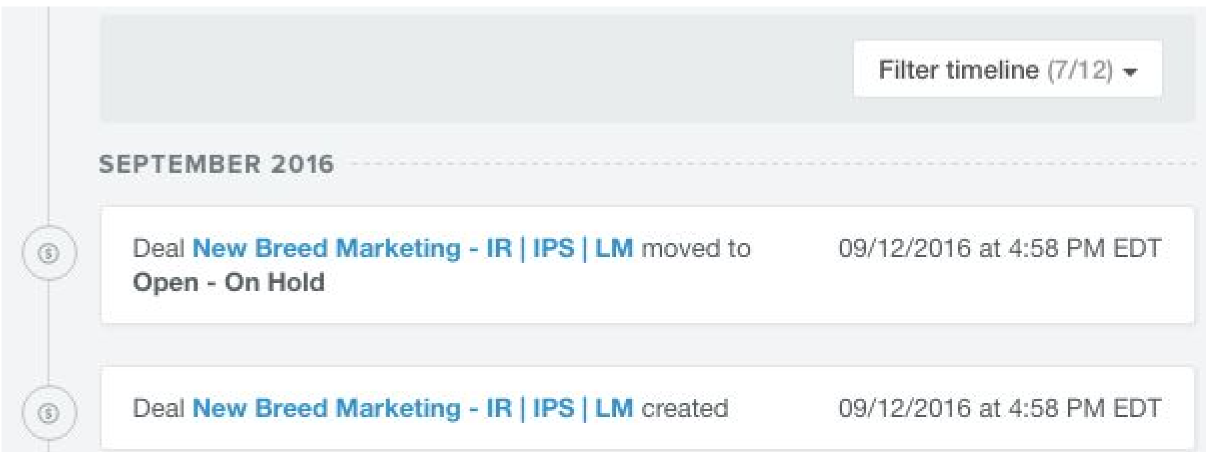
If you have any doubts while navigating the company tab, simply consult **Section 3** and follow along while working within the Companies tab rather than the Contacts tab. For those familiar with

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

4.2 Differences

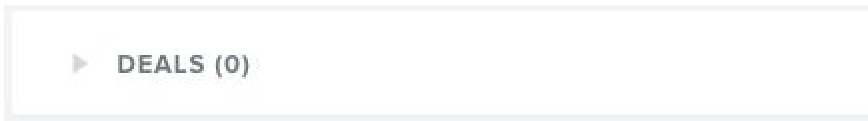
While much of this section has outlined and reinforced the similarities between the Contacts and Companies records, it is important to point out a few differences between the two.

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.



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.

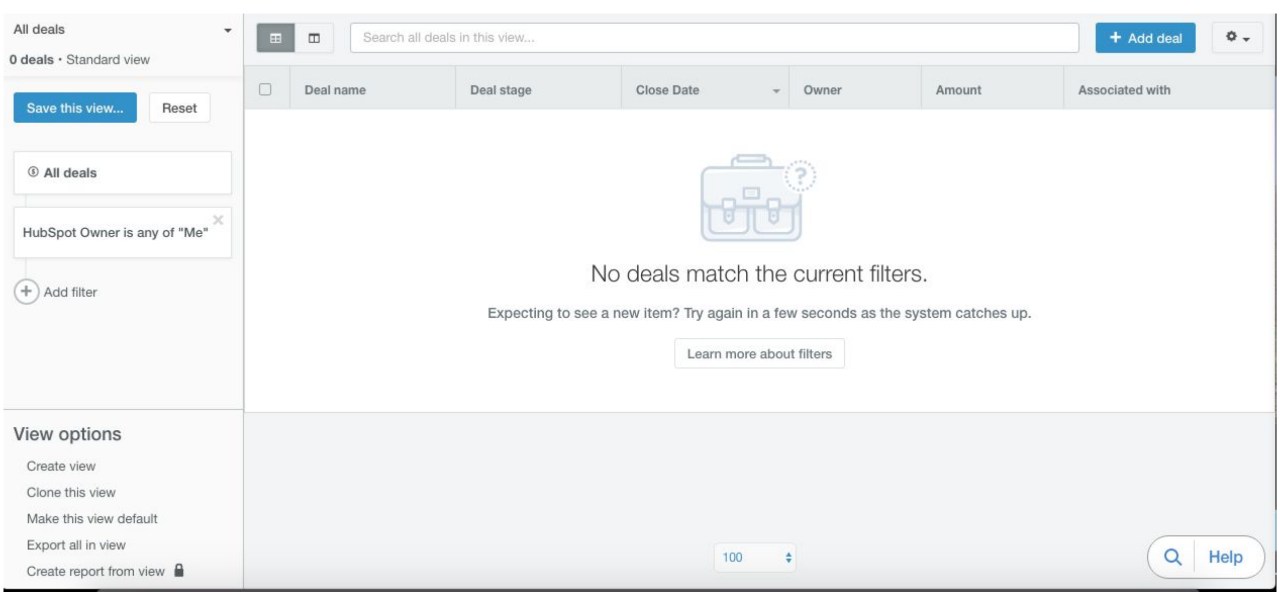
Lastly, there is a panel banel below the associated contacts panel that lists any deals that your organization has made with a given company and the respective stage of each deal. This type of information is often pulled from Salesforce CRM, but the HubSpot CRM has the ability for deal tracking as well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



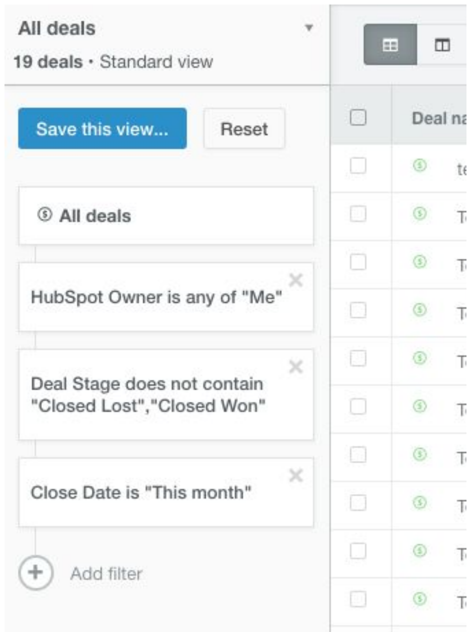
When prospecting, the company tool can be valuable in segmenting and targeting based on a variety of company properties - ones that often are unique to a firm and wouldn't be available on a person's contact record. Utilizing the companies tab and the contacts tab simultaneously allows reps to harvest, 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.

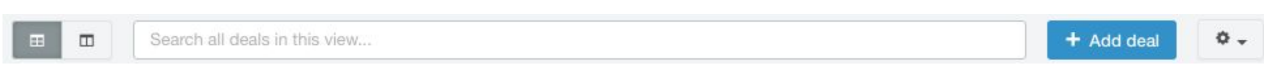


Let’s start with managing deal views. At this point, you’re certainly comfortable in understanding how to manage and manipulate views in the **contacts and companies** tabs - **deals can be manipulated in the exact same way**! Filters can be applied and views can be shared with peers. *Don’t forget to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



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!

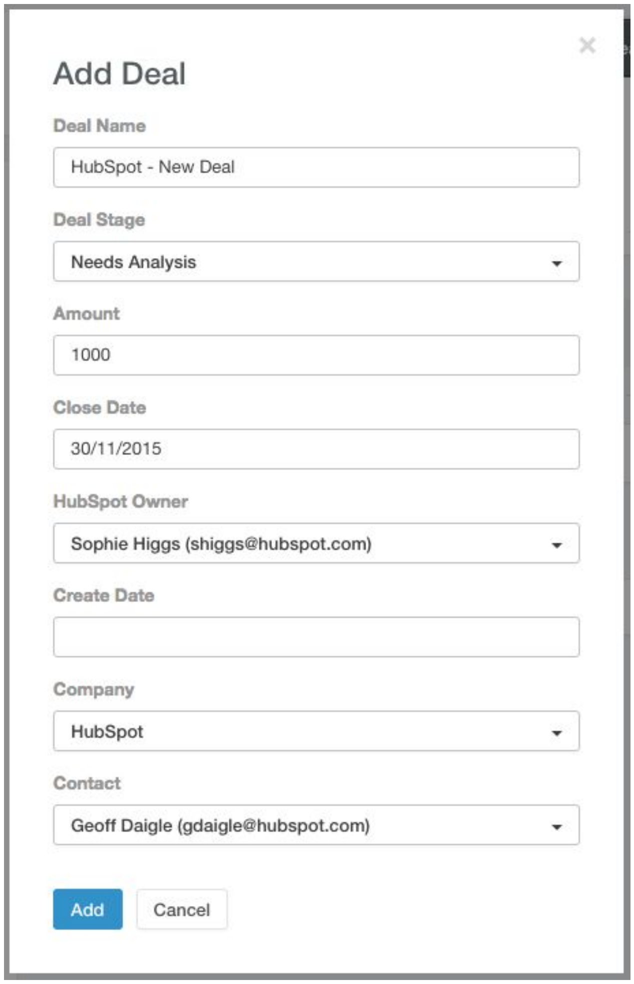


Utilize the **settings gear** to edit any columns in the pane, edit deal stages, edit properties, and manually import deals that do not yet live in the HubSpot CRM.

5.1 Adding Deals and Deal Records

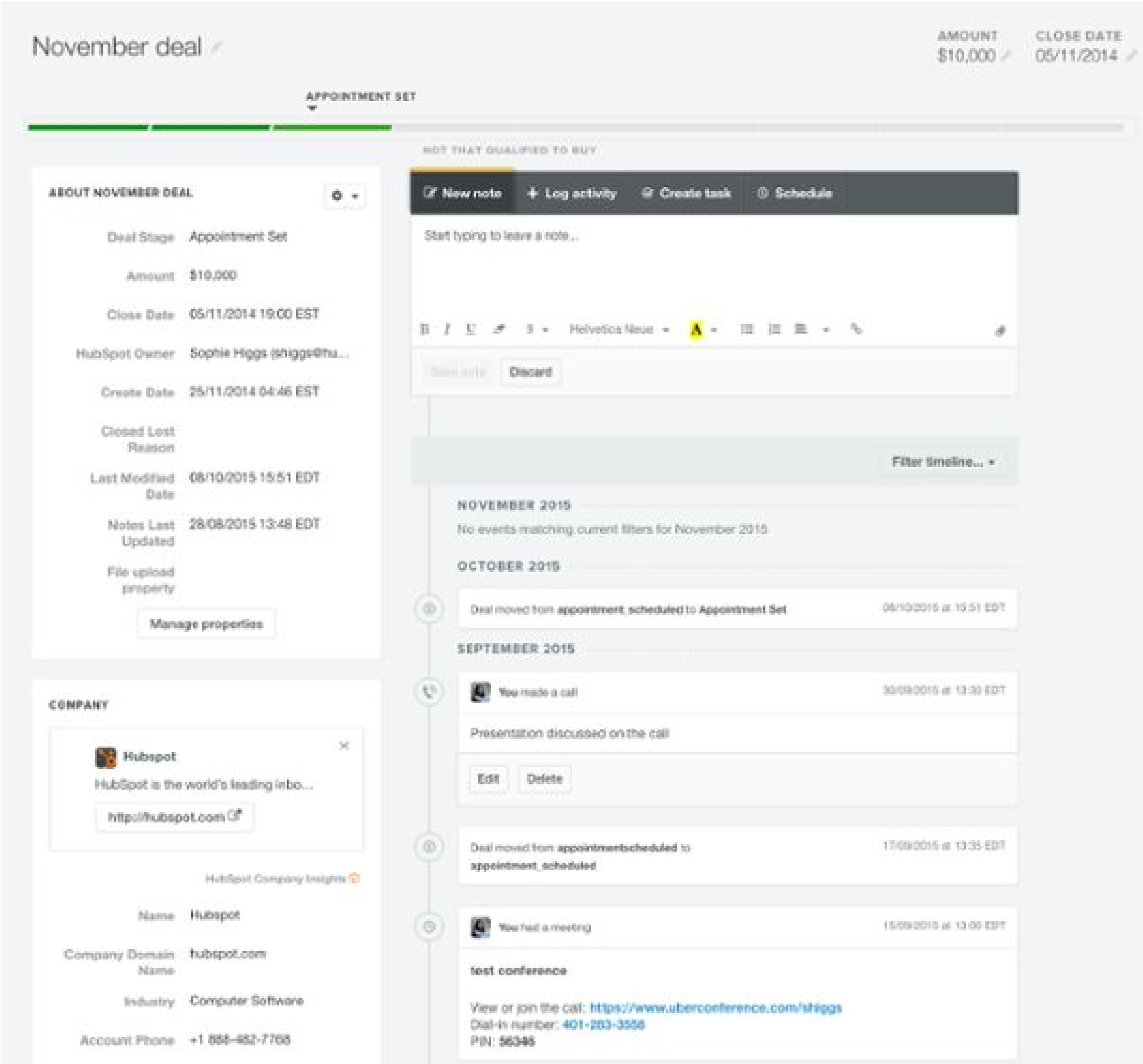
If your organization decides to implement HubSpot CRM as the main platform that reps will be working in, reps will have to enter deals (or opportunities) that they have grown throughout the sales process.

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.



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.



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)

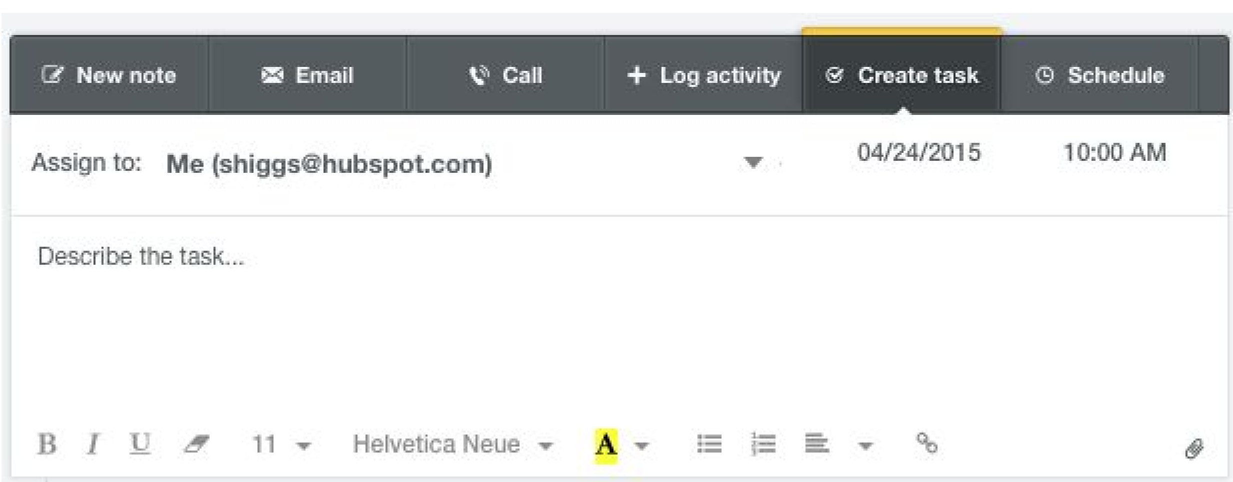
You can also customize these deal stages/probabilities so that they are unique to your sales process. These should be outlined and finalized **before** reps begin adding deals to the CRM and their pipelines.

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.

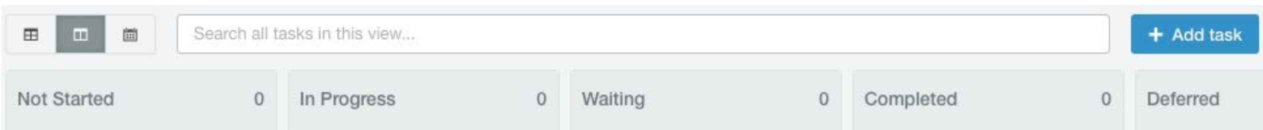
6.0 Tasks

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.)



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.



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.

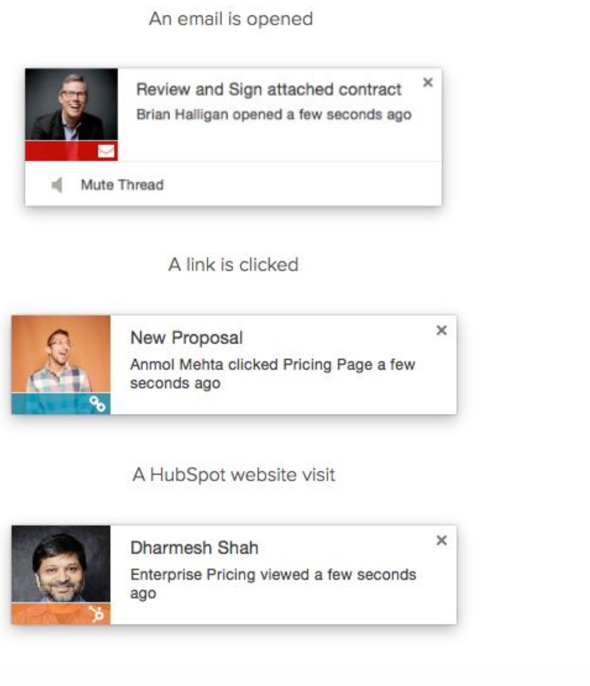
7.0 Sales Tools

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).

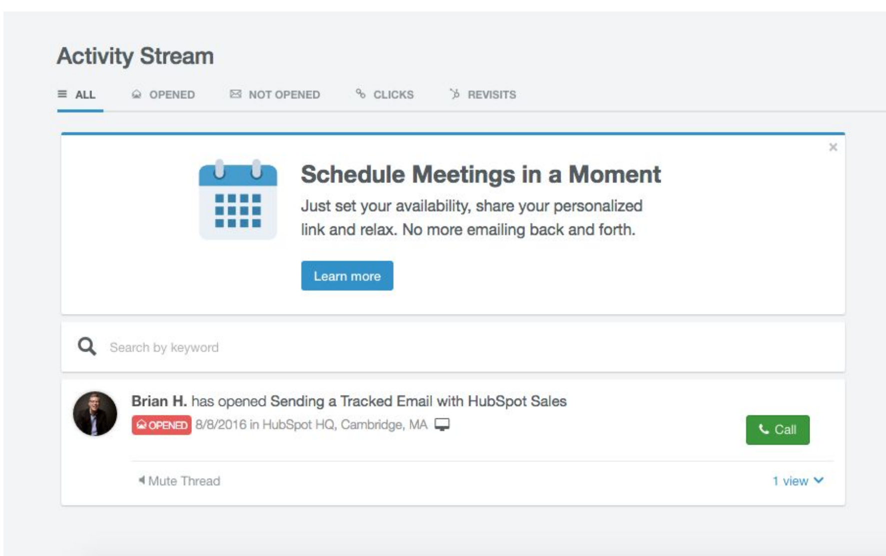
7.1 Notifications

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.

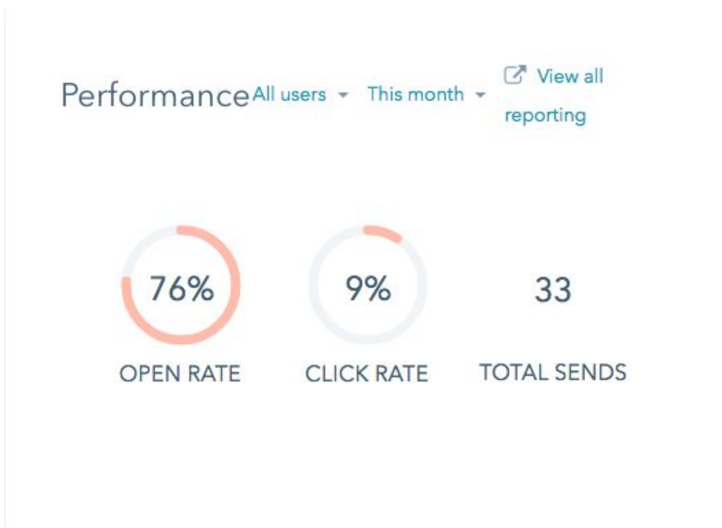


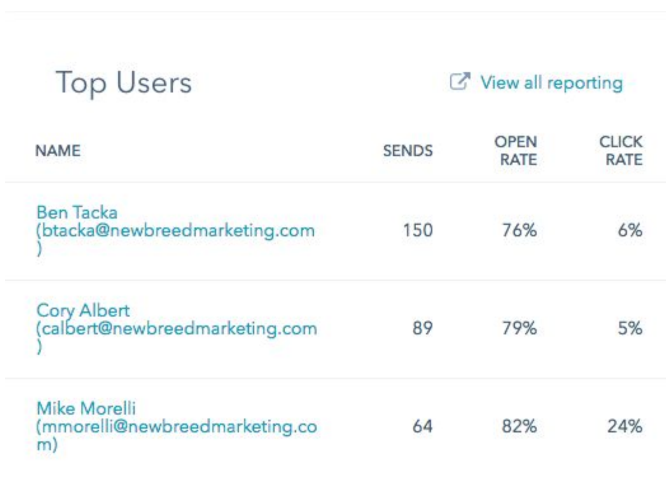
7.2 Templates

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.



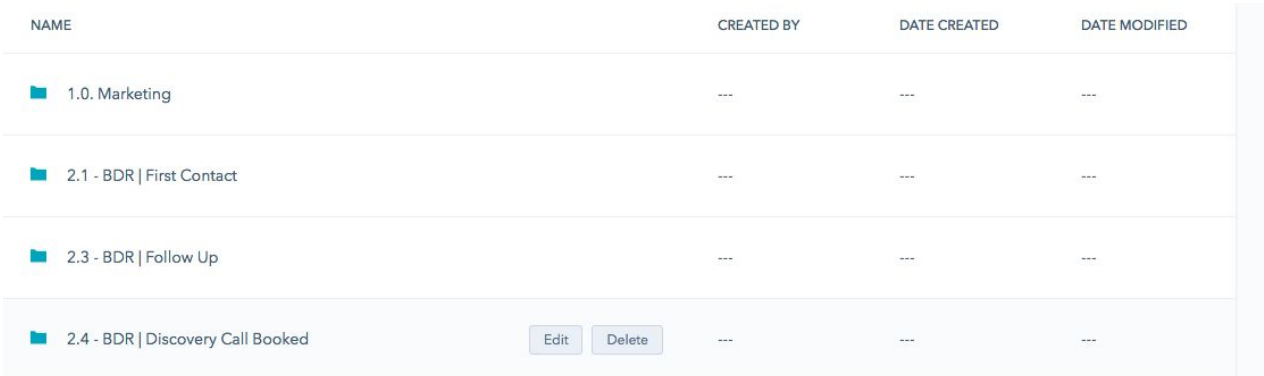


Top Users

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.com)	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.



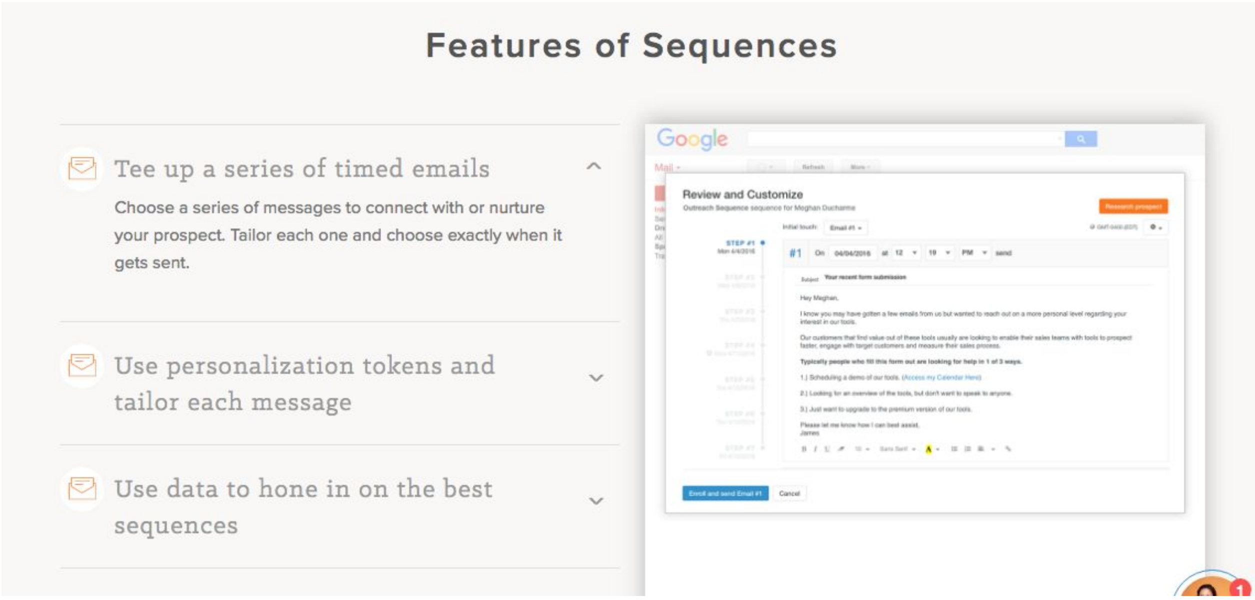
The panels introduced earlier also have the ability to dynamically change based on filter criteria. Users have the ability to change timeframes as well as drill down into particular users and examine template usage as well as performance.

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.

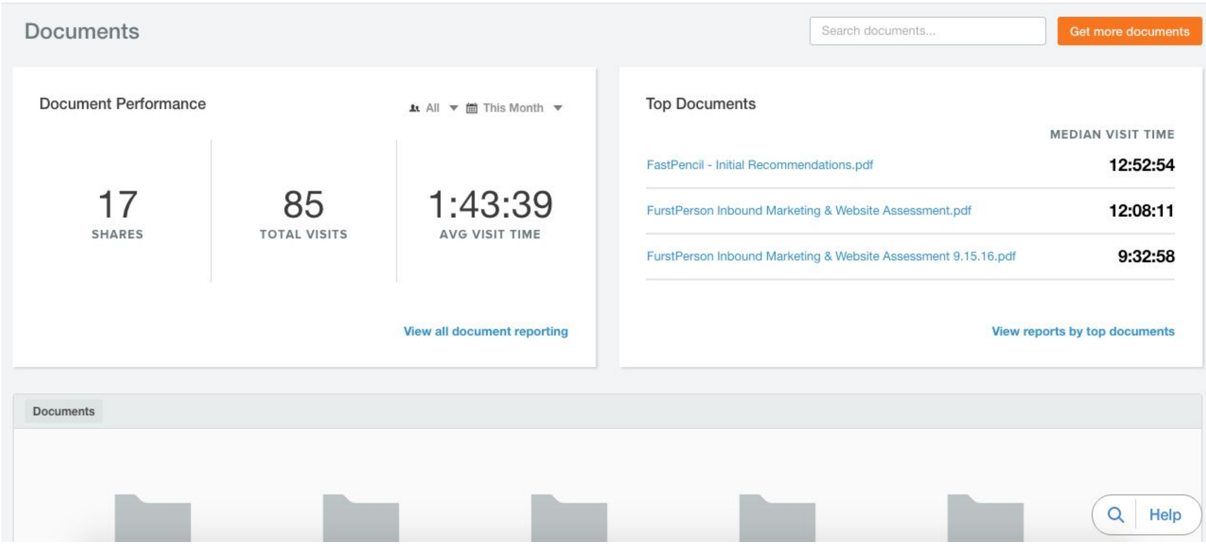
Cheers to efficiency!

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.

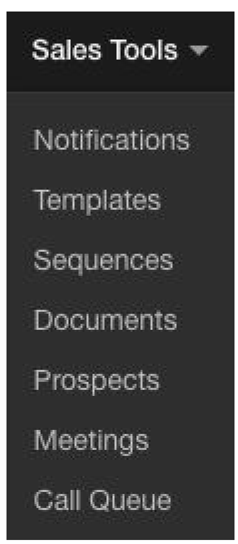
The Document library allows your organization to build a library of shared and up-to-date sales content. Like the **Templates** tool, this documents page allows users to store, edit and share documents. These documents can be shared externally to clients or partners as well!

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.



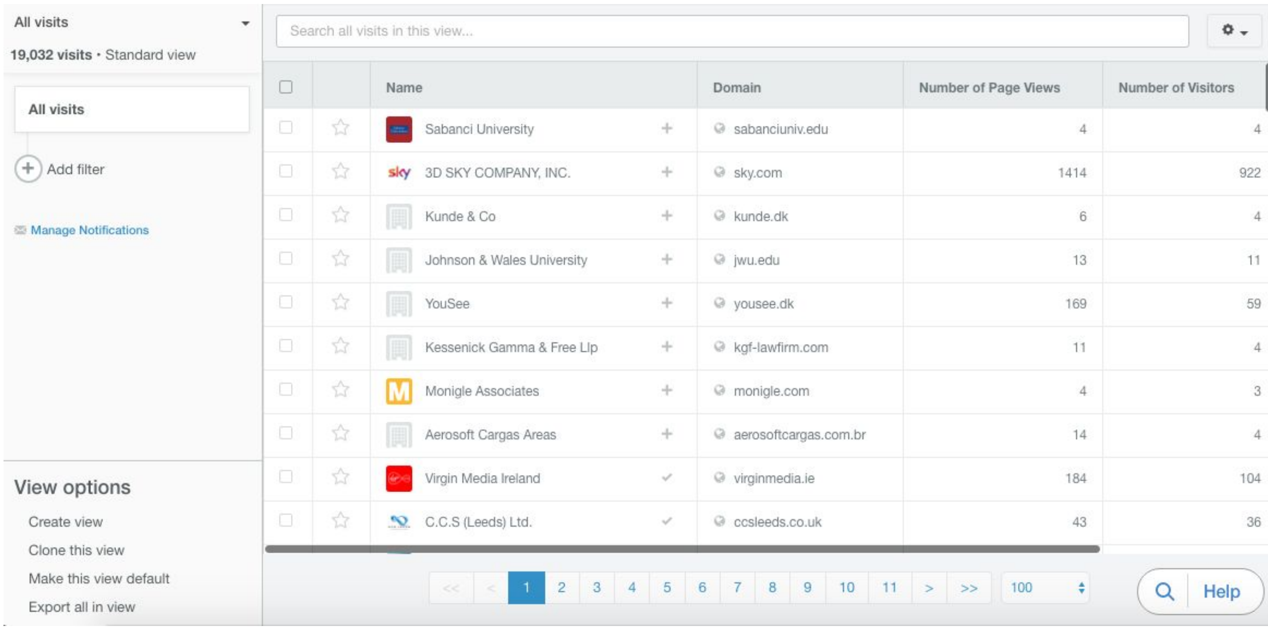
Top Documents shows which of your documents are being viewed the longest by users. Again, more reporting is available with the Pro subscription level.

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

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



Name		Domain	Number of Page Views	Number of Visitors
Sabanci University	+	sabanciuniv.edu	4	4
3D SKY COMPANY, INC.	+	sky.com	1414	922
Kunde & Co	+	kunde.dk	6	4
Johnson & Wales University	+	jwu.edu	13	11
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
Virgin Media Ireland	✓	virginmedia.ie	184	104
C.C.S (Leeds) Ltd.	✓	ccsleeds.co.uk	43	36

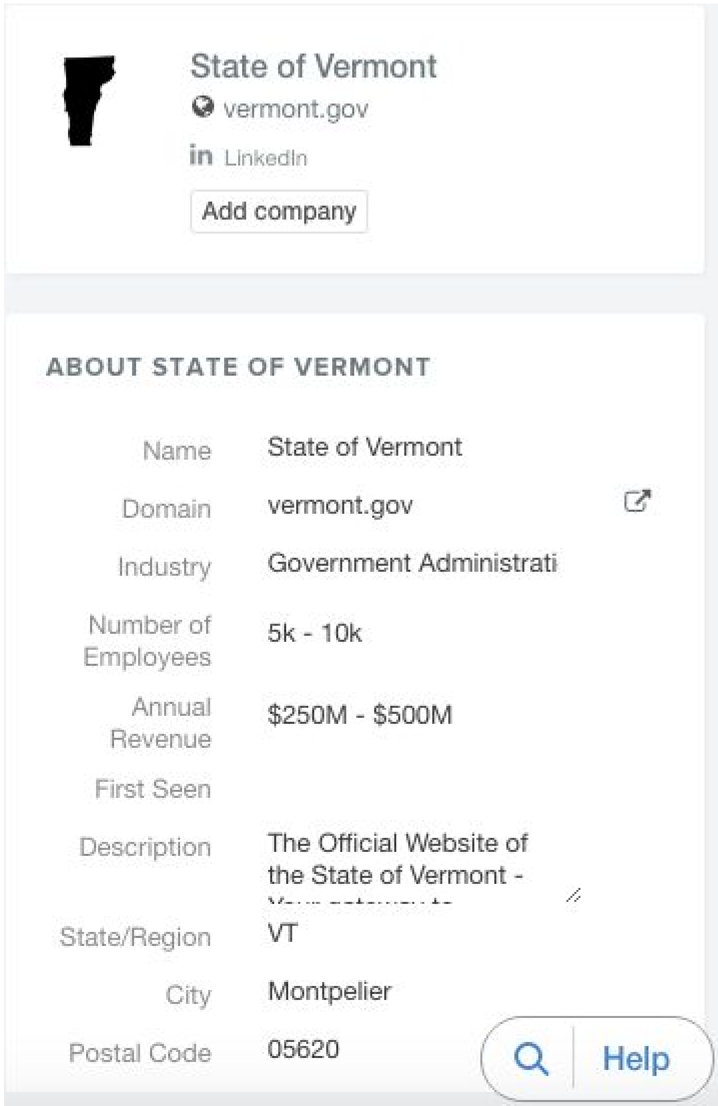
Do you notice what’s different here when comparing to the company or contact pages?

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
University of Vermont	✓	uvm.edu	2097	412
Vermont State Colleges	+	vsc.edu	66	31
State of Vermont	+	vermont.gov	197	63

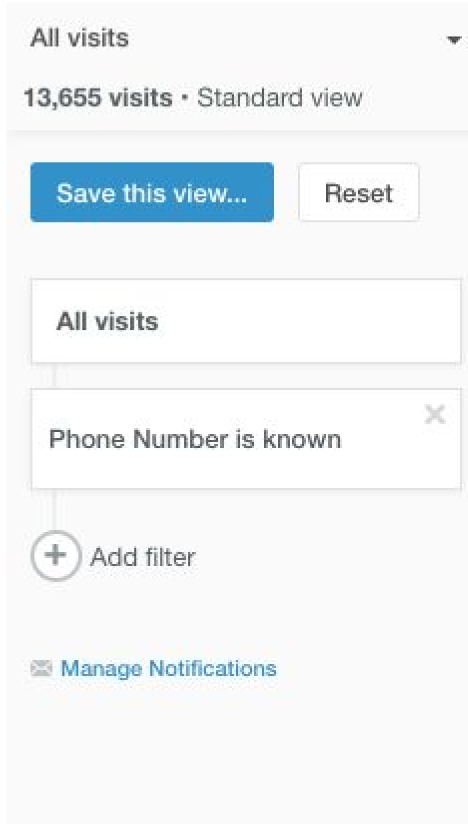
Above we have an example of three organizations that have made contact with New Breed’s website. You’ll notice either a **check mark** or a **plus sign** to the right of each organization name. This allows the user to see if the organization is in their respective HubSpot database. In this case, “University 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.



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.

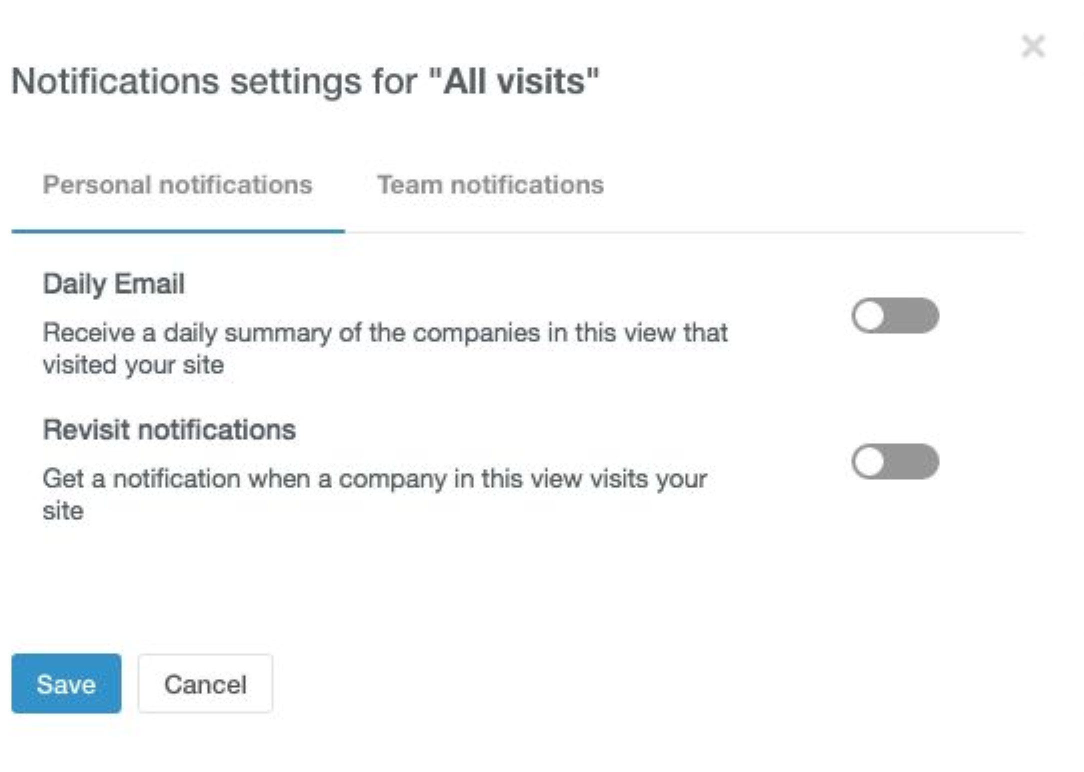


In this case, we've decided to examine all prospects that the database has a phone number associated with. This way, hypothetically, sales reps can make a quick outreach call to these prospects if they desire, or lists/workflows can be built to examine these prospects in more granularity.

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.



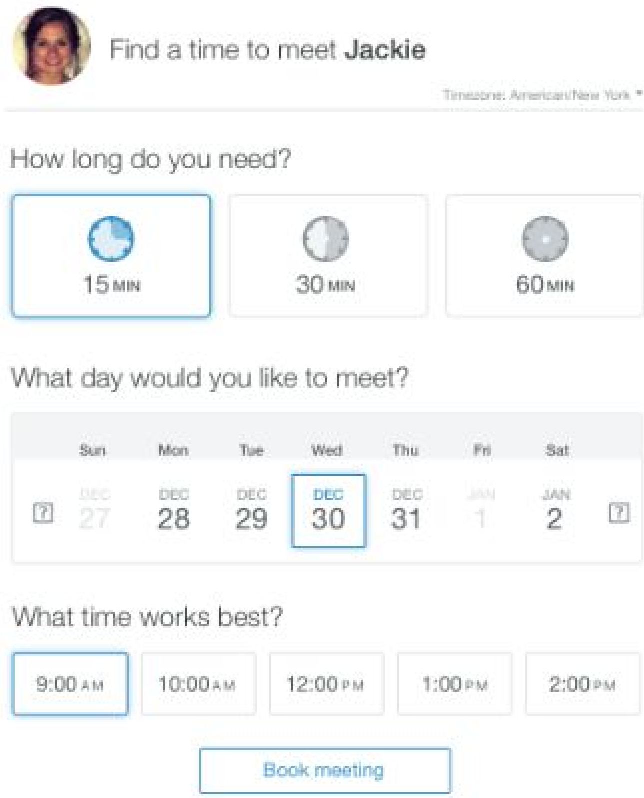
Lastly, clicking the settings gear in the top right corner enables users to edit columns being seen in the window.

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.

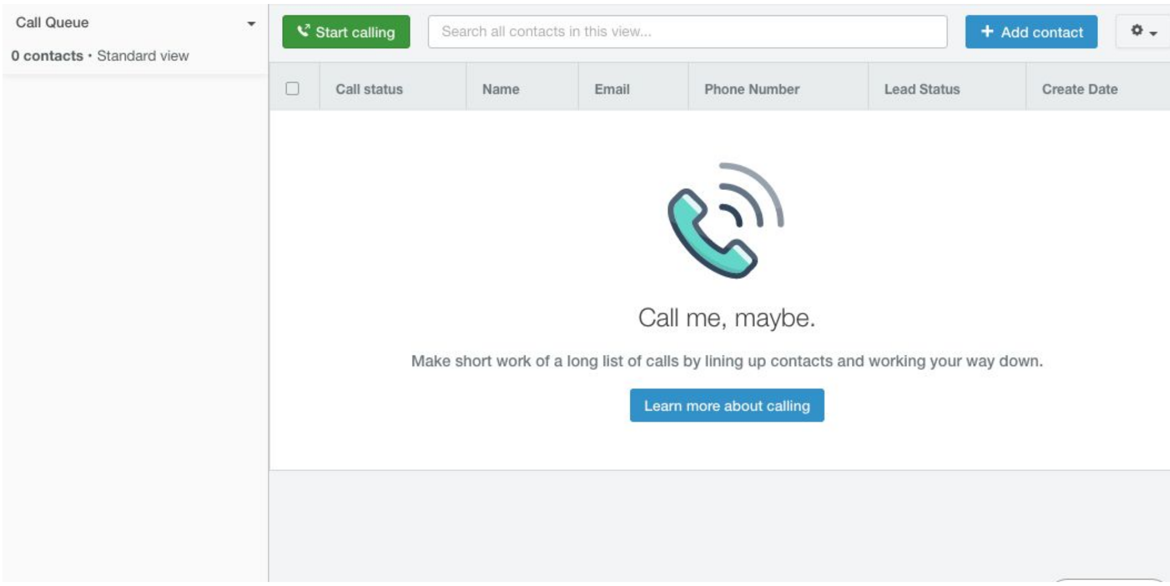
HubSpot meetings allows your leads to book your HubSpot users directly with times that work for them. Users, on the other hand, can set their own availability - they can pick who can book them, when, and for how long.

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.

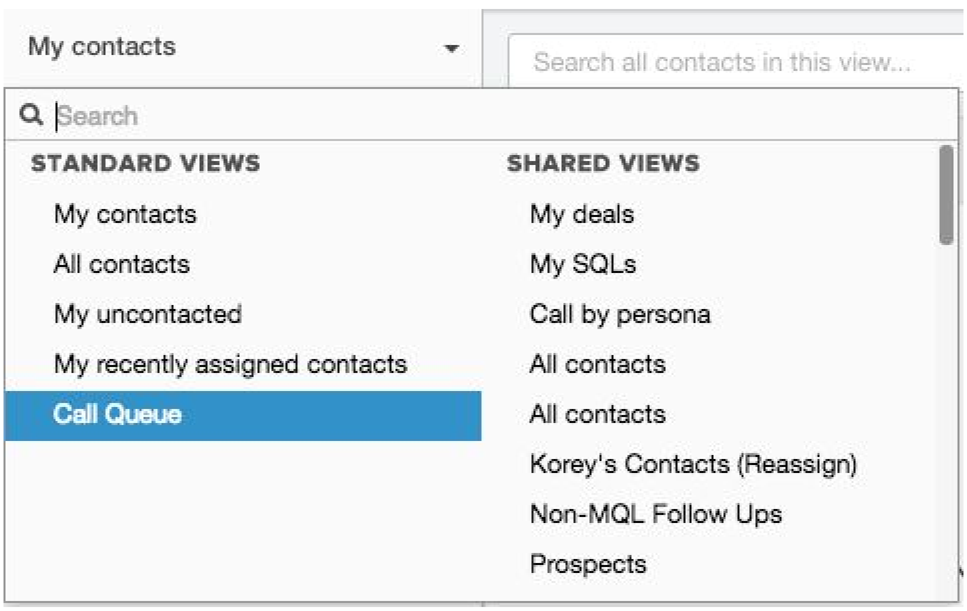


7.7 Call Queue

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.



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.

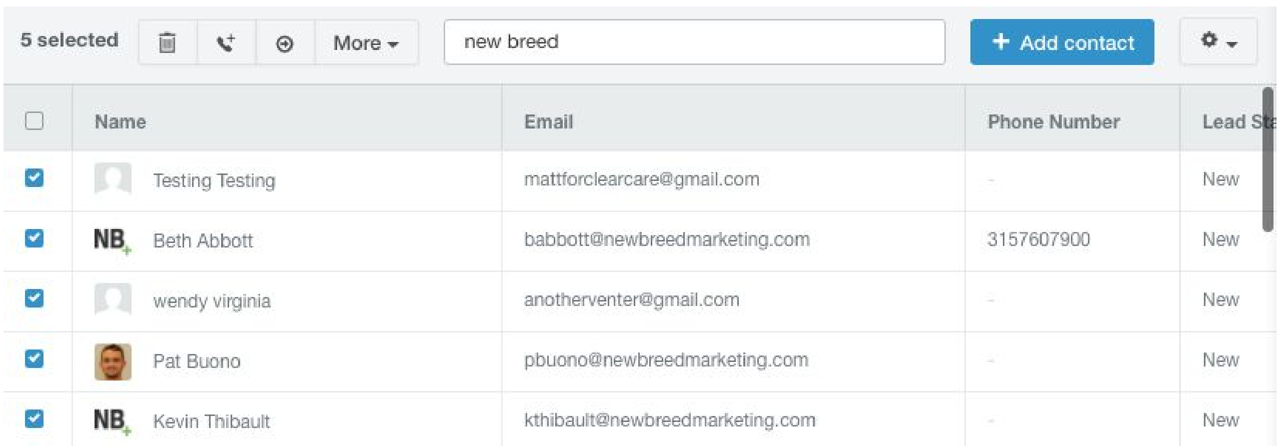


If a rep has a good idea of exactly who they want to call without the use of the contacts tab, more power to them! They can use the "add contact" button on the Call Queue page to manually add contacts to the list.

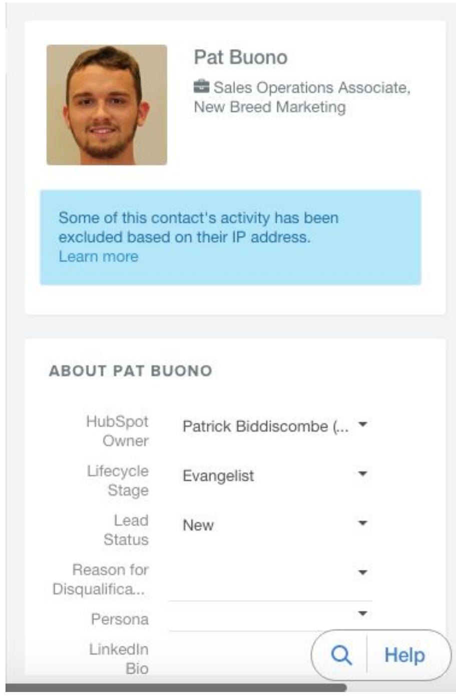
Columns that display certain contact properties can be displayed and changed by clicking the gear icon in the top right corner. Contacts can also be manually uploaded into the queue from other sources, such as an excel file.

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”.



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.

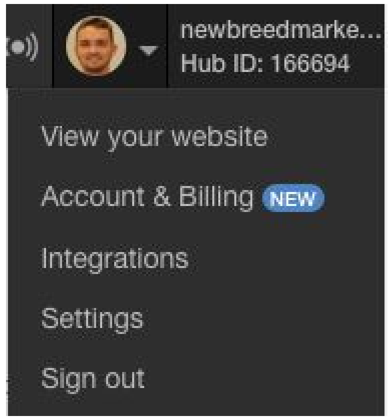


8.0 Integrations

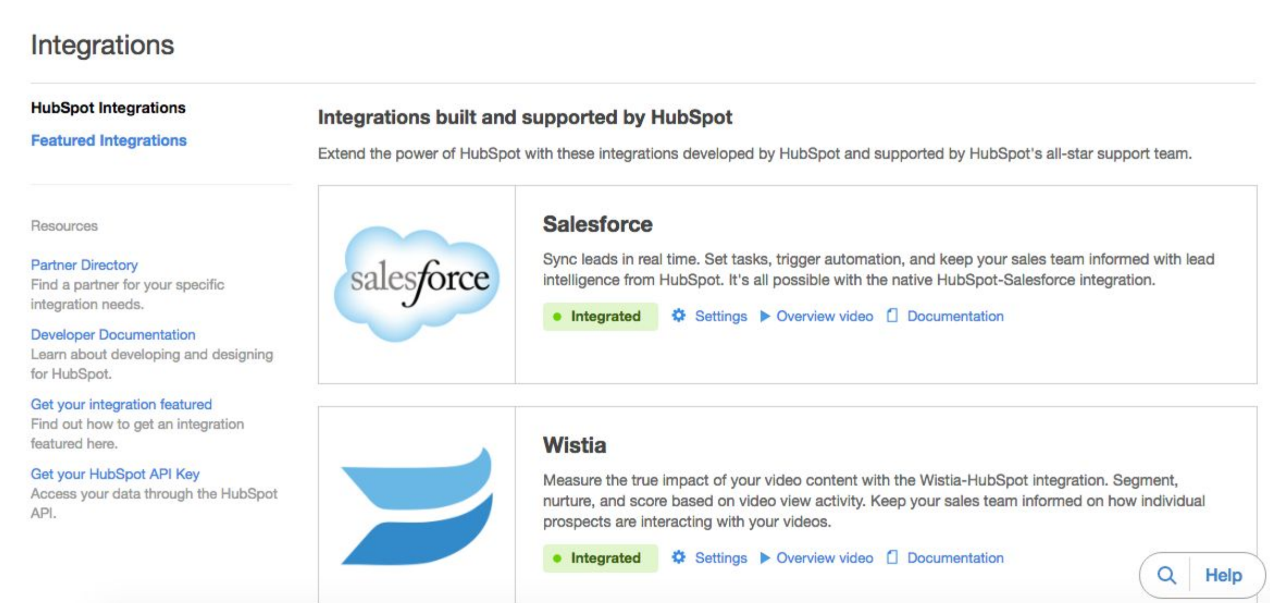
HubSpot's solutions allow for a number of **integrations** with other common software platforms. These integrations, while useful, require a bit of setup as well as maintenance once implemented.

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.

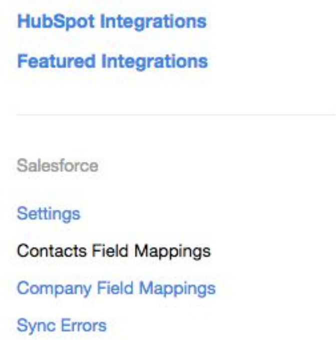


By scrolling through this page, we can see which **third-party solutions** have been integrated with your organization's HubSpot instance. This is also where we view the settings of each respective integration. HubSpot also provides overview videos for each integration as well as useful documentation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



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

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!)

https://knowledge.hubspot.com/articles/kcs_article/settings/what-are-the-crm-user-roles-and-permissions

https://knowledge.hubspot.com/articles/kcs_article/deals/creating-and-managing-deals-in-hubspot-crm

https://knowledge.hubspot.com/articles/kcs_article/email-notifications/how-do-real-time-notifications-work

http://www.hubspot.com/products/sales/sales-automation

http://www.hubspot.com/products/sales/document-tracking

https://knowledge.hubspot.com/meetings-user-guide