

# The HubSpot Growth Platform



# Learn everything you need to know about HubSpot

## [Introduction to HubSpot](#)



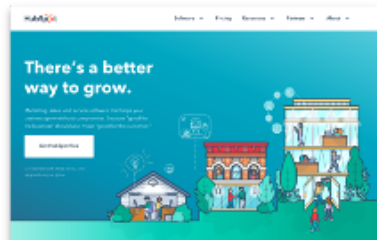
## [HubSpot Platform Overview](#) *(this presentation)*



## [What's New in HubSpot](#)



## [Hubspot.com](#)



## [Why Go HubSpot?](#)



## [Product Catalog + Pricing](#)



HubSpot offers a full suite of software for marketing, sales, and customer relationship management that are powerful alone, and even better when used together.

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### Marketing Hub

Attract and engage new customers by creating relevant, personal marketing.



### Sales Hub

Build an efficient process to engage your prospects and turn them into customers.



### Service Hub

Connect with your customers, exceed their expectations, keep them longer, and grow faster.



### HubSpot CRM

The free CRM system for growing businesses that your team will love.

# Introducing the HubSpot Growth Suite

All the tools HubSpot has to offer at the Starter, Professional or Enterprise level, available in a single package available for 25% off

## Marketing Hub



## Sales Hub



## Service Hub



HubSpot CRM

See [hubspot.com/pricing](https://hubspot.com/pricing) for more details.

Required onboarding and contact pricing not included above.



# HubSpot CRM





# HubSpot CRM

The free CRM system for growing businesses that your team will love.

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Free

Conversations (including live chat)

Contacts

Companies

Deals

Prospects

Tasks & Activities

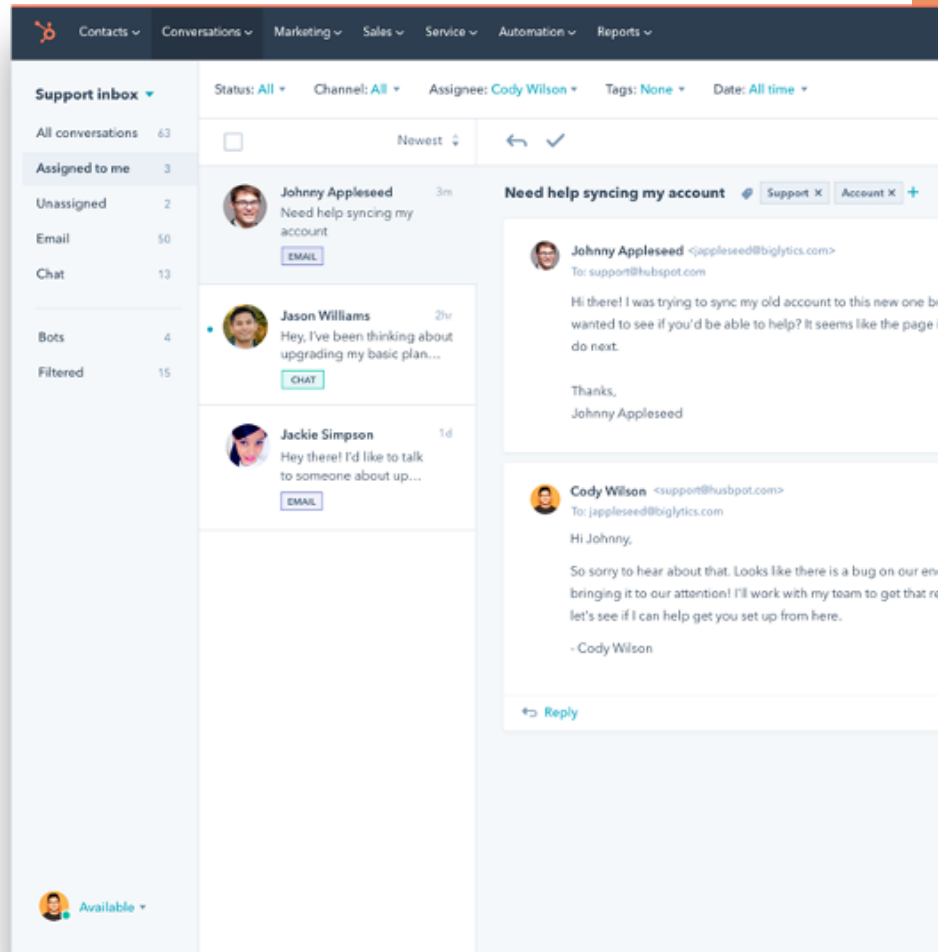
Tickets

Forms & Pop-ups

HubSpot CRM:

# Conversations

Conversations is a universal, collaborative inbox that brings together messages from live chat and team email so you can view, manage, and reply to conversations from prospects and customers in one central place.



HubSpot CRM:

## Contacts + Companies

HubSpot CRM organizes everything you know about your contacts and their companies in a single place. Store data in custom fields, browse a timeline of past interactions, and communicate with your contacts from a single unified view.

The screenshot displays the HubSpot CRM interface for a contact named Lena Letterman. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The left sidebar shows the 'Contacts' tab selected. The main content area is divided into three sections: a contact profile, 'About this contact' details, and a timeline of activities.

**Contact Profile:**

- Name:** Lena Letterman
- Role:** Financial Manager at Oktra
- Actions:** Note, Email, Call, Log, Task, Meet

**About this contact:**

- First name:** Lena
- Last name:** Letterman
- Email:** lenaletterman@demospot.org
- Phone number:** +18578295297
- Company name:** Vaia-Core
- Company Industry:**

**Activity Timeline:**

- Filter by:** Filter activity (2/40), All users, All teams
- Month:** November 2018
- Page view:** Biglytics | Home and 8 other pages
- Session Details:**
  - 11/29/2018 at 4:21 PM GMT: Viewed 8 C
  - 11/29/2018 at 4:21 PM GMT: Viewed 8 C
  - 11/29/2018 at 4:20 PM GMT: Viewed Wh
  - 11/29/2018 at 4:20 PM GMT: Viewed 8 C
  - 11/29/2018 at 4:19 PM GMT: Viewed Bigl
- Form submission:** Lena Letterman submitted [\*] Default Form on What is Big D
- No properties updated.**



HubSpot CRM:

## Deal Management

Whether you have an established sales process or you're starting from scratch, HubSpot CRM makes it easy to create your ideal process. Add, edit, and delete deal stages and properties without help from IT. Then drag and drop deals between stages.

HubSpot CRM Deals page interface showing a pipeline view with two columns: SCOPING CALL (311 deals) and BUDGET SET (1,134 deals).

**SCOPING CALL Deals:**

- \$50,000.00 Ruth Simonis - Wedding  
Close date: August 30, 2019
- €26,100.00 Acme - TEST  
Close date: June 30, 2019
- \$47,100.00 Silver Deal for Hahn, Morar and Von  
Close date: June 13, 2019

**BUDGET SET Deals:**

- \$3,650.00 Jaleel Jast - Test Deal  
Close date: May 31, 2019
- \$149.00 Sean Shoreman - Kangaroo  
Close date: May 31, 2019
- \$300.00 Sadye Wyman - donor  
Close date: May 31, 2019

**Totals:**

- SCOPING CALL: Total: \$4,273,178.64
- BUDGET SET: Total: \$9,659,683.96

HubSpot CRM:

## Prospects

Track prospects' visits to your site in real time, determine which companies are the most engaged, and set up custom email notifications for your team.

Sort prospects using dozens of different filtering criteria like geography, company size, number of visits, and more.

## Visits

[< Back](#)

### Filtering on "All visits"

Add filter

Filter visits by...

### MOST USED PROPERTIES

City

Postal Code

State/Region

### ALL PROPERTIES

Prospect properties

Address

City

Country

☐

NAME

☐

netBlazr

☐

Boston University

☐

Bicon, LLC

☐

Massport

☐

Brightcove

☐

Suffolk University

☐

Partners HealthCare

☐

Massachusetts Convention C..

☐

Motion Recruitment Partners..

HubSpot CRM:

## Business Card Scanner

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Transform your business cards into CRM contacts in seconds, so you can spend less time inputting data and more time creating great customer experiences.

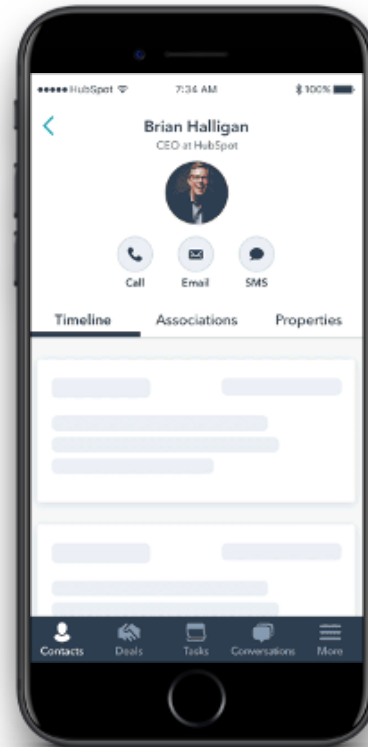


HubSpot CRM:

## Mobile App

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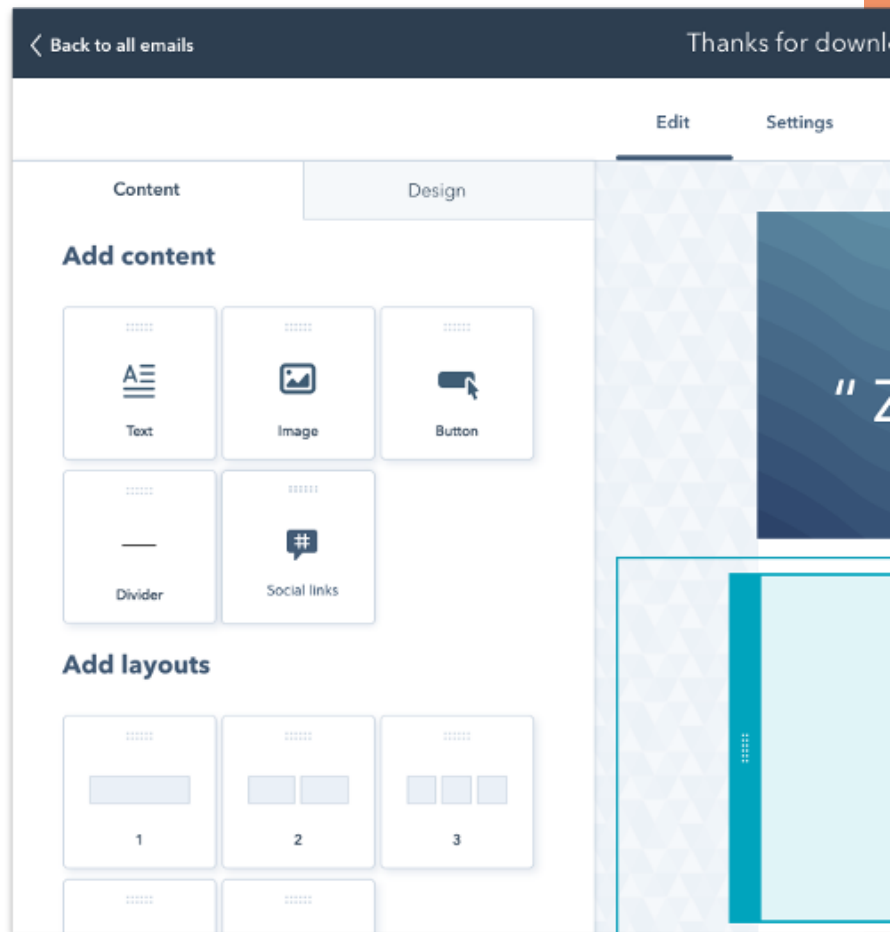
Manage your deals, contacts, and tasks on the move, and stay connected to your leads, customers, and team from anywhere.



HubSpot CRM:

## Email Marketing

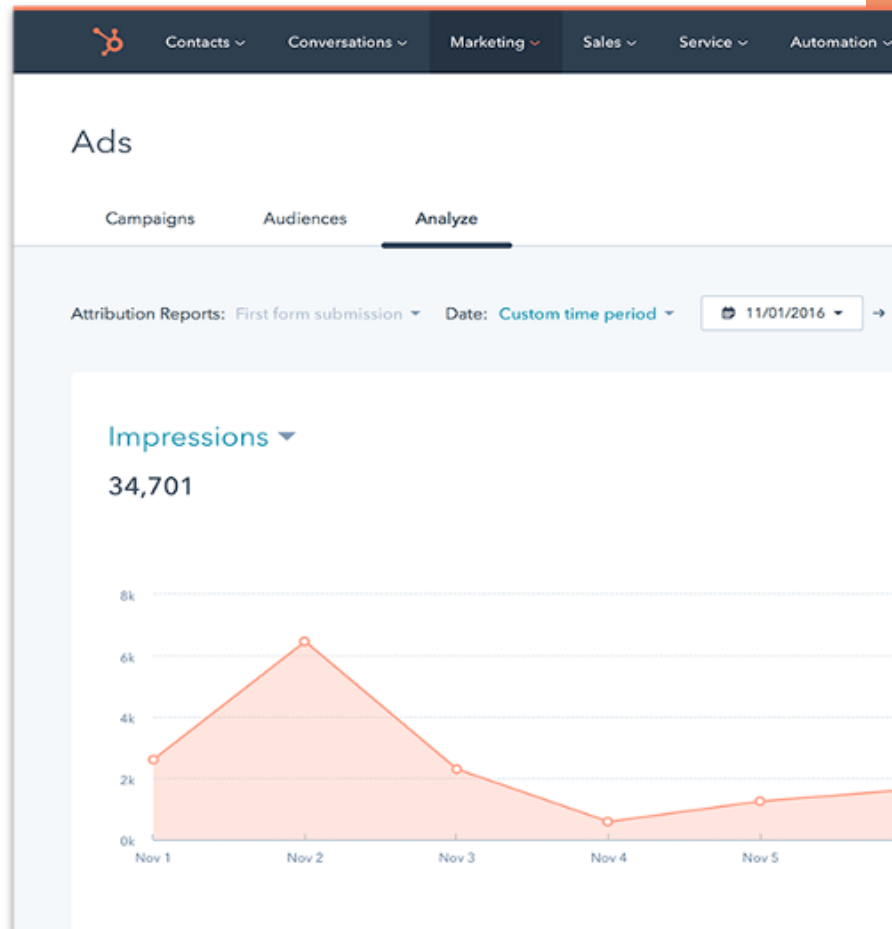
Free email marketing with up-to 2,000 sends per month using the free HubSpot CRM. Because email marketing and CRM go-together like your favorite combinations.



HubSpot CRM:

## Ads

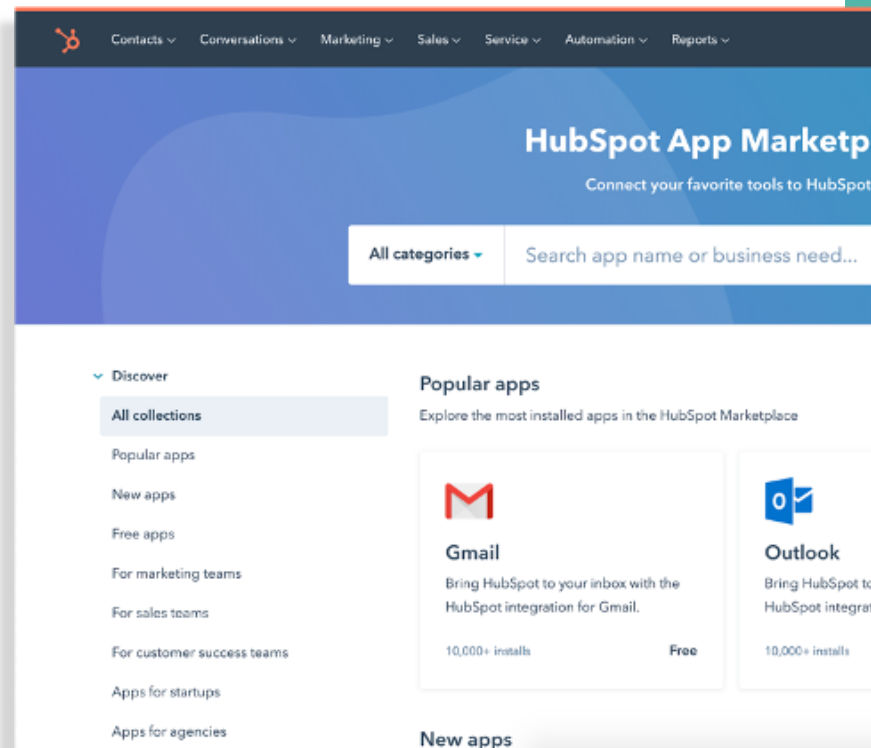
Run and measure cross-network advertising on the only platform that can **easily** tell you details on who converted from your ads, and the ROI.



HubSpot CRM:

## Part of the Growth Platform

HubSpot CRM works in close concert with Marketing Hub, Service Hub, Sales Hub, and hundreds of HubSpot app integrations. Add additional tools easily, whenever it makes sense for your team.





# Marketing Hub







## Marketing Hub

Marketing Hub helps you attract and engage new customers by creating relevant, personal marketing.

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### Starter

- Conversion Tools
- Ads Creation & Management
- Basic Analytics
- Email Marketing

### Professional

*Everything in Starter, plus:*

- Marketing Automation
- Attribution Reporting
- Personalization
- User Roles
- A/B testing

### Enterprise

*Everything in Professional, plus:*

- Advanced Team Management
- Email Send Protection
- Predictive Lead Scoring
- Advanced Reporting
- Custom Event Triggers
- Password Protected Content

Marketing Hub Starter:

## Conversion Tools

Capture leads through your website with landing pages that are optimized for your brand, easy to customize and track.

Convert your visitors into leads with professional call-to-action buttons, forms, and optimized pop-ups that you can add to your website in minutes.

[Back to all forms](#)

Webinar Sign Up

[Learn more](#)

FormOptions

What should happen after a visitor submits this form

☐ Display a thank you message ☒ Redirect to another page

Please select or add a location.

Follow up options

☐ Notify contact's HubSpot owner of their submission (What's this?)

Send submission email notifications to

Select or enter an email

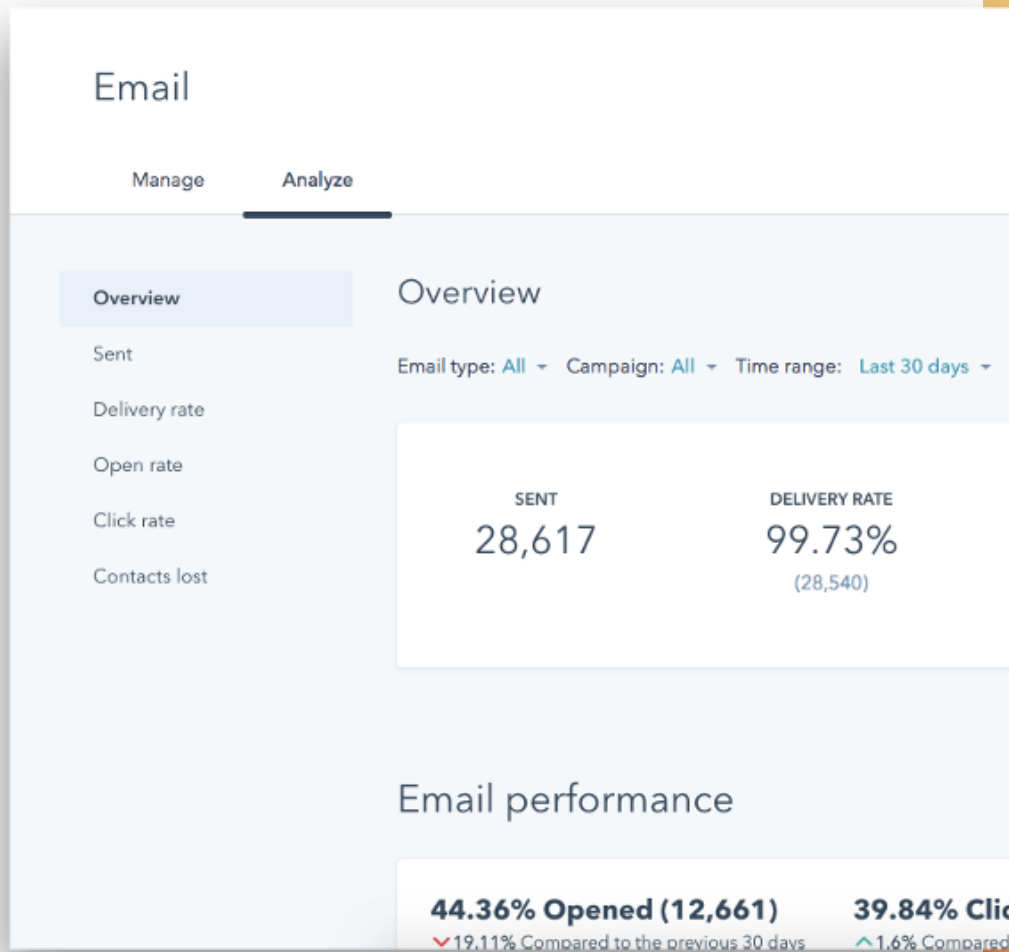
Error message language

English

Marketing Hub Starter:

## Email Marketing

Send beautiful, personalized emails that your prospects will look forward to receiving and measure which messages are most effective. Count on un-matched deliverability and best-in-class email analytics.

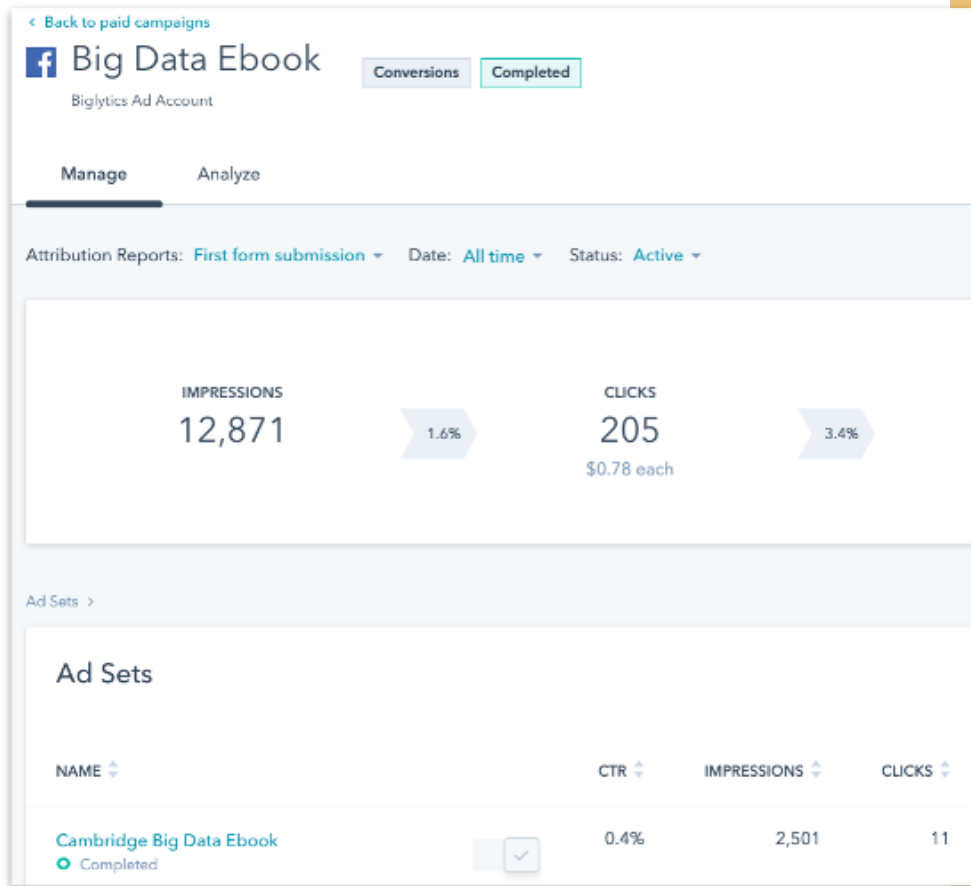


Marketing Hub Starter:

## HubSpot Ads

Using Google Ads, or advertising on Facebook or LinkedIn? HubSpot Ads lets you seamlessly sync all your leads and audiences between HubSpot and the networks.

With Marketing Hub Professional, get more spend and report on the real advertising ROI with complete precision by going a layer deeper. See how many leads, contacts, and customers your ads are generating.



Marketing Hub Professional:

# SEO

SEO has changed. Build your authority in search with tools that help you plan your SEO strategy, optimize your content, and measure real return on investment.

The screenshot shows the 'SEO' section of the HubSpot Marketing Hub Professional interface. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The 'Marketing' tab is active, and the 'Recommendations' sub-tab is selected, marked with a 'BETA' badge. Below the navigation, there is a link to '< Back to domains'. The main heading is 'Recommendations', followed by the instruction 'Find and fix SEO issues to get more search traffic.' A table lists six recommendations, each with a 'View pages' button, the number of pages affected, an impact level with a color-coded dot, and a brief explanation of the issue and its potential consequences.

| RECOMMENDATIONS   | PAGES AFFECTED | IMPACT   | REASON  |
|---|----------------|----------|---|
| Address duplicate pages <a href="#">View pages</a>            | 182            | ● High   | Pages are duplicated. This is the same. D This may result in duplicate content. Create more v |
| Increase word count <a href="#">View pages</a>                | 134            | ● High   | Top content is more than 300 your topic.  |
| Remove title from meta description <a href="#">View pages</a> | 25             | ● Medium | Your meta des results. No ne  |
| Add meta description <a href="#">View pages</a>               | 38             | ● Medium | Your meta des tion about wh pages to help and gets click                                      |
| Add a single H1 tag <a href="#">View pages</a>                | 182            | ● Low    | A single H1 ta understand yo tag or have to   |
| Shorten title <a href="#">View pages</a>                      | 1              | ● Low    | Titles with mo in search engi it doesn't get  |

Marketing Hub Professional:

## Blogging Tools

HubSpot's blog makes it easy to create and optimize content with recommendations and measure which articles are having an impact.

The screenshot displays the HubSpot Marketing Hub Professional interface. On the left, a dark sidebar contains icons for an eye (Optimize), a bar chart (Analytics), and a book (Content). The 'Optimize' section is active, showing a 'Back to blog posts' link at the top. Below it, the text 'You're writing about the topic:' is followed by a tag 'big data' with a close icon. Under 'SEO recommendations TO DO', there are two items: 'Add H1 tag' and 'Add alt text to images', both with a grey circle and a right arrow. The 'DONE' section lists five completed items: 'Word count in good range', 'Add topic to title', 'Add title', 'Page loads quickly', and 'Add topic to meta description', each with a green circle and a right arrow. The last item, 'Title isn't in meta description', has a green circle but no right arrow. On the right, the blog post draft is visible. It has a title '8 Common Misconceptions', an author 'By: Sally Smiles', and a date '7/8/16 9:15 AM'. The post content begins with 'The list post is one of the most popular... composed of -- you guessed it -- a list of items about each item.' and continues with 'Use your introduction as a way to help them. Keep it light by including... can include relating to your list, including...'. The interface includes 'Draft', 'BETA', and 'Edit' buttons at the top right.

< Back to blog posts

Draft BETA Edit

**Optimize**

You're writing about the topic:

big data ×

SEO recommendations  
TO DO

- > ● Add H1 tag
- > ● Add alt text to images

DONE

- > ● Word count in good range
- > ● Add topic to title
- > ● Add title
- > ● Page loads quickly
- > ● Add topic to meta description
- > ● Title isn't in meta description

**BIGLYTICS**

## 8 Common Misconceptions

By: Sally Smiles 7/8/16 9:15 AM

The list post is one of the most popular... composed of -- you guessed it -- a list of items about each item.

Use your introduction as a way to help them. Keep it light by including... can include relating to your list, including...

Marketing Hub Professional:

## Social Tools

Link social interactions to real people in your database, so you can see deep context and prioritize conversations.

See every interaction with your messages, create custom keyword monitoring streams for everyone on your team, and measure social performance across every major channel in one place.

Never miss an opportunity to engage with followers or delight your customers.

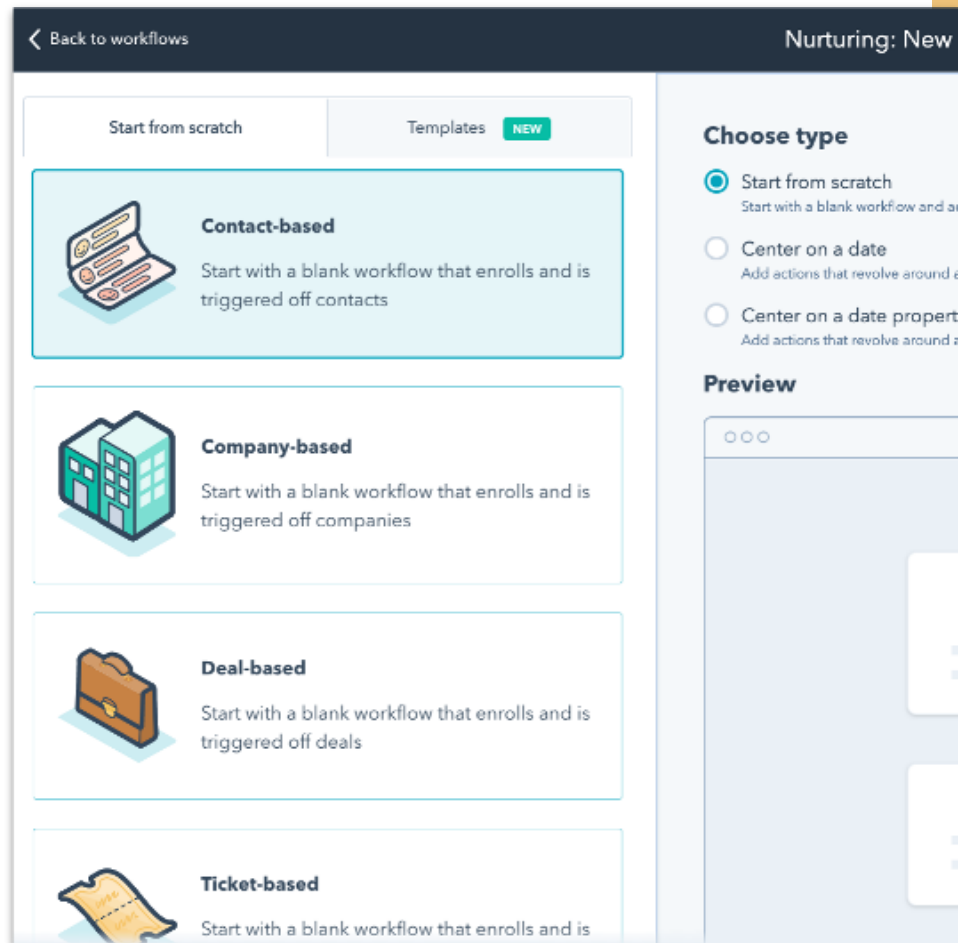
The screenshot displays the 'Social' dashboard with the 'Monitoring' tab selected. On the left, a sidebar lists 'Inbox Streams' (All Activity: 11, Conversations: 2, Interactions: 2, New Followers: 7) and 'Twitter Streams' (Create stream, @hari\_jags's Sent Messages, Duradry, AD/PD 2019, Mentions of @teamsolarMA, @hari\_jags's Timeline, More streams). At the bottom is 'Competitor Streams' with a 'BETA' badge. The main content area shows 'All networks' and 'New only' filters. It features two sections: 'FACEBOOK REACTIONS' with a post from Biglytics about 'Big Data for Non-Techies' and 1 reaction, and 'TWITTER RETWEETS' with a post from Biglytics about 'What is Big Data?' and 1 retweet. A disclaimer at the bottom states: 'Under certain privacy laws and regulations, you must tell anyone who interacts with your connected social media accounts that you may have access rights or ask you to delete their information. Since it isn't always possible to know which social media accounts are connected to your account their data may not be fully removed from the social tools. Before using this feature, please review our privacy policy.'

Marketing Hub Professional:

## Marketing Automation

Automate your marketing beyond just email. Setup nurturing based on contact, or run Account-Based Marketing (ABM) campaigns with company workflows.

Build your nurturing from scratch from HubSpot's powerful segmentation, or get started with a predefined template.





Marketing Hub Professional:


## Granular Segmentation

Segment contacts based on their behavior and company information. Use these hyper-targeted lists to send emails, personalize website content, and power marketing automation.

[< Back to lists](#)

### Name your new list


Estimation: - contacts

Active list 

[Clone](#) [Delete](#)

Form submission


has filled out **Lead Form** on **Webinar: Big Data Algorithms**

AND 











and

GoToWebinar webinar

has attended **Demand Generation Webinar**

AND 

AND

| <input type="checkbox"/> | NAME             |
|--------------------------|---|
| <input type="checkbox"/> |  Kyle Russel     |
| <input type="checkbox"/> |  Karianne Rosent |
| <input type="checkbox"/> |  Rebeka Brekke   |
| <input type="checkbox"/> |  Chris McDermot  |
| <input type="checkbox"/> |  Guy Stoltenberg |
| <input type="checkbox"/> |  Bernadine Kunz  |
| <input type="checkbox"/> |  Caroline Leanno |
| <input type="checkbox"/> |  Rahul Mayer     |
| <input type="checkbox"/> |  Vince Heller    |

[< Prev](#) **1**

Marketing Hub Professional:

## Dashboards & Reporting

Create beautiful, custom reports to export on virtually any metric from HubSpot Marketing, any record from HubSpot CRM, or data from any integrated apps. Use closed-loop reporting to determine the ROI of your work.

### Marketing Dashboard ▾

Date range: All data ▾

#### Marketing Performance

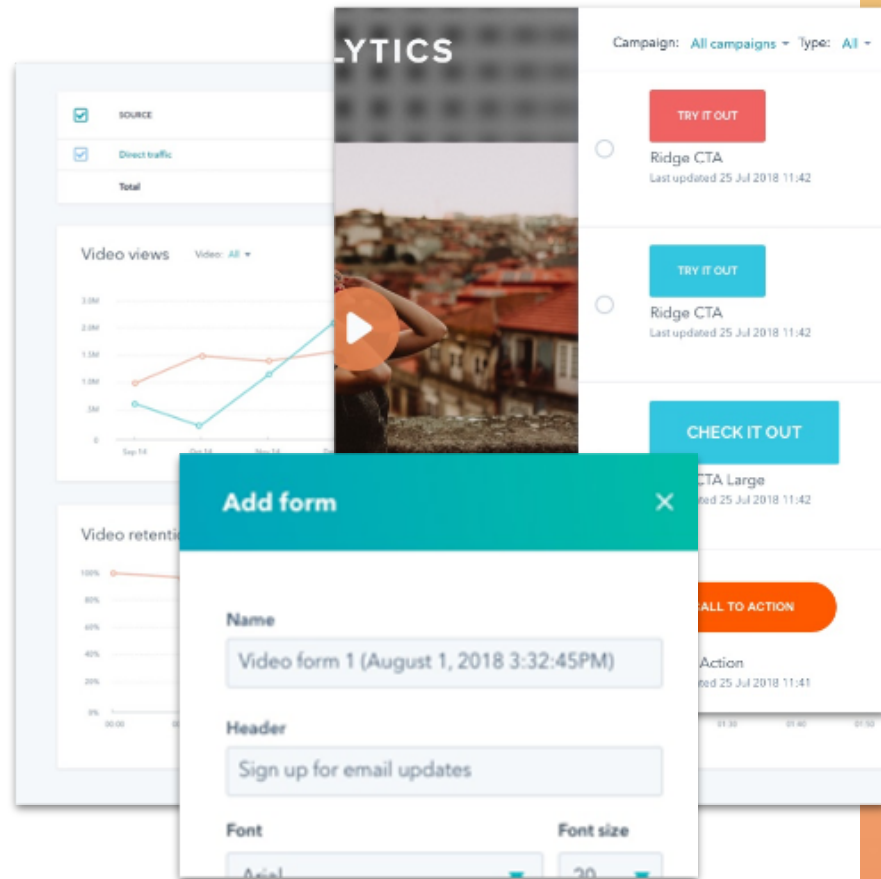


Marketing Hub Professional:

## Video Marketing Features

Marketers can now host and manage video files inside of HubSpot for free. Users can embed those videos into website pages, and blog posts with just one click, and add in-video CTAs and forms to make videos interactive.

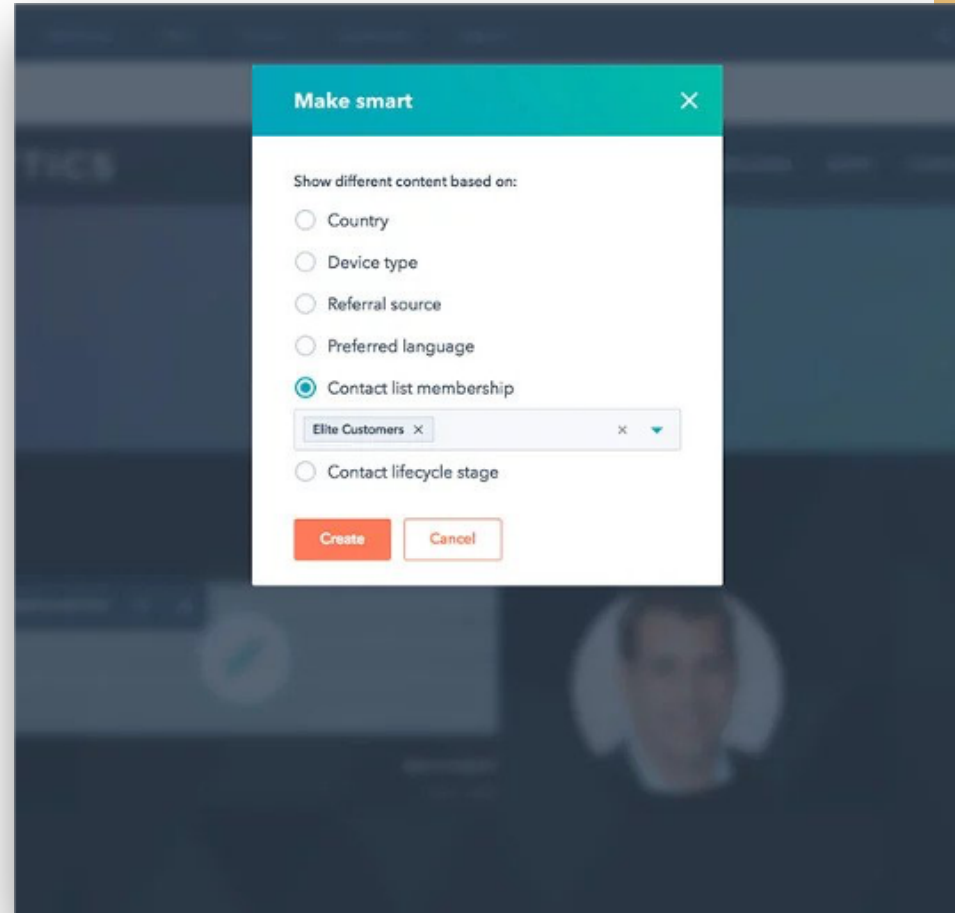
New video landing page and blog post performance analytics help maximize the impact of video marketing campaigns.



Marketing Hub Professional:

## Personalization

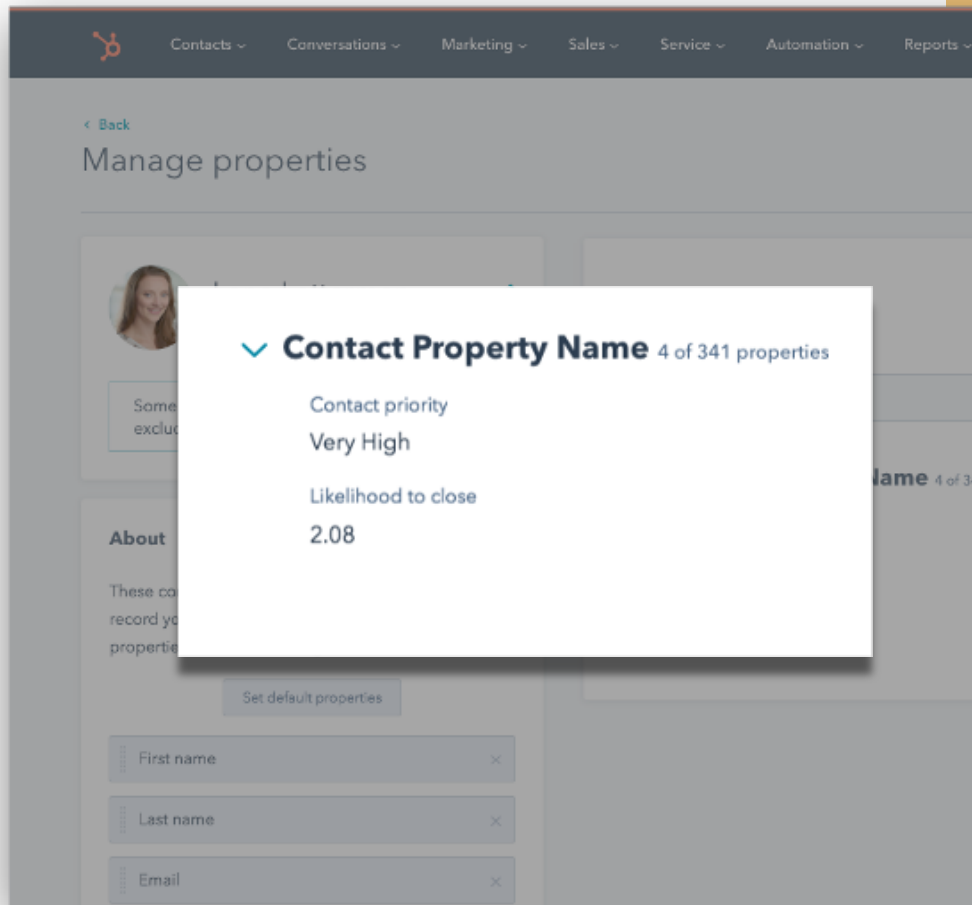
Easily personalize everything from your emails to your website content and calls-to-action. Mention specific details about a contact and their company, or swap out entire blocks of content & conversion paths to make their experience more personal.



Marketing Hub Enterprise:

## Predictive Lead Scoring

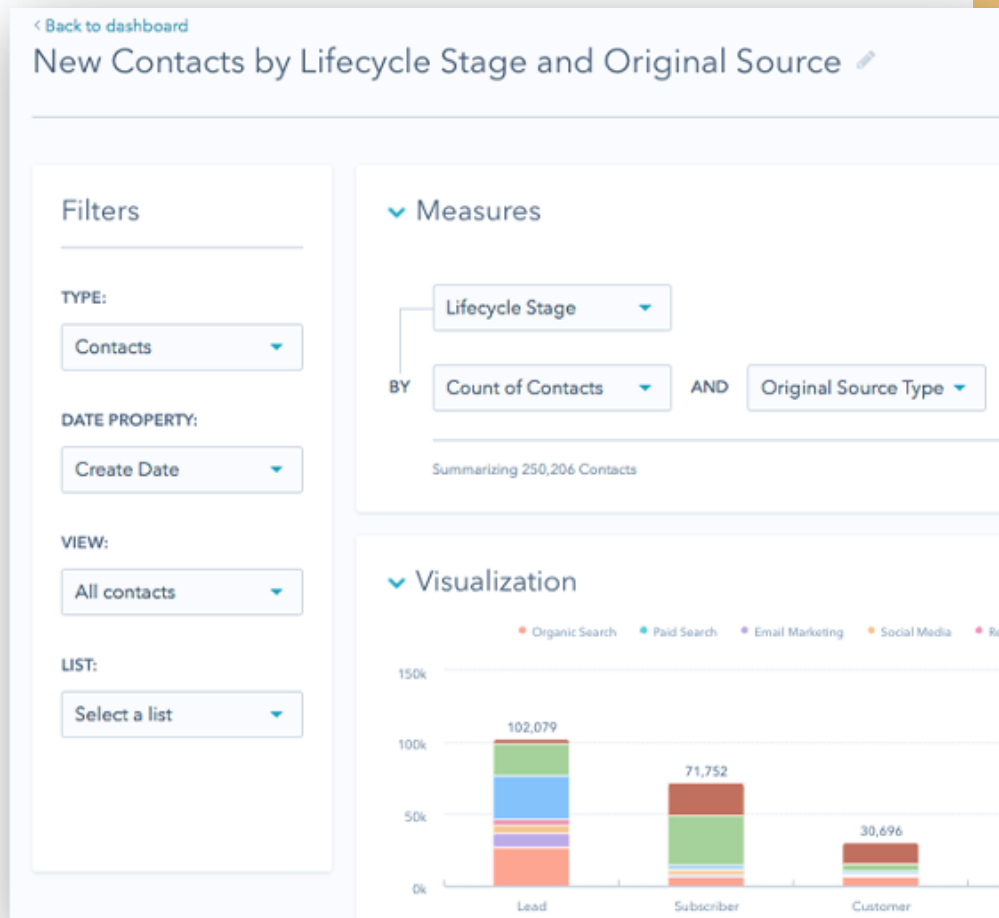
Predictive Lead Scoring takes hundreds of demographic and behavioral factors into account to automatically score contacts based on their likelihood to buy.



Marketing Hub Enterprise:

## Advanced Reporting

Create detailed reports that tie granular marketing efforts to the deals and revenue they assisted or closed. Build custom dashboards based on virtually any data stored in your CRM system.

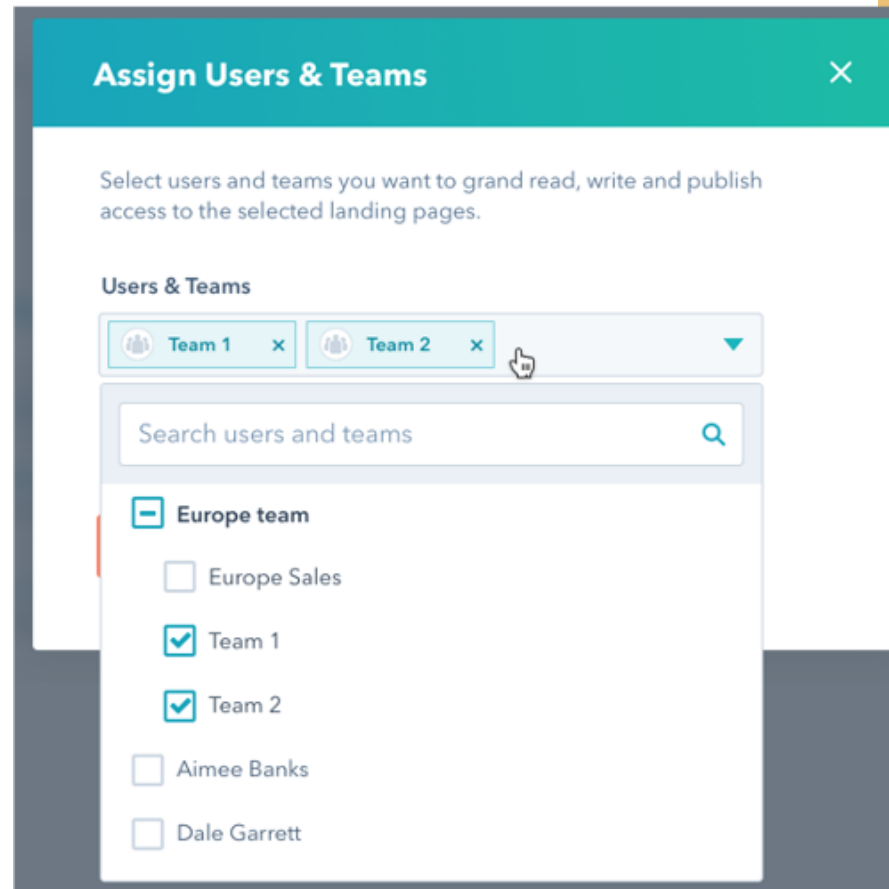


Marketing Hub Enterprise:

## Content Partitioning

Use Teams to segment assets in HubSpot, giving the right users easy and uncluttered access to the right content.

Useful for international marketing teams, teams segmented across divisions, product lines, brands, or other dimensions.



Marketing Hub Enterprise:

## Email Send Protection

As you grow, more teams and people want to talk with customers - from support, service, marketing, product, and management.

Email send protection in HubSpot let's you set the maximum number of times a contact should receive an email, so you can delight your customers with just the right number of emails.

### Email

Configuration

Subscriptions

Subscription Types

Tracking

Sometimes less is more. Set a send frequency cap to make sure you don't over-email your contacts with your campaigns. Control the number of emails your contacts receive by enabling a

If you use workflows to send essential automated emails, you should disable this setting

#### Send frequency

☐ Recipients receive every email ☒ Recipients receive a set number of

Only marketing emails are included in the send frequency cap. ⓘ

#### Maximum number of emails per recipient

3



#### Frequency

☐ Daily ☒ Weekly ☐ Every two weeks ☐ Monthly

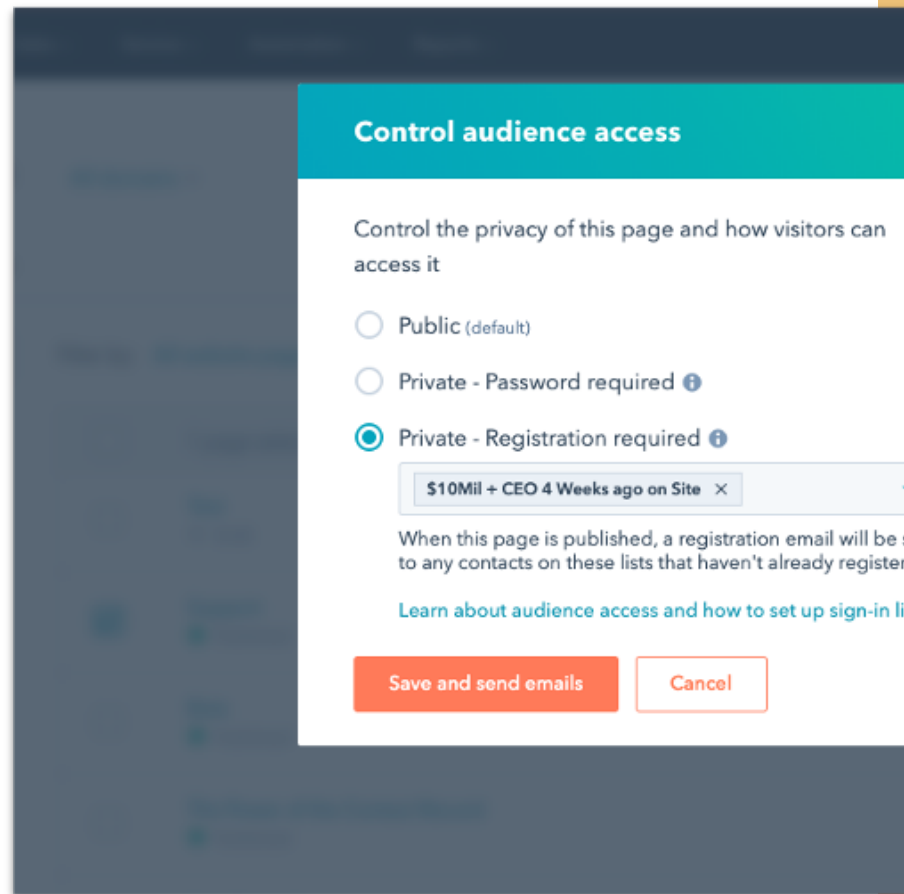


Marketing Hub Enterprise:

## Password Protected Content

Do you have content you want restricted to specific customers, investors, or another group of individuals?

If so, with Marketing Hub Enterprise you can password-protect website content, landing pages, and a blog to only be accessible by the contacts you choose.



The screenshot shows a 'Control audience access' modal window. It has a teal header with the title 'Control audience access'. Below the header, the text reads 'Control the privacy of this page and how visitors can access it'. There are three radio button options: 'Public (default)', 'Private - Password required ⓘ', and 'Private - Registration required ⓘ'. The 'Private - Registration required ⓘ' option is selected. Below the options is a light blue box containing the text '\$10Mil + CEO 4 Weeks ago on Site' with a close icon. Below this box, a paragraph states: 'When this page is published, a registration email will be sent to any contacts on these lists that haven't already registered.' Below the paragraph is a link: 'Learn about audience access and how to set up sign-in links'. At the bottom are two buttons: 'Save and send emails' (orange) and 'Cancel' (white with orange border).

**Control audience access**

Control the privacy of this page and how visitors can access it

☐ Public (default)

☐ Private - Password required ⓘ

☒ Private - Registration required ⓘ

\$10Mil + CEO 4 Weeks ago on Site ×

When this page is published, a registration email will be sent to any contacts on these lists that haven't already registered.

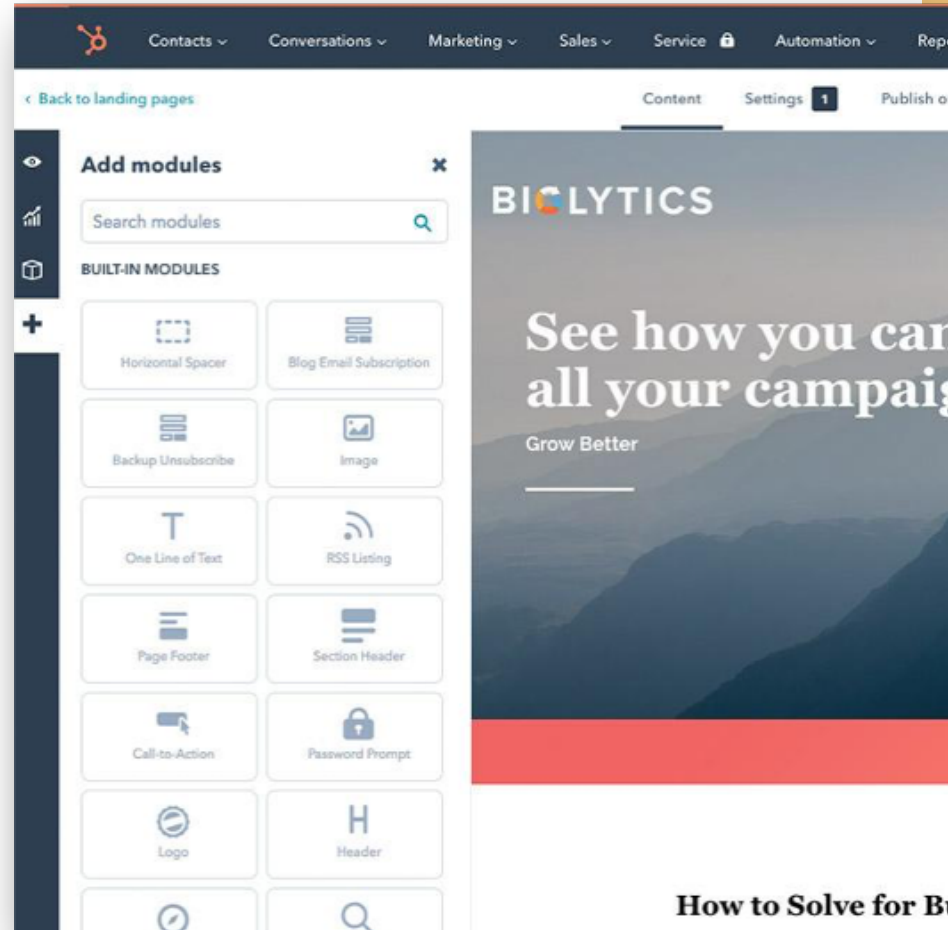
[Learn about audience access and how to set up sign-in links](#)

Save and send emails Cancel

Add-On or Standalone:

## HubSpot CMS

Build and host your entire site with HubSpot's drag and drop website builder. Personalize content for every visitor, and publish mobile-optimized content all from within a single interface.



Marketing Hub:

## Closely connected to CRM

Right out of the box, Marketing Hub is deeply connected to HubSpot CRM. Track contacts, companies, deals, tasks, tickets and more inside the #1 CRM for SMBs.

Already use a CRM system that you love like Salesforce? HubSpot has a fully supported native integration that is easy to set up and use (Professional and above.)

The screenshot displays the HubSpot Marketing Hub interface. At the top, a dark navigation bar contains the HubSpot logo and menu items: Contacts, Conversations, Marketing, Sales, Service, and Automation. Below this, a light blue header bar shows the 'Contacts' tab selected, with a back arrow and a user icon. To the right of the header is an 'Actions' dropdown menu.

The main content area is divided into three columns. The left column features a contact profile for 'Lena Letterman', identified as a 'Financial Manager at Oktra'. It includes a circular profile picture, a row of action buttons (Note, Email, Call, Log, Task, Meet), and a section titled 'About this contact' with fields for First name (Lena), Last name (Letterman), Email (lenaletterman@demospot.org), Phone number (+18578295297), Company name (Vaia-Core), and Company Industry.

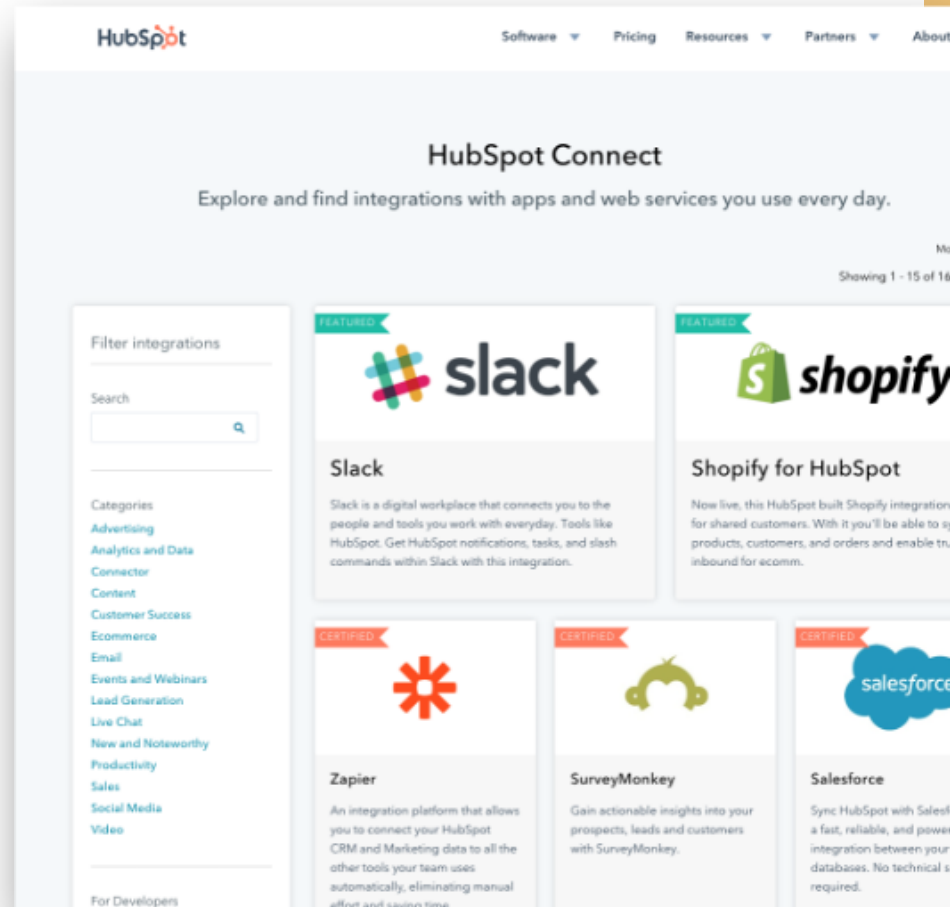
The middle column is the 'Activity' tab, showing a list of activities for November 2018. It includes a filter bar for 'Filter activity (2/40)', 'All users', and 'All team'. Below this, a 'Page view' section shows a list of activities with timestamps (e.g., 11/29/2018 at 4:21 PM GMT) and a 'Session Details' section.

The right column shows a 'Form submission' section, indicating that 'Lena Letterman submitted [\*] Default Form on W'. Below this, there is a section for 'No properties updated'.

Marketing Hub:

## Part of the HubSpot Platform

Marketing Hub works in close concert with Sales Hub, Service Hub, and hundreds of HubSpot app integrations. Add additional tools easily, whenever it makes sense for your team.





# Sales Hub





# Sales Hub

Sales Hub helps you build an efficient process to engage your prospects and turn them into customers.

## Starter

- Live Chat
- Templates & Sequences
- Documents
- Calling
- Notifications
- Meetings

## Professional

*Everything in Starter, plus:*

- Teams
- Multiple Deal Pipelines
- Automation
- HubSpot Video
- Products & Quotes
- Recommendations

## Enterprise

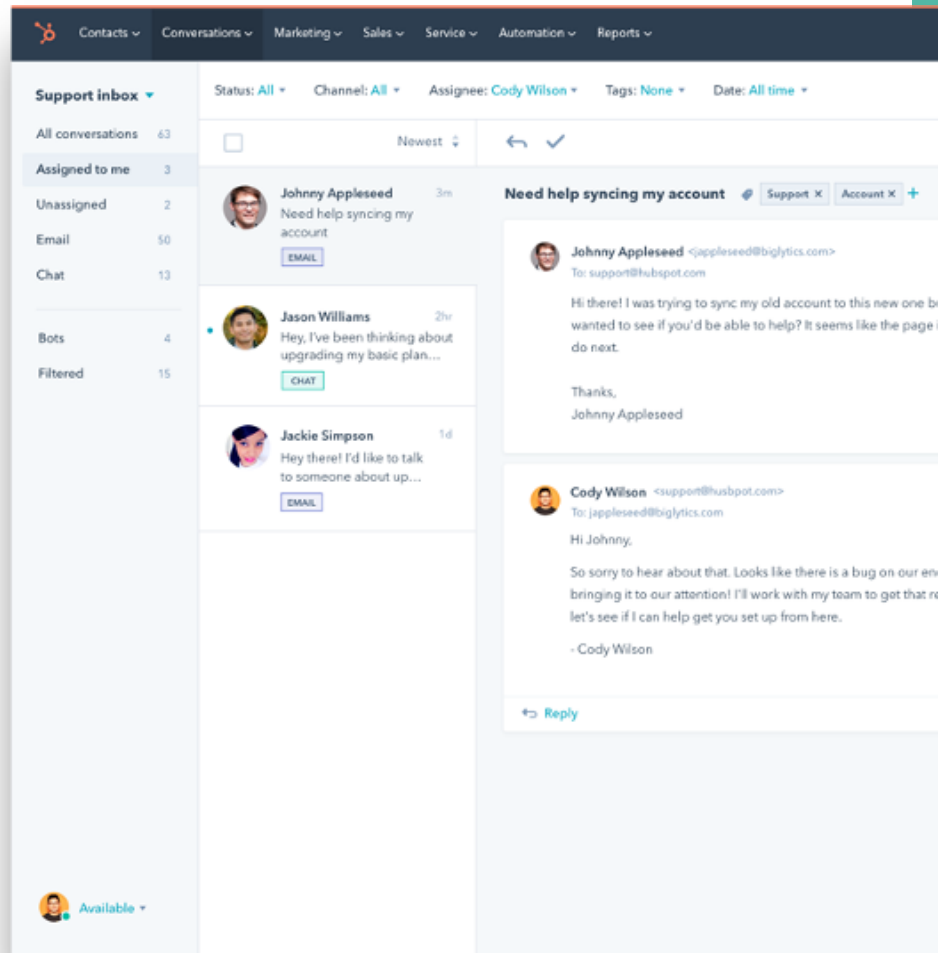
*Everything in Professional, plus:*

- eSignature
- Playbooks
- Advanced Team Goals
- Predictive Lead Scoring
- Call Transcription
- Advanced Reporting

Sales Hub Starter:

## Conversations + Live Chat

Conversations is a universal, collaborative inbox that brings together messages from live chat, team email, and Facebook Messenger so you can view, manage, and reply to conversations from prospects and customers in one central place.



Sales Hub Starter:

# Templates, Sequences & Snippets

Craft personalized templates for every stage of the sales process, and share them across your team.

Tee up a timed series of email messages based off your templates with Sequences.

Save time by saving short “snippets” of text you can easily drop into your emails using keyboard shortcuts.

The screenshot displays the HubSpot 'Sequences' interface. On the left is a sidebar with navigation links: Mail, COMP, Inbox (2), Starred, Sent Mail, Drafts (5), \_Outbox, copywriting, emerging le, Fidelity, GrowthSta, and a profile icon for Elise. The main area is titled 'Sequences' and 'Meeting Follow Up'. It shows a sequence timeline with two emails: 'EMAIL 1' on 'Thu 9/14' and 'EMAIL 2' on 'Tue 9/19'. To the right, the 'Start sequence at:' dropdown is set to 'Email 1'. Below this, the 'Email 1' configuration panel is visible, showing the 'Send email on' date as '09/14/2017' at '7:10 PM'. The email content includes a 'Biglytics Recap' section with the text: 'Hey Jeffrey, Great connecting with you. We covered a lot on the call so I want links. Biglytics - \$50/month per user Custom Objects - Unlimited Advanced Reporting - Unlimited Advanced Permissions Unlimited Events - Unlimited usage events'. At the bottom, there are 'Start sequence' and 'Cancel' buttons, and the 'To:' field is populated with 'jrusso@hubspot.com'.



Sales Hub Starter:

## Documents

Build a library of helpful sales content for your entire team, share documents right from your Gmail or Outlook inbox, and see which content closes deals.

When a lead clicks an email link to open your document, or shares it with a colleague, we'll notify you instantly on your desktop. Get aggregate data about how your sales content is helping to move your sales process forward.

[← Back to documents](#)



### About HubSpot

SHARES

145

VISITORS

11

VIEWS

17

### Visitors

NAME



Joseph Cavallaro



Kristen Kelley



Julia McCarthy

Sales Hub Starter:

## Calling

Use data from your HubSpot CRM to prioritize your best calls, and set up a daily calling queue. Just one click connects you to a prospect through Voice Over IP or your desk phone.

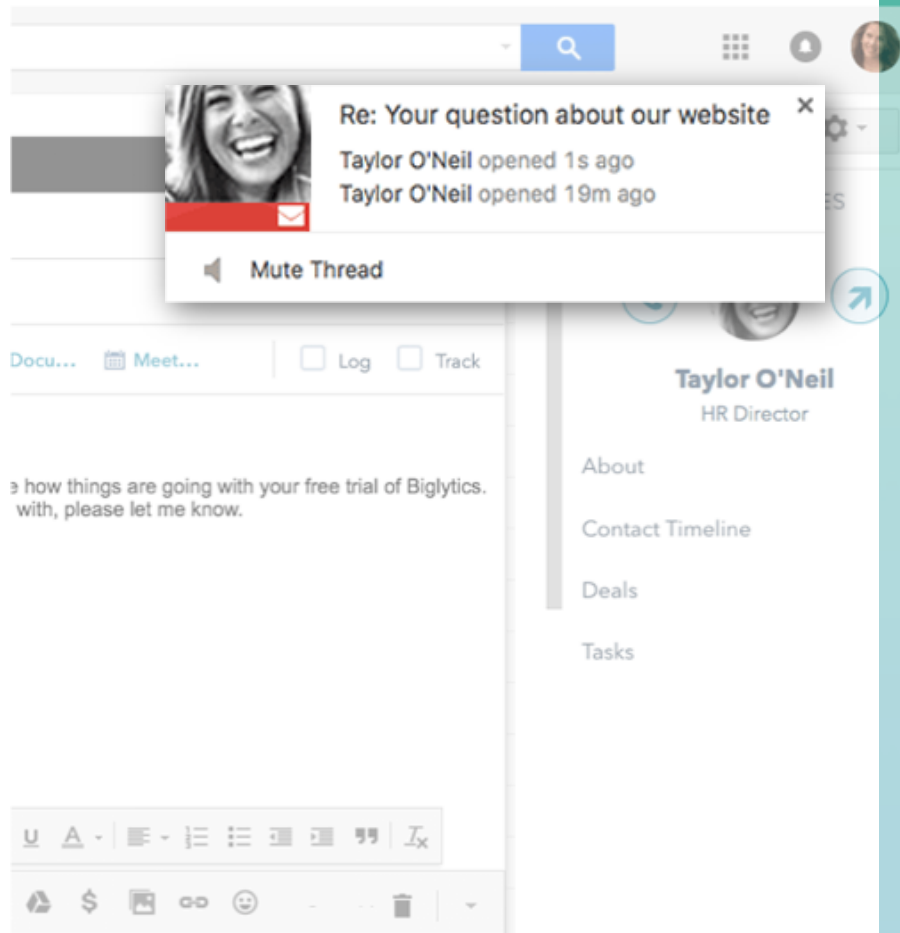
The screenshot displays the HubSpot CRM interface. At the top, a dark navigation bar contains icons and labels for Contacts, Conversations, Marketing, Sales, Service, and Automation. Below this, a teal header bar shows 'Connected to: +18578295297' and a timer '0:28' next to a red call icon. The main content area is divided into two columns. The left column features a contact profile for 'Lena Letterman', identified as 'Financial Manager at Oktra'. It includes a profile picture, a warning message about IP address exclusion, and icons for Note, Email, Call, Log, Task, and Meet. Below the profile is an 'About this contact' section with fields for First name (Lena), Last name (Letterman), Email (lena.letterman@demospot.org), and Phone number. The right column shows an 'Activity' tab with a filter for 'Filter activity (2/40)' and tabs for Notes, Emails, and Calls. A calendar view for November 2018 displays a list of call events on 11/29/2018 at various times. A 'Call' button is visible on the right side of the interface.

Sales Hub Starter:

## Notifications

Use notifications to follow up seconds after a lead opens an email, clicks a link, or downloads an important document. Our built-in activity stream automatically logs each lead's email actions inside your browser or in Sales Hub.

Open, click, and reply data helps you hone in on which email templates and sequences are most effective.




Sales Hub Starter:

## Meetings

Put the power to book meetings in the hands of your prospects. Meetings sync to your Google or Office 365 calendar, so your schedule is always up-to-date. As prospects book meetings, automatically create new records and log the activity in your CRM.

UTC -04:00 Eastern Standard Time



### Schedule time to chat with a Biglytics data analyst...

< October >

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
| 25  | 26  | 27  | 28  | 29  | 30  | 1   |
| 2   | 3   | 4   | 5   | 6   | 7   | 8   |
| 9   | 10  | 11  | 12  | 13  | 14  | 15  |
| 16  | 17  | 18  | 19  | 20  | 21  | 22  |
| 23  | 24  | 25  | 26  | 27  | 28  | 29  |

### Confirm meeting for

Friday, October 28, 2016 3:00 PM

First name \*

Last name \*

Your email address \*

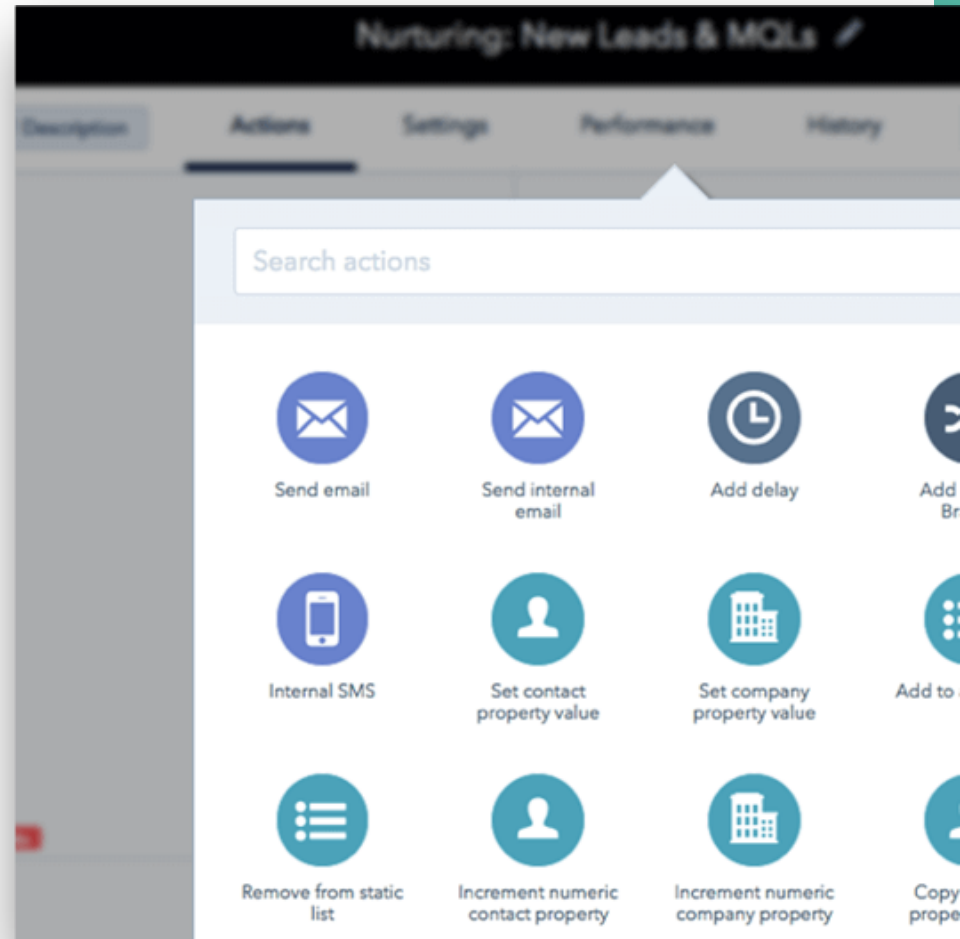
Company Name \*

Company Size (employees) \*

Sales Hub Professional:

## Automation

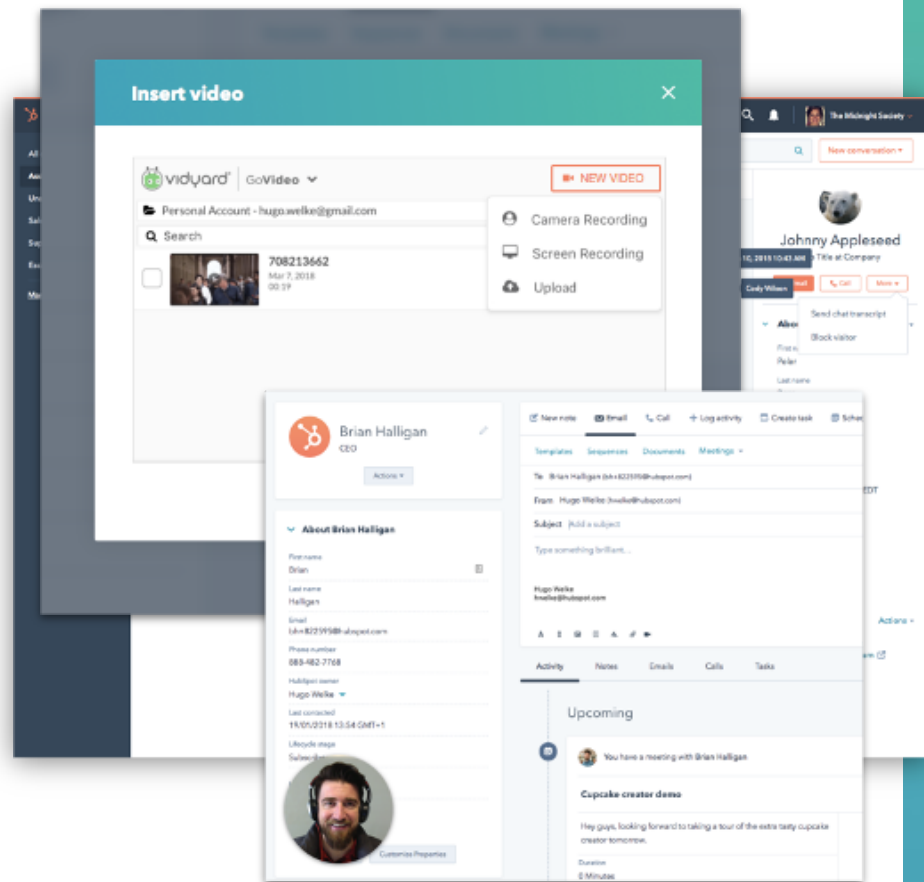
Automate common management tasks like assigning leads, alerting reps when contacts take specific actions, creating tasks, and more.



Sales Hub Professional:

# Selling with Video

Salespeople can build stronger relationships with prospects by creating, sharing, and tracking personalized videos right from HubSpot CRM.



Sales Hub Professional:

## Products & Quotes

Products makes it easy to build a library of products that your sales team can easily add to deals inside HubSpot.

Quotes allows your sales reps to quickly configure a quote right inside HubSpot using your contact, company, and product data. Send a shareable link to your quote, and even allow your prospect to pay using a credit card or EFT via Stripe.

The screenshot displays the HubSpot Marketing Professional interface. A modal window is open for payment, featuring the HubSpot logo and a close button. The modal contains the following elements:

- Email**: A text input field with an envelope icon.
- Card number**: A text input field with a card icon.
- MM / YY**: A text input field with a calendar icon.
- CVC**: A text input field with a lock icon.
- Remember me**: A checkbox with the label "Remember me".
- Pay \$2,280.00**: A prominent blue button.

Below the modal, the background interface shows a "Purchase Terms" section with the following text:

**Purchase Terms**

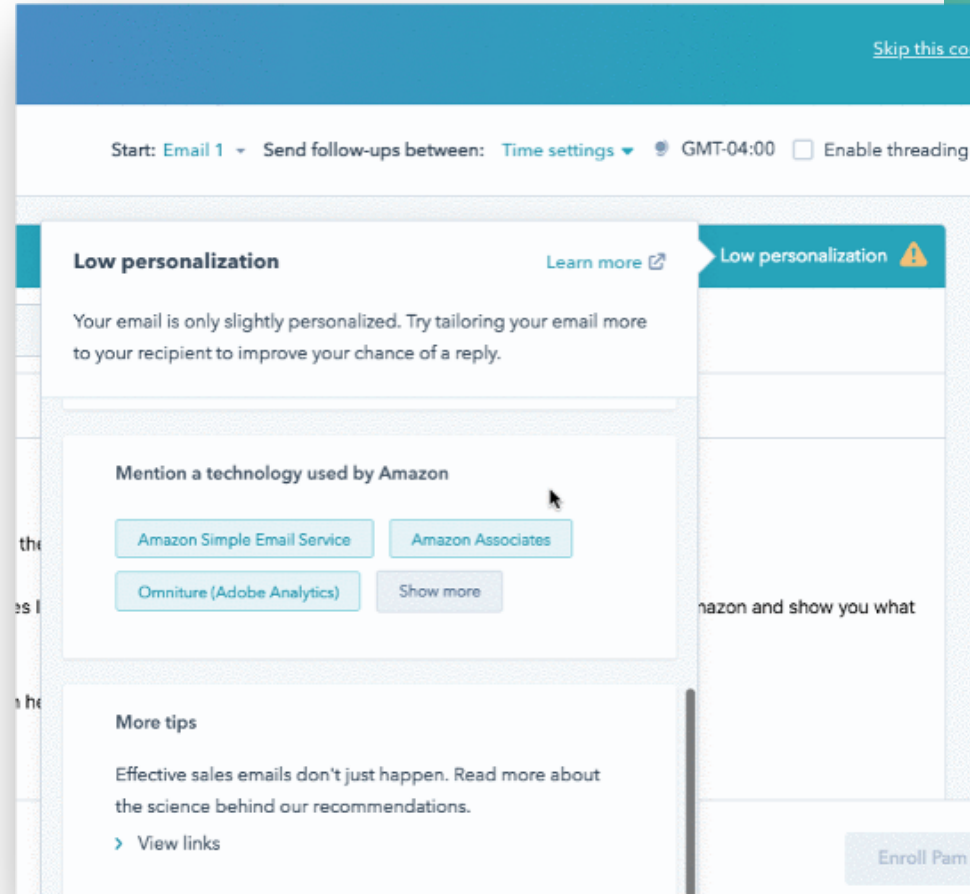
Standard HubSpot [terms of service](#) apply.

All items are payable net 30 and will be invoiced.

Sales Hub Professional:

# Recommendations

Recommendations scores your email templates in real time as a sales rep uses them, offering useful suggestions on how to make messages feel relevant and personal to your prospects.





Sales Hub Enterprise:  
**eSignature**

Collect signatures on quotes and other documents right inside of HubSpot.

**BIGLYTICS**

Sign

## PKGD Marketing - New Deal

Prepared on May 13, 2019 - #20190513-115429401  
For PKGD Marketing - Taylor O'Neil, Can Kutay [Show details](#)

### Products & Services


| Hours              |                                    |
|--------------------|------------------------------------|
| Description        | 5 x \$100.00 / month<br>For 1 year |
| <hr/>              |                                    |
| Product A          |                                    |
| Description        | 1 x \$10,000.00                    |
| <hr/>              |                                    |
| Recurring subtotal | \$500.00 / month                   |
| One-time subtotal  | \$10,000.00                        |
| Total              | \$10,500.00                        |

*This total doesn't include any applicable taxes.*

Sign

This quote expires on August 11, 2019.


Questions? Contact me



**Elise Beck**  
[sbeck@hubspot.com](mailto:sbeck@hubspot.com)

Download quote

Print quote



**Biglytics**  
25 First Street  
Cambridge, MA 02139  
United States

Sales Hub Enterprise:

# Playbooks

Build a library of sales best practices and resources. Use rules-based automation to surface recommended content to your sales team, right inside of HubSpot.

The screenshot displays the HubSpot Playbook editor. The top navigation bar includes 'Sales', 'Service', 'Automation', and 'Reports'. The main header is 'Playbook'. The content area is titled 'Discovery Call Script' with a description: 'Use this script when conducting a discovery call with new leads. Record answers for easy access later.'

The script content includes a question: 'How far out are you on making a purchase decision?' with three radio button options: '1-3 months', '3-6 months', and '6+ months'. Below this is a 'Lifecycle stage' dropdown menu set to 'Lead'. A text area labeled 'Add notes here' is provided for additional input.

The 'Goals' section lists the objectives of the script: 'Understand their business model, business goals, and why they chose those goals.' This is followed by a bulleted list of questions to ask the prospect: 'What are the top initiatives at the company right now?', 'How does your business model work?', 'Who is your target customer?', and 'How many customers do you have now?'



At the bottom right, there are 'Save' and 'Cancel' buttons. On the left side of the interface, there is a sidebar with a 'New note' button and a 'Leave a note...' text input. Below this is an 'Activity' tab showing a timeline of events for 'June 2017'. The timeline includes two entries for 'Charlotte A.': one dated 'June 4 at 2:18' with 'SENT' and 'DEL' status, and another dated 'June 3 at 11:1'.

Sales Hub Enterprise:

## Advanced Goals

Give individual sales reps and teams the ability to report on metrics related to specific goals, like calls logged, meetings booked, revenue generated, or deals created.

The screenshot displays the 'Settings' page in Salesforce Sales Hub Enterprise, specifically the 'Goals' configuration section. The left sidebar contains a navigation menu with the following items: Account Defaults, Contacts & Companies, Conversations, Domains & URLs, Import & Export, Integrations, Marketing, Properties, Reports, Goals (highlighted), and Tracking code. The main content area is titled 'Goals' and includes several configuration options: a frequency selector with 'Monthly' and 'Weekly' tabs, a metric dropdown set to 'Tickets closed', and a team dropdown set to 'All teams'. Below these options is a table listing users and their associated teams.

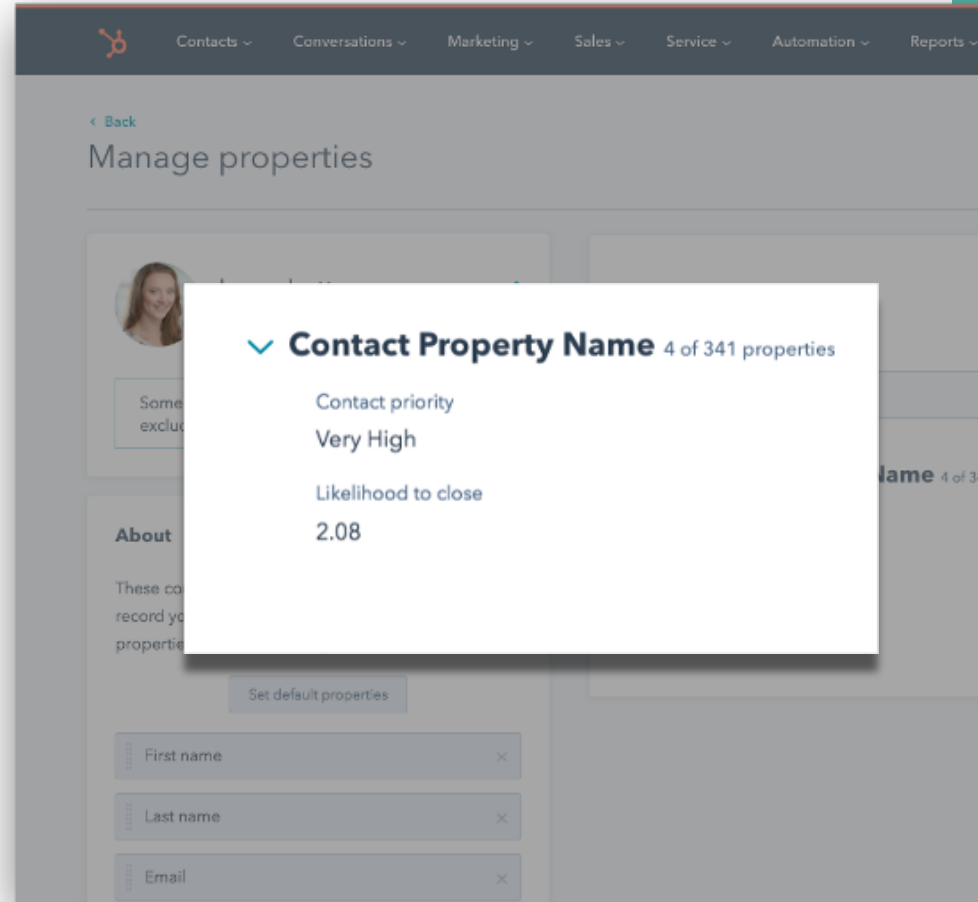
| <input type="checkbox"/> | USER   | TEAM    |
|--------------------------|--|---------|
| <input type="checkbox"/> |  Charlotte Arrowood | Midwest |
| <input type="checkbox"/> |  Nate Lacy          | Eastern |

+ Add user

Sales Hub Enterprise:

## Predictive Lead Scoring

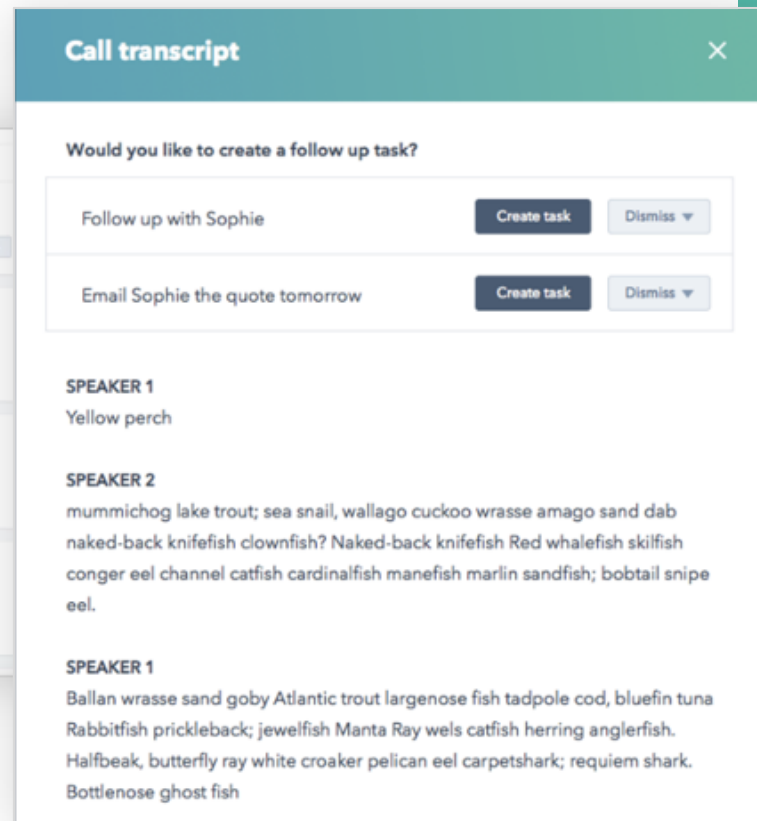
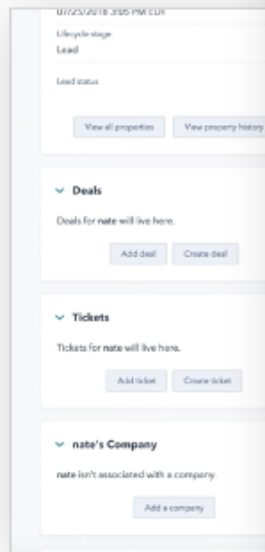
Predictive Lead Scoring takes hundreds of demographic and behavioral factors into account to automatically score contacts based on their likelihood to buy.



Sales Hub Enterprise:

# Call Transcription

Let HubSpot conveniently transcribe any recorded call right inside your CRM.



Sales Hub:

## Closely connected to CRM

Right out of the box, Sales Hub is deeply connected to HubSpot CRM. Track contacts, companies, deals, tasks, tickets and more inside the #1 CRM for SMBs.

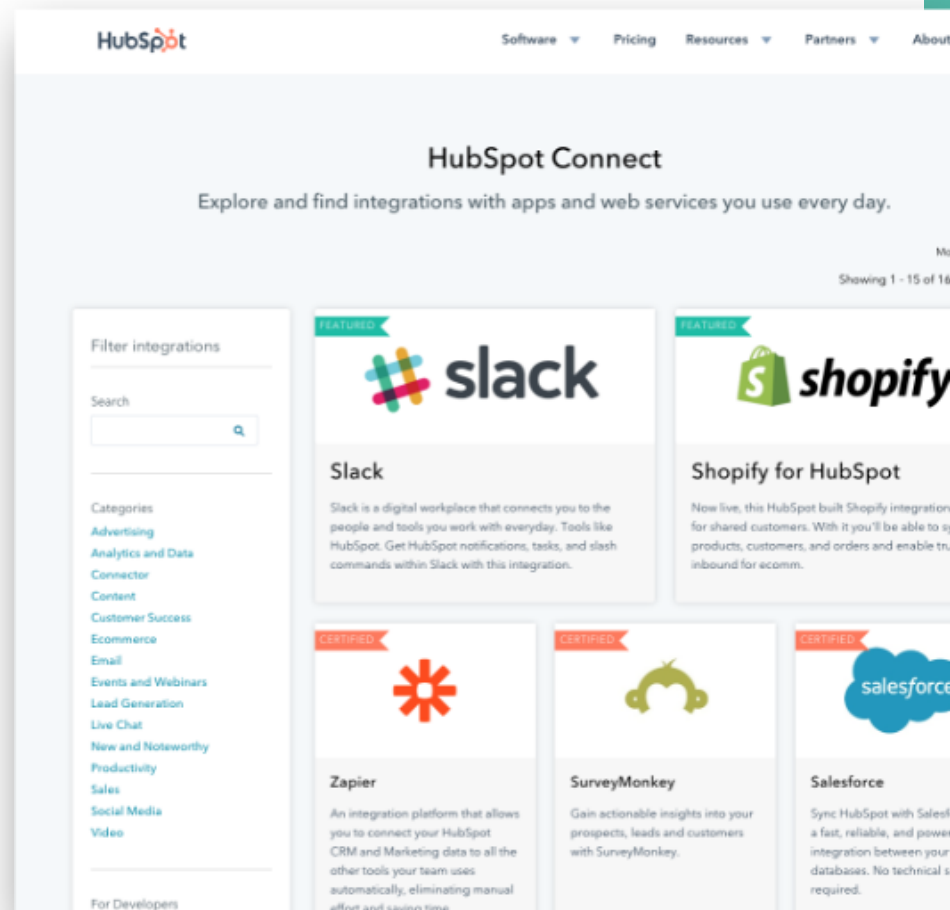
Already use a CRM system that you love like Salesforce? HubSpot has a fully supported native integration that is easy to set up and use (Professional and above.)

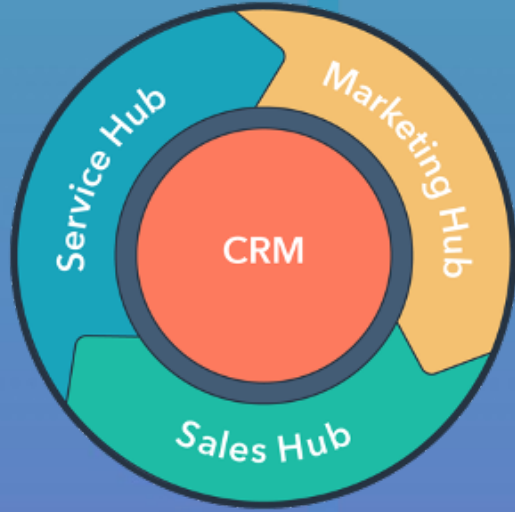
The screenshot displays the HubSpot Sales Hub interface. At the top, a dark navigation bar contains the HubSpot logo and menu items: Contacts, Conversations, Marketing, Sales, Service, and Automation. Below this, the 'Contacts' section is active, showing a profile for 'Lena Letterman', Financial Manager at Oktra. The profile includes a circular photo, a list of actions (Note, Email, Call, Log, Task, Meet), and a section titled 'About this contact' with fields for First name (Lena), Last name (Letterman), Email (lenaletterman@demospot.org), Phone number (+18578295297), Company name (Vaia-Core), and Company Industry. To the right, the 'Activity' tab is selected, showing a list of activities for November 2018. The activities include a 'Page view' for 'Biglytics | Home and 8 other pages' and a 'Form submission' by 'Lena Letterman' on 'Default Form on W'. Each activity entry shows a timestamp and a small profile picture of the user.

Sales Hub:

## Part of the HubSpot Platform

Sales Hub works in close concert with Marketing Hub, Service Hub, and hundreds of HubSpot app integrations. Add additional tools easily, whenever it makes sense for your team.





# Service Hub







# Service Hub

Service Hub helps you create a better customer experience, self service solutions, and growth through happier customers.

## Starter

Conversations  
Live Chat  
Shared inbox  
Tickets & Help Desk  
Templates & Snippets  
Documents  
Calling  
Meetings

## Professional

*Everything in Starter, plus:*  
Help Desk Automation  
Knowledge base  
Customer feedback  
1:1 video creation & hosting  
Support Bot / Custom Bot Builder  
Required Ticket Fields  
Custom Reporting

## Enterprise

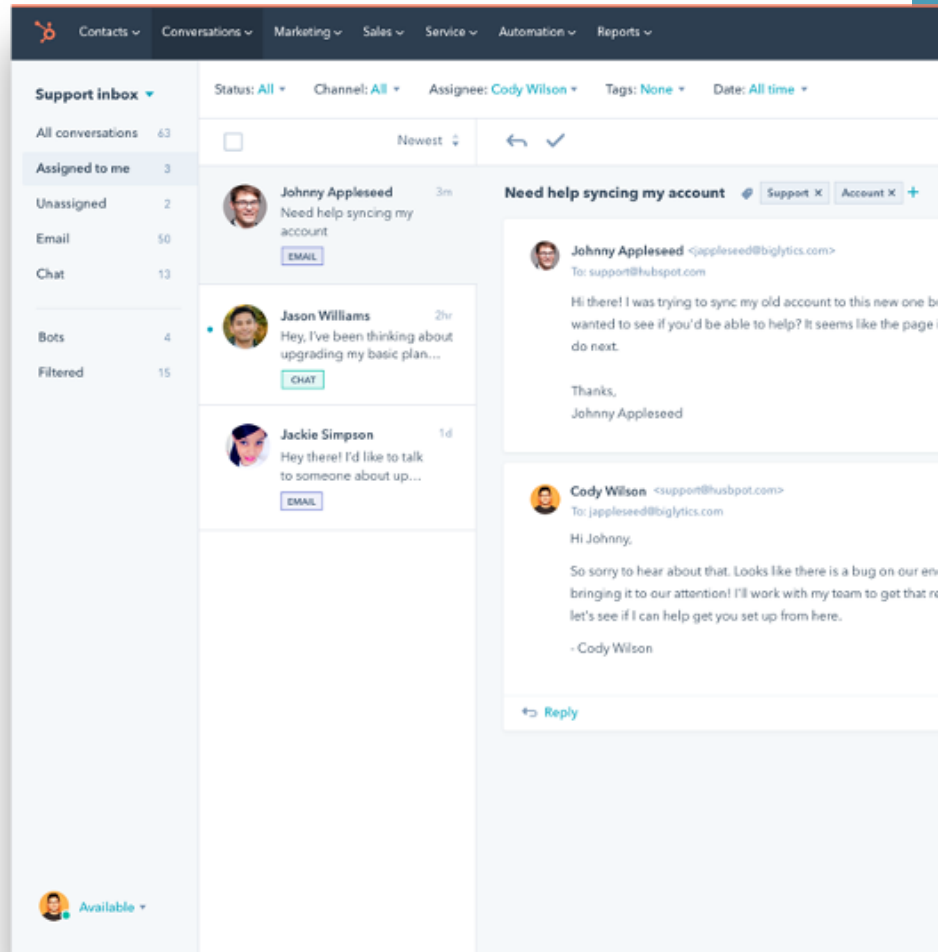
*Everything in Professional, plus:*  
Goals  
Playbooks  
Calculated Properties  
Single sign-on  
Advanced Team Management  
Advanced Reporting

Available at Service Hub starter

## Conversations + Live Chat

Conversations helps you manage and master customer communication. You'll leverage live chat, a shared universal inbox, an easy-to-use chatbot builder, built in tickets, and collaboration and productivity tools to deliver an exceptional customer experience.

Conversations is built on the HubSpot CRM, this means you'll see contextual data about every customer right where you're conversing with them.



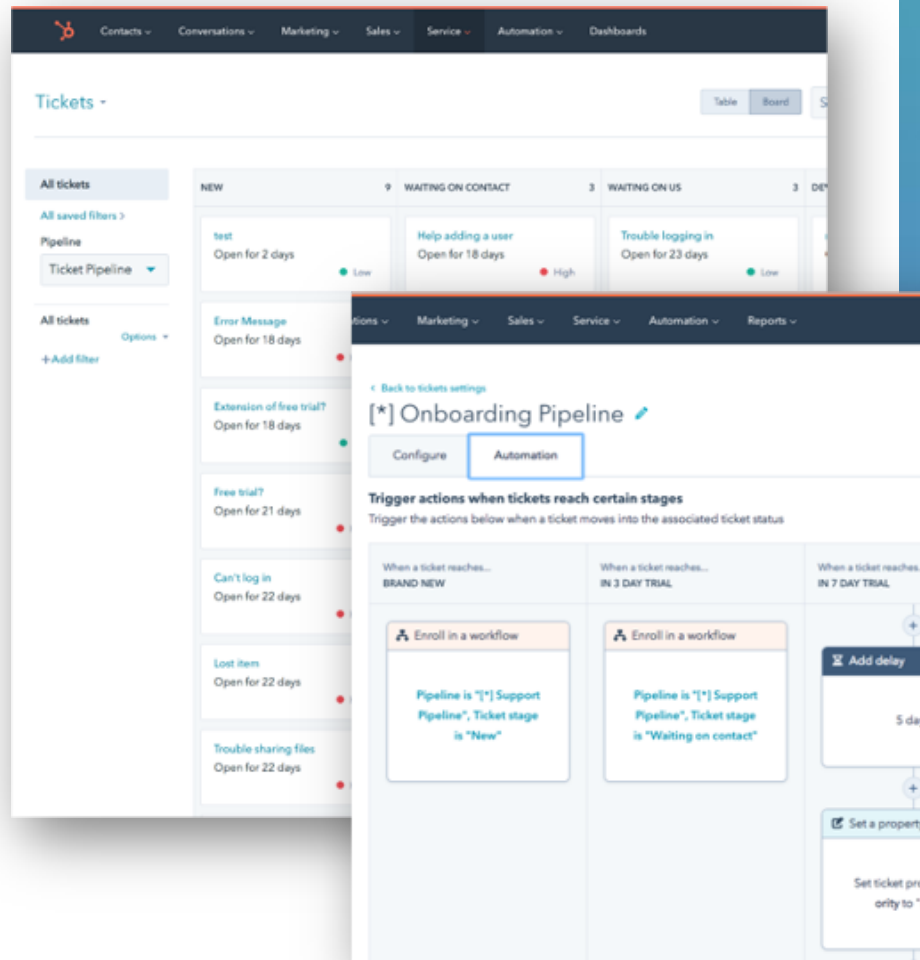
Available at Service Hub starter

# Tickets & Help Desk

As customer conversations increase in volume and complexity, tickets is here to help.

Use tickets to collaborate and communicate with customers on issues that come through Conversations. Tickets can be assigned to members of your team, organized, prioritized, and tracked in a central location.

Build a high functioning help desk system by adding HubSpot automation and powerful custom reporting.



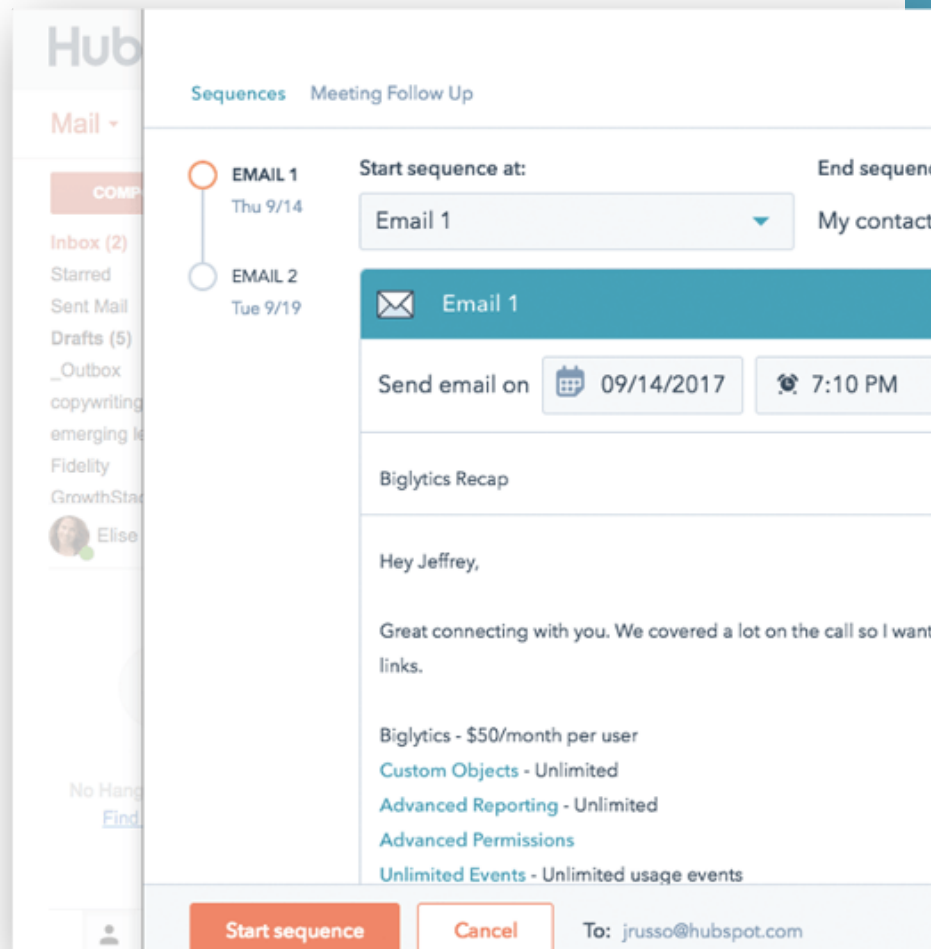
Available at Service Hub starter

# Templates, Sequences & Snippets

Craft personalized templates for every stage of the service process, and share them across your team.

Tee up a timed series of email messages based off your templates with Sequences.

Save time by saving short “snippets” of text you can easily drop into your emails using keyboard shortcuts.



Available at Service Hub starter

## Calling

Use data from your HubSpot CRM to prioritize your best calls, and set up a daily calling queue. Just one click connects you to a prospect through Voice Over IP or your desk phone.

The screenshot displays the HubSpot CRM interface. At the top, a dark navigation bar contains icons and labels for Contacts, Conversations, Marketing, Sales, Service, and Automation. Below this, a teal header bar shows 'Connected to: +18578295297' and a timer '0:28' next to a red call button icon.

The main content area is divided into two columns. The left column features a contact profile for 'Lena Letterman', identified as 'Financial Manager at Oktra'. It includes a profile picture, a note about excluded activity, and icons for Note, Email, Call, Log, Task, and Meet. Below the profile is an 'About this contact' section with fields for First name (Lena), Last name (Letterman), Email (lena.letterman@demospot.org), and Phone number.


The right column shows the 'Activity' tab, which includes filters for 'Filter activity (2/40)', 'All users', and 'All teams'. A calendar view for 'November 2018' displays a list of activities under 'Session Details', with timestamps ranging from 4:21 PM to 4:19 PM GMT. A 'Call' button is visible on the right side of the activity list. Below the calendar, a 'Form submission' entry is shown, indicating 'Lena Letterman submitted [\*] Default For'.

Available at Service Hub starter

## Meetings

Put the power to book meetings in the hands of your customers. Meetings sync to your Google or Office 365 calendar, so your schedule is always up-to-date. As customers book meetings, automatically create new records or log the activity in your CRM.

UTC -04:00 Eastern Standard Time



**Schedule time to chat with a Biglytics data analyst...**

< October >

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
| 25  | 26  | 27  | 28  | 29  | 30  | 1   |
| 2   | 3   | 4   | 5   | 6   | 7   | 8   |
| 9   | 10  | 11  | 12  | 13  | 14  | 15  |
| 16  | 17  | 18  | 19  | 20  | 21  | 22  |
| 23  | 24  | 25  | 26  | 27  | 28  | 29  |

**Confirm meeting for**  
Friday, October 28, 2016 3:00 PM

First name \*

Taylor

Last name \*

O'Neil

Your email address \*

taylorfoneil@gmail.com

Company Name \*

PKGD Marketing Inc.

Company Size (employees) \*

1-49

Confirm Cancel

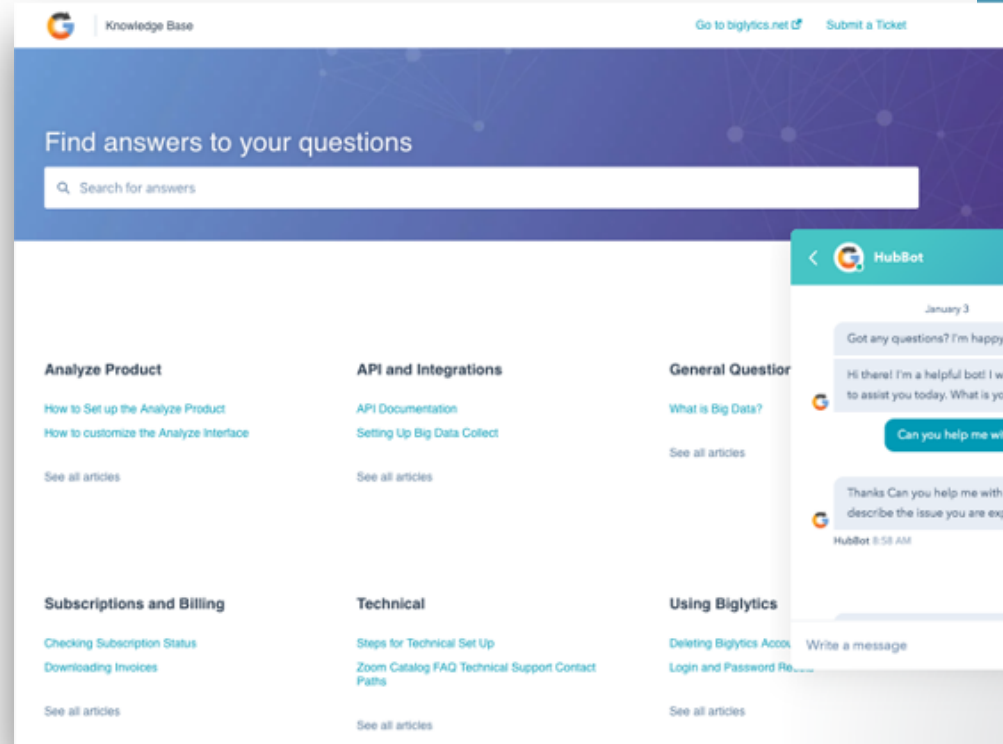
Available at Service Hub Profesional

# Knowledge Base

Help customers help themselves by turning your customers' frequently asked questions and tickets into a robust, search optimized knowledge base of help articles, videos, and documentation.

The built in analytics dashboard collects feedback on articles and analyzes search patterns to improve your articles over time.

Build a support bot to help customers find the knowledge articles related to their specific questions.



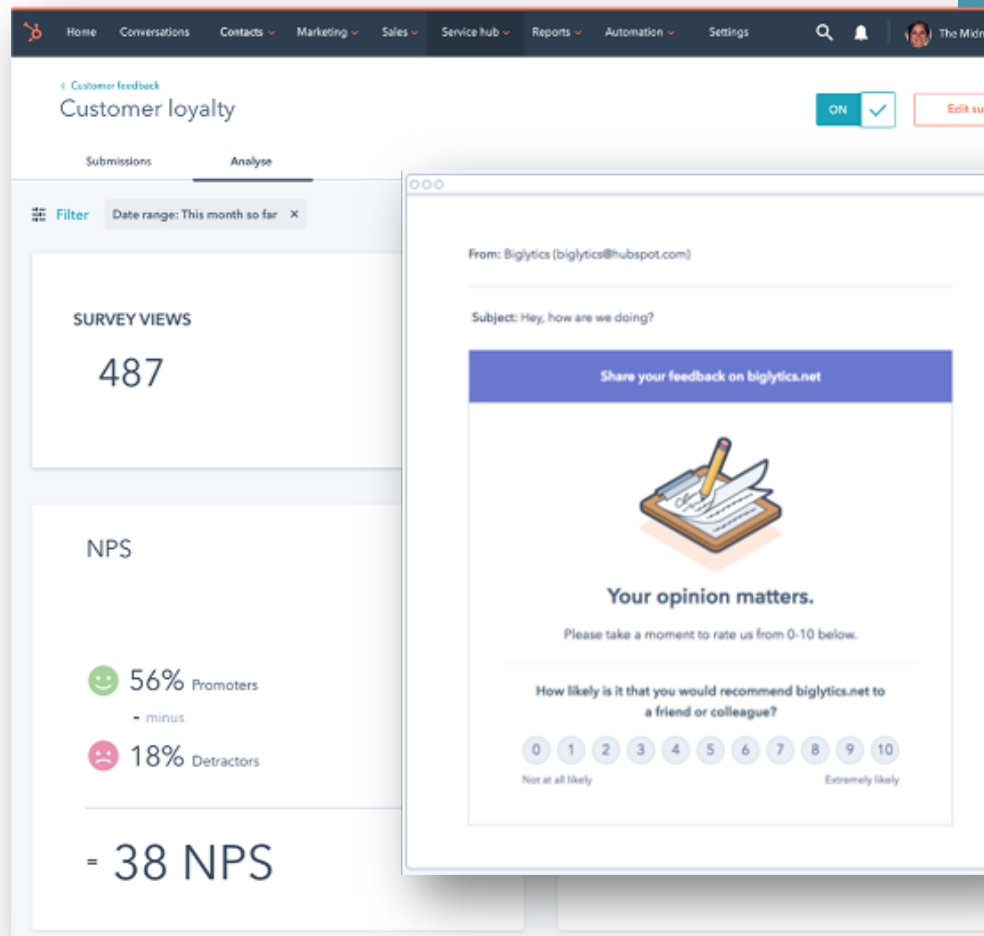
Service Hub Professional:

## Customer Feedback

You can't really build your business around your customers unless you're listening to them.

Truly understand how your customers feel with customer feedback. Deploy surveys like Net Promoter Score, and Customer Satisfaction, that give you a quantitative pulse on customer happiness and needs.

The feedback tool will analyze survey results for you and provide actionable data that helps you improve your service & product, identify advocates, and grow through happy customers.



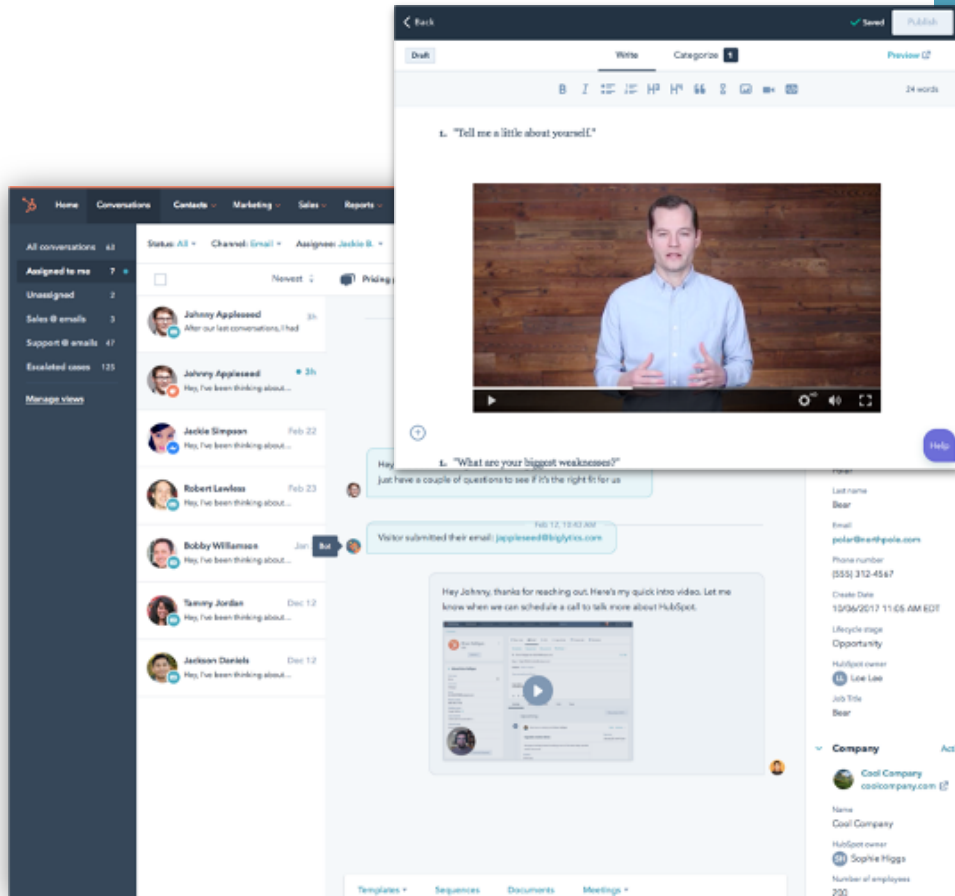


Service Hub Professional:

## Video Features

Service teams can help customers faster and more completely with personalized help videos created and shared directly from Service Hub.

Service agents can record their screen right from a ticket and send to customers, improving service and solving issues faster. Service teams can also host and embed videos in their knowledge base.



Service Hub Professional:

## Bots + Automation

Use bots to improve live chat efficiencies and scale 1-to-1 communications by routing customers to relevant help documentation, the appropriate chat agent, and more.

Automate common management tasks like creating tickets and tasks, alerting your team when customers take specific actions, and more.

The screenshot displays the HubSpot Helpdesk Automation interface. The top navigation bar includes 'Marketing', 'Sales', 'Service', and 'Automation'. The main header is 'Helpdesk Automation'. Below this, there are tabs for 'Actions', 'Settings', and 'Performance'. The 'Actions' tab is active, showing a workflow diagram. The workflow starts with an 'Enrollment triggers' box: 'Contact has filled out Event de-registration [SAVE]'. This is followed by a 'Create a ticket' box: '"Contact registration help form" and assign to Marcus Andrews'. The workflow ends with a checkmark icon. To the right, the 'Create a ticket' configuration panel is open. It has a teal header with a back arrow and a close button. The panel contains the following fields: 'Assign ticket to' with radio buttons for 'Contact's existing' and 'Specify a HubSpot owner' (selected), and a dropdown for 'Marcus Andrews'; 'Ticket Pipeline' with a dropdown for 'Support Pipeline'; 'Ticket Status' with a dropdown for 'Waiting on us'; 'Ticket name' with a dropdown for 'Contact registration help form' and an 'Insert contact token' button; 'Source' with a dropdown for 'Form' and a trash icon; 'Ticket description' with a dropdown for 'Help register these people as they come in.' and an 'Insert contact token' button and a trash icon. At the bottom of the panel are buttons for 'Set another ticket property', 'Save', 'Cancel', and a trash icon.

Marketing Sales Service Automation

### Helpdesk Automation

Actions Settings Performance

**Enrollment triggers:**  
Contact has filled out Event de-registration [SAVE]

**Create a ticket**  
"Contact registration help form" and assign to Marcus Andrews

**Create a ticket**

Assign ticket to

☐ Contact's existing

☒ Specify a HubSpot owner

Marcus Andrews

Ticket Pipeline

Support Pipeline

Ticket Status

Waiting on us

Ticket name

Insert contact token

Contact registration help form

Source

Form

Ticket description

Insert contact token

Help register these people as they come in.

Set another ticket property

Save Cancel

Service Hub Enterprise:

## Advanced Goals

Give individual agents and teams the ability to report on metrics related to a specific customer goal, like response time, ticket volume, resolution time, and customer experience related metrics.

The screenshot displays the 'Settings' page in Service Hub Enterprise. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The 'Goals' section is active, showing options for 'Monthly' and 'Weekly' reporting. Below these, there are dropdown menus for 'Tickets closed' and 'All teams'. A table lists users and their associated teams, with a '+ Add user' button at the bottom.

| USER  | TEAM    | 7/15                  |
|---|---------|-----------------------|
| <input type="checkbox"/> Charlotte Arrowood | Midwest | <a href="#">Add a</a> |
| <input type="checkbox"/> Nate Lacy          | Eastern | <a href="#">Add a</a> |
| <a href="#">+ Add user</a>                  |         |                       |

Service Hub Enterprise:

# Playbooks

Build a library of best practices and resources like onboarding scripts to help you customer service team consistently delight customers.

Use rules-based automation to surface recommended content at the right time to managers on the phone having conversations with customers.

The screenshot displays the Service Hub Enterprise Playbooks interface. The top navigation bar includes links for Contacts, Conversations, Marketing, and Sales. The main header is 'Playbooks'. Below this, a light blue box prompts the user to 'Choose which users can write and publish playbooks'. A 'View: All' dropdown is present. The main content area lists several playbooks, each with a checkbox and a status indicator (green dot for 'Published, with edits' and orange dot for 'Draft').

|                          | NA...  |
|--------------------------|--|
| <input type="checkbox"/> | [*] Onboarding Follow-up Call<br>● Published, with edits             |
| <input type="checkbox"/> | [*] Onboarding Follow-up Call Copy<br>● Draft                        |
| <input type="checkbox"/> | [CS] Day 45 - Midpoint Onboarding Checkup<br>● Published, with edits |
| <input type="checkbox"/> | [CS] Day 95 - Post-Onboarding Checkup<br>● Published                 |
| <input type="checkbox"/> | onboarding<br>● Draft  |
| <input type="checkbox"/> | onboarding call #1<br>● Draft  |

The right panel shows the details for the '[CS] Day 95 - Post-Onboarding Checkup' playbook. It includes an objective, a checklist, and a marketing hub section.

**[CS] Day 95 - Post-Onboarding Checkup**

**Objective: Customer Growth & Account Stewardship**

- Establish Account game plan with CSM
- Close initial & establish future cross - adoption opportunities
- Schedule "Midyear Checkup" (Month 6)

**Checklist**

- Execute proper research
- Review health check to see the state of the account
- Additional item - Review the IS TO CSM hand-off notes
- Confirm the call 2 days prior
- Execute the call
- Log the call on the account
- Label the call as Day 95 Check Up
- Establish next steps + send recap email + calendar invite for the Month 6 check up back to appropriate internal folks at HS

**Marketing Hub**

- They have just completed their 90 day onboarding process
- I likely to have just completed a transition call from IS to CSM

A red 'Close' button is located at the bottom right of the right panel.

Service Hub:

## Closely connected to CRM

Right out of the box, Service Hub is deeply connected to HubSpot CRM. Track contacts, companies, deals, tasks, tickets and more inside the #1 CRM for SMBs.

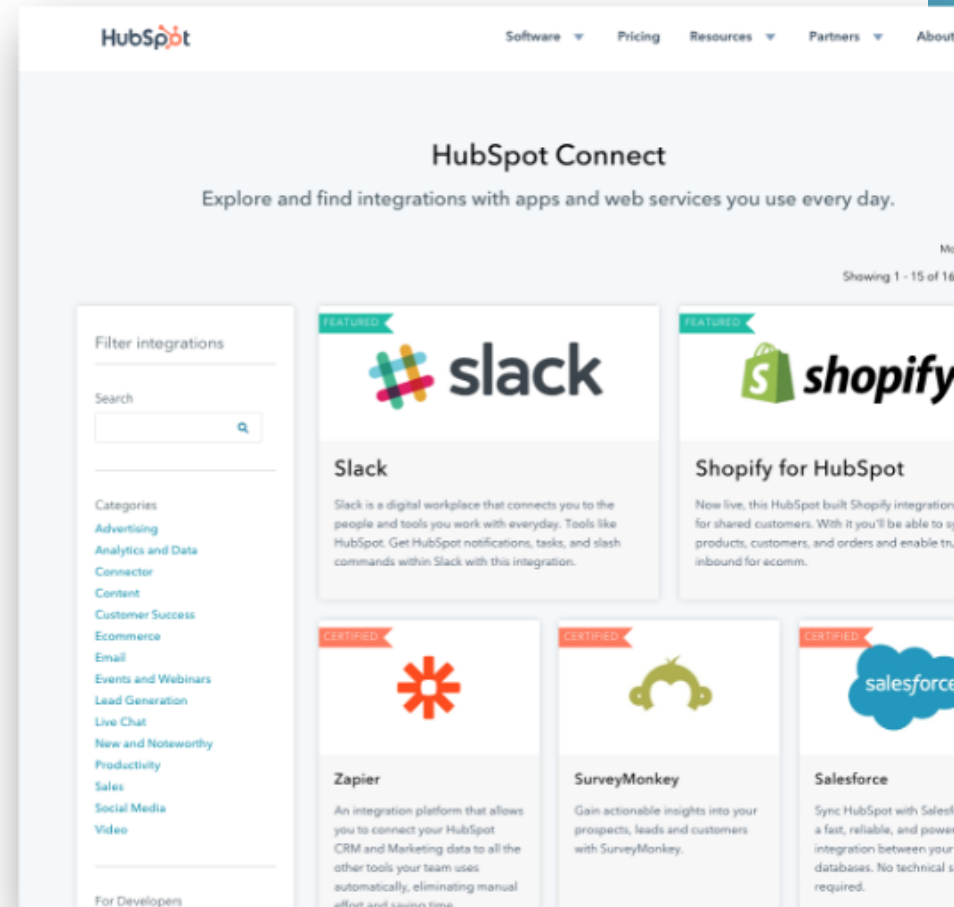
Already use a CRM system that you love like Salesforce? HubSpot has a fully supported native integration that is easy to set up and use (Professional and above.)

The screenshot displays the HubSpot Service Hub interface. At the top, a dark navigation bar contains the HubSpot logo and menu items: Contacts, Conversations, Marketing, Sales, Service, and Automation. Below this, the 'Contacts' section is active, showing a breadcrumb '< Contacts' and an 'Actions' dropdown. The main content area features a contact profile for 'Lena Letterman', identified as a 'Financial Manager at Oktra'. The profile includes a circular profile picture, a row of action buttons (Note, Email, Call, Log, Task, Meet), and a section titled 'About this contact' with fields for First name (Lena), Last name (Letterman), Email (lenaletterman@demospot.org), Phone number (+18578295297), Company name (Vaia-Core), and Company Industry. To the right, a sidebar shows the 'Activity' tab selected, with filters for 'Filter activity (2/40)', 'All users', and 'All team'. A calendar view for 'November 2018' is shown, with a 'Page view' section listing 'Biglytics | Home and 8 other pages' and a 'Session Details' section listing five sessions on 11/29/2018. Below the sessions, a 'Form submission' section shows 'Lena Letterman submitted [\*] Default Form on W' and 'No properties updated.'

Service Hub:

# The HubSpot Platform

Sales Hub works in close concert with Marketing Hub, Service Hub, and hundreds of HubSpot app integrations. It's easy to find and add all the additional tools your team loves, whenever it makes sense for your team.



# HubSpot is so much more than software.



## IMPLEMENTATION SPECIALISTS

Implementation Specialists provide guidance in technical setup and initial execution of the HubSpot platform tool set.



## ACADEMY

HubSpot Academy provides free inbound marketing, inbound sales, and HubSpot product training. You'll find certification courses, projects, videos, help articles, and many other types of educational content.

Use Academy to train yourself, your team, and to grow your business.



## CUSTOMER SUCCESS

A Customer Success Manager will be your resource to drive value through inbound strategy development.



## PROFESSIONAL SERVICES

HubSpot Professional Services offers a full suite of training and consulting options to help you maximize your results with HubSpot. Our offerings include everything from group training to highly personalized 1:1 consulting with an inbound or technical expert.



## SUPPORT

HubSpot Support is always available to assist with any questions you and your team have related to using HubSpot. They can be reached via phone, email and directly in-app for all paid customers.

# HubSpot is so much more than software.



Unlimited phone and email support for  
Professional & Enterprise customers, for life



Search the Knowledge Base for user guides  
and help docs



Connect with other HubSpot users through  
the HubSpot Forums or User Groups



Log and manage in-app support tickets

\*Not applicable for our free or Starter tools





[bruce@mmmatters.com](mailto:bruce@mmmatters.com)

[www.mmmatters.com](http://www.mmmatters.com)

Call for a free  
consultation.  
303-505-8009



# MMMG offers these HubSpot Services:

- Setup and implementation
- Audit and optimize your existing HubSpot instance
- Workflow and email nurture setup
- Salesforce – HubSpot integration
- Chat and Team Inbox setup
- Landing page and forms for lead generation
- Website editing
- and any other part of HubSpot

## Why Choose Bruce and MMG?

1. Bruce is an engineer with more than 25 years experience in sales, marketing, and business.
2. As an MBA and engineer, Bruce talks your language and understands your industrial business.
3. Bruce has experience with Eloqua, Marketo, SharpSpring, Pardot, MailChimp, Constant Contact, and more, and has chosen HubSpot to represent.
4. More than 5 years experience with HubSpot as a user and a technician.