

Leveraging Marketing Hub Enterprise: Customer Case Studies

Starting Shortly!



Did you know HubSpot recently launched its first podcast for Aussie and Kiwi's?

Unconventional Business can be found on Apple or Spotify, or at unconventionalbusiness.com.au

who
gives a
crap

sendle

tile
cloud

ko'ala

VINOMOFO

UNITED BY WINE.





Loren Scott

Principal Solutions Engineer



Leveraging Marketing Hub Enterprise: Customer Case Studies



Housekeeping

- We're recording the session and will send it to you, along with the slides and other assets.
- There will be time for questions at the end and we'll get to as many as we can
- Make sure you use the Q&A box, not the chat box, as that isn't being monitored
- If you do have any follow-up questions after the session, book time in with your Inbound Growth Specialist and they'll be happy to answer them



Today's Agenda

1. Guest Introduction
2. Introduction to Marketing Hub
3. Customer Case Studies
4. Customer Panel
5. Q/A



Meet Our Guests



Chris McCarney

Chief Revenue Officer



John Kilkenny

Head of Partnerships



A Tale Of Two Hubspot Customers

evergen

PetSure 



HubSpot Marketing Hub 2020 Vision

1

Always easy. Now deeply powerful

2

CRM-Powered Marketing

3

Powerful Reporting





[HOMEOWNERS](#) [PARTNERS](#) [NETWORK OPERATORS](#) [ENERGY RETAILERS](#)

[LOGIN](#)

Evergen software enables smarter energy.



Evergen Intelligent Control optimises solar and battery system performance, enabling homeowners to take control of their energy costs and impact on the environment.

Our technology also enables smarter energy by orchestrating large fleets of batteries to enable Virtual Power Plants. This ensures a resilient and decentralised energy system of the future and drives benefits for consumers, businesses, network operators and utilities.





Setting the scene...

Started with Hubspot

May 2019

Started on Hubspot MHE

Feb 2020

Team size

5

Key Initiatives

Multi-Channel CX ✓

Single Source Customer Data ✓

Systems Integrated ✓

Partner Channels ✓

Customer Onboarding ✓

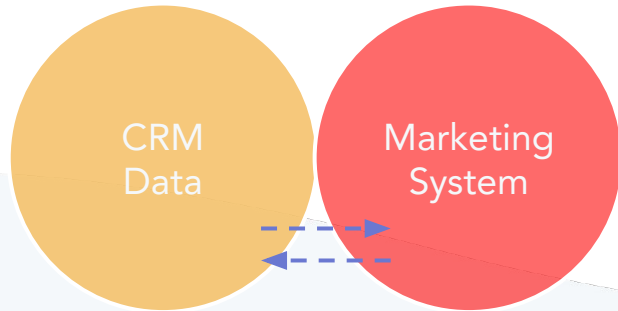


Partner Onboarding



CRM-Powered Marketing

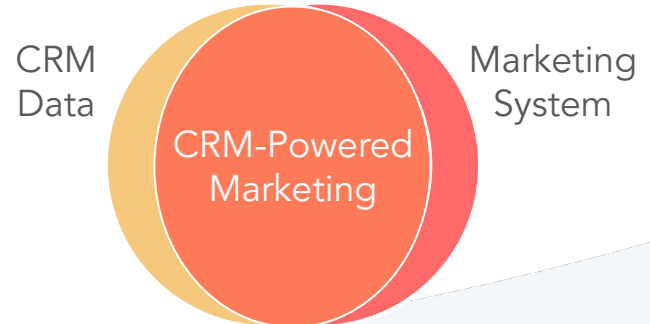
Old Way



An integration between your customer data and marketing system leaves you guessing.



New Way



When customer data lives inside your marketing tools, it's simple to personalize your marketing and break through.

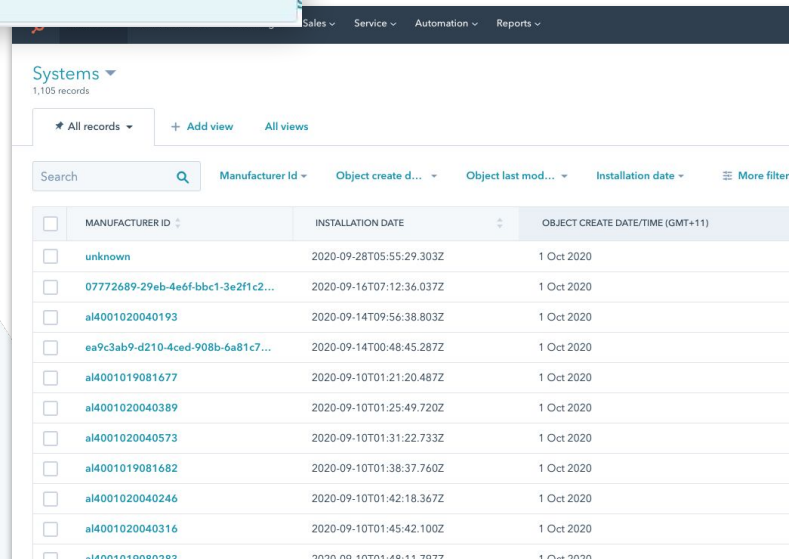
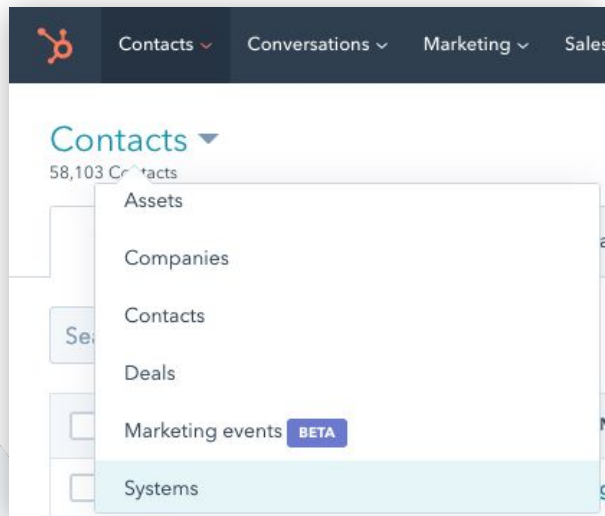


Custom Objects

Because custom objects more accurately represent your business in the CRM, they allow for deeper segmentation and more personalized marketing.

More accurate and personalized upsell, cross sell, onboard campaigns are all early use cases.

Now live All Enterprise Hubs



Contact Workflows

We've given our Workflows engine a complete under-the-hood renovation. Workflows now extend to contact workflows, allowing you to automate many more manual tasks. These include triggering Slack notifications and updating CRM (deal, ticket, quote) properties when a new lead is created or changes stages.

The screenshot displays a workflow configuration interface for a 'Sales Pipeline'. The main workspace shows a sequence of steps: 1. A 'Delay until event happens' step with the event 'Property value changed' and a delay of '7 days'. 2. An 'If/then branch' step with two paths: 'Closed Won' (with condition 'Deal stage is any of Closed Won (Sales Pipeline)') and 'Closed Lost' (with condition 'Deal stage is any of Closed Lost (Sales Pipeline)'). 3. Three parallel actions: 'Send internal email notification' (with subject 'Check In' to Deal owner'), 'Send email' (with subject 'Welcome!'), and 'Create task' (with task 'Review' assigned to Deal owner).

On the right side, there is a configuration panel for the 'Delay until event happens' step. It includes a dropdown for the event type ('Property value changed'), a filter for 'Deal stage is any of Closed Won (Sales Pipeline)', and a section for 'Max amount of time deals will be in this delay'. This section contains a warning: 'If a matching event doesn't happen in the amount of time chosen, the deal will go to the next step in the workflow.' Below this are input fields for 'Days' (set to 7), 'Hours' (0), and 'Minutes' (0), with a note that '1 day is equal to a full 24-hour period'. A checkbox labeled 'Delay as long as possible' is currently unchecked.

Now live Marketing Hub Professional & Enterprise



SMS

Hubspot Ecosystem allows you to plug-and-play hundreds of applications directly into your Hubspot portal. SMS connectors allow you to send messages directly from Workflows or Contact profiles.

The screenshot displays the HubSpot App Marketplace interface. At the top, the header reads "HubSpot App Marketplace" with the tagline "Connect your favorite tools to HubSpot". A search bar contains the text "sms" and a dropdown menu is set to "All categories".

On the left side, there is a navigation menu with sections: "Discover" (listing various app categories like "All collections", "Popular apps", "New apps", "Free apps", "For marketing teams", "Featured sales apps", "For customer success teams", "Apps for startups", "Apps for agencies", "Made by HubSpot", "Data sync by PieSync", "CMS apps", "Account-based marketing apps"), "Categories" (with "All categories" selected), and "Pricing" (with "All" selected).

The main content area is titled "Search Results" and shows "1-45 of 46 results for 'sms' in All Categories". The results are sorted by "Relevance".

The search results are displayed in a grid of app cards. Each card includes the app's logo, name, developer, description, star rating, number of installs, and pricing. The visible apps are:

- SMSZap** by LyttonWeb: SMS Marketing and Sales Automation built natively for HubSpot. 5 stars, 400+ installs, \$5 /mo.
- Sakari SMS** by Sakari SMS: SMS Automation and Two-Way Text Messaging built for HubSpot. 30 stars, 2,500+ installs, Free.
- Keeper SMS** by Keeper, LLC: Fast, simple, powerful business text messaging. New, \$4.17 /mo.
- Mitto Global SMS** by Mitto: Send individual and marketing SMS to engage with your prospects. 50+ installs, Free.
- Integração WhatsApp e SMS** by NAS: Integração Premium de WhatsApp e SMS com HubSpot para Grandes Marcas. 1 star, 50+ installs, Starting at \$49.99 /mo.
- Lucy SMS Marketing** by Voicy.AI: Reach out to all your customers within seconds. 1 star, 10+ installs, Starting at \$45 /mo.
- SMS for HubSpot** by MessageMedia: Seamlessly send & receive SMS within.
- Heymarket SMS Integration** by Heymarket.
- TextingHouse** by TextingHouse: Envoi de SMS PRO - Send pro SMS.

Now live Marketing Hub Professional & Enterprise



Project Management

Project Management connectors allow you to create tasks directly from Workflows, keeping your CX Journeys and backend project boards in sync.

Now live Marketing Hub Professional & Enterprise

The image shows a composite view. On the right is the HubSpot App Marketplace interface. At the top, it says "HubSpot App Marketplace" with a sub-header "Connect your favorite tools to HubSpot". A search bar contains "project management". Below the search bar, a sidebar lists navigation options: "Discover", "All collections", "Popular apps", "New apps", "Free apps", "For marketing teams", "Featured sales apps", and "For customer success teams". The main area displays "Search Results" for "project management" in "All Categories", showing "1.45 of 170 results". The results are sorted by "Relevance" and include:

- Project Buddy** by Reddi Apps: "Integrate your tasks in HubSpot directly to Asana with Project Buddy." 100+ installs, \$2.08 /mo.
- monday.com** by monday.com: "Manage all your leads, contacts and companies in monday.com." 2,000+ installs, Starting at \$10 /mo.
- Zerys** by Zerys: "Plan, Produce, Edit, & Publish Custom Content. Access 85k Pro Writers!" 100+ installs, Free.
- Teamwork** by Teamwork: "Create powerful campaigns using Teamwork Projects with HubSpot." 4,000+ installs, \$22.50 /mo.
- Unito** by Unito: "Sync your HubSpot tasks to tools like Trello, Asana, Jira, and Zendesk." 300+ installs, Starting at \$10 /mo.
- Asana** by HubSpot: "Create task follow-ups and more in Asana with HubSpot workflows." 2,500+ installs, Free.

On the left, a workflow diagram is shown with the following steps:

- Contact enrollment trigger**: "Form submission has filled out Energy Retailer / Network Operator inquiry on Any page"
- Create record**: "Create deal *Contact: Company name VPP Opportunity* and assign it to Chris McCarney"
- Create an Asana Task**: "Create Asana task New VPP opportunity for Contact: Company name | Update the deal details"



WebHooks

Webhooks within Workflows allow you to send data to external systems, making a 'triggered' integration much easier. Keeping your systems closely aligned will make your CX much more valuable!

Now live Marketing Hub Enterprise

Trigger a webhook ×

Method


POST

Webhook URL *

https://

Use Request Signature

App ID

[Learn more about webhooks](#) 



Team Management

Partitioning takes the pain out of staying organized. Separate your marketing assets by team, so every user has access to the right content. You'll have a cleaner, better-organized database across all your teams, brands, and regions.

Now Live Marketing Hub Enterprise

Users Teams Roles

Restrict new content to creators and their teams
By default, newly created content can be accessed by all users with content permissions. Toggle on to restrict access to newly created content (e.g., website pages, landing pages, blog posts, lists), to its creator, their team, and if applicable, their parent team(s). [Learn more](#)

Organize your users into groups for organizational, reporting, and partitioning purposes.

Search

<input type="checkbox"/>	NAME ↑	CHILD TEAMS ↓	USERS ↓	ADDITIONAL USERS ↓
<input type="checkbox"/>	Commercial Team	0	0	0
<input type="checkbox"/>	Customer Support	0	3	1
<input type="checkbox"/>	External Installations Partners	0	1	0
<input type="checkbox"/>	Finance	0	1	0
<input type="checkbox"/>	Installations	Reseller, +1	4	1
<input type="checkbox"/>	Management	0	4	0
<input type="checkbox"/>	Marketing	0	0	0
<input type="checkbox"/>	Sales	0	1	0
<input type="checkbox"/>	Sales ACT	0	0	0
<input type="checkbox"/>	SDR	0	0	0
<input type="checkbox"/>	Tech	0	4	0



Flexible Dashboards

Flexible dashboards give you a beautiful, customizable, and data-dense dashboard that allows you to easily build and share dashboards with your team.

Previously, you were limited to 4 report sizes. Now, you have 20 different options, allowing you to further customize your dashboards.

In Beta | Professional and Enterprise Plans for All Products



With a lot of pet parents doing it tough at the moment, we're here to help. If you're in a vulnerable domestic position or experiencing financial difficulty, please contact us at help@petsure.com.au. Current circumstances have changed our method of service delivery, so please make claims and enquiries via your Pet Portal or by emailing your pet insurance provider for fast-tracking by our dedicated team.

PetSure. For a life with pets

Just as many of us put pets at the centre of our lives, we put the welfare of pets at the heart of our business.



Our services



Pet insurance
for pet owners



Support for vets



GapOnly™





Setting the scene...

Started with Hubspot

Nov 2018

Started on Hubspot MHE

Nov 2019

Team size

5

Key Initiatives

B2B & B2C Channels ✓

Multi - Brand Alignment ✓

Single Source Customer Data ✓

Partner Channels ✓

Retargeting Automation ✓



Partner Onboarding

Lupo Digital



Advanced Segmentation

Using Teams and Lists together, The PetInsurance teams has enabled Brand and market segment specific campaigns that a range of teams can execute. This has broadened their market coverage from their Hubspot portal, doing more with much less.

Now Live Marketing Hub Enterprise

Active list ⓘ

The results of this list are limited to team(s): **PetSure**

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

List membership

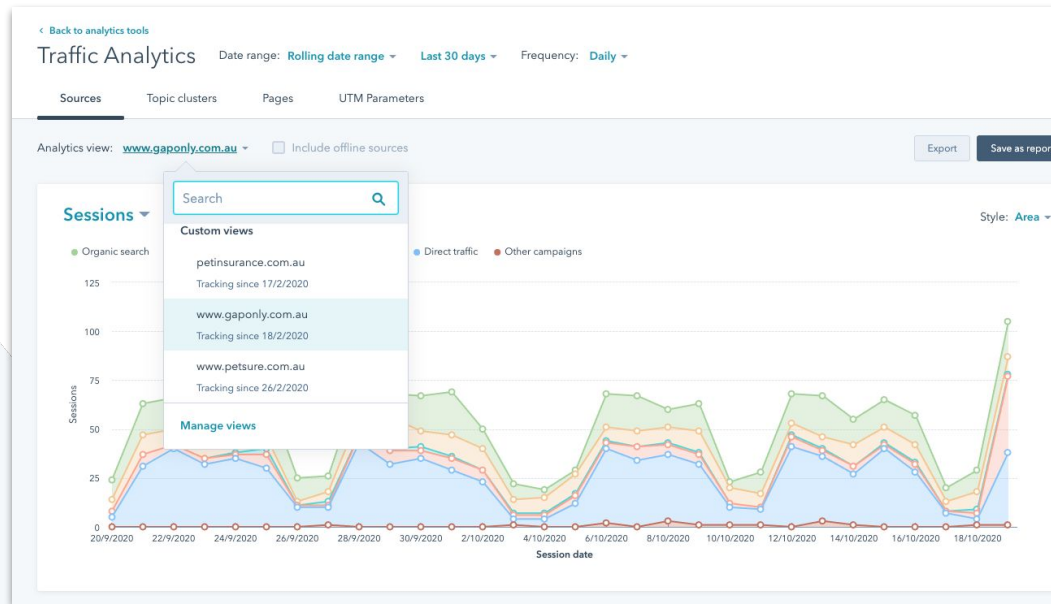
- is not member of **Quote Stage from Quote Tool = Purchased**
- and
- is not member of **Partner Contacts not to delete**
- and
- is member of **GoToWebinar = Registered**
- and
- is not member of **Do not delete - Penny**

ⓘ



Brand Domains

Connecting Multiple Brand Domains to Hubspot allows you to do more with less from one connected portal, creating a single view of a Contact interacting across brands and regions. Cross-selling and reporting across brands has never been easier.



Now Live Marketing Hub Enterprise + Brand Domains



Preference Centers

With Email Preference groups, you can manage your email subscriptions across brands and regions, and teams automatically without having to manually update customize.

In BETA Marketing Hub Enterprise + Brand Domains

Email

Preferences Center Configuration Tracking SMTP Send Frequency

Don't send to unengaged contacts
Improve your email sending quality and score.

Resubscription email
Let unsubscribed contacts know how they can opt themselves back into your emails. [Edit email](#)

Compliance copy email
Automatically BCC all outgoing messages where they can be reviewed for compliance later.

Double opt-in
Set up an opt-in request email, confirmation page, and, optionally, a follow-up email. [Create email](#)

Default subscription types (3)
These subscription types are automatically created for your portal and tied to tools inside HubSpot.
[Subscription types](#) [Edit](#)

Preference groups [Add](#)

Create a group and make managing your marketing emails simple. Assign addresses, subscription types, and subscription pages to teams, and add translations from one place.

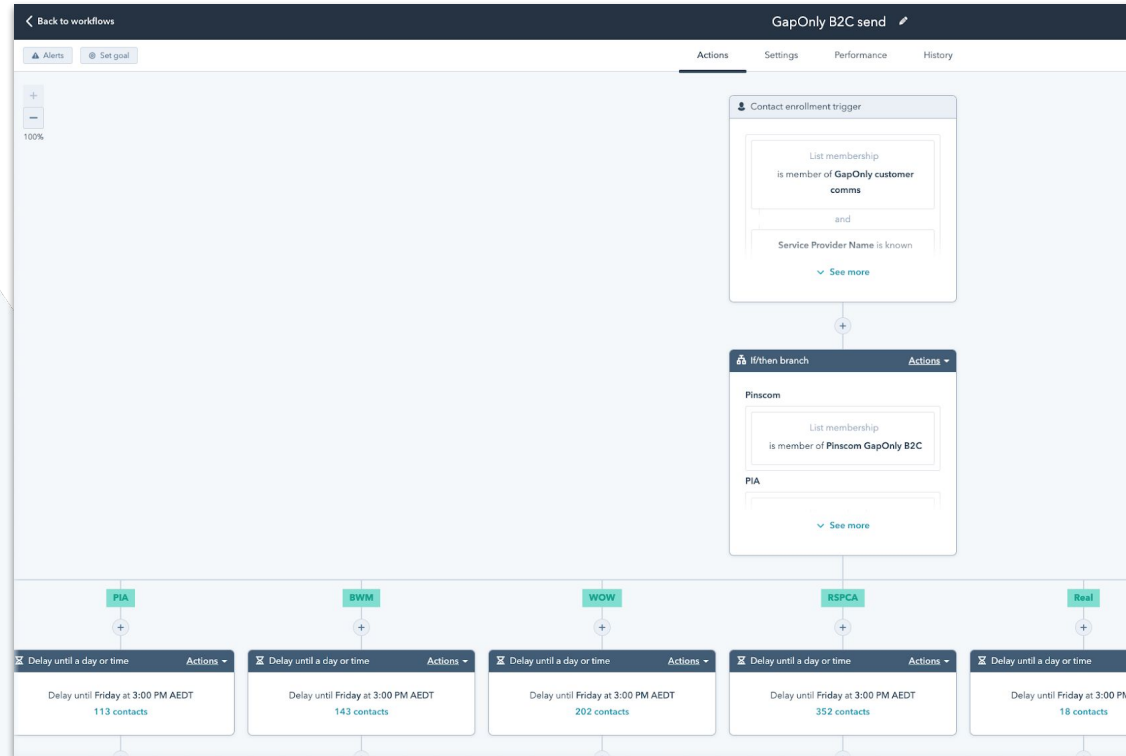
Filter by: **Active** ▾

- [Bondi Vet Pet insurance](#)
- [PetSure](#)
- [Initial Group](#)



New Workflows Editor

With the new and improved workflows editor, you can build multi-branch workflows that allow you to add multiple conditions to a single if/then step, so your workflow can take more than two paths from a single if/then action. No need to build multiple workflows to accomplish the same goal.



Now live Marketing Hub Professional & Enterprise



Advanced Delays in Workflows

You can now also create more personal and relevant customer experiences by controlling when you communicate with your audience using new advanced delays.

Now live Marketing Hub Professional

Delay until event happens

Edit delay Contacts in delay

Learn more ×

Take a quick tour to see what you can achieve with this new delay. [Start tour](#)

Choose an event type and then filter by event property. If a matching event happens while the contact is in this delay, the contact will go to the next step in the workflow.

Event ×

Page visited ▾

URL contains any of `https://gaponly.com.au/`

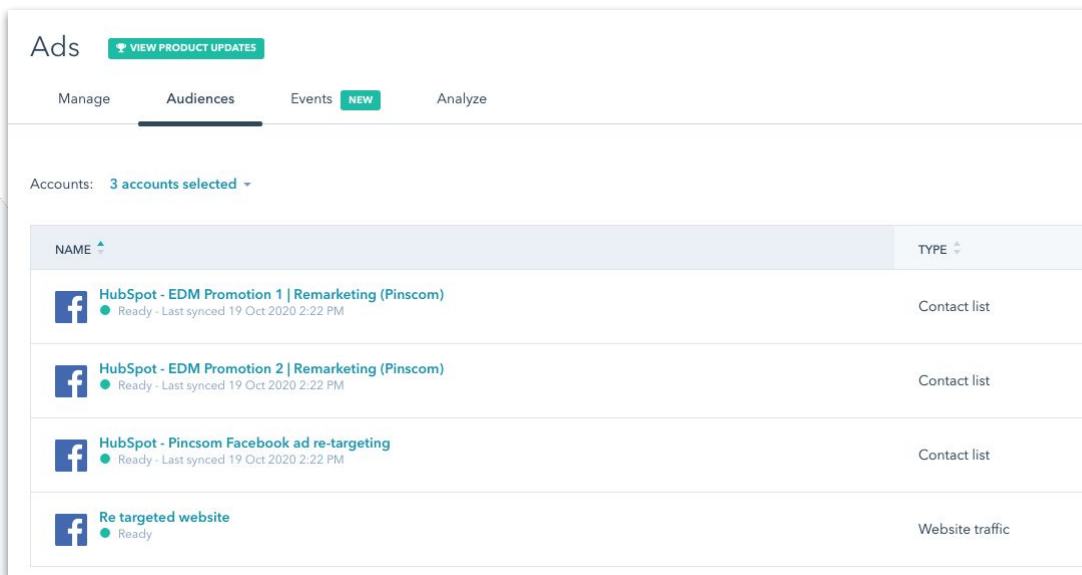
AND







Ads ReTargeting

Sync your segmentation with custom audiences and retarget with precision, increasing conversions in the middle of funnel.

Available Now | Marketing Hub Professional



The screenshot displays the HubSpot Ads interface. At the top, there's a navigation bar with 'Manage', 'Audiences', 'Events', and 'Analyze'. The 'Audiences' tab is active. Below the navigation, there's a 'VIEW PRODUCT UPDATES' button. The main content area shows 'Accounts: 3 accounts selected'. A table lists the audiences:

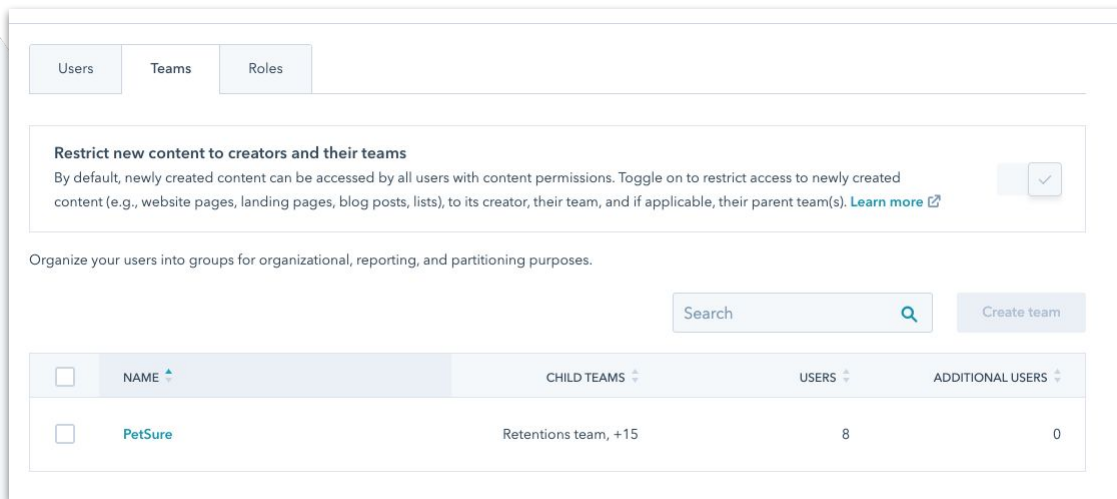
NAME	TYPE
 HubSpot - EDM Promotion 1 Remarketing (Pinscom) ● Ready - Last synced 19 Oct 2020 2:22 PM	Contact list
 HubSpot - EDM Promotion 2 Remarketing (Pinscom) ● Ready - Last synced 19 Oct 2020 2:22 PM	Contact list
 HubSpot - Pinscom Facebook ad re-targeting ● Ready - Last synced 19 Oct 2020 2:22 PM	Contact list
 Re targeted website ● Ready	Website traffic



Team Management

Partitioning takes the pain out of staying organized. Separate your marketing assets by team, so every user has access to the right content. You'll have a cleaner, better-organized database across all your teams, brands, and regions.

Now Live Marketing Hub Enterprise



The screenshot shows the 'Teams' management interface. At the top, there are three tabs: 'Users', 'Teams', and 'Roles', with 'Teams' selected. Below the tabs is a toggle switch for 'Restrict new content to creators and their teams', which is currently turned on. A descriptive text below the toggle explains that this setting restricts access to newly created content to its creator, their team, and their parent team(s). Below this is a search bar and a 'Create team' button. The main area contains a table with columns for 'NAME', 'CHILD TEAMS', 'USERS', and 'ADDITIONAL USERS'. A single team, 'PetSure', is listed with 8 users and 0 additional users.

<input type="checkbox"/>	NAME	CHILD TEAMS	USERS	ADDITIONAL USERS
<input type="checkbox"/>	PetSure	Retentions team, +15	8	0



More from Marketing Hub

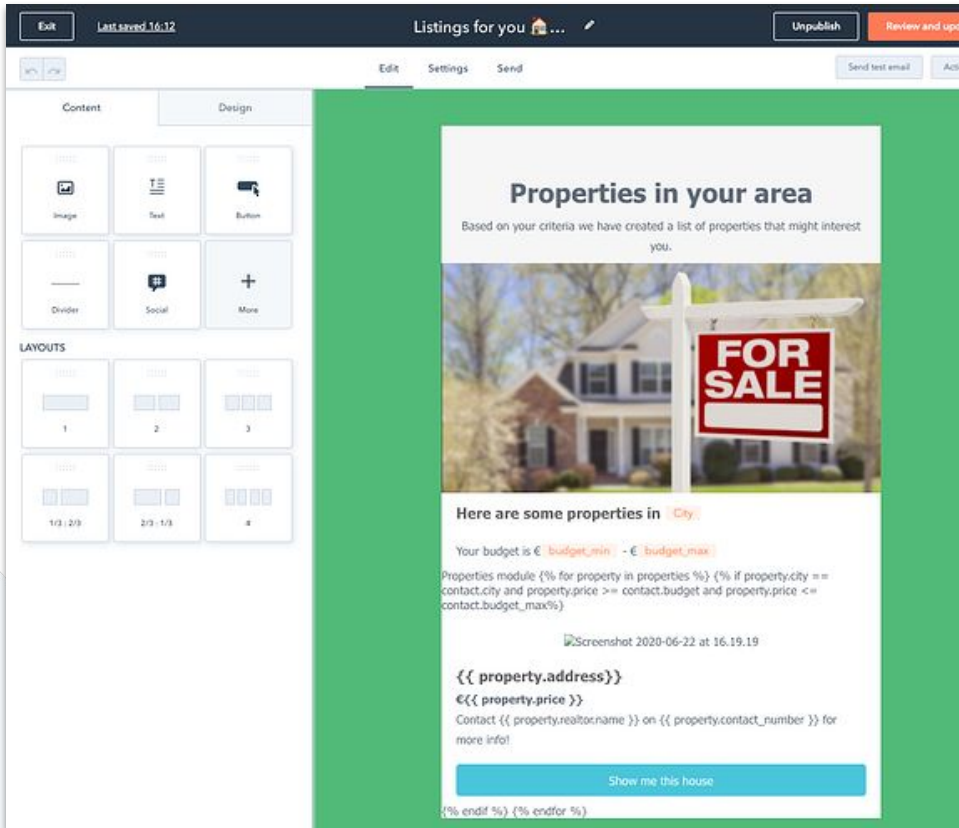


Programmable Email

Programmable email content allows you to deliver highly customized and relevant email content to your customers at a massive scale.

Powered by HubSpot CRM and database the new feature allows for a level of email personalization at a scale never possible before.

Private Beta Marketing Hub



The screenshot displays the HubSpot email editor interface. The top navigation bar includes 'Exit', 'Last saved 16:12', 'Listings for you ...', 'Unpublish', and 'Review and up...'. Below this, there are tabs for 'Content' and 'Design', and buttons for 'Edit', 'Settings', 'Send', 'Send test email', and 'Actions'.

The 'Content' panel on the left shows various widgets: Image, Text, Button, Divider, Social, and More. Below this is the 'LAYOUTS' section with four grid options labeled 1, 2, 3, and 4.

The main preview area on the right shows a green-themed email template titled 'Properties in your area'. The content includes:

- A header section with the title 'Properties in your area' and a sub-header: 'Based on your criteria we have created a list of properties that might interest you.'
- A large image of a house with a 'FOR SALE' sign.
- A section titled 'Here are some properties in City:' followed by a budget filter: 'Your budget is € {{ budget_min }} - € {{ budget_max }}'.
- A paragraph of placeholder text: 'Properties module {% for property in properties %} {% if property.city == contact.city and property.price >= contact.budget and property.price <= contact.budget_max %}'.
- A timestamp: 'Screenshot 2020-06-22 at 16.19.19'.
- Placeholder text for property details: '{{ property.address }}', '€ {{ property.price }}', and 'Contact {{ property.realtorname }} on {{ property.contact_number }} for more info!'.
- A blue button labeled 'Show me this house'.
- Footer placeholders: '{% endif %}' and '{% endfor %}'.



Account Based Marketing

HubSpot now offers new purpose-built ABM features like: target account home and a new account overview that help sales teams work hand in hand with marketers to run an ABM strategy in HubSpot.

Available Now | Starting in Marketing Hub Professional And Sales Hub Professional

The screenshot displays the HubSpot interface for account-based marketing. On the left, the 'Target Accounts' section shows 53 accounts across all networks, with a list of companies including Xuatico, A2 Robotics, Wash Plus, Root Legal, Webb Appliances, LD Associates, PN&M, and Cordafone. The main 'Account overview' panel features a teal header and a summary of activity for the current month: 89 page views (3.01% increase), 47 sessions (2.98% increase), 5 new contacts (7.12% increase), 13 1:1 emails sent (13.45% increase), 2 logged calls (1.07% increase), and 1 meeting (2.98% increase). Below this is a 'Contacts' table with columns for contact name, buying role, last touch, last engagement, and scheduled actions. The table lists contacts like Amy Andrews (Decision Maker), Brian Boxer (Champion), Callie Craven (Economic Buyer), Lacey Thomas, and Lissa Terry. A 'Blocker' label is visible for Callie Craven. The interface also includes a search bar for contacts and a pagination control showing 1 of 25 per page.

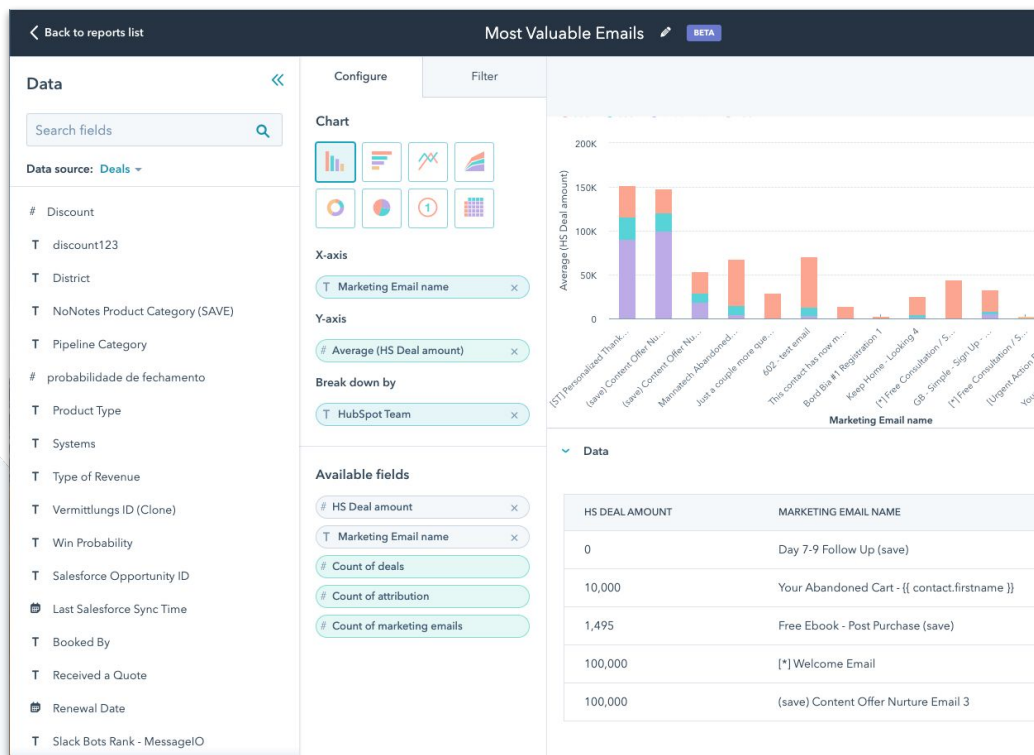
PAGE VIEWS	SESSIONS	NEW CONTACTS	1:1 EMAILS SENT	LOGGED CALLS	MEETINGS
89 ▲ 3.01%	47 ▲ 2.98%	5 ▲ 7.12%	13 ▲ 13.45%	2 ▲ 1.07%	1 ▲ 2.98%

CONTACT	BUYING ROLE	LAST TOUCH	LAST ENGAGEMENT	SCHEDULED
Amy Andrews CEO at S2 Bogota	Decision Maker	3 days ago Ethan Kopit called	1 hour ago Opened email from Ethan Kopit	
Brian Boxer VP Marketing at S2 Bogota	Champion	5 days ago Nate Lacy sent email	2 days ago Opened email from Nate Lacy	Meeting Task
Callie Craven VP Finance at S2 Bogota	Economic Buyer Blocker	2 weeks ago Nate Lacy sent email	3 days ago Viewed Why HubSpot?	Sequence
LT Lacey Thomas		No outreach	5 days ago Viewed ABM 101	
LT Lissa Terry		No outreach	5 days ago Viewed ABM 101	



New Custom Report Builder

Now, you can access your contact, company, and deal data alongside your marketing email, landing page, and blog engagement data (with many more data sources to come throughout the beta) right within the custom report builder. This is a streamlined way to answer your key questions.



In Beta | Professional and Enterprise Plans for All Products



Behavioral Events

Behavioral events, formerly custom events. Give marketers the ability to trigger marketing based on website, inapp, or other behavior based actions.

Using CRM data and behavioral events, you can set up a trigger that fires off an email to prospects when it's clear they are trying to decide whether to buy or not.

Now Live Marketing Hub Enterprise

Create event ✕

DETAILS — CONFIGURE Step 1 of 2

Event name
Revenue reporting

Tags
Select tags ▾

Event type

Clicked element

Submitted form

Visited URL

Custom event

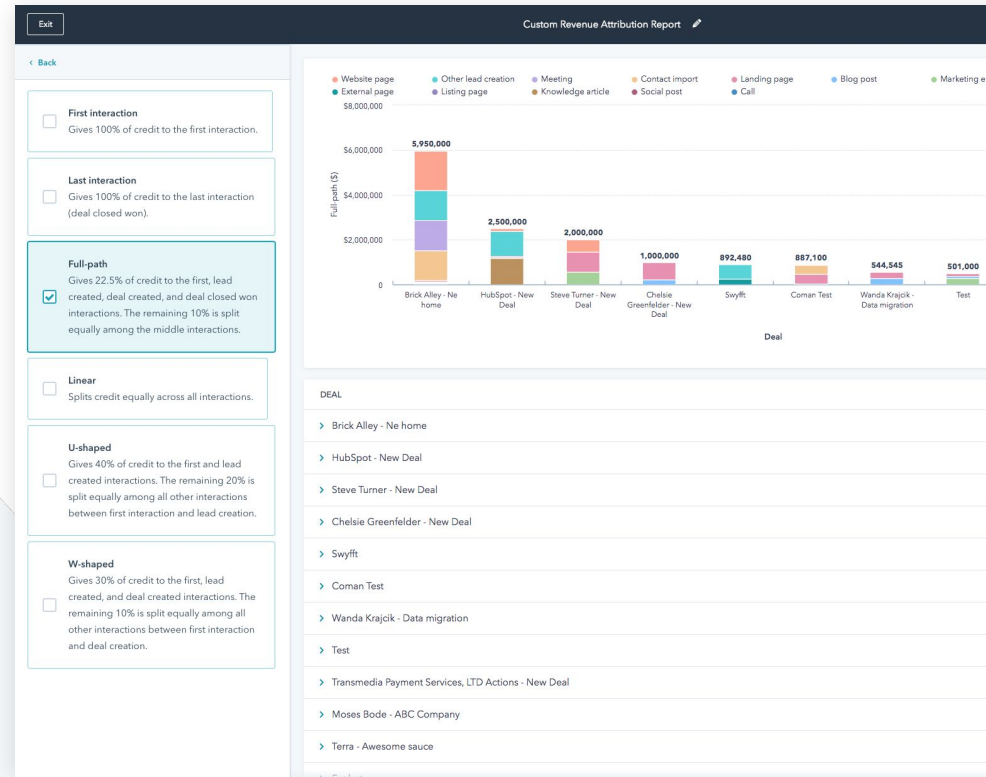
Cancel Next >



Multi-touch Revenue Attribution

Get credit for the business you drive by tying revenue to every marketing action, automatically. Make better strategic decisions rooted in real business value. Unlike most attribution solutions, HubSpot's attribution is built for real people, not data scientists.

Now Live Marketing Hub Enterprise



Customer Panel



Customer Panel



Chris McCarney

Chief Revenue Officer



John Kilkenny

Head of Partnerships



Questions?



Up Next: How To Implement a Cross Channel Communications Strategy with MessageMedia

Thursday 22nd October, 12:00 PM (AEDT)



David Gutla



Cameron
McFarlane



Tara Salmon



Mariano Favia



Thank you

