



Welcome Virtual Attendees

We will start at 4:00pm

#TCHUG



User Group - Twin Cities

How To Use HubSpot To Run More Lean In
Economic Uncertainty

September 29, 2022

#TCHUG

Welcome!

Twin Cities HubSpot User Group is a community of HubSpot software customers and thought leaders. This group meets to discuss product updates, learn new best practices, and network with each other.



Your Host: Tiffany Cavegn

Denamico

Marketing & Education

About Denamico

Denamico is a Diamond Tier HubSpot Solutions Partner in Minneapolis.

We have hosted the Twin Cities HUG since 2014.



denamico





Agenda

1. Current State
2. Challenges We're Facing
3. How to Find Your Gaps
4. New Solutions and Resources
5. Community Networking

Current State

- Disconnected systems
- Disconnected data
- Disconnected people
- Customers are inundated
- Lack of trust



Challenges We're Facing

25%

of Sales Reps

said updating CRM frequently
takes time
away from selling

46%

of Marketers

dedicate more time to
preparing & segmenting data
than any other task

43%

of Sales & Marketers

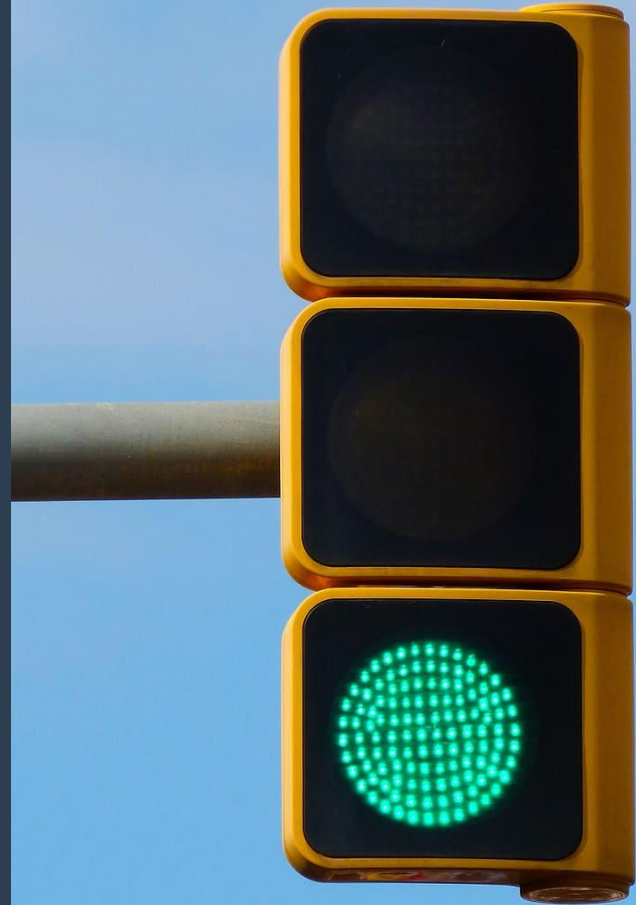
cite a lack of shared data on
prospects as the #1 challenge to
aligning sales & marketing



**We don't
know what we
don't know.**



**Where To
Start?**





How To Find Your Gaps

- Identify multiple sources of truth
- Identify gaps in your marketing, sales, service, and operations processes



Goal: One Single Source of Truth

- You have already taken the first step by using HubSpot!
- But how many other systems do you have?

Tech Stack Audit

Integration Facts



MarTech Tools: 8000+



HubSpot Apps: 1000+




Avg # systems: 100+ / 200+



Benchmark # of integrations: 6-10

Core Systems

	A	B	C	D	E	F
1						
2		Tech Stack - [Client Name]				
3		Category	Software Vendor / App	# of Users	Department(s) Using	Use Case / R Operatio
4		Example	SalesForce	50	Sales and Service	
5		ERP				
6		CRM				
7		Email				
8		Website (CMS)				
9		Blog Hosting (Domain Mgmt)				
10		Website Forms				
11		Website Analytics				
12		E-commerce				
13		Email Marketing				
14		PR Marketing/Social Listening				
15		Marketing Automation				
16		Social Media Management				
17		Pipeline Management & Forecasting				
18		Forecasting				
19		Sales Enablement (Email Temps, Sequences, etc.)				
20		Scheduling				
21		Virtual Meetings / Communications				



A Full CRM Closes More Deals

Customers who owned Sales, Marketing, and Service Hub saw a 75% higher increase in deals close rate than those who only owned Sales Hub after 12 months. ([Source](#))

Improvement in Deal Close Rate 12 Months Post-Purchase



A Full CRM Attracts More Visitors

Customers who owned Marketing, Sales, and Service Hub saw a 22% higher increase in website traffic than those who only owned Marketing Hub after 12 months. ([Source](#))

Website Traffic Improvement 12 Months Post-Purchase



In Summary

- Evaluate your tech stack
- Work towards a single source of truth
- Exponential results when using 3 Hubs and 6+ integrations





Goal: Zero Gap Customer Journey

- Evaluate your teams:
 - Marketing
 - Sales
 - Service
 - Ops
- Tech Integrations
- Data Quality & Reporting

Areas of Impact

- **Marketing**
- **Marketing Automation**
- **Marketing Content**
- **CRM**
- **Sales Enablement**
- **Data & Reporting**
- **Ops / Tech Integrations**

Categories of Evaluation

Vision

Systems

Process

Insights

Efficiency

Measurables

Customer Experience

Scalability





Area of Impact:
Marketing Content

Category of Evaluation:
Insights

Statement:

Data collected from campaigns is used to inform future sales and marketing initiatives

Enhance Your Marketing Efforts

- Share the same goals, vision, and strategic plan as the sales team.
100% understanding of what makes your solution different from the competition, by all team members.
- All team members can speak to each stage in your sales pipelines.
- Use customer insights from other departments to support their marketing plays and strategies.
- Equip the sales team with the marketing content they need.
- Build content that addresses customer pain points and areas of interest based on sales and customer support feedback.



Enhance Your Marketing Content & Automation

- We have a process to scale marketing automation and identify gaps in the system based on mapping and performance.
- Sales and marketing campaigns are aligned and communicate a cohesive message due to shared processes.
- Our campaigns speak to ideal customers and provide valuable information.
- We nurture leads by providing relevant content about our products and services using automation using behavioral / engagement data.
- We can identify when a lead becomes hot and should be passed to sales.
- We measure the success of our campaigns using revenue attribution reports.



Enhance Your Website

- Website as an extension of the sales team, produces high-quality leads that fit our ICP, and shortens the sales cycle.
- Website is “plugged in” to the CRM and facilitates easy lead and customer follow-up.
- When visitors to our website reach out using a form, we have automation in place to address their needs.



Marketing Next Steps

- Meet Regularly
- Develop a Content Creation Process
- Coordinate Campaigns with Sales
- Shadow Sales and Service Calls
- Create a Shared Space for Sales Enablement Materials



Leverage Your CRM

- Our CRM is our single source of truth for important data across departments.
- Our CRM is integrated with other core systems
website, sales enablement tools, marketing automation, and customer success
- Our teams leverage the CRM on a daily basis because it's intuitive, easy to use, and enhances their performance.
- Our CRM data is inextricably linked, accurate, actionable, and informs decision making repeatedly and confidently.
- Sales and marketing processes work in tandem to close high-priority leads.
- Our CRM helps provides accurate sales analytics & forecasting.
- Our CRM allows for easy segmentation of contacts to enhance the customer experience using personalization.



86%

of Sales Reps

Confused about which tool to use for
which task, leading to missed quotas



Enhance Your Sales Operations

- Sales pipeline management is seamless – deals are tracked in real time, accurately, and with ease through the sales cycle.
- Our sales tools provide a user-friendly experience that promotes using the technology.
- We have the ability to ramp up new members of the sales team through established technology training and documented operating procedures.
- We automate the ability for leads to schedule meetings with our salespeople with integrated calendars.
- Our sales team can focus on revenue-generating responsibilities versus admin activities because our enablement technology automates repetitive tasks



Enhance Your Sales Content

- Review customer feedback provided by support
- Use the same product messaging/positioning as marketing and service teams.
- Understands the organization's most important buyer personas
- Have a dedicated space for sales enablement material.
- Know your goals and how close you are to reaching them



Sales Next Steps

- Replace Silos with Collaboration
- Understand the Customer Journey
- Implement Customer Feedback
- Use a “Marketing-First” Approach
- Keep Your Message Consistent



Enhance Your Customer Experience

- Attend meetings on new product announcements.
- Establish a process for supplying sales and marketing with customer stories.
- Sends the marketing team content creation ideas.
- Meet with sales to discuss strategies around high-priority pipelines.
- My team has performance goals that support quarterly and/or annual organizational goals.



Service Next Steps

- Have Meaningful Cross-Functional Meeting To Share Stories
- Implement an A.C.A.F. Customer Feedback Loop

Ask. Categorize. Act. Follow-Up.

- Host Customer Spotlights
- Share NPS Scores
- Build a Repository of Insights



Enhance Data & Reporting

- We rely on a single platform to collect data from other systems to produce accurate reporting.
- Data is clean and current, and allows for sophisticated segmentation of lists, including an accurate view of buyer intent.
- Our customer-facing teams have the ability to view insights on customers throughout their full lifecycle.



Enhance Operations

- Our leadership has a vision with corresponding goals and is committed to implementing and utilizing systems and technology to increase lead gen, accelerate sales, and improve customer service.
Data, technology, and people work together efficiently across revenue teams.
- We have a standard process to implement new technology, train users, and foster long-term adoption.
- Standard operational procedures (SOPs) are documented, followed by all, and continually updated within the organization.
- We eliminate redundant systems within our tech stack and have a process for evaluating new technology to grow the business.



4 hours

lost per week

helping users access & utilize tools



Enhance RevOps Systems

- Manage a single source of truth for customer data, that the whole company works from.
- Own reporting across all revenue functions (marketing, sales, and service).
- Connect applications from across the company in one central place, automatically (without manual imports and exports every time).
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Operations Next Steps

- Ask for Feedback
- Determine core KPIs
- Audit your tech stack & identify:
 - Duplicate or undefined sources of truth
 - Unintegrated (core) systems
- Map Out the Customer Journey
- Track Team Attribution



Key Takeaways

- Communication is a key component to systemic change
- Use evaluation criteria as a stepping stone
- Share resources and reporting
- Review your target audience / personas quarterly
- Set shared goals
- Meet regularly with other teams

Identify Your Gaps &
Get Feedback From
HubSpot Experts to Solve

RevOpsScore.com



Additional Resources

Email to follow
with links to today's resources:

HubSpot Academy course
Tech Stack Audit Template
... and more



**It's Time For
Happy Hour!**





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