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50 SIMPLE HUBSPOT HACKS FOR GUARANTEED COMPANY GROWTH

CONTENTS

AN INTRODUCTION TO HUBSPOT AND ITS TOOLS

What is HubSpot?

HubSpot is an all-in-one marketing, sales and customer service solution that's designed to help businesses grow.

Launched in 2006, HubSpot has grown exponentially. It now offers a number of individual platforms that can be used on their own, or combined into a single suite of powerful tools.

The platforms that make up the suite are: HubSpot Marketing, HubSpot Sales, HubSpot Service and the HubSpot CMS. Each platform has its own set of tools, so for anyone looking to invest time and effort into HubSpot, understanding how they work is essential to getting the most out of them.

Huble Digital has been using HubSpot for a number of years and we want to make it easier for you to get started with 50 HubSpot hacks (that you can use right now).

Let's dive in!

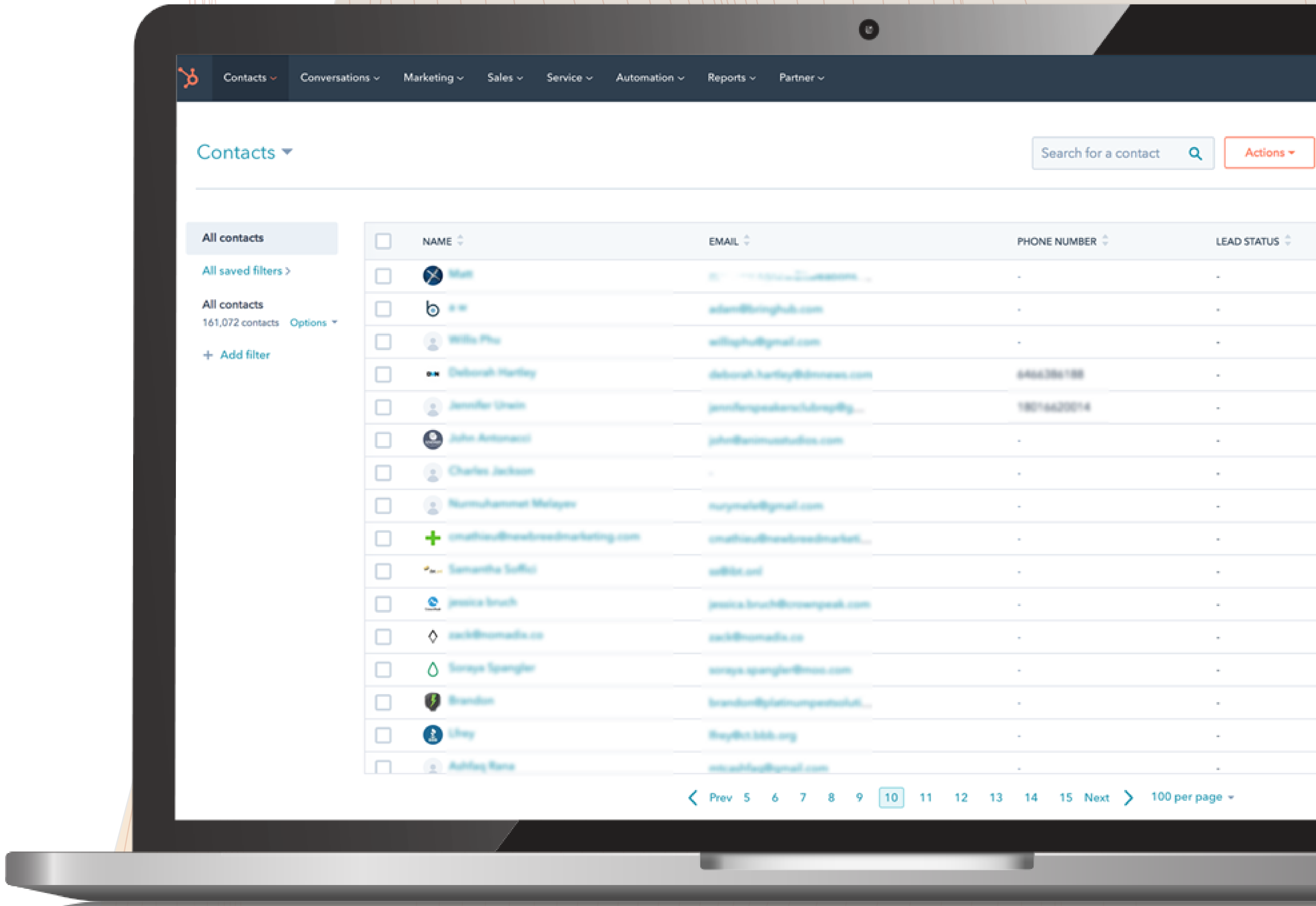
HUBSPOT CONTACTS AND LISTS

1. **Configure your contact records to only show the information you want to see**

   Set up your activity feed so it displays the contact information you are interested in. There will be certain fields that are more important to you, so ensure that these are configured to be at the top. You can also use default settings so that you and your team can see the same information, or configure the settings so that separate departments can see information that's relevant to them.

2. **Enable notifications for conversions and when leads revisit your website**

   You can configure HubSpot so that conversions and lead revisit notifications are delivered directly to your inbox or your HubSpot dashboard. If you use Slack, you can integrate Slack with HubSpot and then set up the 'HubSpot bot' to send you lead revisit notifications and form submissions in real-time, so you never miss an opportunity. These notifications allow you to act on live data so that no sales opportunity falls through the cracks.



3 Use lists to segment by buyer journey stage

Set up your contact lists based on lifecycle stage. You should then create different lead nurture pathways based on which lifecycle stage people are at. By segmenting your contact lists in this way, you make it easier to manage, engage with, and prioritise potential leads.

4 Create lists of people that visit your website

Set up lists of people that have visited your site in the last two days. These are the people that sales should reach out to first when they've got spare time. Your sales team can see which pages potential leads have browsed to ensure the conversation they have later that day is timely and relevant.

EMAIL MARKETING

5 Use the HubSpot drag and drop email tool

Instead of spending hours building new email templates for new marketing campaigns, you can use HubSpot's new drag and drop email tool. It's incredibly easy to use and requires no development at all, meaning you can begin crafting beautiful emails right out of the box.

6 A/B test your emails to determine which ones are most effective

With A/B testing, you can send two slightly different emails to your audience to see which triggers the most engagement. Instead of guessing which emails resonate, you can use actual data to inform your email creation. With A/B testing you can change the subject lines, layout and content of your emails to figure out which content your audience responds to more.

7 Include only one conversion point on your emails

Your HubSpot marketing emails should focus on one conversion point. If you give your leads five or six different CTAs to choose from, the likelihood is they won't click on any of them. By tailoring your message to one CTA specifically, you'll see an increased click-through rate.

8 Add personalisation tokens

With HubSpot's personalisation tokens, you can send out emails that look like they were intended for a specific person.

Personalisation tokens can use a variety of different properties, such as: first name, company name, office location, and subscription type. This means there's no need to type out salutations or the recipient's name manually for each email. It can all be automated!

Personalisation tokens can improve email engagement as recipients will be more likely to open, read and interact with an email they feel was written for them.

SOCIAL MEDIA

9 Use HubSpot's social media template file to create social media in batches

With this tool and a CSV document, you can batch upload your social media posts. This means that you can spend one hour per week running your social promotion, as opposed to 30 minutes per day.

10 Use your company spokespeople accounts as well as your company accounts

You'll see far more engagement with your content if you use your employees' professional social profiles — including those belonging to your directors and board members. In the last few years the opportunity for your spokespeople to become influencers on LinkedIn has increased exponentially, allowing for

11 Use analytics to identify your most successful posts, clone them and then repost them weeks later

If something has worked well, try to improve it and do it again. The same goes for your social media posts. If you have a post that worked really well, don't try and reinvent the wheel — post it again a few weeks later with a few subtle adjustments. You can also put paid media budget behind your popular posts to extend their reach even further.

HUBSPOT CMS AND WEBSITES

12 Use HubSpot's reporting tools

HubSpot's reporting tools help you identify your best performing pages, which of them are getting traffic, what type of traffic they're receiving, as well as which content on your website is converting and generating customers. This gives you the insight you need to optimise your webpages for greater lead generation and conversion.

13 Use HubSpot's drag and drop modules

Gone are the days of having to enlist the help of a developer to reconstruct a webpage. HubSpot's intuitive yet powerful drag and drop feature gives you the tools you need to edit your pages as and when needed.

14 Use HubSpot's SEO tool

HubSpot's SEO tool offers tremendous help to those who are looking to improve their webpages for search engines. The tool provides recommendations on how to improve your page titles, meta information, image sizes, and more.

15 Make the most of the content staging environment

Build your pages knowing exactly what they will look like and how they will function. HubSpot's Content Staging environment is a development environment that allows you to redesign or create staged pages before publishing them to your production site.

16 Use smart content

If you’re not using smart content on your website, you’re doing yourself and your website a disservice. Smart content displays different content to contacts based on the information you have on them. Smart content can be customised based on a number of variables — including language, device type, and where a contact is in the sales cycle.

For example, you could show a marketing qualified lead (MQL) bottom-of-the-funnel (BOFU) content offers to get them over the line to a sales qualified lead (SQL). Similarly, you could show current customers different products or services — or even advertise a testimonials page where they can leave a review on your products and services.

BLOGGING

17 Use the HubSpot calendar

The Hubspot calendar tool allows you to create tasks and schedule blogs, emails, landing pages and social messages and add them to the month's calendar. This gives you a good overview of the content you have going out across your company blog and social channels.

18 Optimise the past

Don't just create and publish content and never go back to it! Keep looking for ways to improve old content and provide more value to readers. Google loves fresh content and will reward high-quality work that is updated for relevancy. If you're looking for ideas, HubSpot's blog analytics tool can help you identify your top-performing posts.

LANDING PAGES

19 **Remove the navigation on landing pages**

As a marketing manager, you probably spend a lot of your time trying to direct people towards landing pages. Once you have a lead on a landing page, the main focus is then communicating the offer and making it as easy as possible to complete the form. Don't confuse things and distract them with other links and offers. Removing the navigation on your landing pages is best practice and ensures that interested prospects stay on the landing page and keep your conversion rates high.

20 **Don't make your forms too long and use progressive profiling**

Website visitors are averse to long forms, so make sure your form length (or the number of questions you ask) reflects the value of what you are offering. If you are offering a top of the funnel eBook, you shouldn't be asking for too much information. However, if you're offering a free trial of your product — which has a higher value — you can ask for more information in return.

Progressive profiling allows you to make your forms smarter and more efficient. If a contact filling out your form has already provided a value for a specific field, then you can specify that another form field should appear in its place. Progressive profiling can get you even more information on the existing leads who fill out forms on your website.

21 **Make your offering very clear and concise**

Explain what you are offering clearly. Make sure to include all the information visitors need and that you reiterate the value of the offer. Don't include too much information or you'll overwhelm and confuse visitors along the way. One really easy way to do this is with landing page videos — what better way to explain the value?

HUBSPOT FILE MANAGER

22 Keep things in order with strict naming conventions

Make it easy for anyone in the business to find assets they are looking for in HubSpot. For example: thank you pages should have TYP at the end of their file name and landing pages should have LP.

Using names that only make sense to you can create confusion among your team members. So make sure you have agreed on naming conventions. An example for an eBook file name could be: 2018 - *title* - eBook. That way you know what it is (an eBook), what it is about (its title) and when it was published (2018).

Let’s say you also have an image for this eBook that you use across your website to promote it. You would then follow a similar process, but with the addition of “image” and any extra comments like “cropped”. This way, if you search up the word eBook in the File Manager for example, you would find all eBook related results.

23 Image and video size — optimal sizes for each

Google's search rankings take page load speed into consideration — the longer webpages take to load, the worse the user experience. So before you upload files into HubSpot, make sure that you've reduced the file size as much as you can without losing the quality of the image or video. This also includes assets like PDFs, where large images are often used.

24 Shutterstock integration — download stock imagery, simply

We recommend using the Shutterstock integration, which provides 60,000 free images for all HubSpot Marketing customers. You can download high-quality images from Shutterstock directly from within HubSpot. The benefit of this is that when you are building blogs, and publishing social posts, you don't need to leave HubSpot to find an image that suits the content. HubSpot also integrates with Canva, an intuitive tool that helps you craft professional layouts and beautiful design assets for your content.

HUBSPOT LEAD CAPTURE

25 **Make the most of HubSpot pop-up forms**

HubSpot lead ads are a great way of converting leads on specific pages of your website, without needing them to navigate through to landing pages specifically. Lead ads can be built in a variety of ways to ensure that they are of interest to visitors.

26 **Smart CTAs are a must**

What if you want to send the right message to the right website visitors and at the right time?

HubSpot's Smart CTAs allow you to show different CTAs to website visitors and contacts, depending on how they have engaged with your website thus far. For example, if one website visitor has downloaded your eBook on 'Ultimate Website Design and Development', instead of showing them the CTA to download that eBook again, you could show them a CTA linking to your eBook 'Optimising Your Website'.

27 Set lifecycle stages based on form fill

To segment your contact database and qualify contacts, set lifecycle stages based on what form a contact fills out. For example, if a contact fills out a form on a landing page for a product demonstration or pricing document, chances are they are interested in your product or service. These contacts should be assigned a lead status of SQL, rather than MQL, as they are an opportunity for sales to follow up with.

This kind of approach ensures that your sales resource is utilised in the best way possible – and that your leads are segmented in a fashion that helps you see who is most likely to make a purchase.

28 Phone number validation and progressive profiling in your forms

To encourage website visitors to fill out forms with their real phone numbers, set the contact number form field to be a certain amount of characters. This way, those filling out forms will be more likely to use an actual number than insert a bunch of random digits. It's still possible for someone to use a random number — but it'll be more genuine than without this in place.

If a lead has filled in a form before — and you have those details — use progressive fields to hide the fields they have already provided details for, rather than asking for the same information again. You can set up your forms to show new form fields that are different to those a contact has already filled out.

LEAD MANAGEMENT

29 Get your lead scoring in order

Not all leads are created equal — some will be more likely to make a purchase than others. While the occasions where B2B leads make a purchase right away are few and far between, some leads will be further along the buyer's journey than others. On that basis, your sales team needs to prioritise their engagement with leads.

Instead of speaking to every individual lead that marketing generates, salespeople should focus on the leads that represent the most perceived value to the business. Lead scoring is the process of assigning scores (values) to leads based on their behaviour with your business, or on your website. For example, if a lead downloads all of your content assets, they are more likely to be interested than say, a lead who subscribes to your blog and does little else.

30 Define lifecycle stages to make lead qualification easier

If you want to streamline your lead management and subsequent engagement, you need to define your lifecycle stages clearly. Defining your lifecycle stages will allow you to better qualify your leads and then segment them for more targeted marketing and sales activity. Don't bundle all your leads under one lifecycle stage — the more segmented your marketing, the more targeted and effective it will be.

For more tips on successful lead management, **check out this blog post.**

31 Use workflows to streamline lead management

When you start generating inbound leads via your website, there are a few things your marketing and sales teams will need to do to ensure your database is clean. The HubSpot workflow tool can streamline the process by setting up tasks and criteria, which removes time-consuming manual tasks from your process.

Want to improve your lead qualification and handoff with HubSpot? **Check out this blog post.**

32 Optimise marketing to sales lead handover

Marketing to sales lead handover is one area where many businesses fail. They do the hard work of generating qualified leads for sales but then forget to transition them over or inform sales that they have done so. Luckily, the whole process can be automated with HubSpot.

If you have defined your lead management and lead qualification process, you can set up workflows to automatically move marketing qualified leads (MQLs) over to sales once they meet certain criteria. This makes it easier for your sales team to pick up on newly generated leads without having to go and shout at the marketing department.

Find out how to optimise your lead qualification and lead handoff in **this blog** post.

PLANNING AND STRATEGY

33 Topic clusters and content strategy tools

Search engines — in response to consumer online search behaviour — are changing. Search engines no longer look at just keywords, they now have altered algorithms that favour topic-based content.

HubSpot's content strategy tool can help you build out topic clusters, manage them, check to see if internal linking is in place, and see their performance.

34 Keyword research — target low competition, high-volume, longtail keyword terms

Don't try to compete on generic, broad keyword terms — these terms will have high competition and a number of websites will already be established authorities on them.

Instead, identify keyword terms that are relevant to your business and have low competition and good search volumes. This way it will be easier to rank on search engine results pages and generate a targeted stream of traffic.

SALES

35 Email integration

HubSpot needs to connect with your inbox to send emails through the CRM. Make sure you hook up your business emails to HubSpot so that you can use these features. HubSpot Sales Hub can also be used directly from your email client (Gmail, Hotmail, Office 365, etc.) by installing the HubSpot extension/add-on.

36 Use workflow automation to create tasks on deal stages

You'll most likely have a standardised process that sales representatives follow when a deal enters your sales pipeline. There may be certain steps that need to be taken when a prospect reaches a specific deal stage.

To make it easier for your sales team to keep track and streamline the process, you can automate the creation of tasks for each deal in HubSpot. This allows your sales team to understand which tasks are related to specific deals, as well as automatically move deals along once tasks are completed.

Just go into your HubSpot account, click on the **settings icon in the main navigation bar** and head to **Sales** > **Deals** in the left sidebar menu. Hover over an existing sales pipeline and click **Edit** or **Add another pipeline.** Click the **Automation** tab and then click **Create a task** in the deal stage you want to automate a task for. From there, just follow the instructions!

37 Create tasks and manage them in HubSpot

No need for additional tools to keep track of your marketing or sales to-do list. Just use HubSpot. In HubSpot, you can create different task queues in order of priority; perfect for a sales team with lots of contacts and leads to follow up and communicate with.

These tasks can be assigned to team members, as well as include due dates, further details, task type, reminders and much more.

38 Use the meetings tool

If you want to schedule appointments with prospects faster — and allow them to book the time they want — use the HubSpot Meetings tool. No need to go back-and-forth on email to find out when they are available.

The Meetings tool syncs with your Google or Office 365 calendar, so prospects can always see when you are available. Using it, they can automatically schedule time with you — as long as you provide them with a meeting link or include calendars on your website.

39 Set up sequences and templates

Don't waste time sending out emails to prospects manually. If you want to nurture prospects (and give your salespeople more time to focus on closing deals), use HubSpot's sales sequences. Sequences allow you to send a series of targeted, timed email templates (which you can customise) to nurture a prospect, in conjunction with calls, while setting yourself tasks at the same time. When contacts reply or book a meeting, they'll be unenrolled from the sequence automatically.

40 Implement live chat on your website

We’re in 2020. Website visitors have been filling out forms for over a decade and could do without the tedium of waiting to be contacted. They want to speak to someone (or something) that can answer their questions in real time. There is still a place for forms and landing pages, but you’ll want to streamline the engagement process for website visitors (and prospects).

Taking the above into account, use live chat and/or a chatbot on your website. This helps website visitors get answers when they need them, and quickly. Using a live chat or chatbot feature will also make it easier for you to direct them to web pages, eBooks, case studies and other content that they can digest and potentially convert on.

41 Use snippets

Drafting an email to a prospect or need to send quick responses via live chat? Use HubSpot’s snippets. The snippets tool allows you to create reusable blocks of texts that can be pulled into emails or live chat windows. Think of them as canned responses — approved, tailored responses that can be used quickly.

Snippets can help to streamline sales engagement with prospects or messages with website visitors. Remember, it’s all about making the process as frictionless as possible!

42 Use cross-object reporting

Provided you are a HubSpot Professional, Enterprise or Reporting add-on user, you can build and run custom reports across multiple data sets, funnels, pipelines and event funnels. This is called 'cross-object reporting'.

Using these reports, you can build and run reports on or across contacts, companies, deals, tickets or products and any associated activities. So if you want to analyse data from a specific source in HubSpot and cross reference it against another, you can do so.

This means that salespeople can now build reports that are tied to specific properties and deals in HubSpot. For example, if you want to create a report based on which leads led to sales opportunities, you can tie deals of this nature to the 'first conversion' property in HubSpot using the report builder. This is just one example — but you should definitely be using it for your marketing and sales activity!

43 Take advantage of lead sources

Make sure you know which channels generate your business the most leads and then use lead sources to inform your marketing approach.

If you are running an event and asking people to fill in a form on your laptop, make sure to disable cookie tracking on your forms. If you don't, each form submission from the same browser will create a new contact.

For more information on HubSpot lead sources and how to use them, **click here.**

44 Customise your dashboards

1. You can create default dashboard views for specific users and fixed default dashboards for team members.
2. Any changes you make to the reporting dashboard are specific to you and not replicated elsewhere. Every team member gets their own dashboard, so you can customise your own as you please!

45 Create custom reports

1. Reporting add-on allows you to create custom reports from saved filters to further segment reports. If your marketing director or CEO needs to see a specific report, you can easily create one in HubSpot which displays the information you need.

For more information on the HubSpot reporting tool and how to use it, click here.

INTEGRATIONS

46 **HubSpot integrations**

With almost 200 integrations, HubSpot's Connect Library integrates HubSpot with your favourite tools. By installing integrations for the tools you already use, you increase efficiency and streamline processes. HubSpot also allows you to build your own integrations so that your team can continue working with their favourite too

47 **Integrate Slack with HubSpot**

Slack is one of our favourite integrations. It includes tasks, commands and notifications that are relevant to your work within HubSpot. A HubSpot Bot installed on your Slack helps you stay on top of your tasks by notifying you about things you want to be notified about. You can create tasks directly through Slack and use commands to help you work even more efficiently!

CONVERSATIONS

How to use conversations in HubSpot

Conversations were introduced to improve the experience of your visitors, leads and customers through a variety of tools. The two newest of these is the Inbox and Bot features. Through the Inbox, you can keep all conversations in one place so that you and your team can see what your customers are asking about, and what you and your team members are speaking to them about.

What's included?

- Inbox — a convenient view of your 1:1 interactions, including live chat messages and emails.
- Live Chat — a place for you to speak to your prospects at their time of need.
- Team Email — Connect a shared inbox for you and your team so that you can keep track of relevant conversations.
- Chatbot Builder — Build a bot that can qualify leads, book meetings with you and answer questions that provide solutions to common questions.

All of the above tools are available right now and free to use!

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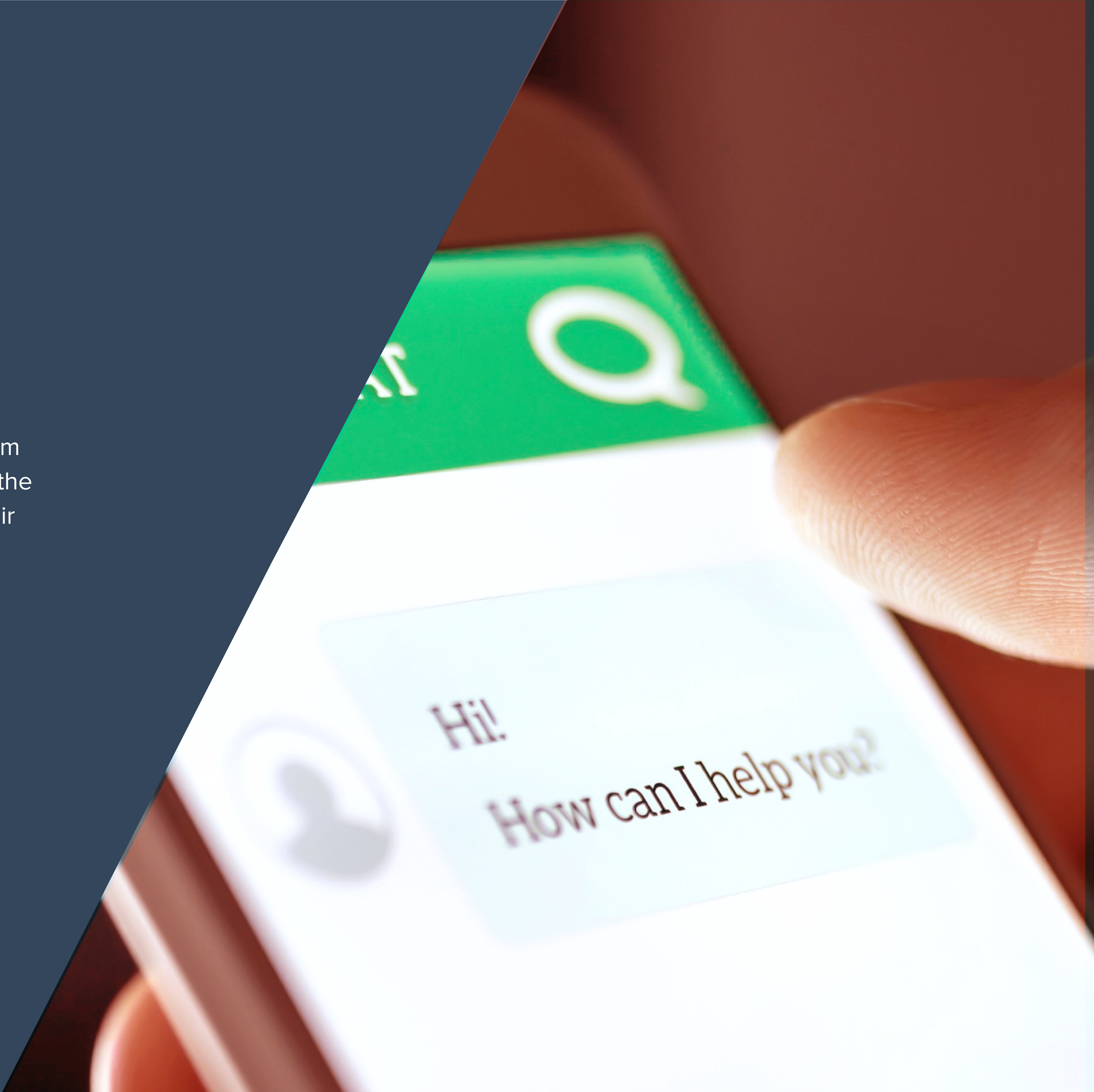
Bots for lead nurturing and engagement

Bots is a particularly exciting feature as it can increase engagements of visitors on your website by identifying what a lead is looking for before a person from your team has even seen them! This saves you time and provides the visitor with an opportunity to indirectly inform you of their requirements at their exact time of need.



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Ask us for help

As a HubSpot Elite Solutions Partner, we know HubSpot inside out. If you require skilled, hands-on support, why not **get in touch with a Huble Digital consultant** or attend one of our **HubSpot training sessions?** Our team of specialists and expert guests run training sessions throughout the year and can create an agenda that addresses your specific questions.

In addition, we also run free HubSpot training webinars. Past webinars can be accessed on demand – you just need to **register!**

Hopefully the above hacks have provided you with some food for thought. For anything else HubSpot-related – **don't hesitate to get in touch!**

Get in Touch