

HUBSPOT REBOOT: 5 SECRETS MARKETERS WISH THEY HAD KNOWN THE FIRST TIME AROUND

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YOU CAN CALL ME NICK "SAL"

I've been trying to figure these
secrets out for some time...

- 6th HUG speaking appearance
- 5 time presenter at INBOUND
- 4.5 years on the Customer Team at HubSpot Inc.
- 2nd year working full-time at IMPACT, HubSpot's #1 Agency Partner of The Year

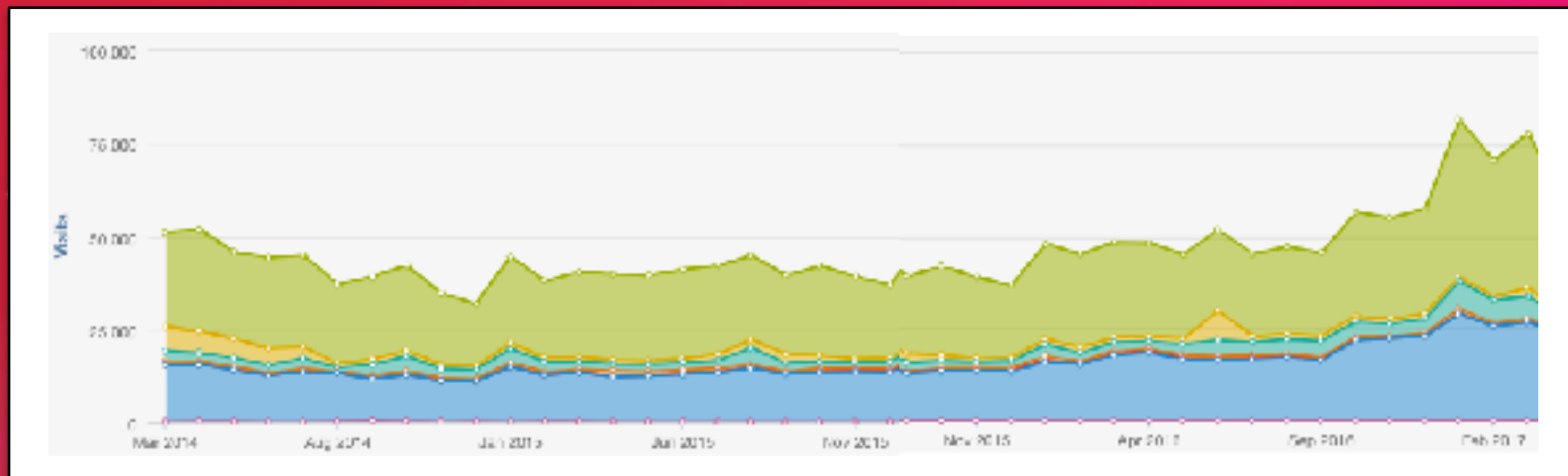


DISCLAIMER:
THIS IS ALL MY OPINION,
NOT HUBSPOT'S

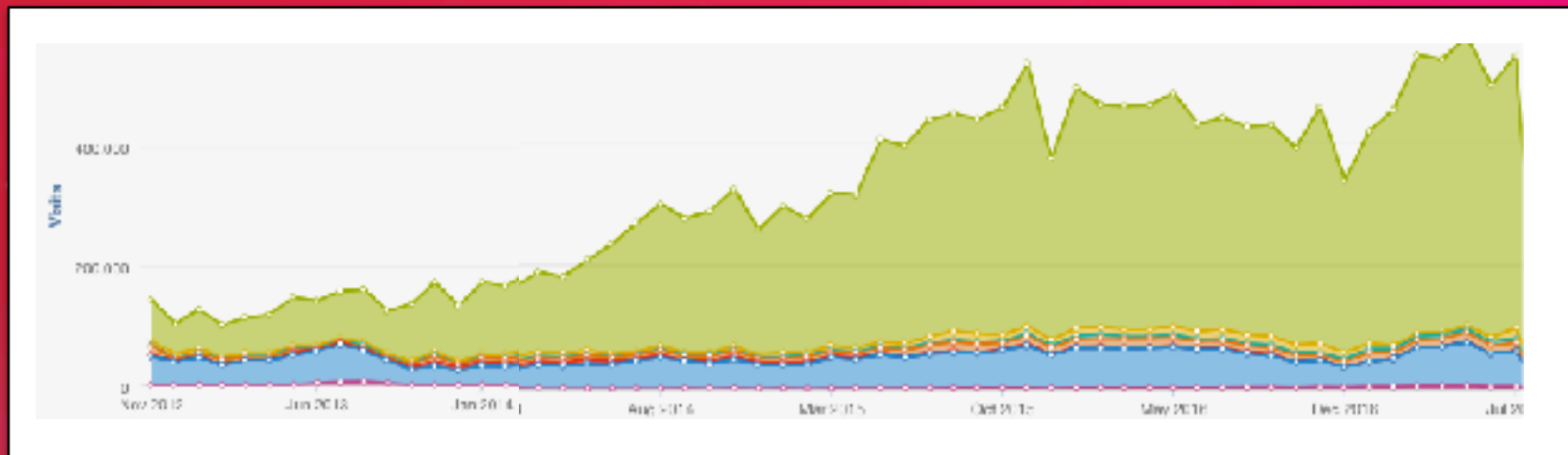


**EVERYBODY
STRUGGLES...**

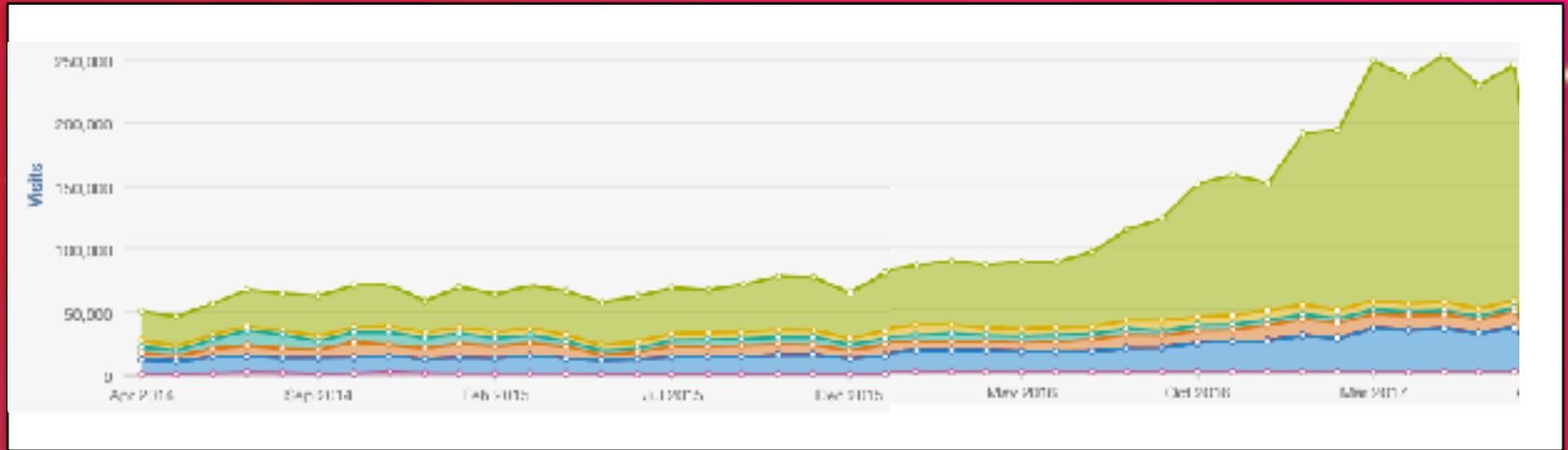
LOSING GROUND?



TREADING WATER?



QUESTIONING YOUR POTENTIAL?



**YOUR STRUGGLES MIGHT
BE MILESTONES ON THE
WAY TO SUCCESS.**

5 SECRETS FOR SUCCESSFULLY STARTING/RESTARTING YOUR JOURNEY

1. Get organized - project management from day 1
2. Get quick wins - using what you have
3. Seek constant feedback - recruit your content advisory board
4. Report the FULL ROI - often and with well-structured meetings
5. Partnering up - starting informally and building up from there



1 GET ORGANIZED

HubSpot is NOT your strategy.

It is a platform to execute your strategy.

TIPS TO GET ORGANIZED FROM DAY 1

- Draft a project charter (get the assignment + expectations in writing)
- Manage key stakeholders with a DARCI Chart
- Map out your conversion machine
- Keep your HubSpot clean and free of chaos
- Document everything

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DRAFT A PROJECT CHARTER

Project Charter Template

- High-level project description
- Establish key drivers/justification for this project:
- Establish measurable project Objectives & Key Results (OKRs)

No more than 4 objectives with 4 or fewer key results per objective

- Define project partners – collaborators and influencers
- 2-3 High-level risks + mitigation plan:
- Summary timeline & milestone schedule
- Summary budget
- Acceptance Criteria
- Commit + Assign resources
- Project approval requirements

Signed by project sponsor (Mark)

“Is this a project?”

“Am I the manager of this project?”


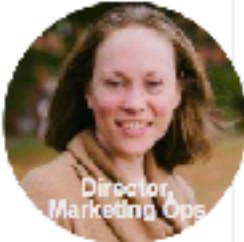



“Then, before I can commit, we need the assignment and expectations in writing.”

**- SAID BY EVERY SUCCESSFUL
PROJECT MANAGER, EVER**

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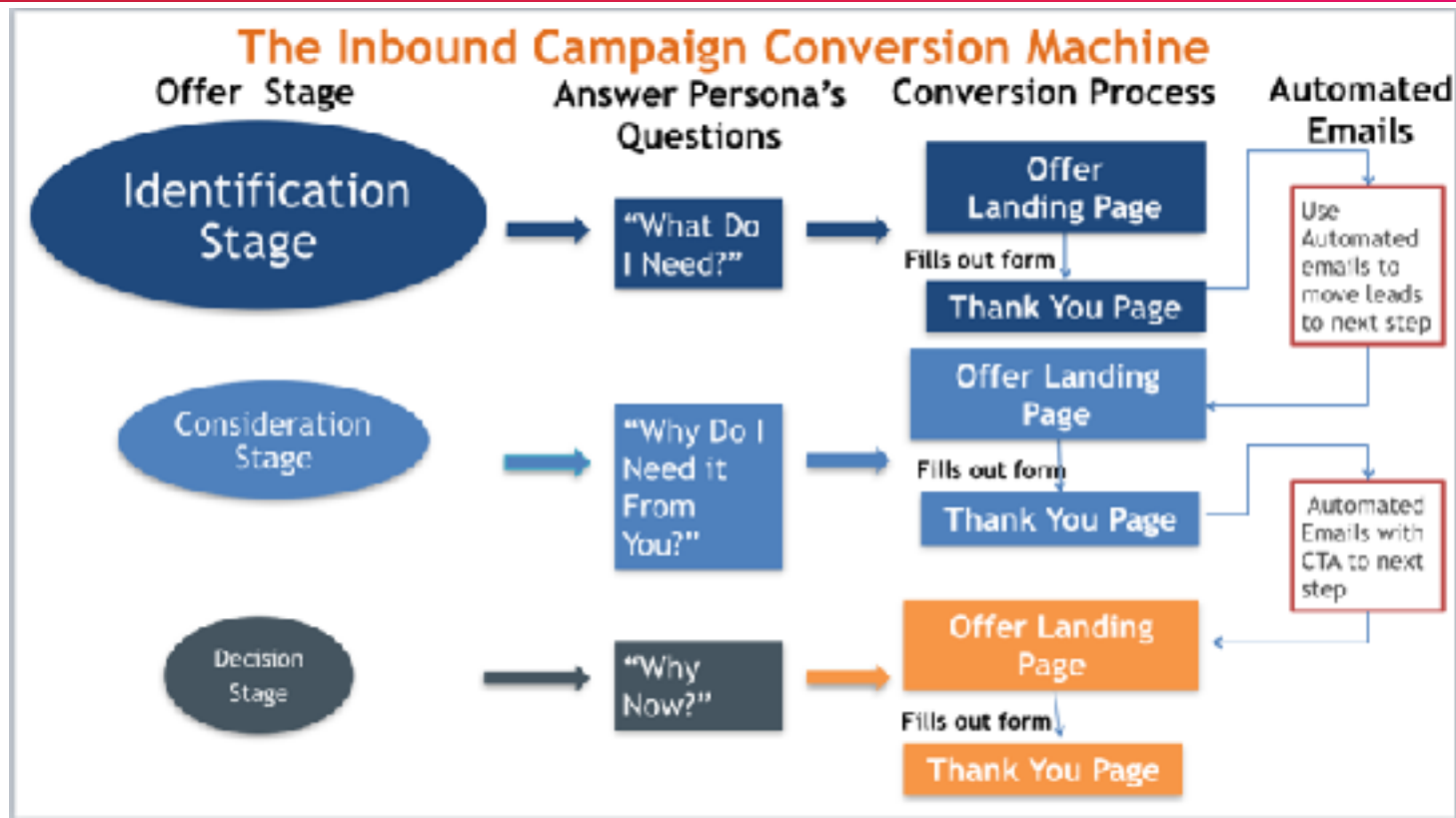
MANAGE COLLABORATORS WITH A DARCI CHART

D	A	R	C	I
Decision Maker	Accountable	Responsible	Consulted	Informed
 VP Marketing	 Director Marketing Ops	 Marketing Ops	<ul style="list-style-type: none">• Content = @Monica Baranova• Code = @Raymond Baranova• Mktg = @Katie Caldwell• Sales Ops = @Craig Collins• Marketing Ops = @Sara Davidson	<ul style="list-style-type: none">• Sales• Services• Support
 VP Sales Ops		 Sales Ops		

TIPS TO GET ORGANIZED FROM DAY 1

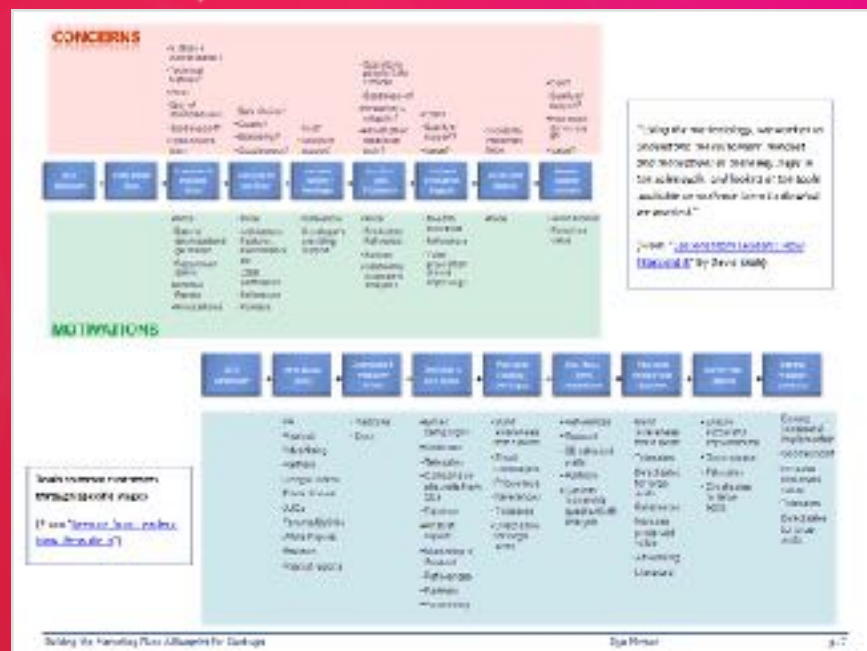
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MAP OUT YOUR CONVERSION MACHINE



Ilya Mirman

Keywords: *work engagement; organizational commitment; turnover intentions*



@NickSalInbound

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KEEP YOUR HUBSPOT FREE OF CHAOS

- Clean up unused contact properties and lists.
- Use drop-down vs. open text fields in forms to control inputs.
- Use consistent naming conventions for everything in your portal.
- Match every contact to lifecycle stage + a next step (or remove them).
- Set dates to groom your portal at least quarterly, if not more often.




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AS YOU FIGURE THINGS OUT....

Document your organization's official playbooks!

The Playbook for Playbooks (Creating a Process)

**Brie Rangel**
Last modified 369 07, 2017 by Tom Stoops

 **Work in Progress**
This playbook is very much a work in progress. Please utilize with caution.

Objective: Create Efficiency and Ensure Consistent Quality

The Playbook explains in detail what is needed for the team to do the work, how to do the work, and when Playbooks live in the "Playbooks" section of the page tree. We have internal and external playbooks, with work.

THE FOLLOWING PROCESS IS AN OUTLINE FOR THE HIGHEST PRIORITY, CORE SERVICE PLAYBOOKS, MOVING FORWARD.

- 1. ID & Verify That the Playbook is Needed**
Click here to expand...
- 2. Story: Research & Brainstorm on the 'IMPACT' way'**
Click here to expand...
- 3. Story: First Draft of Playbook**
Click here to expand...
- 4. Story: First Draft Review Meeting**
Click here to expand...
- 5. Story: Owner Updates Based on Critique and Feedback**
Click here to expand...
- 6. After Acceptance of Step 5, Update Playbook Header**
Click here to expand...
- 7. After Time, Use & Revisions, Update Playbook Header**
Click here to expand...

SUMMARY: GET ORGANIZED FROM DAY 1

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MY FAVORITE RESOURCES

- IMPACT's own Goal Planning & Strategy Template
- Project Charter Template
- HubSpot's Classic ebook: Building the Marketing Plan by Ilya Mirman
- Nick's INBOUND talk on organizing a messy HubSpot database

*Access them all via this page: nicksalinbound.com/hubspot-reboot



2 GET QUICK WINS - USING WHAT YOU HAVE

And now, the truth...
The cavalry ain't comin.

“I remember staying up all night to do our on boarding homework. We were grinding (we still are). I don’t think I was even sleeping in the beginning.”

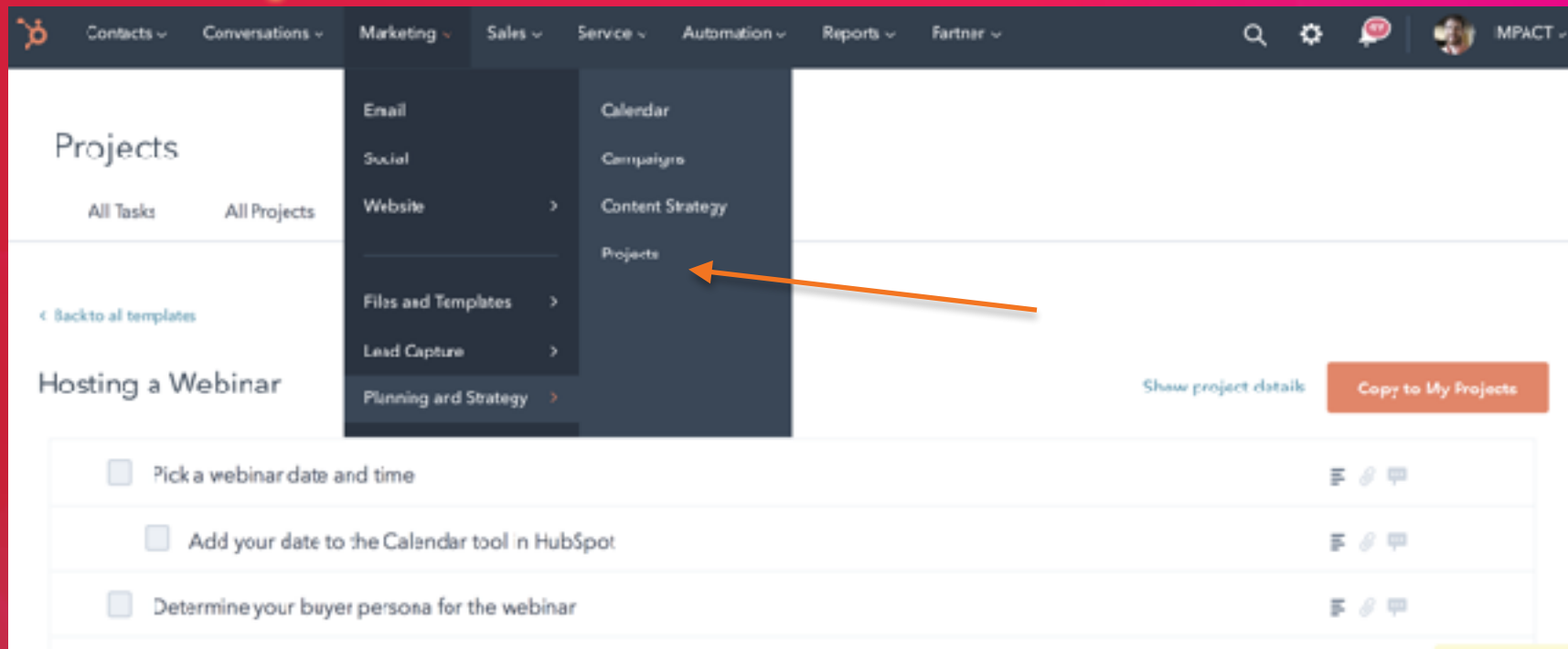
-TRISH LESSARD
CEO OF MEDIA JUNCTION
(NOW A DIAMOND PARTNER)



**Ready to become
An #InboundTeamof1?**

GET BIG WINS QUICKLY, USING WHAT YOU HAVE

- Start with getting more appointments for sales.
- Lean on what's actually worked content-wise in the past.
- Plan your persona interviews as your next blog articles.
- Host a webinar / live broadcast (this will *really* build urgency).
- Re-engage your old contacts with news of your new content.



**CHECK OUT STEP BY STEP HUBSPOT PROJECTS
BY HUBSPOT ACADEMY (AND MAKE YOUR OWN!)**

Shows & Podcasts The IMPACT show Website Throwdown Inbound Success The Hubcast Markethor Creator's Block [SUBSCRIBE](#)



THE IMPACT Show
WITH STEPH AND NICK

What is The IMPACT Show?

A digital marketing podcast, where Steph and Nick will broadcast live on Facebook every other Friday and dive deep into one big issue facing growth leaders in marketing and sales today. In addition to this, Steph and Nick will keep their fingers on the pulse of marketing, sales, business, and tech advancements, then in 5 minutes or less, report exactly what you need to know.

Join us every other Friday at 11:00 AM Eastern!

Subscribe to the Show

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Shows & Podcasts The IMPACT Show Website Throwdown Inbound Success The Hubcast Markethor Creator's Block [SUBSCRIBE](#)



INBOUND SUCCESS
WITH KATHLEEN BOOTY

What do the most successful inbound marketers do to get great results? ...that's the question that I've set out to answer with the Inbound Success Podcast.

You've heard the stories about companies using inbound marketing to dramatically increase sales, grow their business, and transform their customer relationships, but not everyone who practices inbound marketing knows it out of the park.

If you want to know what goes into building a world class inbound marketing campaign that gets real, measurable results, check out the Inbound Success Podcast. Every week, we interview marketing folks who are rolling up their sleeves, doing the work, and getting the kinds of results we all hope to achieve.

The goal is to "pass back the crown" and learn what works, what doesn't and what you need to do to really move the needle with your inbound marketing efforts.

This isn't just about big picture strategy - it's about getting actionable tips and insights that you can use immediately in your own marketing.

Subscribe to the Show

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CHECK OUT THE BROADCASTS/PODCASTS
WE'RE MAKING (AND MAKE YOUR OWN!)
IMPACTBND.COM/SHOW


@NickSallInbound

Now that you've taken the bull by the horns and got some content out, how do you make sure you're **giving the people what they need?**

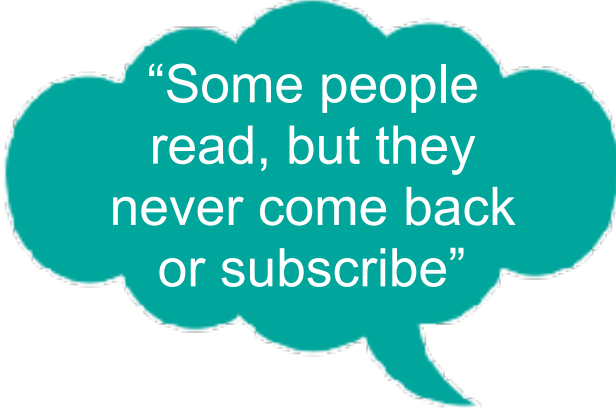


3 SEEK CONSTANT FEEDBACK


WHAT'S THE STRUGGLE?



"Nobody is reading my content"



"Some people read, but they never come back or subscribe"



"The wrong people are interested in my content"

TIPS FOR GATHERING CONTINUAL FEEDBACK

- Start a subscriber snowball (begin by asking your closest contacts).
- Recruit a group of content beta testers (top customers+staff+prospects).
- Study visitor/contact data for how individual people are interacting with your content (verify spoken feedback with behavior/action).
- Being CONSCIOUS of the feedback is the goal. Not always following.

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EXAMPLE: HOTJAR'S LATEST PILLAR CONTENT STRATEGY

The Essential Guide to Growing Your Early-Stage SaaS Startup

Brought to you by **hotjar**

Building this extensive guide has been a fun and challenging project. We've been lucky to have a lot of help from very talented contributors – we thank you all for your support.



For being beta readers and helping us pinpoint exactly what early-stage startups need:

- Abdurashid Atahanov, Digital Analytics & Marketing Partner / Founder at Prospectu
- Alan Gleeson, Curator at SaaSResources.com
- Alex Hudson, CTO at Iron Group

For taking the time to review and comment an earlier draft of this guide:

- Sujan Patel, Growth Marketer & Entrepreneur
- Alan O'Rourke, Growth Marketer
- Dan Kaplan, Founder at Exponents

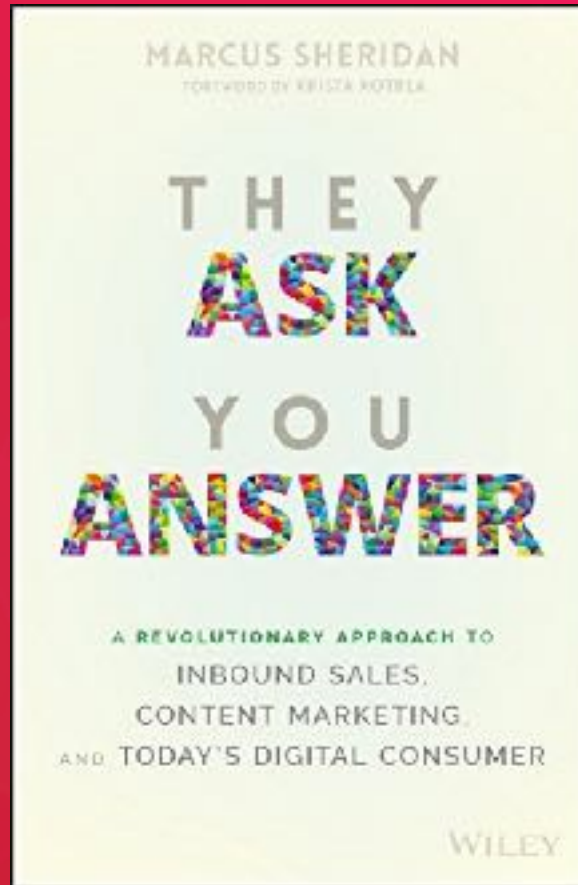
[See the full page example here.](#)

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**MARCUS SHERIDAN SAYS...
THEY ASK YOU ANSWER**

Now that you're putting out content people actually like and use, how do you effectively report **the outcomes of your hard work?**



4 REPORT THE FULL RETURN ON INVESTMENT (ROI)

THE STRUGGLE WITH REPORTING ROI

“I don’t get consistent chance to present”

“My meetings end in confusion, frustration or disappointment”

“I’m starting to fear the next reporting opportunity”

“I can’t close the loop on leads I send to sales”

“I don’t get any credit for my hard work”

Reporting is Deeper than the Numbers...

TIPS FOR REPORTING ROI

- How the meeting is conducted > the content of your report
- Always be educating (before, during and after the meeting)
- Recognize every big win and contribution (beyond leads & sales...)
- What did we try? What did we learn? What's the next step?
- Tell the story of your contacts - humanize them
- Make the data available on demand (dashboards, smart lists etc)

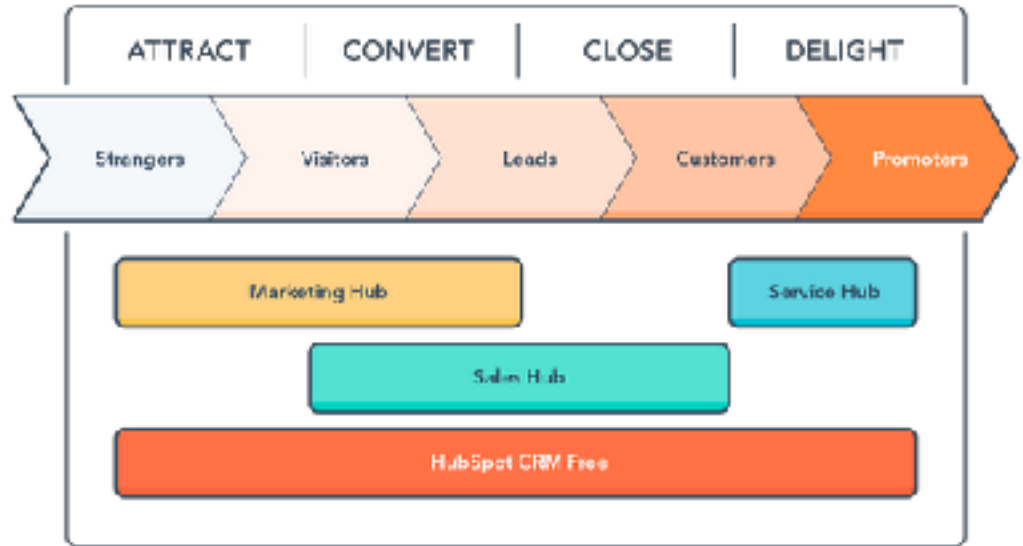
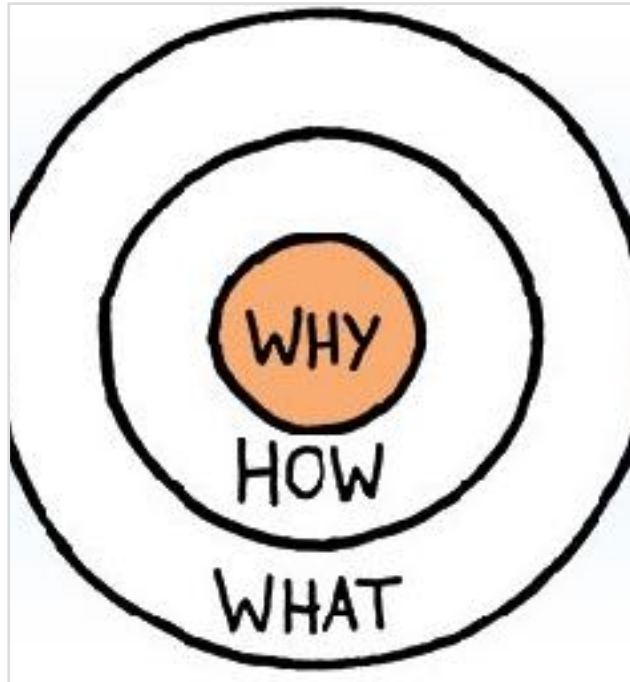
NAILING THE ROI MEETING RITUAL

1. Have a clear agenda (approved ahead of time and key people there)
2. Make them frequent (at least monthly or you're toast)
3. Practice a little crowd control ("take notes", "questions at the end" etc)
4. Focus on outputs ("So what?", next steps, workshop a bit)
5. Debrief with your champion (get feedback + their perspective on the team)

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ALWAYS BE EDUCATING



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TELL THE STORY OF YOUR CONTACTS - HUMANIZE THEM

The Stories - How did they find us?

Monica Smith

- Monica first met you on April 20th, 2016.
- She was doing a Google search for keywords related to having a on clients without improving b
- Through doing that, she found [Expand Your Impact on Your Psychotherapy Clients \(With Your House\)](#).
- After reading that article, she reading other blog articles and rest of the site.

Kathie Freeburg

- Kathie first met you on April 21th, 2016.
- She was doing a google search for

The Stories - How did they become prospects?

Monica Smith

- Monica, who landed on a blog article before anything else, started immediately reading other articles.
- From there, she read about Trim-Life, and then the Six-Day program.
- Finally, after viewing around 60 pages, she decided to convert on [The Ultimate Guide to Clinical Hypnotherapy Techniques](#).
- She also subscribed to the blog at this point.

Kathie Freeburg

- Kathie, who landed on Program page before started reading other Six-Day program.
- Within just a few mo already downloaded course guide.
- During this process, to the blog.

The Stories and the Stats Tell Us This:

1. Our blog content, published starting in 2013, attracts visitors to articles better than ever.
2. Those visitors proceed to read other content, including articles and web pages.
3. They later converted on content assets that were written in 2013, including your Six-Day Course Guide.
4. After receiving automated emails, they return back to the website.
5. They then go on to enroll in our course.
6. Best students become testimonials to attract future generations.

That's inbound marketing at work -- attracting visitors, converting them into prospects, educating them on hypnotherapy and The Wellness Institute, and helping them make the enrollment decision.

TIPS FOR REPORTING ROI

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SUMMARY: REPORTING ROI

- How the meeting is conducted > the content of your report
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- Recognize every big win and contribution (beyond leads & sales...)
- What did we try? What did we learn? What's the next step?
- Tell the story of your contacts - humanize them
- Make the data available on demand (links to dashboards, smart lists etc)

HOW TO REPORT INBOUND ROI

SHOWCASING THE ONLINE MARKETING
DATA YOUR CLIENTS CARE ABOUT MOST



HubSpot

A Publication of

**CLASSIC EBOOK:
HOW TO REPORT INBOUND ROI**

@NickSallInbound

MY FAVORITE RESOURCES

- [How to Report Inbound ROI Guide](#) - still the best ebook there is on the topic, in my humble opinion
- [Monthly Marketing Reporting Templates](#) (Excel + PPT) from HUBS
- Get better at reporting/presenting publicly [via a local Toastmasters club](#)

*Access them all via this page: nicksalinbound.com/hubspot-reboot

**Now that you've proven the ROI and
you have more buy in, how can you
translate that into getting
more help?!**



5 PARTNERING UP

THE STRUGGLE WITH FINDING A PARTNER...

“Should I find a partner or hire/train internally?”

“I don’t know how to manage them once I do hire them”

“I’ve been burned before...”

“I’m doing well but can’t get budget for more help.”

“I don’t know how best to hire an agency”

TRANSITION INTO FORMALLY PARTNERING UP

- Build into your charter conditions for extra budget
- Build up to a full retainer (1-off workshop, mini-project, first 90-days, etc)
- Educate yourself and transfer all knowledge/processes you can
- Form informal partnerships with fellow marketers/mentors

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START WITH SEEKING INFORMAL MENTORSHIP ARRANGEMENTS...

- with a visionary - someone who has “seen the movie” before
- with a really organized person
- with a fellow entrepreneur/startup
- with someone who communicates with good taste/style
- with a university (guest speak, start intern program, raise your own HubSpotters)

**MAYBE IT'S
SOMEBODY
YOU'LL MEET
AT THIS....**



LET'S RECAP:

5 SECRETS FOR STARTING/REBOOTING YOUR HUBSPOT JOURNEY

1. Get organized - practice project management from day 1
2. Get quick wins - using what you have
3. Seek constant feedback - form up your group of content beta testers
4. Report the FULL ROI - with educational and well-structured meetings
5. Partner up - starting informally and building up from there



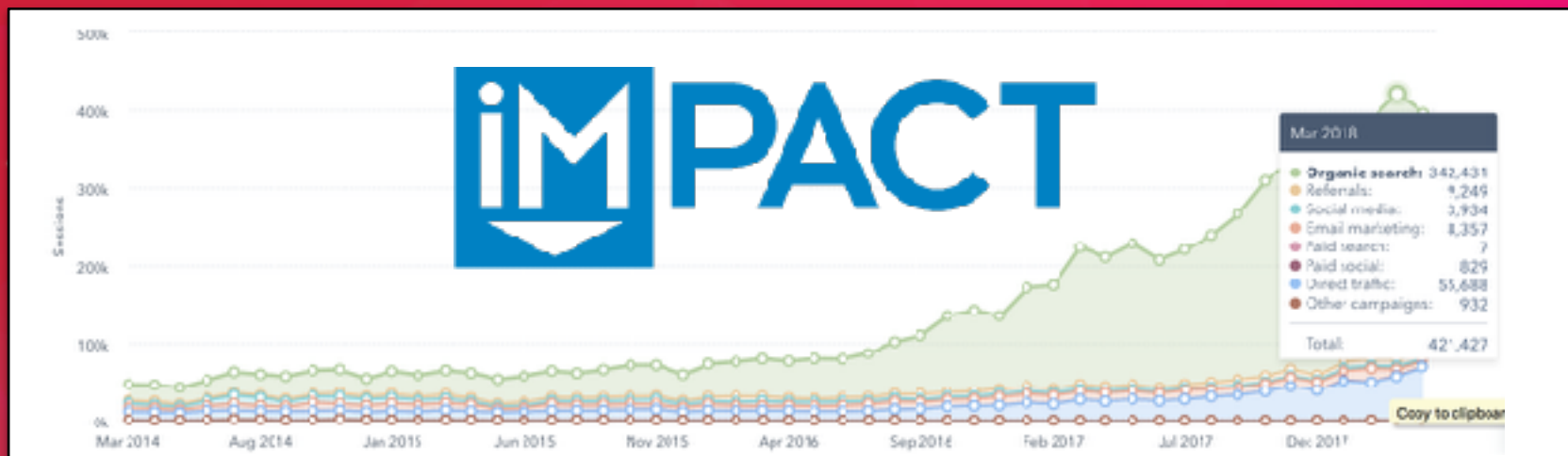
6 KEEPING IT REAL...

The story of the old dog...

**#RealTalk: Is the marketing the problem
or is it your business?**



THE BIGGEST SECRET:
“THE STRUGGLE IS WORTH IT.”



“We know; we’ve all been there.”

QUESTIONS? LET'S TALK ABOUT IT!

Get the deck + resources:
nicksalinbound.com/hubspot-reboot

Book a time to chat later at:
impactbnd.com/nick

THANK YOU.