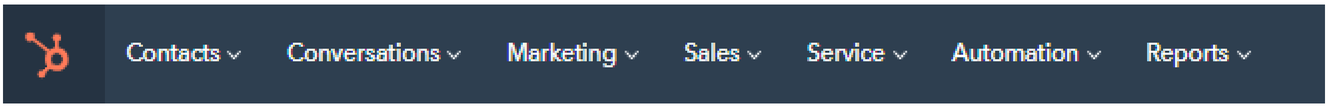
HUBSPOT.

When using Hubspot as a CRM, there are a couple of things to understand.
*- It only works when you use it properly **
*- It will be your best friend ***
*- No information is too much ****

* Using it properly – In this information pack, I will explain the importance of assigning ***deals, contacts and companies.*** It won't make much sense now, but will later on.

** This system is amazing – every single person within the company can search for information to tell a client or peer, as long as the CRM is utilised properly.

*** No information is too much! You can write from a customer interaction, that the dogs name is Poppy. Bringing up Poppy at the next interaction brings so much joy and care – the small things are what bring customers back! As well as an in depth blurb about the discussion had of course!



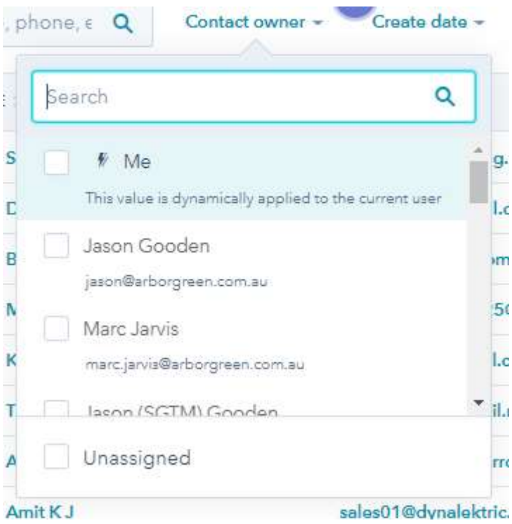
CONTACTS:

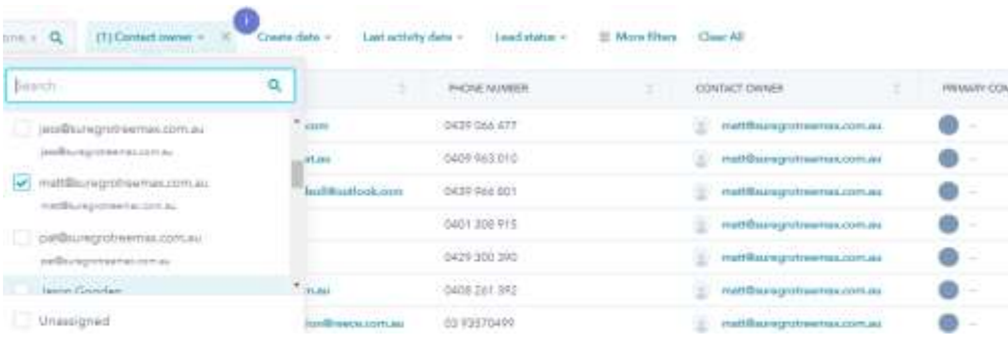
Under the contacts tab, you will find your contacts, companies and lists.

Contacts: This is where everyone is located in the CRM, from huge companies to the once off purchasers.

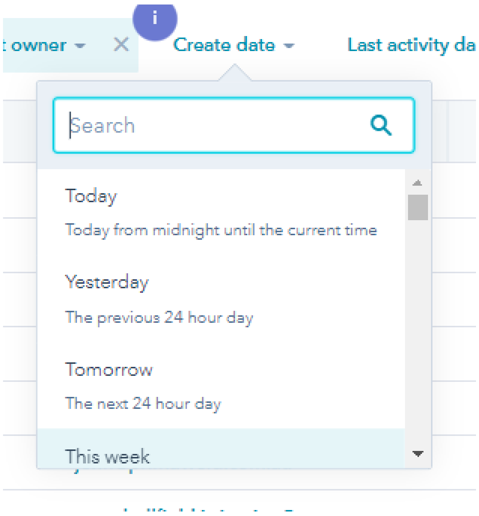
You can search through your contacts via the above links and reduce your search by choosing the 'owner' of the contact, the creation date, last activity and lead status. These are the main and easiest options to find what you are looking for.

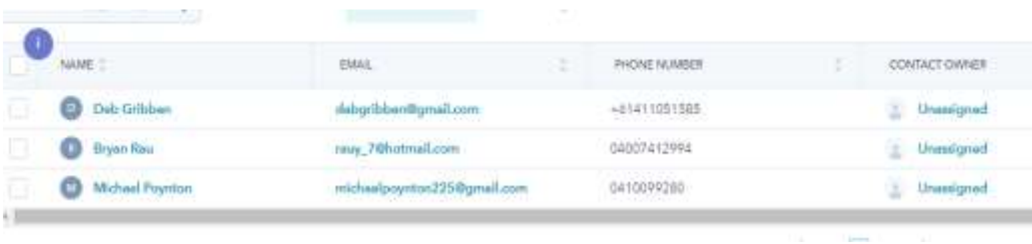
Contact owner: by placing yours or your peers name in this box – you can minimise your search – please see below as an example.





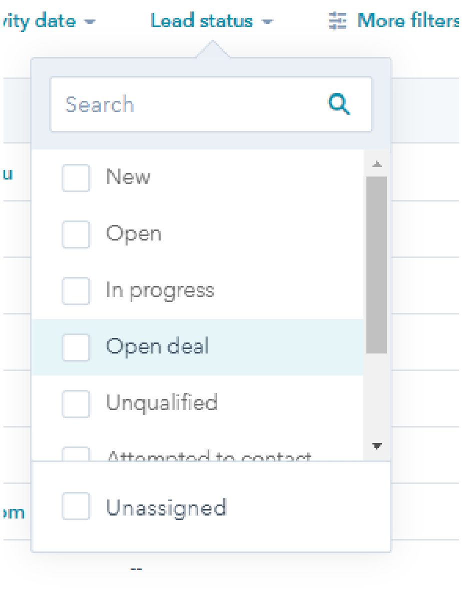
Create date: is pretty straight forward, you can reduce the search by choosing today, yesterday and so on. Please see below. In the longer image, I have selected ‘Yesterday’.





Last activity date: is the same as create date. It gives you options to search; today, yesterday, tomorrow, this week etc.

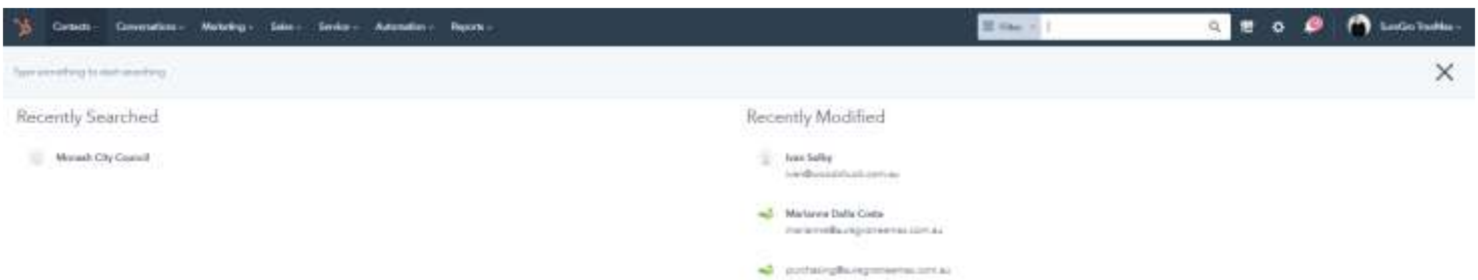
Lead Status: Using Lead Status as a filter in your contact list is great for the SALES team! Please see image of options to select.



COMPANIES:

When we move over to the company TAB, all options explained above are exactly the same. We can search via Contact Owner, Create date, Last activity, lead status. These options are super helpful when you know exactly what you are looking for.

With all of the above being explained, you can also quite easily search via the search option in the top right of the page (displayed below)

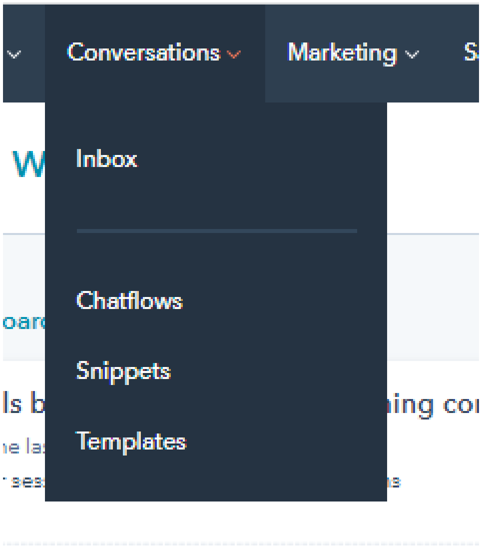


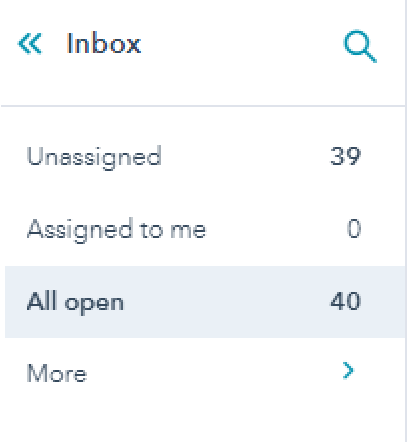
The above search bar is like searching in our own little google search engine! Every single piece of information can be searched via this area – from contacts and companies, to tickets and reports.

LISTS: Please refer to Jason or Marc.

CONVERSATIONS:

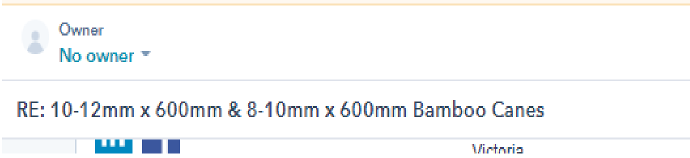
This is where Customer Service spends most of their time.
Here we find the Inbox, Snippets, Templates (Chatflows, please refer to Jason or Marc).



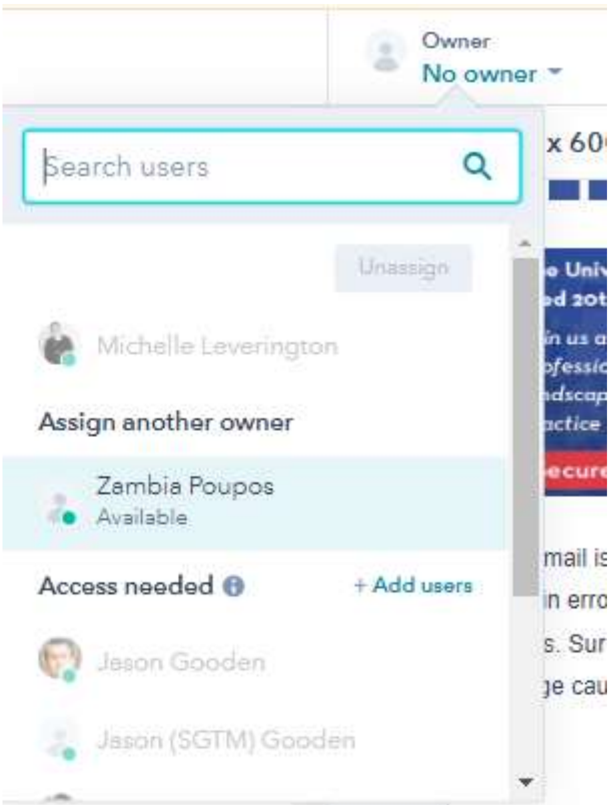


Inbox: The main workings of the inbox are; *Unassigned, assigned to me and open.* The incoming interactions are automatically unassigned.

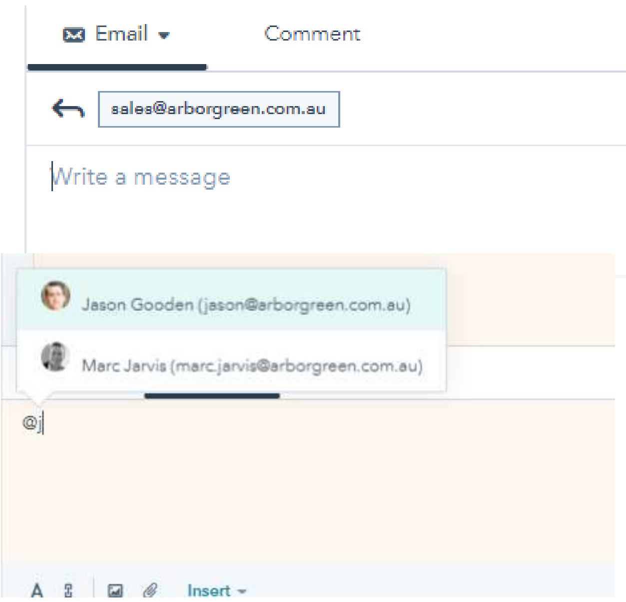
From the image to the left, we can see that there are 40 emails requiring assistance, 39 of them are unassigned and 1 is assigned to an 'owner'.



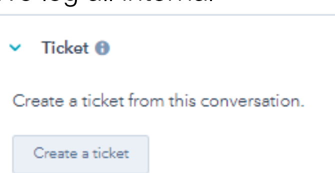
To assign an email to yourself to work on, in the top left hand corner of the actual email you will find 'owner'. If this email has not already been taken, you will find that it says 'No owner'.
To assign this email to yourself, you will see a drop down box – from here you are required to select your name as seen below.

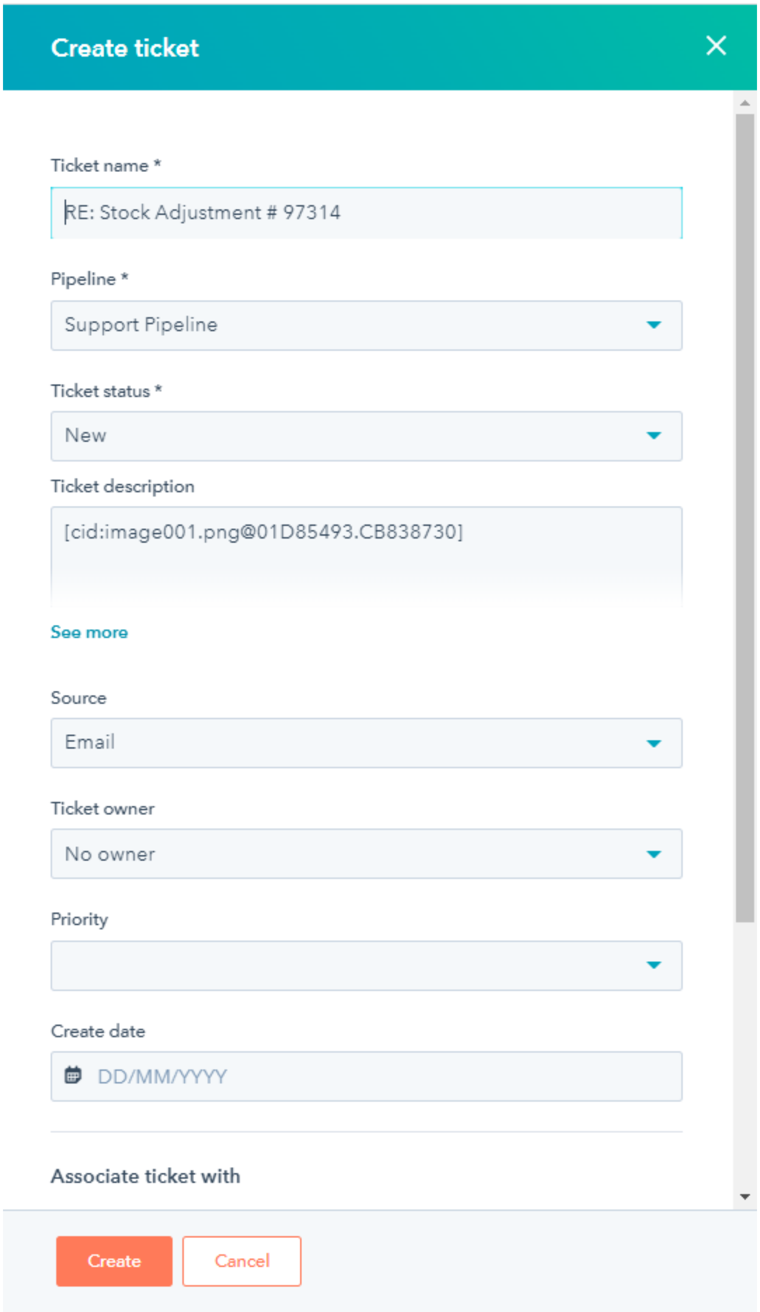


We have found the best option to respond to a customer via the inbox, **is in the ticket.** This will be explained further down. At the bottom of the inbox you will find 2 options **email and comment.** The email option is what I have stated above, we try not to use this option. Comment: Using the comment option at the bottom of the inbox, is an internal communication point, were you can '@' your team mates to let them know of the information within the conversation etc.



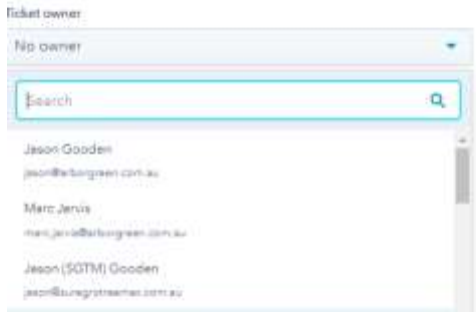
Creating a ticket out of the inbox: We log all internal communication from a customer via a ticket (internal meaning, Email, Phone call etc.) When working out of the inbox, you will see (pictured below) the column to the right of the screen with details about the contact, as well as an option to 'create a ticket'



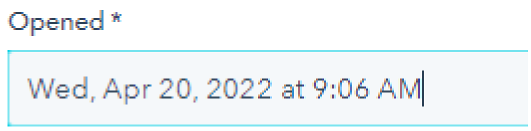


When you select creating a ticket as an option, the screen to the left comes up – The ticket name and status should be automatic. The description of the ticket should also be automatic with information of the email displayed, but as we have said above, no information is too much! Here you can add any additional information you believe would be beneficial for the team to know.

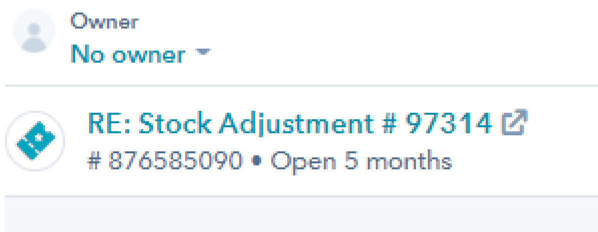
Ticket owner: this should automatically have yourself pop up as you are creating the ticket, but if not, it is the same as any other drop down box.



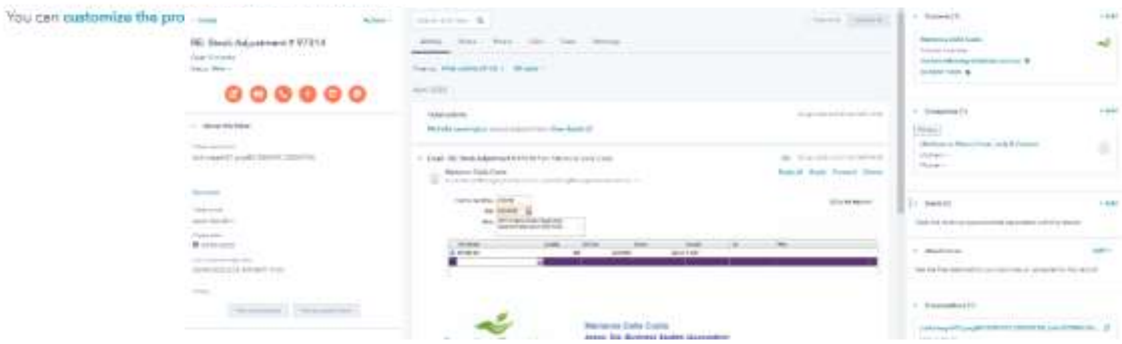
Create date: ALT+N. This option displays as below and what allows multiple programs to communicate and allow KPIs and percentages. The last 2 options are associating the ticket with; contacts and



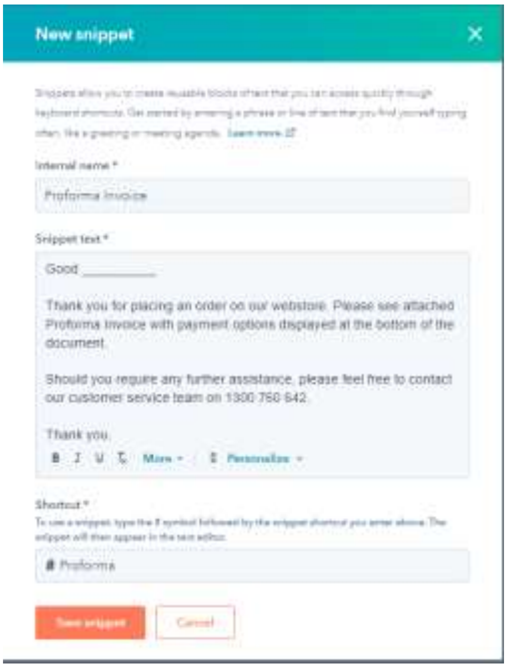
company. This is really important as it displays information across all platforms and the next employee can pick up where it has been left! Once the ticket has been created, you can open it just below where you find the 'owner' of the ticket.



Now that all information is prepared and ready to go – please see below image of what a ticket with ALL information should look like 😊



Snippets: Snippets are a shortcut to information required in an email etc. The below image is pretty self-explanatory. We use snippets for Price changes, Quotes and orders, credit applications etc. They are a wonderful time saving option!



The below image shows where your saved snippets are located as well as the option to create on in the top right-hand corner. As anything on HubSpot, you can also search for the 'owner' of a snippet if you are not having much success finding what you need.

Snippets can be edited anytime.

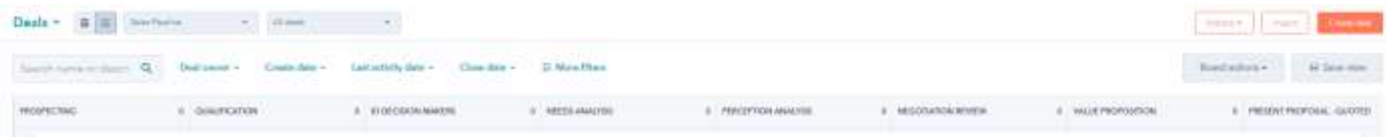
Templates & Chat Flows: please refer to Jason or Marc.

Marketing & Automation TAB – please refer to Jason or Marc.

Sales: The two main options in the sales tab are Deals and Tasks. Please refer to Jason or Marc for the others.

Deals: Under deals, you will find all every single possible monetary interaction with the client. Please see below a screen shot of the options.

As explained above, Deal owner, Create date etc are all the same. You can search using the box to the left of the screen for ANY deal.



For a more in depth explanation of the sales tabs please refer to Mary-Claire – 0490 934 295.

Inclusive of options below;

- Forecast

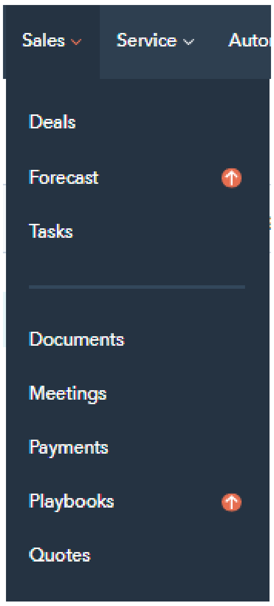
- Documents

- Meetings

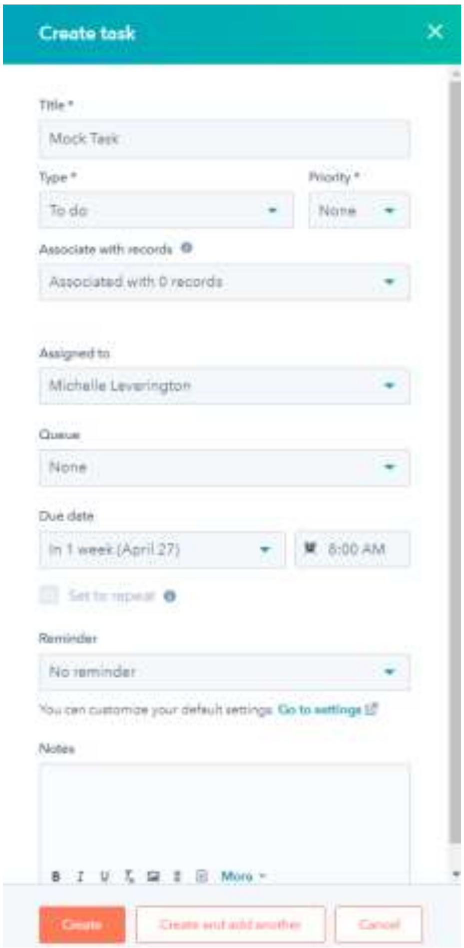
- Payments

- Playbooks

-Quotes



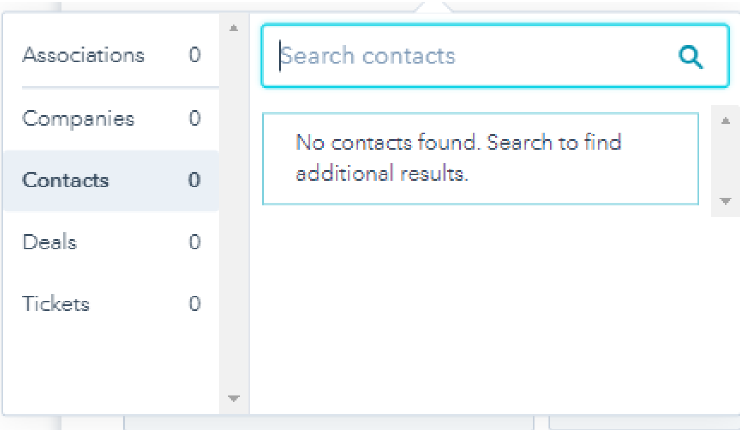
Tasks: Tasks are usually automated on your outgoing deals. For example, you send through a quote today, you will get a reminder to follow up with that client tomorrow to ensure they have received everything okay.



You can also create a task for a reminder for yourself from ANYTHING in the CRM. You can create a task from a deal, company, client, ticket.

To create a task, you find the option to the right hand side of the screen, it is fairly straight forward (like entering a ticket) Please see below some information in the form of pictures.

Title; Whatever you deem necessary – 'Call back Jan – 123645'
Associate with records: super important!! You can associate with the company, contact, deals and tickets. This not only ensures we are using hubspot correctly and associating all we can, it also ensures that if a peer was to find a certain customer and see if they need following up etc, said peer can already see that there is a follow up with so and so.

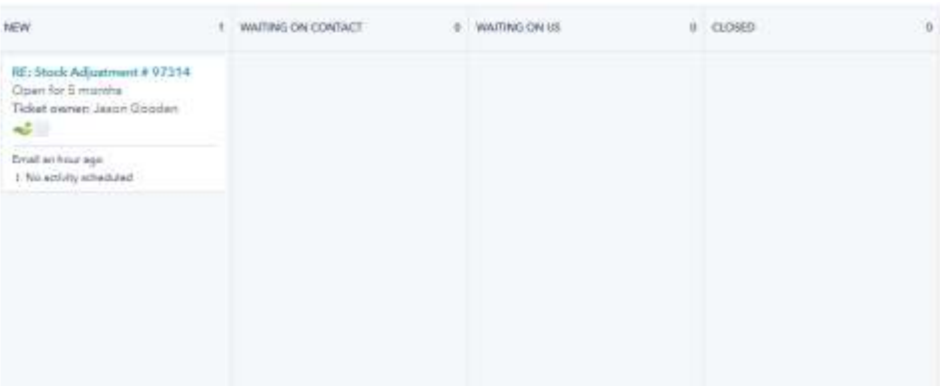


SERVICE:
This option here is for ALL incoming calls, face to face interactions etc. This is the screen customer service religiously have open day in day out.

Tickets are super important and require all information big or small to be lodged. On the ticket screen you will see open and closed tickets. (Image below is a little different but explains)

The ticket screen also shows Owner, Date, Last activity date etc. – Straight forward and explained above.

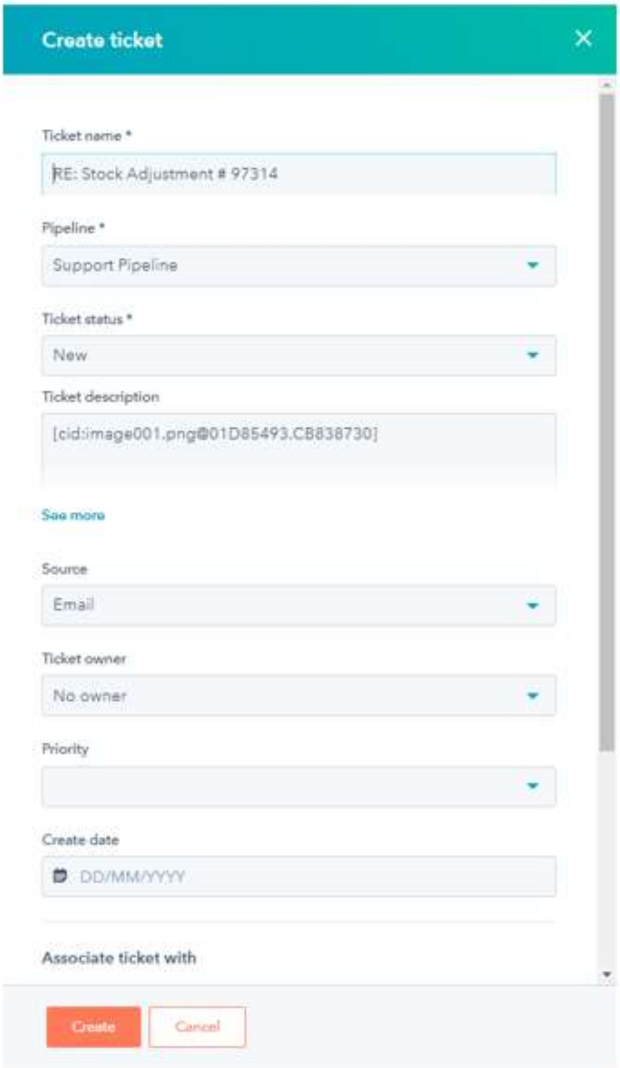
Refer to page 3-4 for tickets



There shouldn't really be any unassigned tickets – as when you are creating a ticket from this screen, you are automatically placing you as the ticket owner. When assigning email conversations, you are creating the ticket with you as the owner there also.

To create a ticket, you find the tab to the right of the screen, all input options are fairly straight forward and repetitive from what has been explained above.

Please refer to page 3-4 for ticket details.



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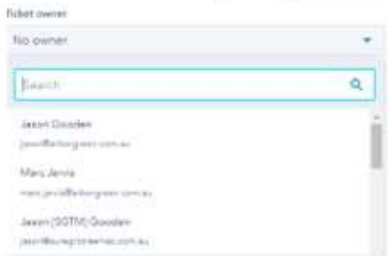

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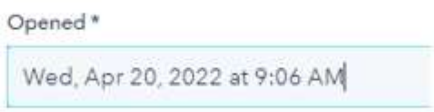

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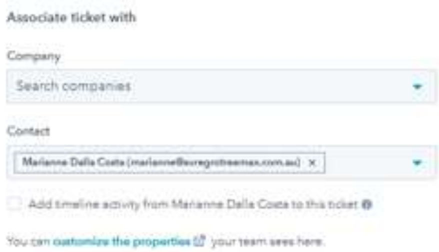

Once the ticket has been created, you can open it just below where you find the 'owner' of the ticket.

SETTINGS:

To change your email signature, go into Settings, General, Email and edit email signature.