INBOUND 22

Things Every HubSpot Admin Needs to Know

HubSpot

A Quick Note on Scope

Being a good admin requires a lot of skills beyond just HubSpot knowledge:

- Systems thinking
- Documentation
- Goal setting
- Strategy
- Logic
- Curiosity
- Etc...

But for this presentation, let's focus solely on the HubSpot features and tools that will help you implement, optimize, and troubleshoot your HubSpot account.

Implementing HubSpot

Let's begin at the beginning. If the data coming into your account isn't good, your experience isn't going to be great.

Basic Setup
(All Subscriptions)

- Import
- Users and teams

Intermediate Setup
(Sales Hub Professional)

- Record customization
- Card customization
- De-duplicate records

Advanced Setup
(Sales Hub Enterprise)

- Permission templates
- Hierarchal teams
- Presets (COMING SOON!)
- Field-level permissions

Basic Setup

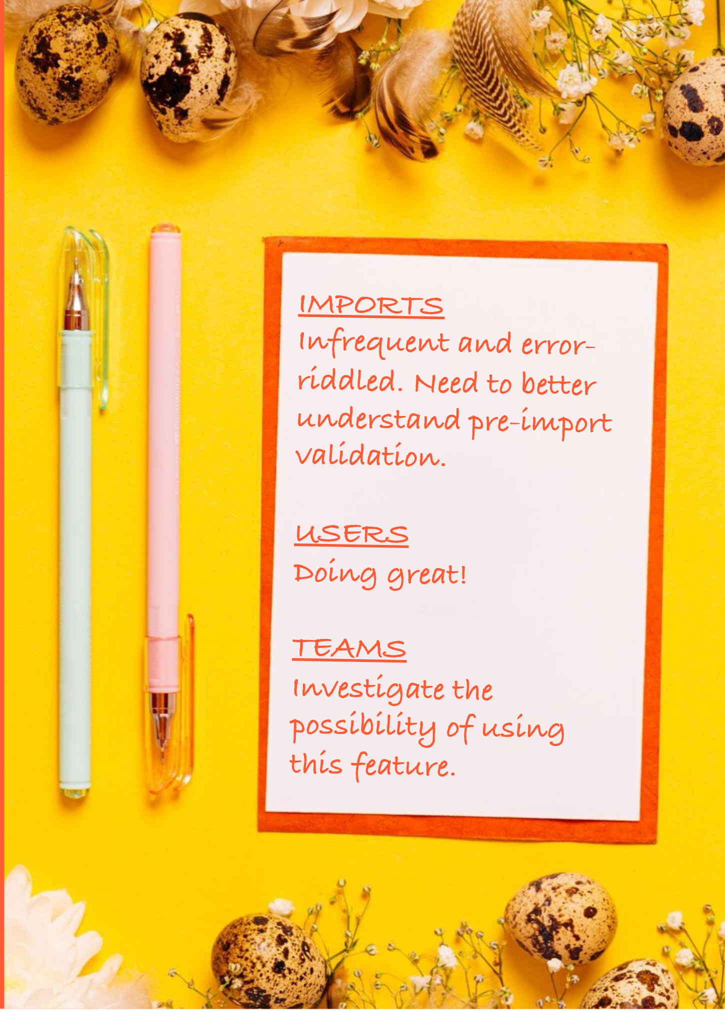
These are things every admin should be aware of, regardless of what hubs or tiers their company uses.

- Import
  - Pre-import validation
  - ID column mapping
  - Parent/child company imports
  - Post-import results
- Users and teams
  - Permissions
  - Teams

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- How often do you import data? Are there ways you could better use existing features to improve that process?
- How do you decide on user permissions?
- Are you using teams? Could you use them better?



Intermediate Setup

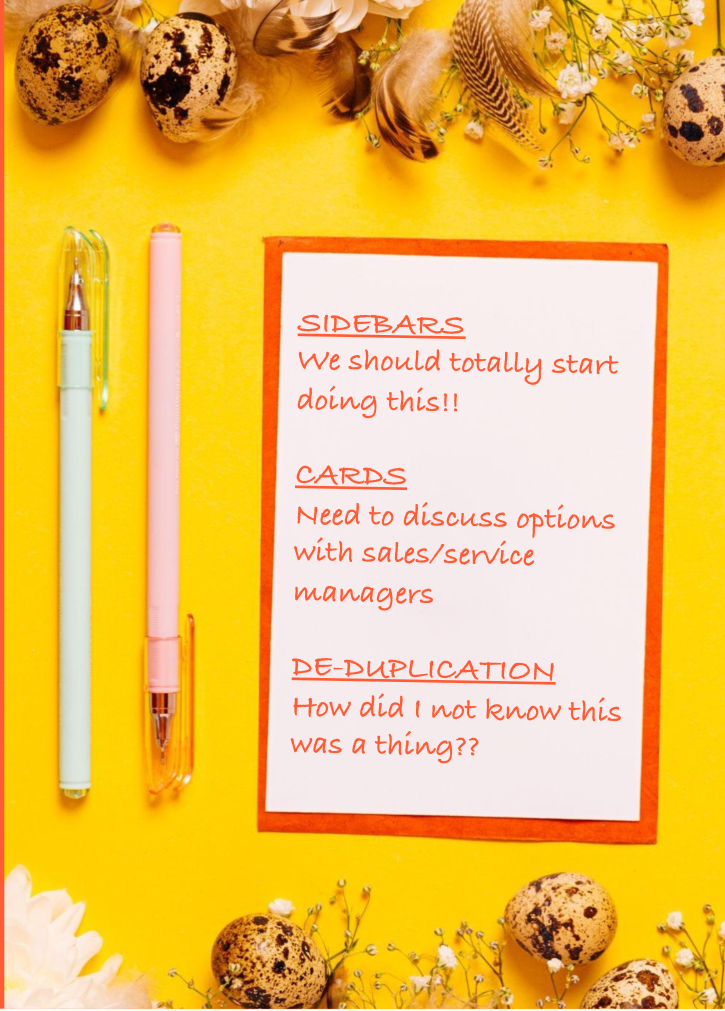
These are slightly more advanced uses that are available to you if you have a Professional subscription to HubSpot.

- Record customization
    - Professional: Sidebars
    - Enterprise: More sidebars!
- Card customization (now by pipeline!)
- De-duplicate records

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- Could your team benefit from customized sidebars?
- Are your cards displaying the most important details?
- Are you using the de-duplication tool? Whose job is that, and how often should they do it?



Advanced Setup

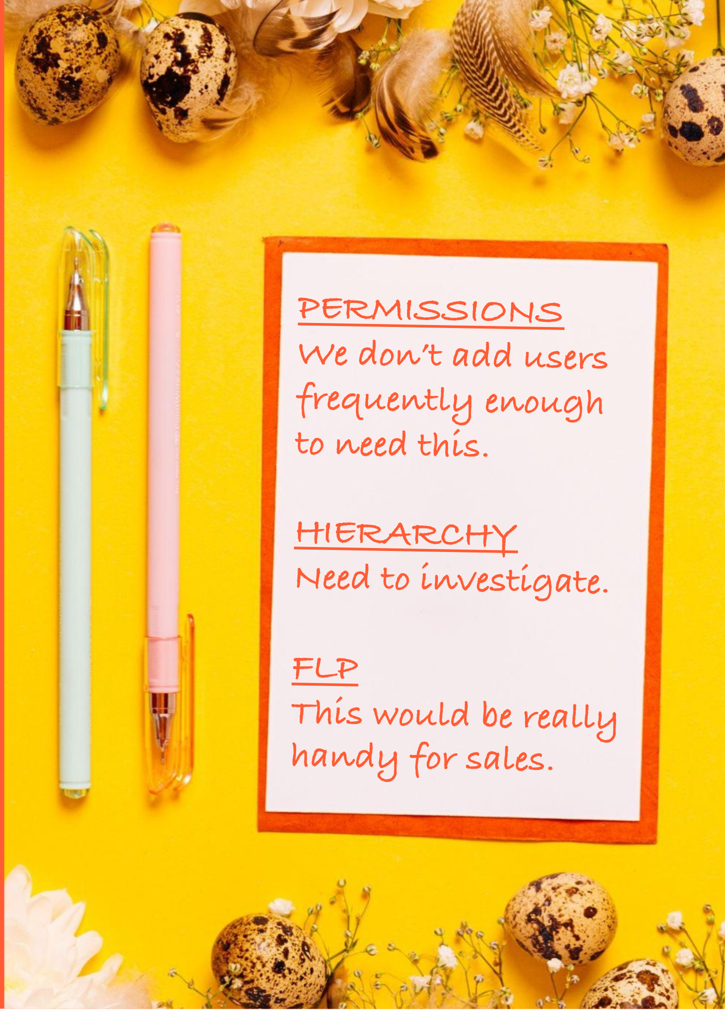
Here are the most advanced options. These are perfect for large teams and are only available in Enterprise subscriptions.

- Permission templates and permission sets
- Hierarchical teams
- Presets (COMING SOON!)
- Field-level permissions

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- How often do you add users to your portal? Would pre-defined permission sets be helpful?
- Do you need hierarchical teams? If so, do you already have them set up in the best possible way?
- What use cases do you have for field-level permissions?



Other Implementation Features

I’m focusing primarily on Sales Hub, but here are some other features that are relevant to this discussion:

- Data sync (Operations Hub Free)
- Fix formatting issues (Operations Hub Starter)
- Data quality automation (Operation Hub Professional)

Bonus

- Data sync
- Fix formatting issues
- Data quality automation

Basic Setup
(All Subscriptions)

- Import
- Users and teams

Intermediate Setup
(Sales Hub Professional)

- Record customization
- Card customization
- De-duplicate records

Advanced Setup
(Sales Hub Enterprise)

- Permission templates
- Hierarchal teams
- Presets (COMING SOON!)
- Field-level permissions

Optimizing HubSpot

Once you're set up, there are many, many ways to optimize your data and processes inside HubSpot.

Let’s Focus on Deal Pipelines

Your sales process is the most fundamental place to make optimizations. Since we don’t have time to cover everything in HubSpot, let’s focus on that!


Source: Pexels

Basic Optimizations
(All Subscriptions)

- Deal stage names
- Number of stages
- Exit criteria

Intermediate Optimizations
(Sales Hub Professional)

- Playbooks
- Required properties
- Deal stage probability
- Forecasting
- Products and quotes

Advanced Optimizations
(Sales Hub Enterprise)

- Automation-only properties
- Connected playbooks

Basic Optimizations

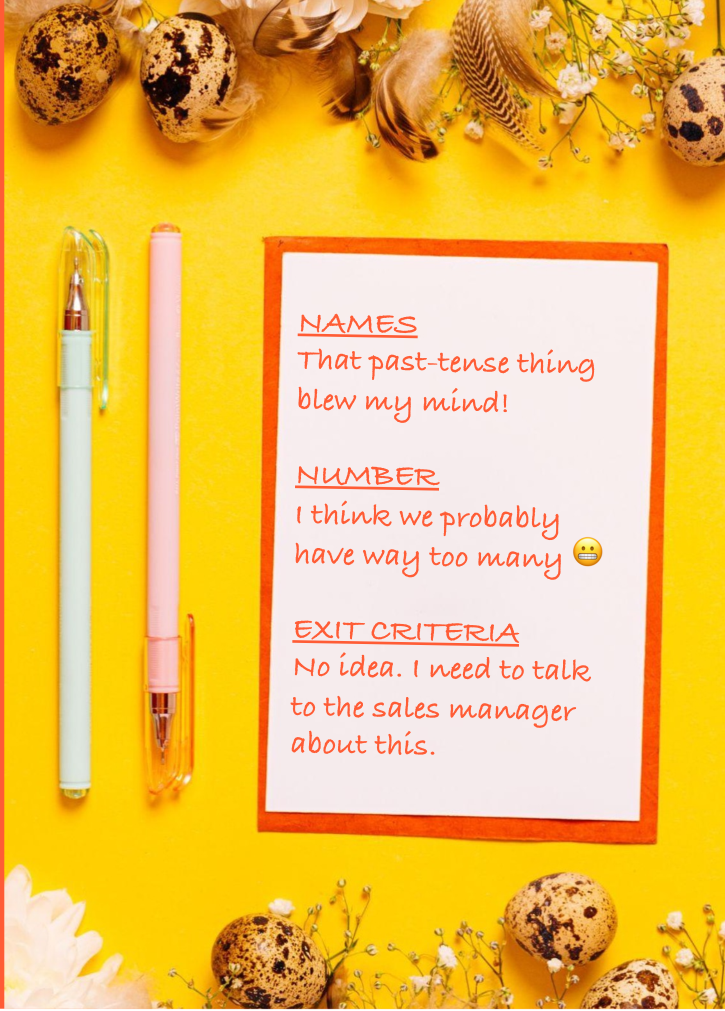
These are things every admin should be aware of, regardless of what hubs or tiers their company uses.

- Deal stage names
- Number of stages
- Exit criteria

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- Can your deal stage names be clarified?
- Do you have the right number of deal stages?
- Have you defined exit criteria? Is your CRM enforcing them?



Intermediate Optimizations

If you have access to Sales Hub Professional, you should optimize your sales process using these features.

- Playbooks
- Required properties
- Deal stage probability
- Forecasting
- Products and quotes

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- Are you using playbooks?
- Are there individual deal stages that should have required properties?
- How accurate are your deal stage probabilities?
- Are your sales teams using the forecast dashboard?
- Are you using products and quotes?

Advanced Optimizations

A highly sophisticated organization can use Sales Hub Enterprise to take its sales process to the next level with these features.

- Connected playbooks
- Automation-only properties

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- Consider honestly: Would your team benefit from this level of sophistication, or is it more than you need?

Other Optimization Features

I’m focusing primarily on Sales Hub, but here are some other features that are relevant to this discussion:

- List segmentation (Marketing Hub Free)
- Attribution reporting (Marketing Hub Professional)
- Datasets (Operations Hub Enterprise)

Bonus
- List segmentation
- Attribution reporting
- Datasets

Basic Optimizations
(All Subscriptions)

- Deal stage names
- Number of stages
- Exit criteria

Intermediate Optimizations
(Sales Hub Professional)

- Playbooks
- Required properties
- Deal stage probability
- Forecasting
- Products and quotes

Advanced Optimizations
(Sales Hub Enterprise)

- Automation-only properties
- Connected playbooks

Troubleshooting HubSpot

As an admin, you're the frontline resource for your entire team. When things go wrong, they'll look to you to fix it. Let's make sure you know the tools of the trade.

Basic Troubleshooting
(All Subscriptions)

- Property history
- Association history
- Security logs
- Deactivate users

Intermediate Troubleshooting
(Sales Hub Professional)

- Workflows
- Custom reports

Advanced Troubleshooting
(Sales Hub Enterprise)

- Impersonate users

Basic Troubleshooting

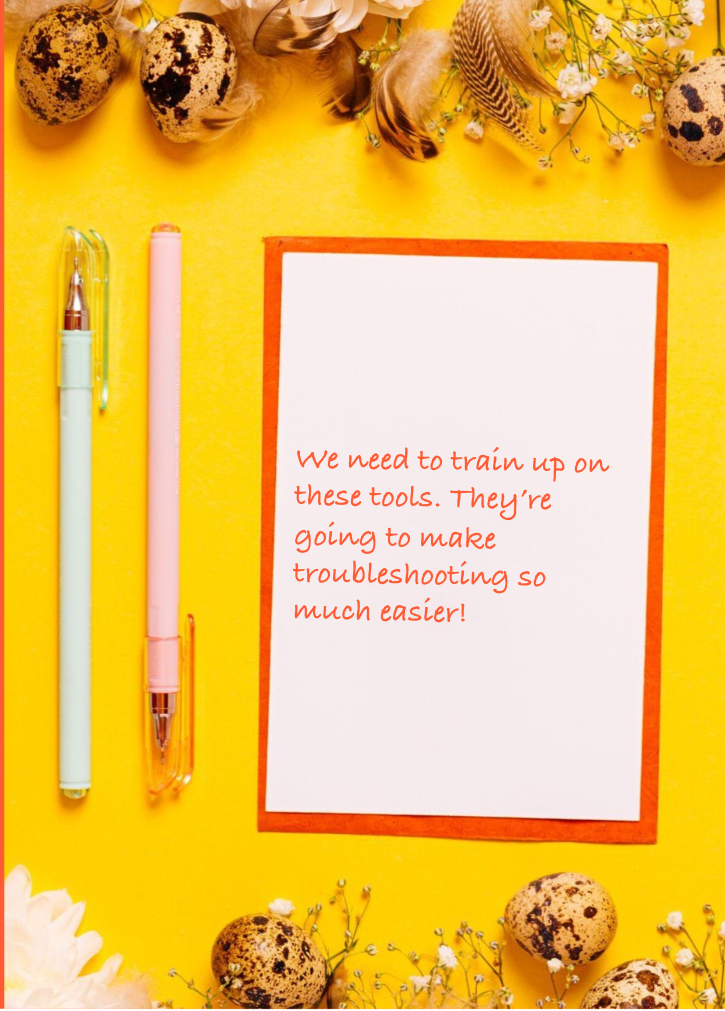
As an admin, it’s crucial that you’re comfortable using these features, regardless of what subscription you have.

- Property history
- Association history
- Security logs
- Deactivate users

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- Are you using property history?
- Are you using association history?
- Are you using security logs?



Intermediate Troubleshooting

More advanced tools require more advanced troubleshooting. Let's talk about how to troubleshoot the features available in Professional subscriptions.

- Workflows
    - Workflow logs
    - Enrollment testing
- Custom reports
    - Filters
    - Refresh rates

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- How confident are you troubleshooting workflows?
- How confident are you troubleshooting custom reports?

Advanced Troubleshooting

Enterprise subscriptions include one of the most powerful troubleshooting tools in all of HubSpot.

- User impersonation

Do It NOW

Take some notes about processes you should revisit after INBOUND is over.

- Are you using user impersonation?

Other Troubleshooting Features

I'm focusing primarily on Sales Hub, but here are some other features that are relevant to this discussion:

- Data quality command center (Operations Hub Professional)
- Content activity history (CMS Hub Enterprise)

Bonus
- Command center
- Content history

Basic Troubleshooting
(All Subscriptions)

- Property history
- Association history
- Security logs
- Deactivate users

Intermediate Troubleshooting
(Sales Hub Professional)

- Workflows
- Custom reports

Advanced Troubleshooting
(Sales Hub Enterprise)

- Impersonate users

Thank you