attentive technology

Unlock the full power of **HubSpot Sales Hub**

Whitepaper

10 Hacks to get more out of HubSpot Sales Hub

The landscape of sales and customer engagement is constantly evolving. To thrive in this dynamic environment where you continuously need to be on top of leads, opportunities and customers, you need a tool to keep track of everything. Fortunately, the HubSpot Sales Hub offers a solution tailored to the needs of sales professionals, enabling them to streamline processes, boost customer engagement, close deals and achieve targets.

In this whitepaper, we share ten hacks designed to help you discover the potential of the HubSpot Sales Hub. These overlooked functionalities are engineered to supercharge your sales efforts, from optimizing configurations to harnessing the power of advanced tools like Sequences and AI-driven Forecasting.

Each hack is carefully curated to both enhance your Sales Hub experience as to deliver the best experience for your leads, opportunities and clients:

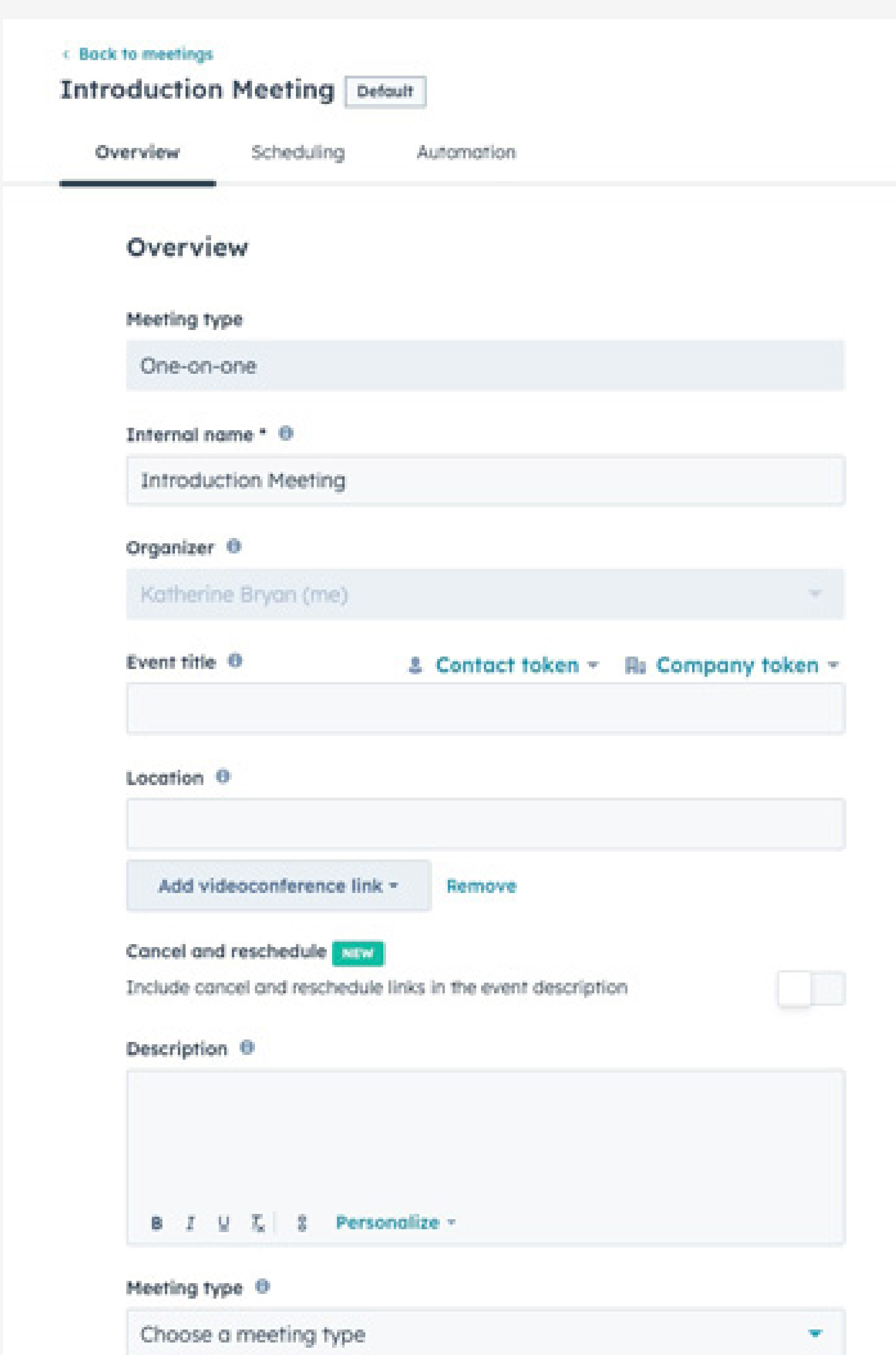
Join us as we explore these hacks, offering actionable insights and practical tips to help you unlock the full potential of HubSpot Sales Hub.

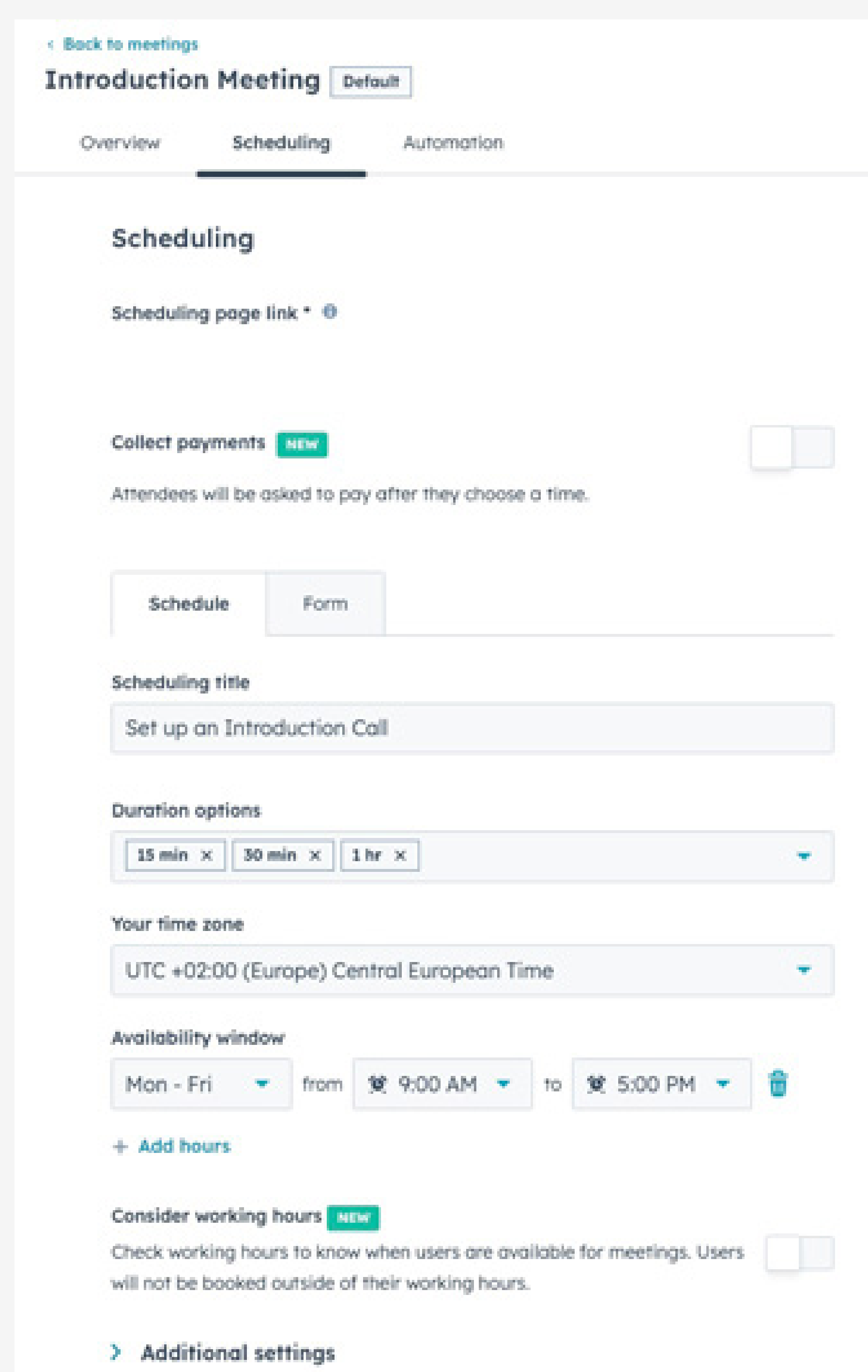
Let’s dive in!

Use the online agenda scheduling feature

Finding the same time in two peoples' calendars can be challenging, with a lot of back and forth to schedule the time. But, with Hubspot's meeting tool, the guesswork can be taken away. By synchronizing the tool with your agenda in the settings, people wanting to schedule an appointment with you know exactly when you are available to chat, and can book immediately.

Consider setting a buffer time between meetings, so you can make sure you are always on time for your appointments.

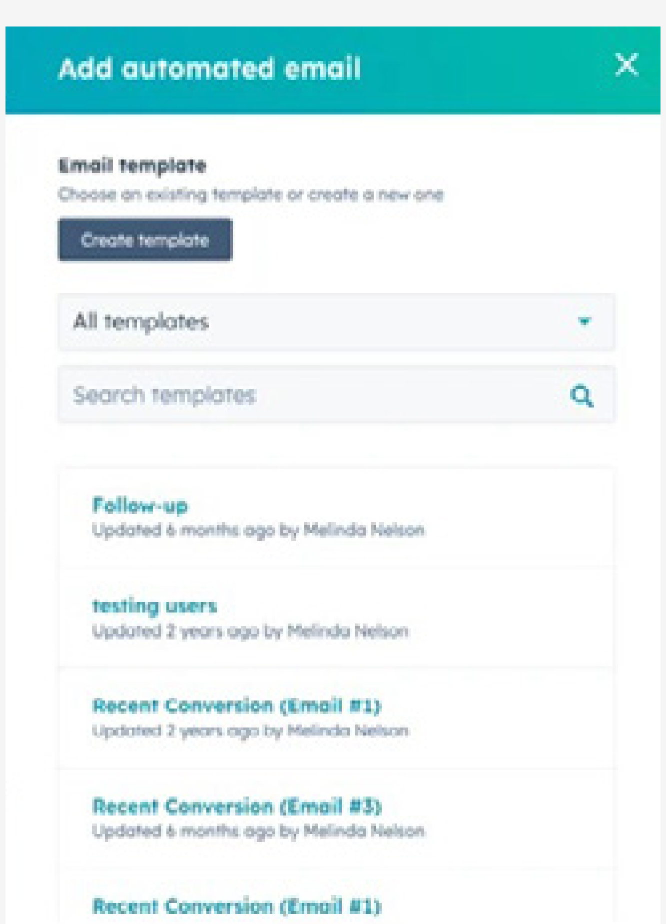


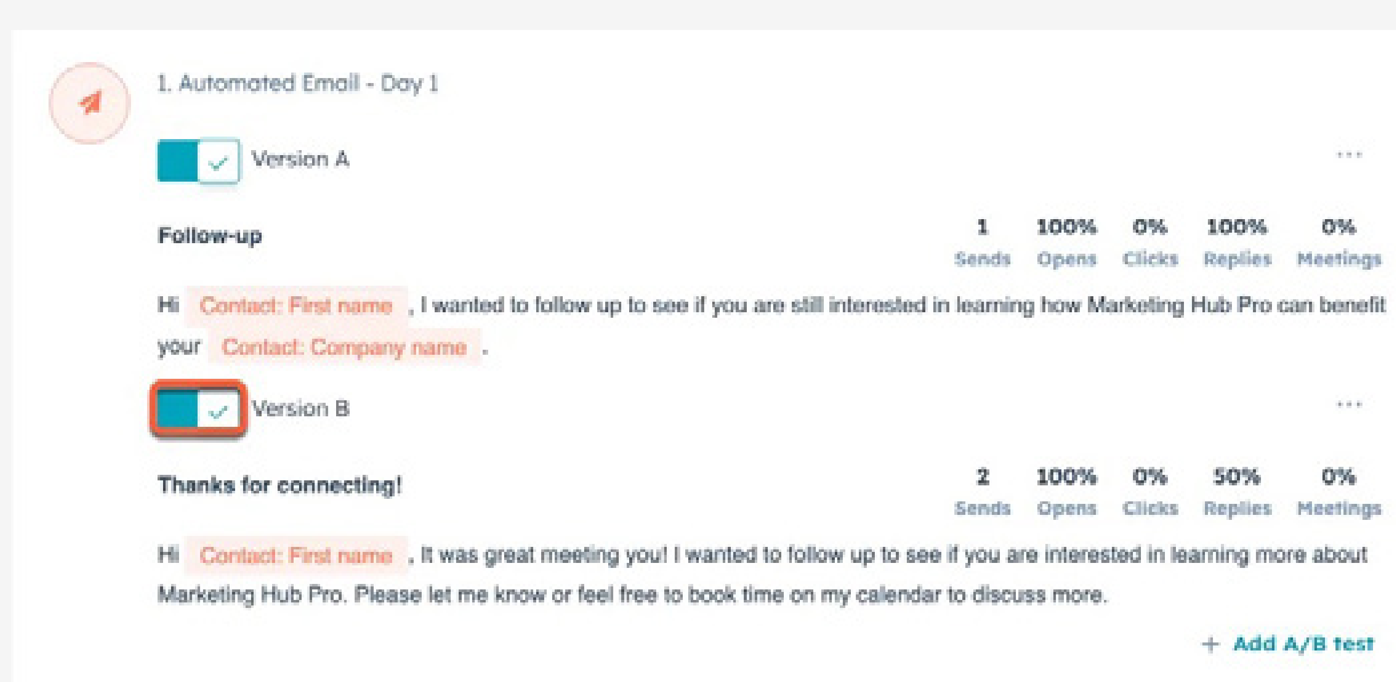


Automate outreach and lead nurturing using sequences

It can get complicated to keep up with all of your lead contacts, especially as that number increases. We won't complain, especially when we can use sequences to help nurture these relationships and create tasks to help set up your weekly work. Head to the sequences tab, and set up your sequence steps to create your lead nurturing flow. Once the overall goal of a particular sequence has been achieved (e.g. scheduling a meeting), the contact will be automatically removed. No repeat information or requests, and no mis sed leads! If you want to help enhance your engagement, try out automated A/B testing and see the results in the step performance table.

Keep in mind that in a Professional subscription, you have to manually enroll contacts into a sequence. Bumped up to Enterprise? Then you can automate the enrollment of contacts into sequences using workflow.

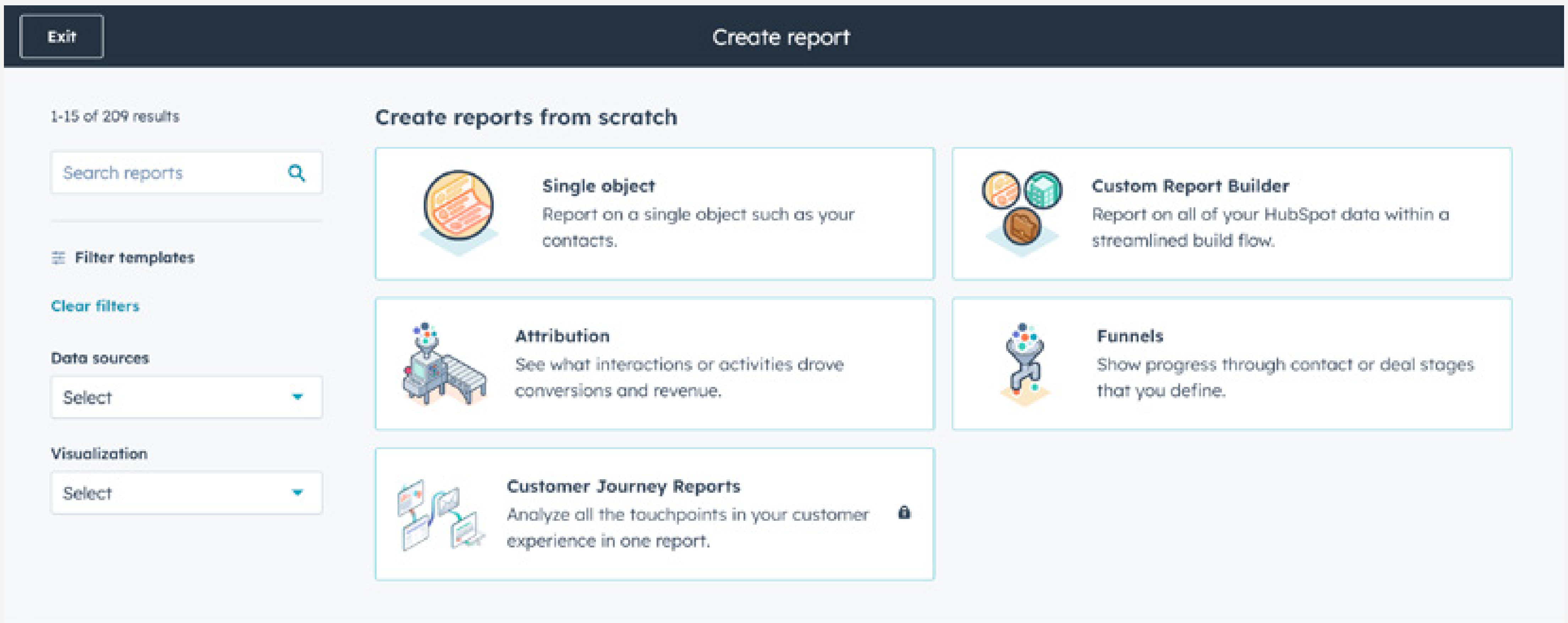




Gain more insights with Custom Dashboards

Within the dashboards feature, Hubspot already contains a vast number of report templates you can add to your dashboards. However, we can customize both the reports and the dashboard itself to show the exact information you want. Use quick filters at the top of the dashboard to filter all below reports on certain criteria, for example on country. You can have more than one quick filter to refine your report data. If Hubspot doesn't already have the report you are looking for, you can create your custom report. New custom reports can also be used in your other dashboards, so no need to create a new one from scratch each time. Now you can compare all of your deals, pipelines, tickets and tasks in one centralized place.

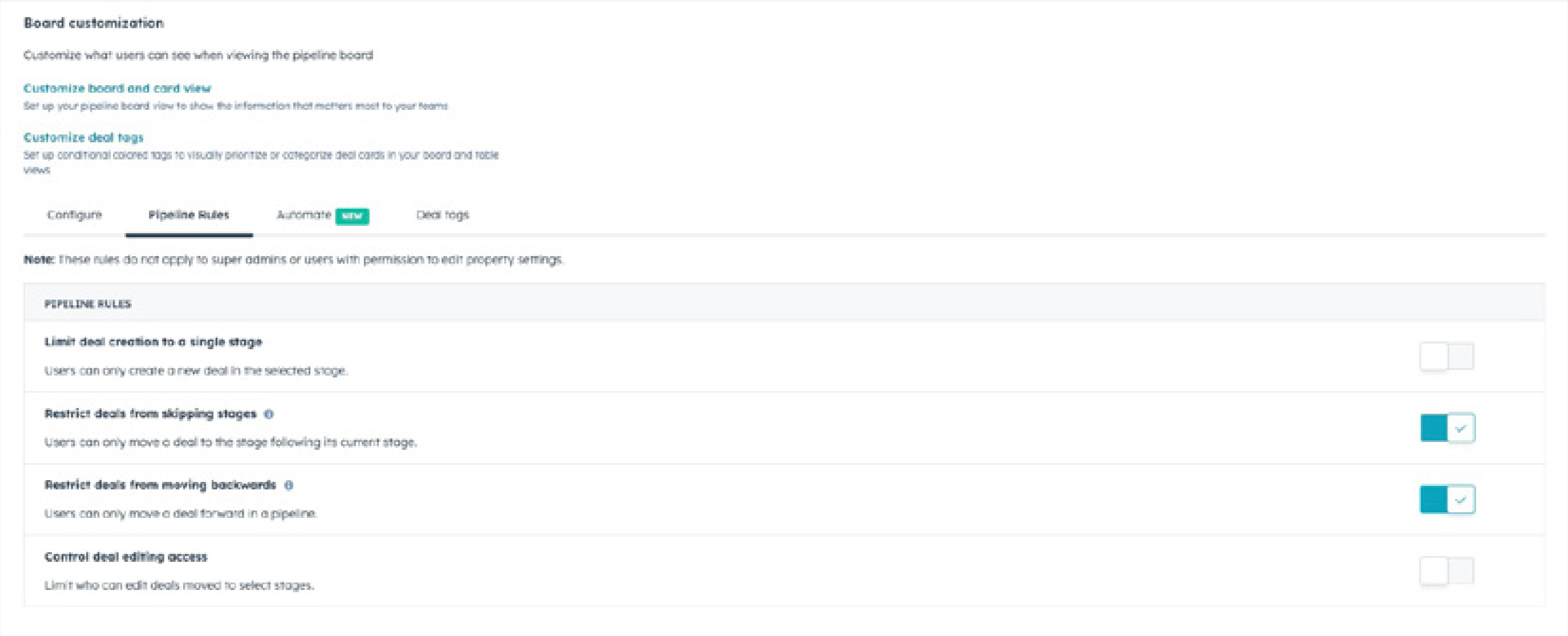
HubSpot has a bunch of template reports dedicated to displaying your Sales activities and performance. Navigate to Reporting & Data, click Reports and find the Sales reports underneath "Report Collections.



Avoid deal stage skips or backward deal stage movement

Using funnel reports is incredibly useful to see the strength of your journey, however, funnel reports work in a specific method. One way to help the data analysis in these reports is to make sure your leads cannot skip deal stages within their journey, or have a backward movement. You can prevent this by heading to your pipeline settings and turning on the toggles to restrict deals from skipping stages, as well as restricting deals from moving backwards. It is important to note, however, that this will exclude the closed lost deal stage.

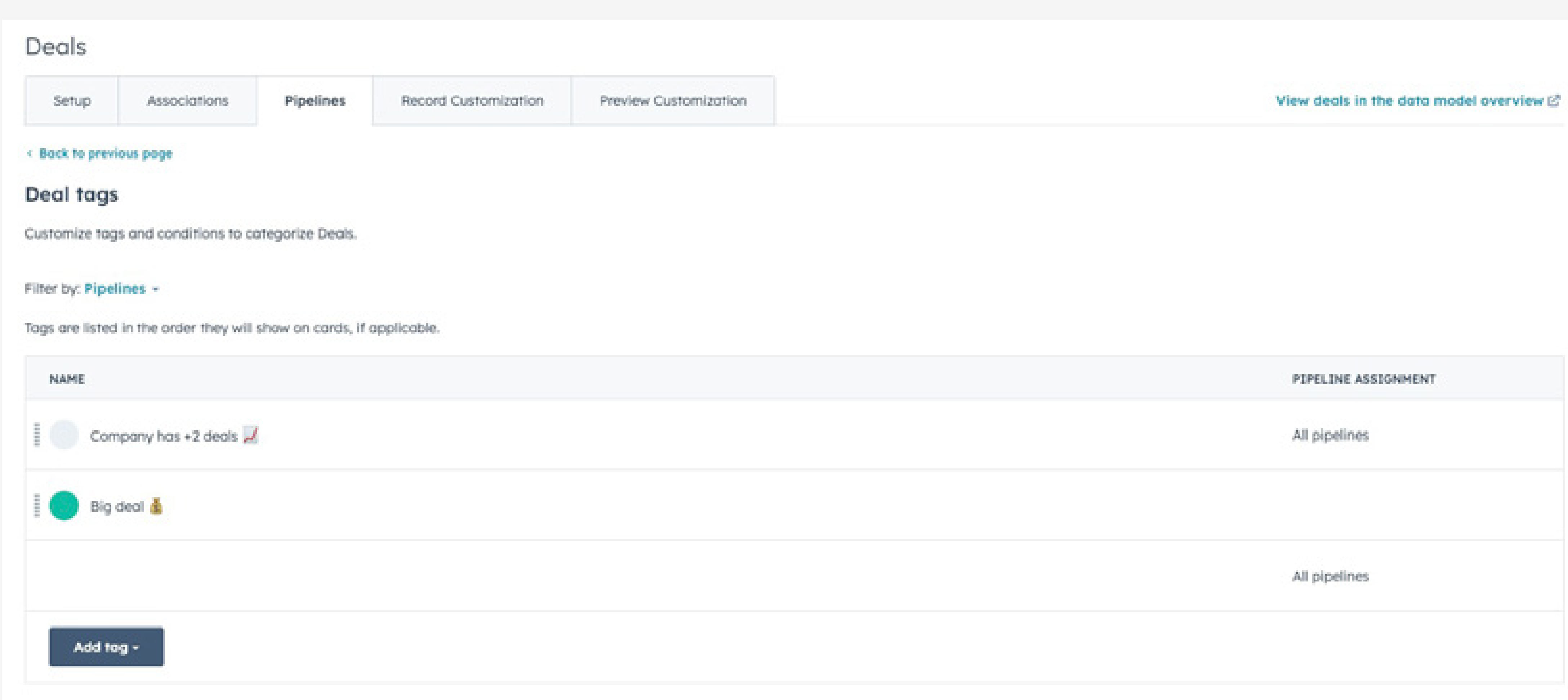
HubSpot has default properties to keep track of when a deal enters a certain deal stage. If you wish, you can set up your calculation properties to keep track of how much time deals spend on average in a certain stage.



Focus on important deals and stages using Deal Tags

A well-populated deal pipeline is exciting, but sometimes difficult to distinguish between the deals, statuses, and ones that are important to watch. By utilizing deal tags, you can customize your pipeline to showcase this information with colourful tags. Head to the customize deal tags link in your settings and create deal tags to appear on the deal cards when deals hit certain criteria. You can create up to ten different tags, choosing from either a preset tag or creating your own custom one.

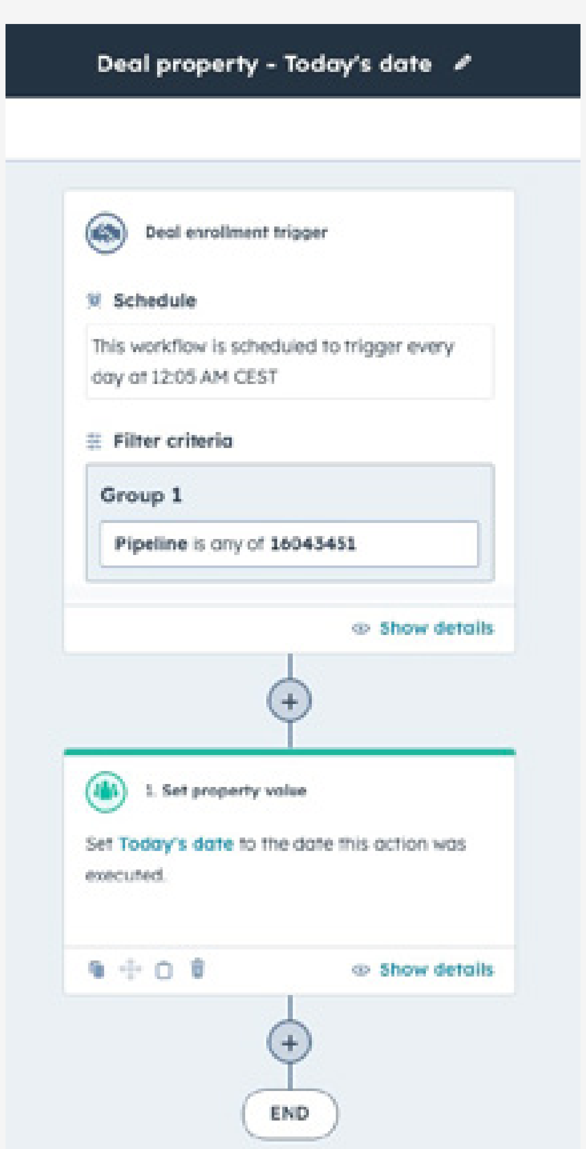
You can also use tags to trigger workflows and therefore e.g. notifications and tasks. Send a reminder to a deal owner if a deal has passed its close date, create a task for the deal owner if there hasn't been any activity on the deal or notify managers when a high-amount deal has come in.

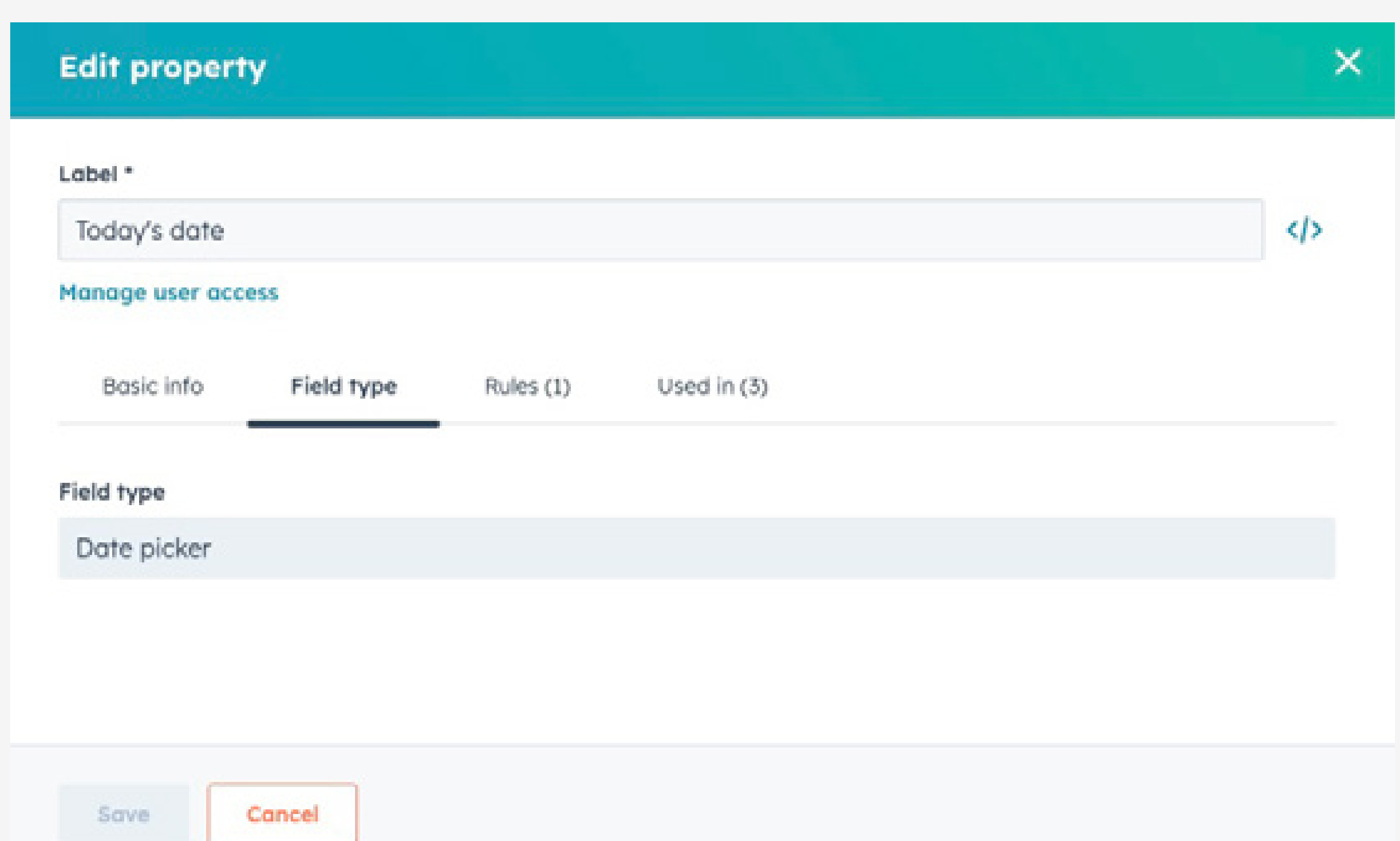


Create a “Today’s Date” property for task tracking

As of this moment, Hubspot does not yet have a “Today’s Date” property, which can be extremely useful for task tracking and workflows. However, we can get around this. Create a property called Today’s Date, and make a workflow to set the property value to update daily with the values of that day. By having this property, you can create time-based tasks based on today’s date and stay on top of your work.

Don’t want to assign tasks to a dedicated HubSpot user or record owner? Create a “shared queue” to place the tasks that need to be done – whoever has a look at this queue, can select and work on the tasks listed in there.

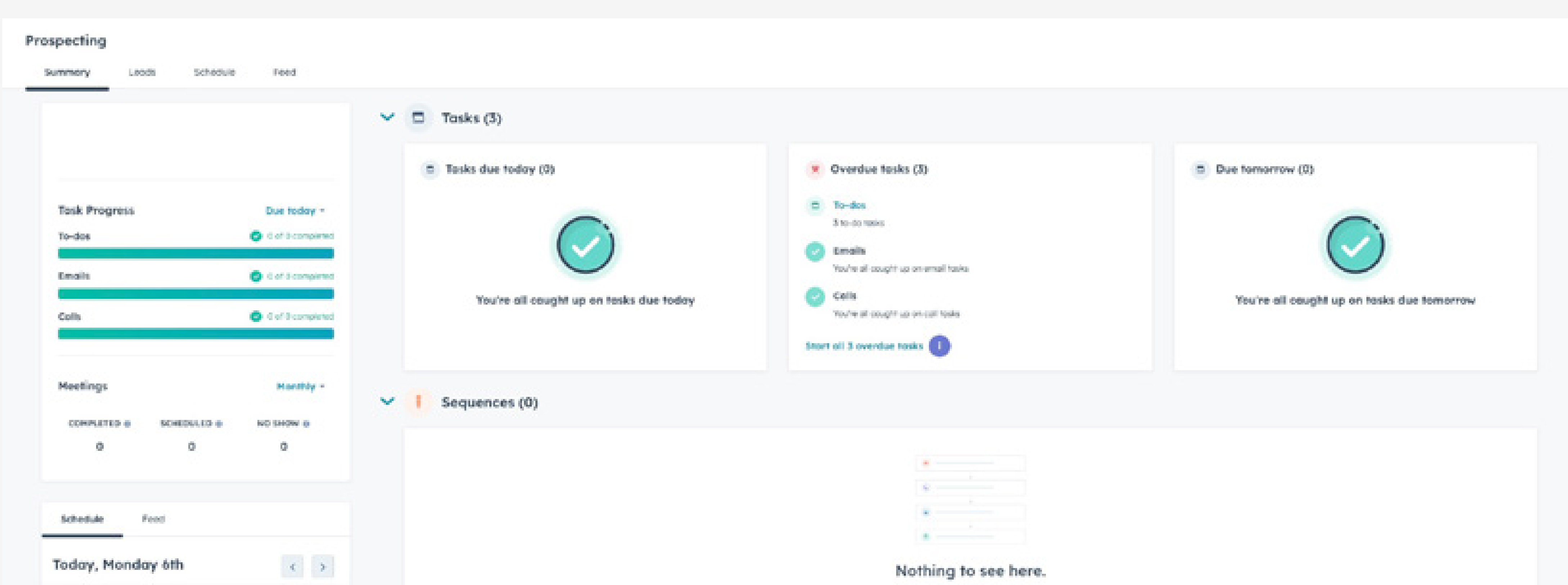




Manage your to do’s with the Prospecting Workspace

With sales data in so many places, it can be hard to manage all the information and put it all together. With HubSpot’s new Prospecting tool, now there is no need for separate dashboards or task lists to keep up with to help manage your leads. Here you can see all your upcoming tasks, meetings, communications, and sequences tasks to manage. Your tasks will be ordered as a checklist, where you can check each one off as you complete them. Clicking through the tasks due, you can filter on task types, so you can prioritize which tasks to complete first, and also (bulk) edit or reschedule tasks. Additionally, at the bottom of the summary tab of the dashboard is a space for suggested activities for new actions that you can pick up, and even cold leads that have started re-engaging with your business.

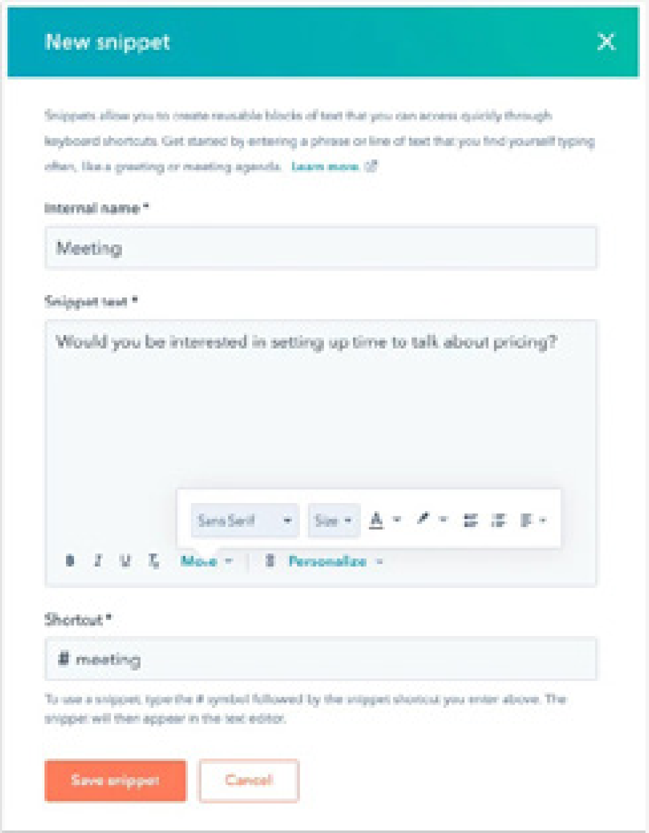
Are you managing a Sales team? You can very easily switch between the workspaces of your team members to gain insight in their workload and to-do’s.

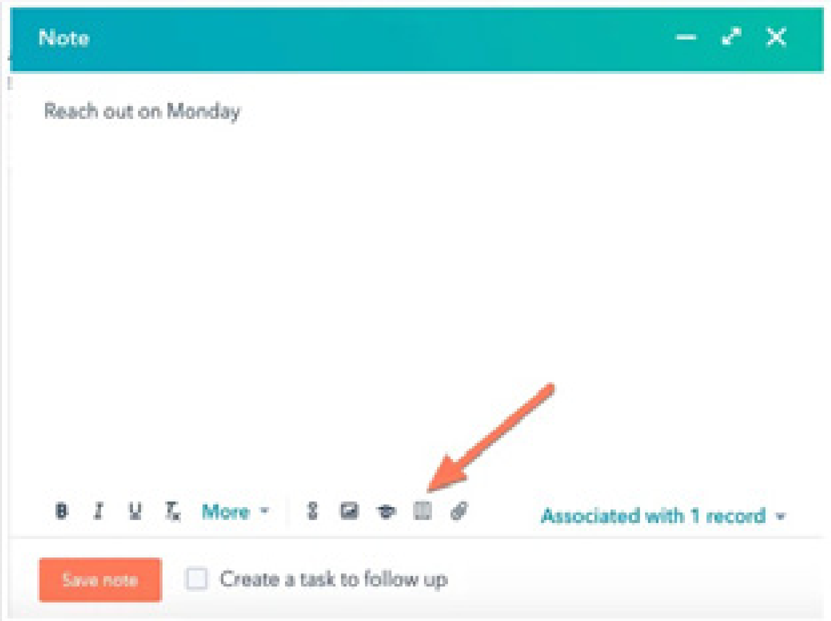


Write snippets and templates to save time

At a certain moment, we find ourselves using the same phrases over and over. Sometimes, we even create email signatures as templates to use in these cases, and update them with the correct information given to the person you are talking to. But this can cost extra time and is open to customization errors. HubSpot Snippets and Templates allow you to create these text templates for you to insert in emails, chats, or even notes, as well as having automatic personalization tokens so the specific information is already inserted for you. Access your snippets by either selecting the snippets icon in the text box editor or by typing # and starting to type the snippet shortcut.

To directly insert your Snippets or Templates into your Gmail or Outlook emails, you need to connect your work email address in the HubSpot settings and use either of the email client's integrations with HubSpot.





Use AI for your Sales Forecasting

Forecasting has never been easier, with being able to compare forecasts and total amounts across all teams, and the individuals within, to measure against your goals. Now, with AI, you have assistance in making predictions for future sales and strengthening your goals, as well as for the current month. Over time, you may also use the forecast accuracy over time table at the bottom of the space to compare the accuracy of the AI prediction with the actual closed won amounts. This overview is for all pipelines' totals, as well as individual pipeline's totals.

Just starting with Hubspot, or with a new pipeline? This feature will require 2 months of deal data, so keep this in mind when you're setting goals.

AI forecast

Date range: This entire month

MOST LIKELY	UPPER	LOWER
€242,042.15	€263,978.72	€220,006.45

Forecast accuracy over time

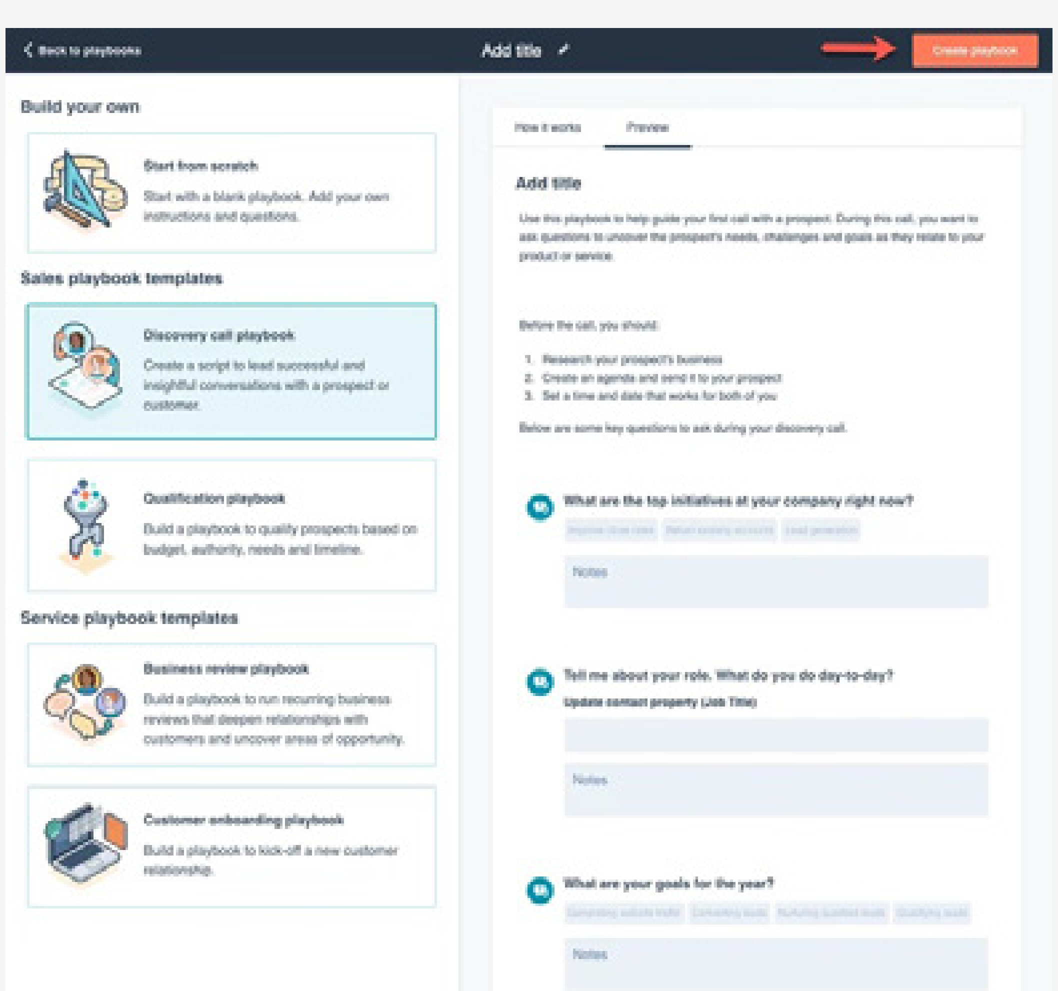
Date range: Last 6 months

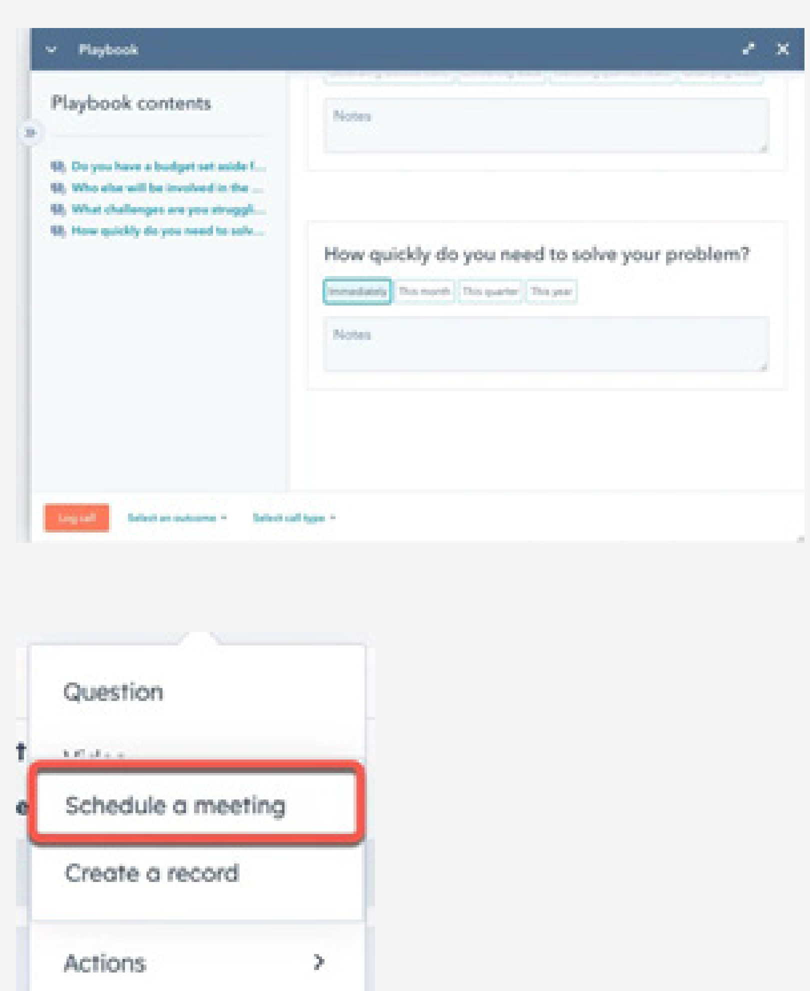
MONTH	CLOSED WON	FORECAST SUBMISSION	AI FORECAST AVERAGE	7-DAY FORECAST	14-DAY FORECAST	21-DAY FORECAST
March 2024	$500,000.00	$500,000.00	—	$760,000.00	$665,000.00	—
February 2024	$600,000.00	$390,000.00 65%	$530,000.00 88%	$480,000.00 80%	$530,000.00 88%	$580,000.00 97%

Optimize time and processes with Playbooks

Time is limited in our work days, and we want to help our sales teams best to optimize their time. You may already have a script to work off of, but pushing information and responses into your notes for the client can be an extra step. This is where Playbooks can come in handy. Playbooks are an interactive card that allows your team to create notes on their questions, and also select pre-determined answers that are relevant to the conversation. These can also include snippets (see point 9), personalization tokens, and the meeting scheduling tool. Now you can keep all questions and responses for a client in one place, and easy for other members of the team to refer back to!

You can access your Playbooks from all CRM records on the right-hand side of a contact, company or deal.





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