



HubSpot Training

Comprehensive, Proactive
HubSpot Training for your teams

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Overview

Our **HubSpot Training** offering aims to get everyone up-to-speed on:

- What HubSpot is
- Where it fits in (and where it doesn't)
- Starting to use HubSpot

You'll have a team of experienced HubSpot experts at the ready - available all year round (no need to worry about people going on holidays or off sick) - to proactively train your team to use HubSpot.

We will customise the training sessions for your requirements - for example, if you are only using Sales Hub.

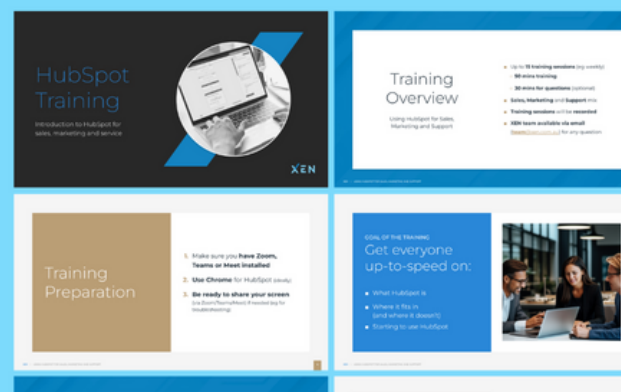
How It Works

- ✓ Regular training sessions (eg weekly or twice weekly)
 - 50 mins training
 - 30 mins for questions (optional)
- ✓ Sales, Marketing and Support mix as needed
- ✓ Training sessions will be recorded and added to a Training Dashboard in your HubSpot portal
- ✓ The optimal mix of Administration, Strategy and Implementation

Access the HubSpot Training Deck

Explore our HubSpot Training Session Overview

[ACCESS THE DECK](#)



Is This For You?



This is a good fit for you if:

- ✓ **Inherited:** You've inherited HubSpot (ie the person who set it up is no longer with the company)
- ✓ **Upgraded:** You've been using parts of HubSpot for years, but have recently upgraded to a higher tier
- ✓ **Expanded:** You've added another Hub to your portal
- ✓ **Grown:** You've grown your use of HubSpot, but haven't kept up with all the new features
- ✓ You are a mid-large company or enterprise
- ✓ You need a team of experts available to guide you through all the administration of your HubSpot portal
- ✓ You need a team experts available to guide you through campaigns, assets and workflows
- ✓ You want to maximise your use of HubSpot



This is NOT a good fit for you if:

- ✗ **Ad-hoc:** You just need ad-hoc help with items (instead see our [HubSpot On-Demand](#) option)
- ✗ **Irregular:** You are mostly happy with your use of HubSpot and what it is achieving for your company, and only need help occasionally
- ✗ **Mature internal team:** You already have an internal CRM Manager who looks after most of the day-to-day admin and setup items

The HubSpot Training Sessions

Here are a few of the training sessions we offer.

You can also access the whole schedule [here](#).

Overview

- **Overview** of HubSpot
- Where it fits in
- Including how it fits in with other systems
- Where it doesn't
- What you can do in HubSpot
- Sales versus Marketing
- Understanding the current Sales process
- Getting everyone setup in HubSpot

Integrating with HubSpot

- Installing the **HubSpot Connector**
- How it works, how to use it
- Troubleshooting - fixing install issues
- Understanding the other company integrations
- Quick tips

Email in HubSpot

- Marketing Contacts versus Non-Marketing Contacts
- The 4 main types of email in HubSpot
 - Sales emails
 - Using Snippets
 - Using Templates
 - Sequences
 - Marketing emails
 - Newsletters
 - Nurture emails (using Workflows)
 - Conversations Inbox
 - General emails
 - Conversations Inbox
 - Transactional emails

Sales in HubSpot

- Overview of the **CRM**
- Tailoring the **layout**
- Using **Views**
- Deals
- Pipeline management
- Tasks
- Target Accounts
- Task management
- Ad audiences and events
- Conversation Inboxes
- Ticket pipelines
- Business process 'recipes'

Attribution in HubSpot

- Attribution and Context
 - **Current state** versus **Desired state**
- **Two significant shifts**
- How to spot Attribution problems
- How to fix Attribution problems
- How to use Attribution in HubSpot
- When to move from Pro to Enterprise

Outcomes



Save time (do stuff quicker)



Minimise effort (do less stuff)



Automate stuff (do stuff at scale)



Team continuously trained

Training Scope

INCLUSIONS:

- ✓ **Training sessions:** The number of sessions would be an agreed number dependent on the pricing package
- ✓ **Basic settings:** We would go through the portal to ensure the basics are set up like Neverlog settings, Ads connected, Social channels connected, and more.
- ✓ **Best practices:** Everything from naming conventions, to managing your marketing contacts.

EXCLUSIONS:

- ✗ **Change management:** We can help train the team if they have a 'can do' attitude. It would be tough to train if someone is not willing to learn or adapt to change.
- ✗ **Custom integrations:** We only have expertise across the HubSpot Marketplace integrations. We don't build custom integrations.
- ✗ **In-person training and workshops:** We are happy to accommodate in-person meetings where possible and where appropriate. If we agree on an in-person meeting/workshop, our time spent travelling will be charged on top of your subscription.
- ✗ **Custom documentation:** We provide training videos, slide decks and process documents where appropriate but we don't develop, manage, or maintain custom documentation for your HubSpot portal.
- ✗ **In-depth HubSpot implementation and projects.** For that, please check out:
 - [HubSpot On-Demand](#)
 - [Virtual HubSpot Manager](#)

Pricing

Prices are in AUD and exclusive of GST.

Australian businesses will be charged an additional 10% GST.

\$4,000 - \$14,000

Pricing depends on the number of sessions needed.

Please get in touch with us so we can provide a quote.

Frequently Asked Questions:

Who is this for?

This is ideal for mid-large companies who have been using HubSpot for at least 6 months.

It's ideal for companies who don't have (people or time) to manage all the strategy, administration and implementation pieces of HubSpot.

How much does it cost?

This depends on the number of sessions you need.

The pricing would be somewhere between \$4,000 - \$14,000. Please get in touch with us so we can provide a quote.

Will this reduce my costs (ie. save me money)?

Yes, it definitely will.

We will train your team and ensure that they use HubSpot to its fullest potential. You'll have immediate access to HubSpot experts all year round, with no need to worry about holidays or sick leave. You can enjoy peace of mind knowing that your portal is in good hands, and you can focus on growing your business

Is there a training schedule that I can refer to?

Yes, you can access the training schedule [here](#).

Are we locked in to follow all these sessions? Or can this be customised?

No, this training schedule is an overview. We will identify the key areas and customise the sessions accordingly.

Frequently Asked Questions:

Am I locked in?

There is no lock-in.

Is it easy to cancel?

You can pause or cancel at any time.

I've just purchased HubSpot - is this a good fit for me?

Probably not.

We have a whole other service focussed on getting you up to speed on HubSpot quickly. It's our [HubSpot Ignition](#) service.

Once your HubSpot portal is all set up, then you can come back here

What's the HubShots Framework?

The [HubShots Framework](#) is a capability maturity model showing the journey companies take in implementing HubSpot through their business.

It has 5 stages that show a company progressing from a predominantly manual set of processes with little tracking, through to a highly automated business with clear tracking and attribution of processes, contacts, deals and revenue.

If you are interested in chatting further about the **HubSpot Training** offering, schedule a call today to discuss your requirements with an advisor.

[SCHEDULE A CALL](#)

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