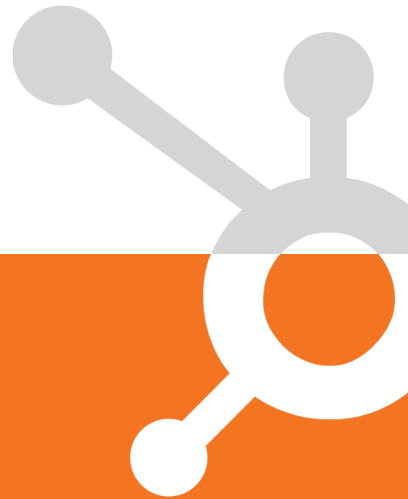


IMPROVE YOUR HUBSPOT ROI:

100+ Questions to Ask



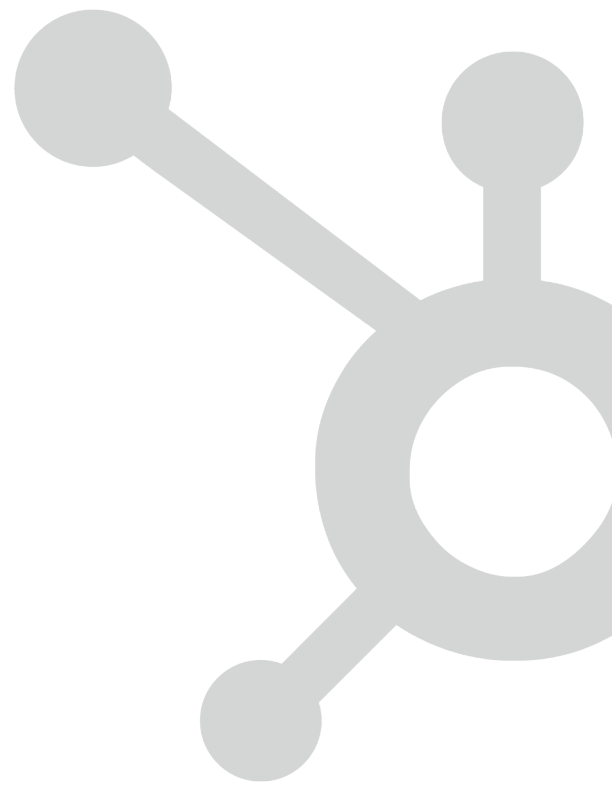


TABLE OF CONTENTS

Get Organized	1
Get Aligned	4
Get Lean and Clean.....	6
Get to Know Your Customers	8
Get Your Website Together for Inbound Sales and Marketing	10
Get New Qualified Sales Leads.....	12
Get More Customers and Keep Them Delighted	17
Get Started Getting More From Your HubSpot Investment.....	20

Your decision to invest in the top-rated marketing technology platform, HubSpot, puts you in elite company with some of the most successful sales and marketing organizations on the planet. HubSpot provides all of the tools you need to create, launch and analyze modern, mobile-friendly websites and targeted inbound marketing campaigns that achieve your business goals.

———— ***If only it were that simple.*** ————

While many HubSpot users grow their companies through robust inbound marketing programs, some struggle to reach their goals, and some wonder about the return on their HubSpot investment.

Why?

In this guide we explore the most common reasons why some HubSpot users and teams see less-than-desired results and become frustrated. It's not that they don't have the talent or the knowledge to build effective strategies and use the tools to their advantage. More often, there are more practical reasons that can be overcome. Let's get started with the all-important first step, planning and resources.

GET ORGANIZED

In our excitement to hit the ground running and start improving sales and marketing results, we may skip some important foundations ultimately crucial to success. Answering a few key questions will help to guide your strategy and planning and allow you to get the most out of HubSpot.



What are your goals for inbound sales and marketing?

Usually, this is about revenue growth, so you'll probably need to involve Senior Management in coming up with realistic goals based on historic data, available resources and budget.

What specific KPIs and benchmarks will you apply?

What will you measure to gauge success and progress toward reaching goals? On the marketing side, consider metrics like:

- website traffic
- bounce rates
- time on site
- time on pages
- inbound leads
- conversion rates
- emails opened and clicked
- marketing qualified leads
- sales qualified leads

On the sales side, you can measure:

- sales qualified leads
- opportunities, deals
- new companies or accounts
- deals at different stages
- win rates
- closed-won deal amounts
- quarterly and annual revenues

For each, how often will you monitor and review these results and how will you report them to stakeholders? Which specific benchmarks will you use to evaluate progress going forward?

What is your timeline for achieving your goals?

Consider company and product goals here. Do you have product launches scheduled, trade shows, investor or user conferences or other important events on the calendar? What about funding rounds or compliance reports? What will you need from sales and marketing for each of these requirements, and how much time will they need to meet their deadlines?

A 2017 Teksystems poll of marketing leaders' top priorities revealed five essential skills needed for success: digital advertising, social marketing, website design/development, content development and mobile marketing.¹

What resources are available?

To avoid confusion and prevent missed opportunities and deadlines, get definitive answers to these questions:

- Who's on the sales and marketing team, and what are their roles? Is there a designated leader? Who does that person report to?
- Are your team members dedicated to inbound sales and marketing, or do they have other roles to fill?
- Do you have enough talented people dedicated to accomplishing your goals?
- If not, how will you find and hire them or outsource to external resources?
- Have you set up HubSpot completely for both sales and marketing? Do you have enough seats available and a software license level appropriate for your needs?

GET ALIGNED

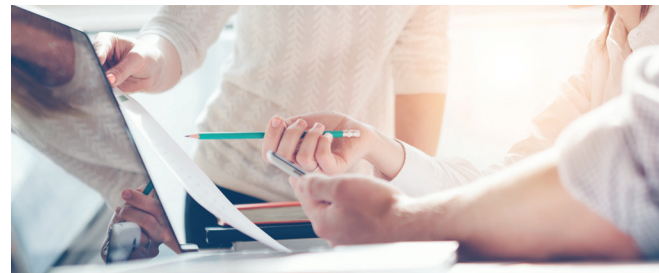
If you're like many midsize to large companies, your sales and marketing organizations are probably split. Each has its own management structure, mission, roles and goals. Ideally, they share company goals and collaborate frequently to achieve them.

Traditional barriers can get in the way, however. Sales teams may report directly to product divisions, for example, while marketers may be centralized under corporate. Priorities for marketers might be very different from sales teams, so it can be frustrating to get marketing support when a sales team needs it and vice versa. Marketers may also be frustrated because sales teams reject their leads, calling them “unqualified.”

The problem is that sales and marketing aren't aligned. They aren't on the same page about lead quality, process or strategy. This can lead to opportunities lost, missed targets and poor overall performance.

The question is what can you do about it?

Today, more sales and marketing organizations are becoming aligned. It starts with a commitment from Senior Management to either physically merge the teams under a common structure or at least develop a service level agreement (SLA) that spells out the process, accountability and rules of the road for working together. The SLA should also identify the goals, KPIs and benchmarks for the organization and provide for methods and tools used to enhance communication and transparency.



90%

of companies say their sales and marketing teams are not aligned. Of those, nearly 40% say that disconnect prevents them from effectively closing deals.²

You will need to answer several questions to build an aligned sales and marketing team:

1

Do you have buy-in from Senior Management to align sales and marketing?

2

If not, how will you get buy-in? Who will sell Management on the plan?

3

Do you have a playbook and SLA in place for:

- Understanding and communicating the sales process?
- Evaluating lead quality and sales readiness?
- Capturing qualified leads and handing them off to sales?
- Enabling sales reps to identify and engage leads quickly and effectively?

4

Do you have HubSpot sales and marketing tools properly set up?

5

Do your teams have the training they need to work together better?



GET LEAN AND CLEAN

A second major challenge facing many HubSpot users is what to do about the legacy prospect and customer database. What condition is your database in? Some common issues include:

- 1 Is your database loaded with stale, inaccurate, unengaged leads?
- 2 Are there many duplicate records with conflicting data?
- 3 Are email addresses valid and current? Chances are, many of them have changed as people change jobs or retire.
- 4 Do you have enough data to segment leads for targeted campaigns?
- 5 There may be multiple databases for different divisions or product lines. How will you merge them? Or will you continue to use them separately?
- 6 Are field values consistent throughout the database, or have they changed over the years?
- 7 Do you have information on email engagement or lead history that could be useful in prospecting or re-engagement?
- 8 Is your cleaned database loaded into HubSpot Sales and Marketing?
- 9 If you use a non-HubSpot CRM, is it properly integrated with HubSpot?

Getting your database healthy and accurate is one of the most valuable things you can do to get more out of your HubSpot investment right away. **With a lean and clean database you can improve segmentation and targeting, email response, persona identification and qualified lead generation.** Your sales team will also thank you because their leads are now accurate, easier to reach and qualify and more likely to close.

It's estimated that companies spend an average of \$100 to maintain each record in their database. Do the math³—if you have 100,000 records in your database and 10% are inaccurate,

**THAT'S \$1M
DOWN THE DRAIN.**

GET TO KNOW YOUR CUSTOMERS

It may sound obvious, but one of the biggest challenges sales and marketing professionals face is in understanding their customers. Not knowing who your buyers are, what they are looking for and why they choose your products and services means you may be fishing in the dark.

Not reaching them where they are online with the right message at just the right time means your competitors may have the upper hand in capturing them as leads and closing them as customers. Even the best inbound marketing program, complete with a modern website, helpful content, expert SEO and paid search campaigns can fail to generate qualified sales leads if the entire program isn't aligned on customer values and buyer personas.

Segmented and targeted emails generate⁴

58% OF ALL REVENUE.



How do you get to know your customers and align on their values? Some basic questions to consider include:

- 1 Have you interviewed or surveyed your customers?
- 2 Do you know their pain points and reasons for purchase?
- 3 Do you know why they picked you and not your competitors?
- 4 Have you created an ideal buyer profile and a set of buyer personas?
- 5 Do you know where they frequent online and what content they consume?
- 6 Do you know what keywords and phrases they use in a search for your products?
- 7 Do you know what messages and user experience they seek?



Once these questions have been resolved, you can create accurate buyer personas you can use for high-converting, targeted inbound and outbound campaigns and help to automate lead qualification and lead nurturing. These in turn can help your sales team focus on the best leads and reach them with the right messages and content at the right time to close the sale.

GET YOUR WEBSITE TOGETHER FOR INBOUND SALES AND MARKETING

Now that you know your customers, it's time to think about your website. After all, your website is most often the first place they go to learn about your products and services, your company and your people.

Most companies stop there, however. They fail to consider the motives of their visitors. If you're doing inbound marketing right, you're reaching out to people who have specific needs. Almost always, those needs solve a problem or "pain point." On visiting your website, the first thing a visitor wants to do is see they are in the right place to find a solution. Your website is a conversation, not a brochure. It's often your visitors' first touch and first experience with your brand. Your job is to help them find what they want and, eventually, learn more about you, your products and services and their benefits. You also need to make it as easy as possible for each visitor, regardless of source or intent, to find valuable answers to their questions.



88%

of online consumers are less likely to return to a site after a bad experience.⁵

The question is how? Start by answering the following questions:

- 1 Have you optimized your website pages on customer-used keywords?
- 2 Have you optimized your site user experience on customer preferences?
- 3 Have you made it easy for visitors to find what they want?
- 4 Have you optimized your site content on buyer pain points and key messages?
- 5 Have you created clear and prominent lead conversion offers your customers want?
- 6 Have you deployed landing pages and strategically placed calls-to-action to capture leads?
- 7 Have you designed and developed your site to be mobile-friendly (responsive)?
- 8 Is your website on the HubSpot COS? If not, why not? You might want to reconsider. Here's an [honest comparison](#) with WordPress.
- 9 Does your site load quickly and consistently across all devices and browsers?
- 10 Are there any search engine errors and warnings (like missing pages) that need to be fixed?



By building a fast, responsive website that is customer-centric and easy to navigate, you can optimize the visitor experience and maximize your chances of capturing qualified sales leads that find you through search, paid media or inbound campaigns. Your website is one of the most important assets in your inbound marketing arsenal, and you should be constantly striving to optimize it for attracting and converting high-value leads.

GET NEW QUALIFIED SALES LEADS

Think of your optimized website as a helpful resource for qualified prospects. You want to identify and develop the leads that are qualified and ready to buy. The rest, you want to manage in a way that mirrors your sales process.

There are four parts of this process: **1)** setting up for success, **2)** attracting qualified buyers, **3)** convincing them to engage by signing up for relevant offers and **4)** continuing to nurture them and help them through the buyer journey to a purchase decision. This is how inbound marketing works. Let's look at the questions you need to answer for each step.



SETTING UP FOR SUCCESS



- 1 Who will be responsible for project management, analysis and reporting?
- 2 Who will create, edit and review content offers and other assets for your campaigns?
- 3 Who will create web page graphics, email graphics and calls-to-action (CTAs)?
- 4 Who will create landing pages and confirmation pages for conversions?
- 5 Who will create copy for emails, blogs and campaign pages?
- 6 Who will create ad copy and design ads for PPC, social media and other paid channels?
- 7 Who will be setting up and managing paid media campaigns?
- 8 Who will manage email marketing and social media content promotion?
- 9 Who will be setting up and interpreting campaign reports and analytics?





ATTRACTING QUALIFIED BUYERS

- 1 Have you identified the top personas and target markets you want to attract and convert into customers?
- 2 What are your goals for each persona and market?
- 3 What are your business goals for each marketing campaign?
- 4 What topics, keywords, types of content and channels will attract target personas?
- 5 Have you optimized website pages with the best search keywords and phrases for their topics, content and likely visitors?
- 6 Have you developed a content strategy and marketing calendar (deliverables and timing) for each campaign?
- 7 What channels (owned, earned and paid) will you use to distribute and promote your offers?
- 8 What keyword strategy will you employ for paid search?
- 9 What is your budget for paid media—is it enough to achieve goals?

Ask the salespeople what they want from marketing and they will say, 'More sales leads.' Give them more sales leads, and they will say, 'You misunderstood me. What I meant is we need'
QUALIFIED LEADS.'

CONVERTING VISITORS INTO LEADS



- 1 Have you gone through the previous steps to identify target buyer personas and develop campaigns to attract them to appropriate offers?
- 2 Do you have relevant conversion opportunities (landing pages, forms and CTAs) deployed and visible on your most visited web pages?
- 3 Have you helped visitors understand the value and benefits of your offers in every conversion opportunity?
- 4 Have you tested various messages and supporting content (like videos, for example) to enhance conversion rates?
- 5 Have you used [A/B testing](#) to maximize conversion rates on landing pages and emails?
- 6 Have you deployed [lead flows](#) on key web pages, landing pages and blogs to increase lead conversions?
- 7 Have you deployed [retargeting ads](#) to remind visitors of your offers and convince them to come back and convert?
- 8 Are you using [smart content](#) to identify returning personas and engage them with fresh, relevant content that answers their questions?

NURTURING QUALIFIED LEADS INTO BUYERS



- 1 Have you captured sufficient lead data to segment personas and qualify them by fit and sales-readiness?
- 2 Have you created [smart, segmented lists](#) to reach and engage target personas?
- 3 Have you used workflows and drip email campaigns to nurture existing leads into customers?
- 4 Have you set up [lead scoring](#) to rank prospects by fit and behavior and used notification workflows and emails to keep the sales team aware of hot leads and new opportunities?
- 5 Have you used chat tools like [Drift](#) or [HubSpot Messages](#) to increase engagement and answer buyer questions?
- 6 Have you increased email deliverability, opens and clicks using integrations like [SeventhSense](#)?
- 7 Have you improved your team's ability to monitor and report results with real-time dashboards across multiple analytics platforms using integrations like [Databox](#)?
- 8 Have you involved customer service in engaging with customers using integrations like [Zendesk](#)?

GET MORE CUSTOMERS AND KEEP THEM DELIGHTED

Once your sales and marketing teams are aligned with an SLA, common goals and processes, it's time to close the loop on your HubSpot investment and start to see real ROI.

Much of the legwork will have been done in the previous steps building a robust pipeline of qualified sales leads using inbound marketing and demand generation. Now is the time to close them.

You can assess your readiness to do that by answering the following questions →



INBOUND SALES READINESS



- 1 Have you implemented your sales and marketing alignment strategy?
- 2 Have you implemented lead management with marketing automation? Is it working the way you expect?
- 3 Are you classifying and segmenting leads by buyer persona and target market?
- 4 Are you automating [lifecycle stages](#) by lead behavior and fit?
- 5 Have you implemented lead scoring by lead behavior and fit, and do the results make sense from a sales perspective?
- 6 Have you automated lead assignment by sales process rules (territories, products, industries, channel partners, etc.)
- 7 Does the system immediately notify assigned sales reps based on sales readiness criteria and behavior, like website visits, email engagement, form conversions and lifecycle changes?
- 8 Have you helped the sales team improve overall sales performance?

Sales reps spend up to

43 HOURS

every month searching for information.⁷



HELPING SALES REPS GET MORE OUT OF HUBSPOT

- 1 Do your sales reps understand how to use the [HubSpot CRM](#) and Sales tools to identify, qualify and engage leads?
- 2 Do they use customized CRM views to prospect and prioritize assigned leads?
- 3 Do they use [sales emails templates](#) and [sequences of emails](#) to support prospect and opportunity outreach with personalized communications?
- 4 Have you developed and made easily available a [library of sales content](#) they can use to engage sales leads?
- 5 Do they document activities faithfully using Notes, Emails, Calls, Meetings and Tasks tracking tools?
- 6 Do sales managers and team leaders use dashboards to monitor sales and marketing progress, goals and activity metrics?
- 7 Do sales and marketing have access to each other's dashboards to promote transparency and SLA compliance?
- 8 Do sales teams access sales activity, tools, data and reports from mobile devices to expand their ability to respond and close sales opportunities?
- 9 Have sales team members bought into using the HubSpot technology to improve results?
- 10 Do they have the training needed to continuously improve results?

PROSPECTING

is the most difficult
part of the sales
process for salespeople.⁸

GET STARTED GETTING MORE FROM YOUR HUBSPOT INVESTMENT

No one said that reaching your sales and marketing goals would be easy. It takes vision and a lot of effort to build a modern digital pipeline based on any sales and marketing technology and proven methods.

Your expectations for getting the most out of your HubSpot investment must be tempered by the reality that finding, attracting, converting and closing new customers requires a team effort and an aggressive go-to-market strategy. You get out of it what you put into it.

The good news is, today's effective sales and marketing processes can be measured and optimized. It's easy to see at any given time where you are in a campaign or a larger marketing initiative. You can compare tactics and messages and double down on those that perform best. You can analyze your data, choose the most effective strategies and plan for the future. Ultimately, this is the value of inbound marketing and HubSpot.

Our customers understand those caveats and look to us for help in many of the areas outlined above. Contact Kuno Creative if you are ready to improve your HubSpot ROI.

CONTACT US TODAY





1. **2017 Teksystems poll** www.blog.hubspot.com/marketing/top-marketing-skills
2. **Marketing to Boost Conversions** www.marketingprofs.com/articles/2015/28319/six-simple-steps-for-aligning-sales-and-marketing-to-boost-conversions-and-fill-your-pipeline
3. **Is Your Data Working For or Against You?** www.heinzmarketing.com/2017/04/abm-is-your-data-working-for-or-against-you
4. **The Ultimate List of Marketing Statistics** www.hubspot.com/marketing-statistics
5. **13 Impressive Statistics on User Experience** www.invisionapp.com/blog/statistics-on-user-experience
6. **31 Facts About Sales Leads and Sales Lead Management** www.blog.salesleadmgmtassn.com/2017/04/31-facts-about-sales-leads-and-sales-lead-management.html
7. **Aberdeen Group** www.aberdeen.com
8. **The Ultimate List of Marketing Statistics** www.hubspot.com/marketing-statistics