CRM, Sales Hub ja integraatiot

Hug Helsinki 5.6.2019

#HugHelsinki

9.10 – 9.40

Se mitä myyt ei ole merkitsevää – se miten myyt on tärkeää

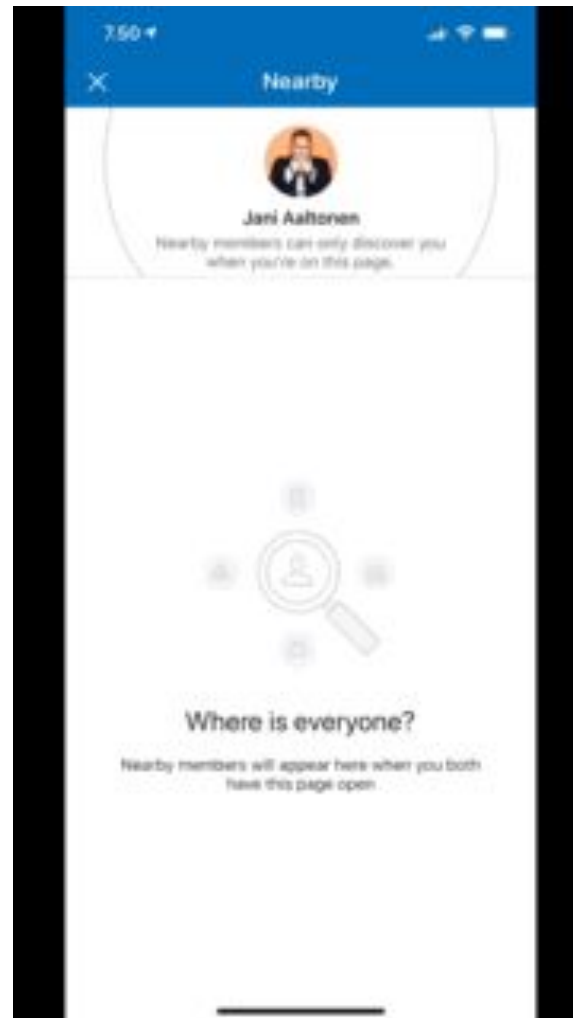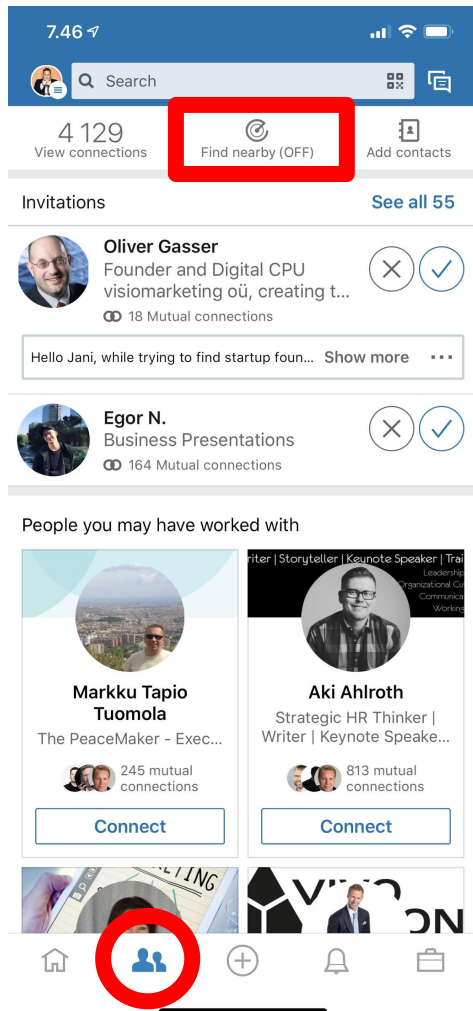Jani Aaltonen, CEO
Sales Communications

#HugHelsinki

Jani Aaltonen
HubSpot Partner of the Year 2016 & 17 &
happiest Customers. Chairman of The Board....

6x HubSpot impact awards

Osaamistarpeet ovat muuttuneet

Most Vital Marketing Capabilities Supporting the Delivery of Marketing Strategies Over the Next 18 Months

Percentage of Respondents. Top 3 Rank Shown

Capability	Percentage
Marketing and customer analytics	40%
Marketing technology acquisition and use	34%
Customer experience	30%
Digital business transformation	27%
Marketing innovation	23%
Customer retention and growth	21%
Digital commerce	19%
Strategic planning relative to corporate strategy	19%
Content creation and management	17%
Customer acquisition	16%
Marketing channel development	15%
New product development	14%
Sales channel development	12%
Lead conversion	10%

Base: All respondents, n = 621
Q. What capabilities do you consider most vital in supporting the delivery of your company's marketing strategy over the next 18 months?
ID: 361758

© 2018 Gartner, Inc.

Source: Gartner (October 2018)

Marketing Technology & Operations Roles and Responsibilities	2018	2019	
Research and recommend new marketing technology products	88%	**89%**	consistently the core of marketing technology operations
Operate marketing technology products as an administrator	82%	**80%**	
Train and support marketing staff on using marketing technology products	76%	**77%**	
Integrate marketing technology products with each other	80%	**75%**	
Monitor data quality within marketing technology products	70%	**70%**	
Architect the overall marketing stack of all marketing technology products	59%	55%	
Monitor performance and other SLAs of marketing technology products	55%	54%	
Integrate marketing technology products with non-marketing systems	58%	51%	
Pay for marketing technology products from a budget (partially or fully)	48%	48%	
Perform technical reviews of marketing technology products	59%	**48%**	11% drop
Identify and sundown outdated or unused marketing technology products	57%	**47%**	10% drop
Negotiate business terms for purchasing marketing technology products	47%	45%	
Identify and consolidate multiple instances of same or similar marketing technology products	51%	44%	
Approve or veto purchase of marketing technology products	49%	43%	
Perform data privacy and compliance reviews of marketing technology products	39%	**36%**	security & compliance drop lower
Customize marketing technology products with software development	43%	35%	
Perform security reviews of marketing technology products	23%	**21%**	
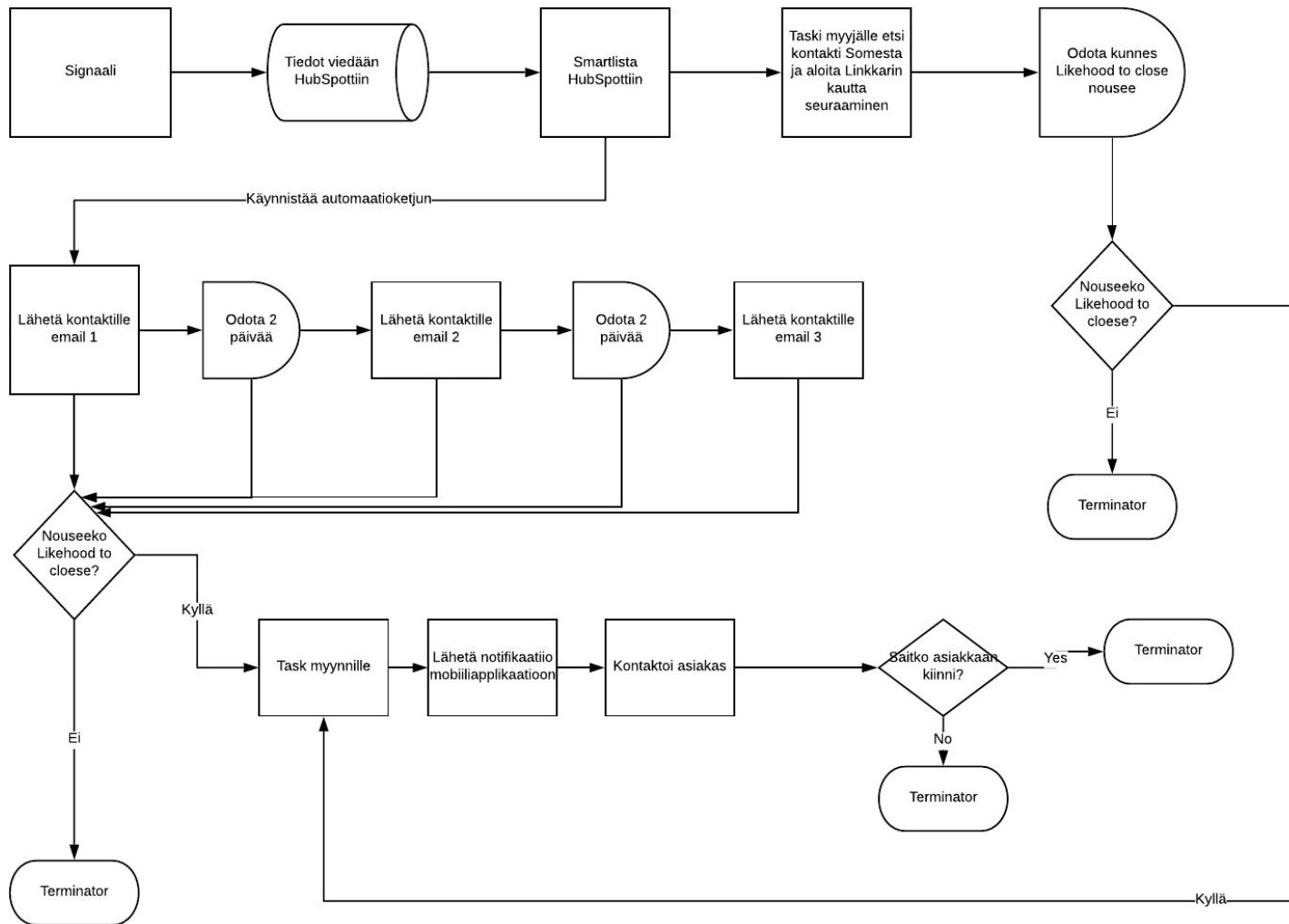
Myynnistä ja markkinoinnista on tullut digitaalinen ammatti

Milloin ihmiset ovat verkossa
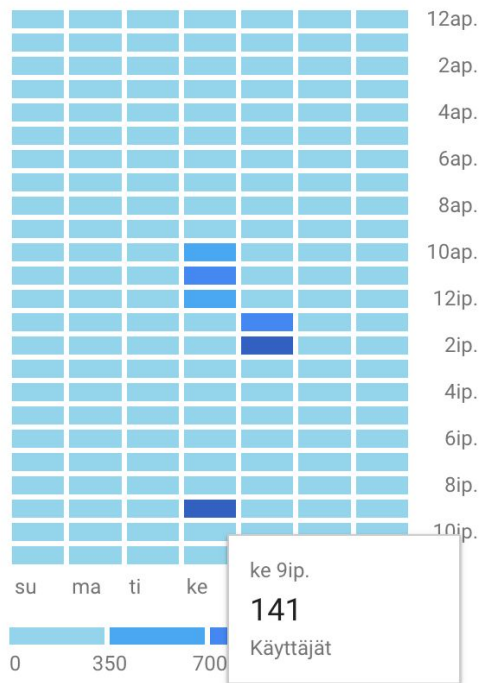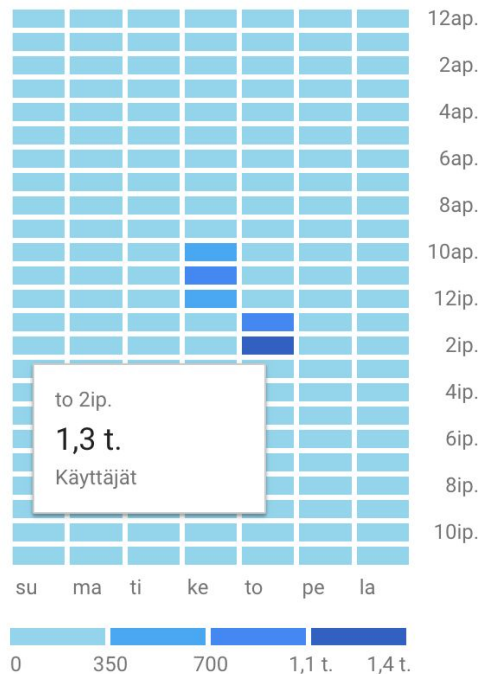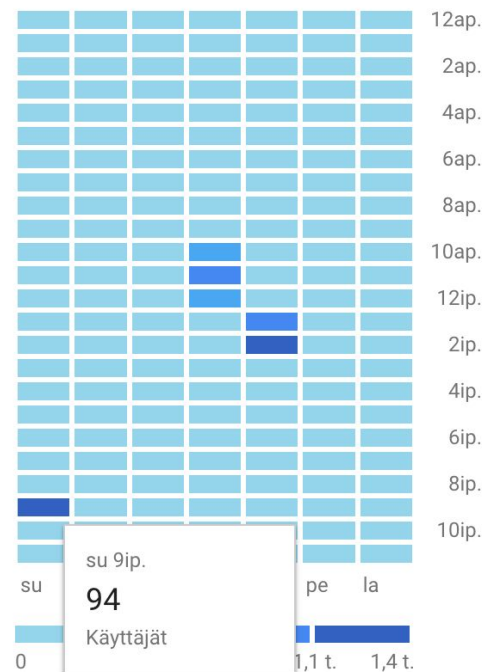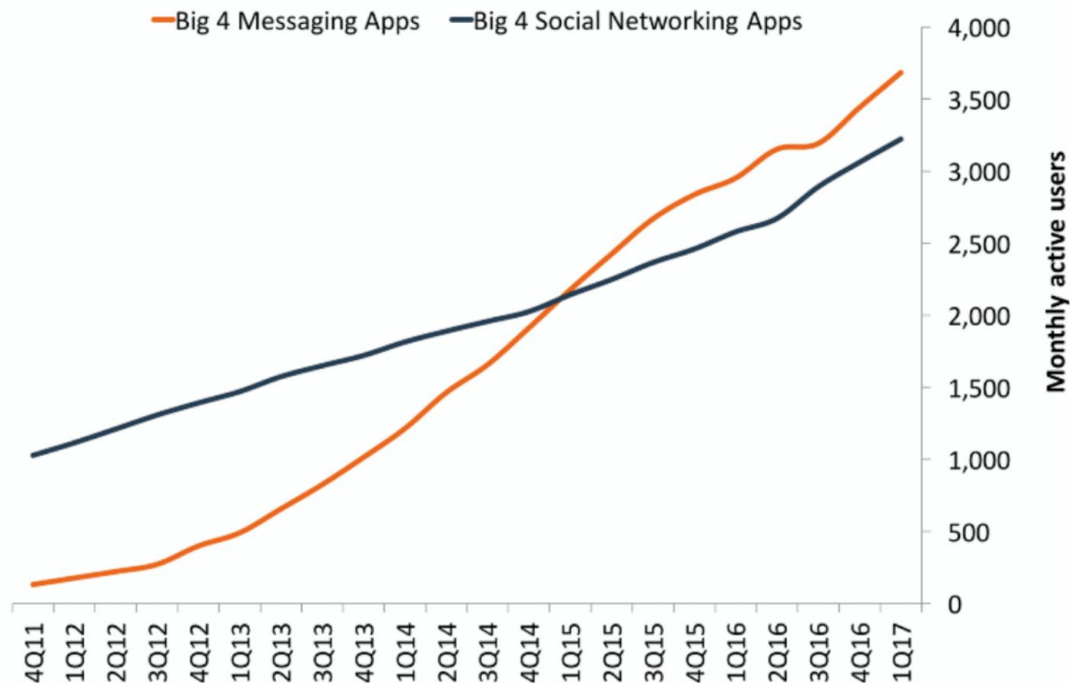
Messaging has grown, and conversational marketing is here.

Messaging Apps Have Surpassed Social Networks

Global monthly active users for the top 4 messaging apps and social networks, In millions

━━ Big 4 Messaging Apps   ━━ Big 4 Social Networking Apps

Monthly active users

4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0

4Q11 1Q12 2Q12 3Q12 4Q12 1Q13 2Q13 3Q13 4Q13 1Q14 2Q14 3Q14 4Q14 1Q15 2Q15 3Q15 4Q15 1Q16 2Q16 3Q16 4Q16 1Q17

Note: Big 4 messaging apps are WhatsApp, Messenger, WeChat, Viber.
Big 4 social networks are Facebook, Instagram, Twitter, LinkedIn
Source: Companies, Apptopia, TechCrunch, BI Intelligence estimates, 2017

BI INTELLIGENCE

chiefmartec.com Marketing Technology Landscape ("Martech 5000")

April 2019

Advertising & Promotion
- Mobile Marketing
- Display & Programmatic Advertising
- Search & Social Advertising
- Native/Content Advertising
- Video Advertising
- PR
- Print

Content & Experience
- Mobile Apps
- Video Marketing
- Email Marketing
- Content Marketing
- Optimization, Personalization & Testing
- DAM & MRM
- Interactive Content
- SEO
- Marketing Automation & Campaign/Lead Management
- CMS & Web Experience Management

Social & Relationships
- Call Analytics & Management
- Events, Meetings & Webinars
- Social Media Marketing & Monitoring
- Community & Reviews
- Advocacy, Loyalty & Referrals
- Influencers
- Conversational Marketing & Chat
- Customer Experience, Service & Success
- CRM
- ABM

Commerce & Sales
- Retail, Proximity & IoT Marketing
- Channel, Partner & Local Marketing
- Sales Automation, Enablement & Intelligence
- Affiliate Marketing & Management
- Ecommerce Marketing
- Ecommerce Platforms & Carts

Data
- Audience/Marketing Data & Data Enhancement
- Marketing Analytics, Performance & Attribution
- Mobile & Web Analytics
- Dashboards & Data Visualization
- Business/Customer Intelligence & Data Science
- iPaaS, Cloud/Data Integration, RPA & Tag Mgmt
- DMP
- Gov, Compliance & Privacy
- Customer Data Platform

Management
- Talent Mgmt
- Product Mgmt
- Budgeting & Finance
- Collaboration
- Projects & Workflow
- Agile & Lean Mgmt
- Vendor Analysis

Produced by Scott Brinker (@chiefmartec) and Blue Green Brands (@bluegreenbrands). blue green

Martec's Law

Technology changes exponentially (fast), yet organizations change logarithmically (slow).

Management must strategically choose which technological changes to embrace, given the highly constrained bandwidth for absorbing organizational changes.

change

fast

technology changes at an exponential rate

slow

organizations change at a logarithmic rate

this change gap widens over time, eventually requiring a "reset" of the organization

time

by Scott Brinker (@chiefmartec)
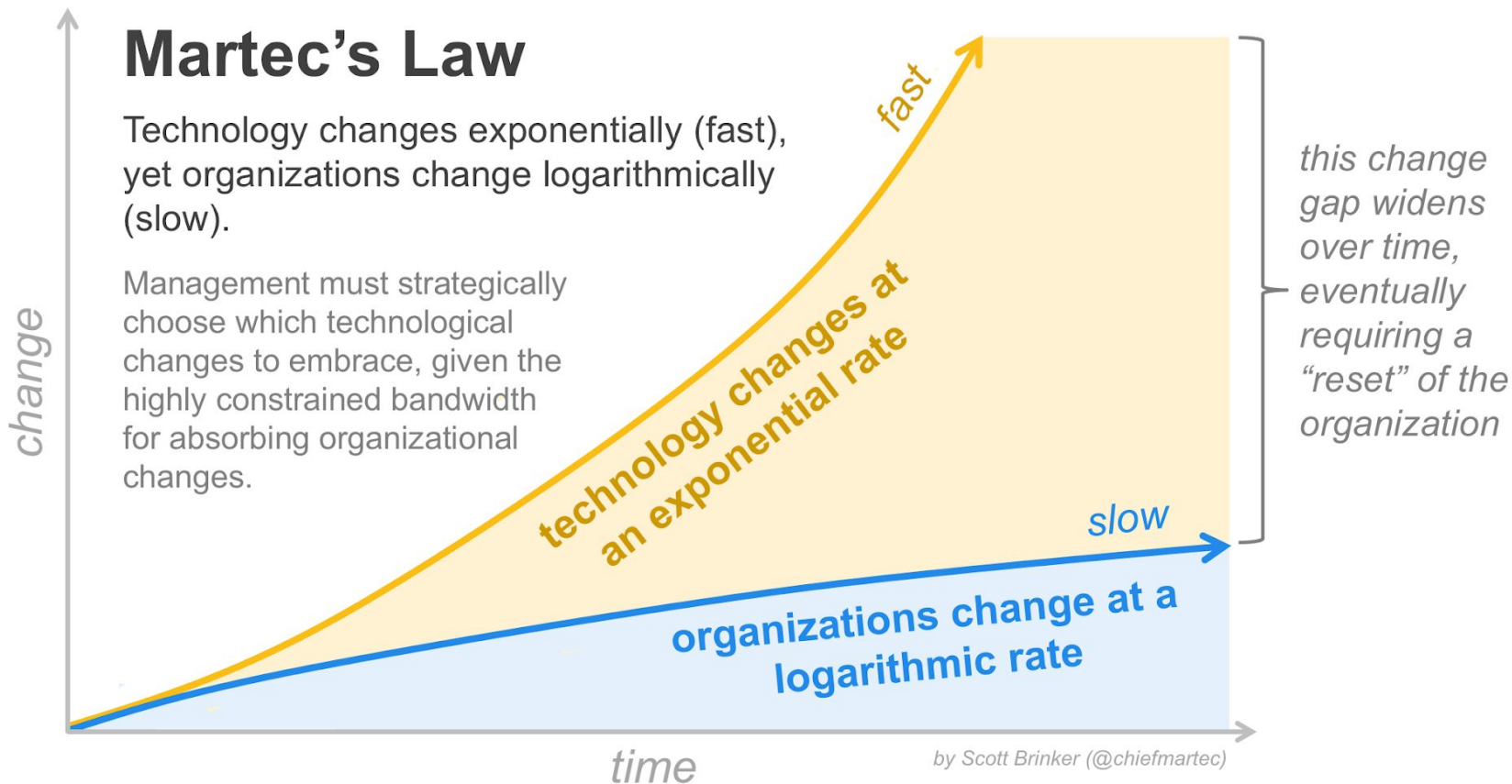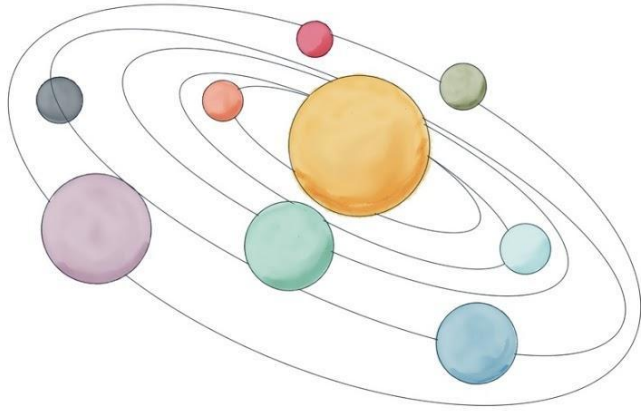
ecosystems

platforms and
networks as the
center of gravity

experts

blending software
and services to
deliver outcomes

engineers

developers and
citizen developers
shape the firm

4 Layers of Integration with SaaS Platforms

GOVERNANCE — grammar — certification, security reviews, access control, installation and onboarding, billing, support, privacy compliance

UI/UX — language — from embedding third-party features in the platform's UI to a standardized canvas for native-like third-party apps

WORKFLOW — verbs — from simple automated triggers and actions to more intelligent flows with conditional logic and interactive steps

DATA — nouns — from blind one-way push of data to intelligent two-way system-of-record synchronization; range of data models

cognitive level of integration

extent of integration

James Watt

James Watt [FRS](#) [FRSE](#) ([/wɒt/](#); 30 January 1736 (19 January 1736 [OS](#)) – 25 August 1819)[1] was a [Scottish inventor](#), mechanical engineer, and [chemist](#) who improved on [Thomas Newcomen](#)'s 1712 [Newcomen steam engine](#) with his [Watt steam engine](#) in 1776, which was fundamental to the changes brought by the [Industrial Revolution](#) in both his native Great Britain and the rest of the world.

He developed the concept of [horsepower](#),[2] and the [SI](#) unit of power, the [watt](#), was named after him.

Flywheel
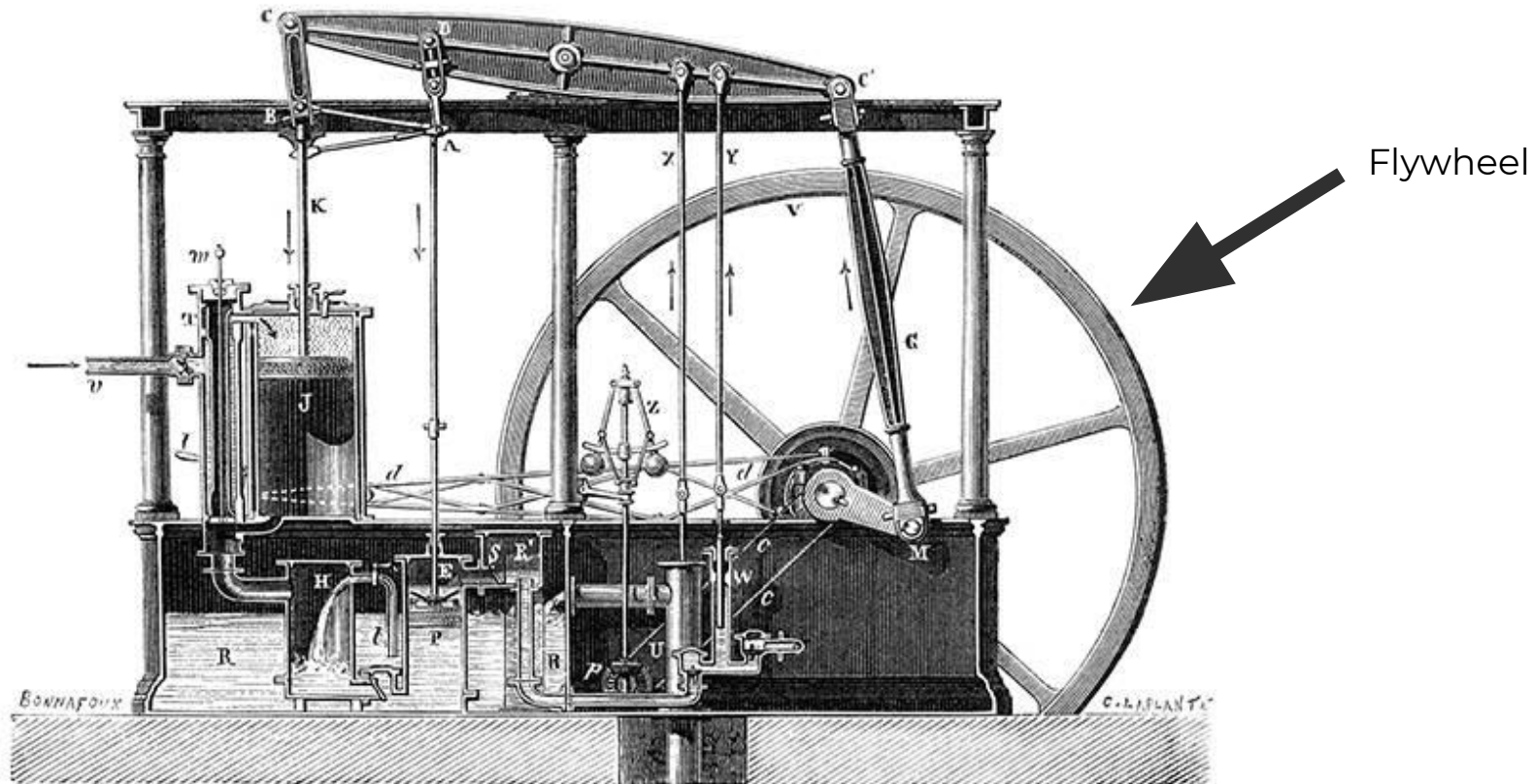
Fig. 59. — Machine à balancier de Watt.

v. Tuyau de prise de vapeur ; T, tiroir ; J, cylindre ; H, condenseur ; PE pompe d'épuisement ; WY pompe alimentaire de la chaudière ; UX pompe d'alimentation de la bâche R ; *p* Z régulateur ; *dd* excentrique ; ABCD parallélogramme ; GM bielle et manivelle ; V volant.

oldbookillustrations.com

James Watt
- Höyrykone 1765

Myyntiä kuvataan usein suppilolla (Funnel)
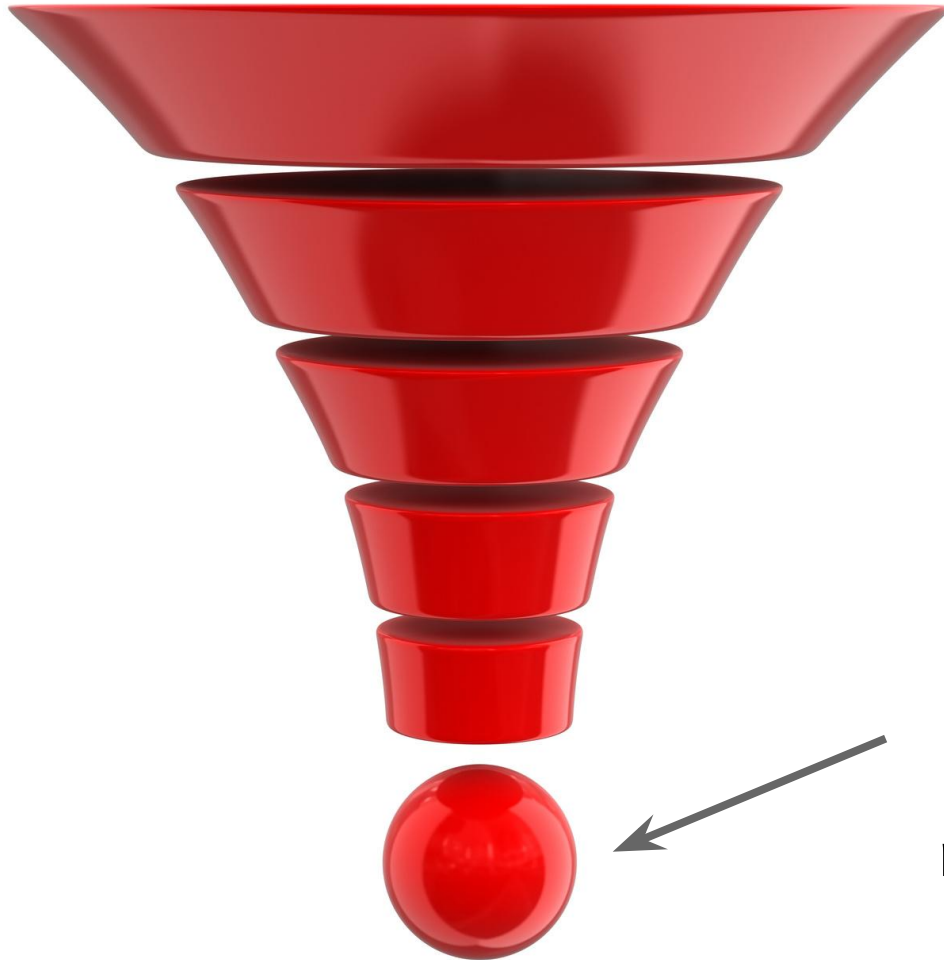
Asiakkaat, jotka tulevat suppilosta ulos vaikuttavat suuresti asiakkaisiin, jotka menevät suppilosta sisään.

3 tekijää, jotka määrittävät kuinka paljon voimaa yrityksesi vauhtipyörä sisältää

- Kuinka nopeasti pyörität pyörää?
- Kuinka paljon kitkaa pyörässäsi on?
- Kuinka pyörä on rakennettu - kuinka iso se on ja kuinka paljon se painaa

Liikettä lamaannuttavat voimat

- **Voimat tuhoavat toisensa**
  - Kun myynti ja markkinointi ja asiakaspalvelu on eri siiloissa tyytymättömien asiakkaiden määrä kasvaa joka hidastaa liikettä

- **Klassinen myynnin ja markkinoinnin kuilu hidastaa vauhtipyörää merkittävästi**
  - Markkinoinnin, myynnin ja aspan yhteinen tekeminen kiihdyttää pyörää

- **Siilojen poistaminen ja toimintojen yhdistäminen on avain**

Amazon.com Flywheel

- Lower Prices on More Offerings
- Increase Customer Visits
- Attract Third-Party Sellers
- Expand the Store, Extend Distribution
- Grow Revenues per Fixed Costs

Design New
Chips That
Customers Crave

Price High
before Competition
Catches Up

Intel
Flywheel

Reinvest Profits
into R&D

Drive Down
Unit Costs

Harvest
Profits Even
as Prices Fall
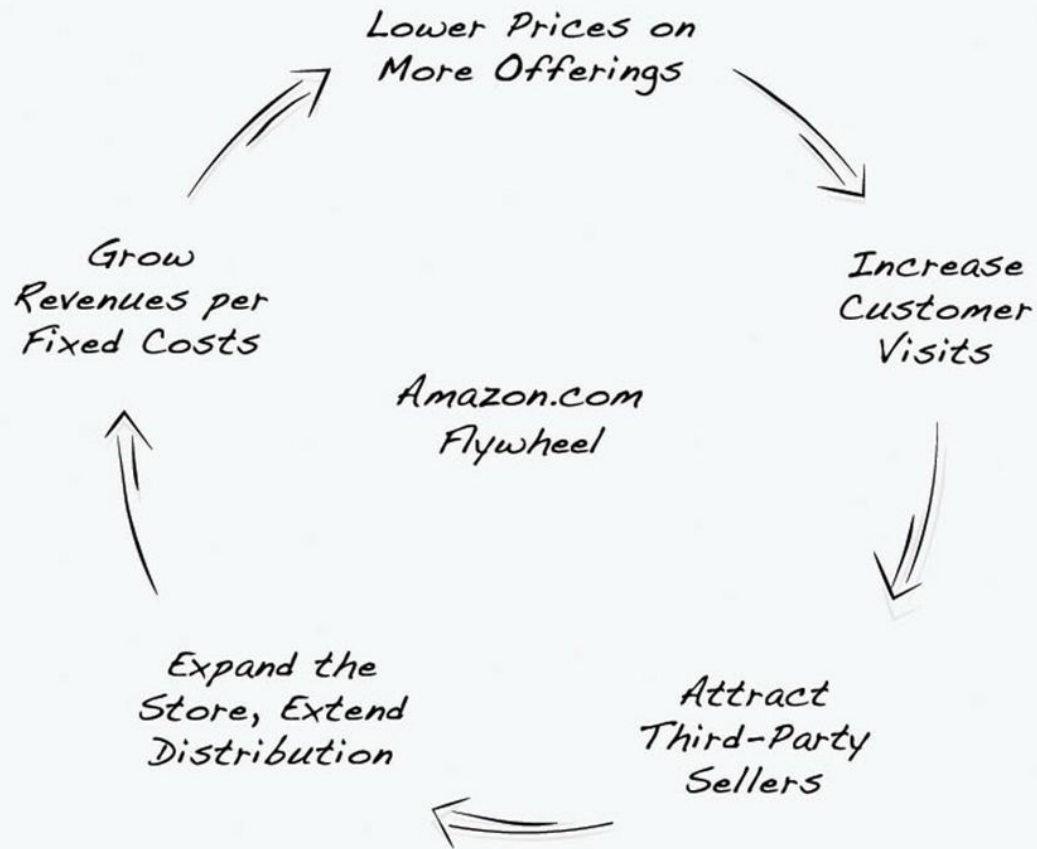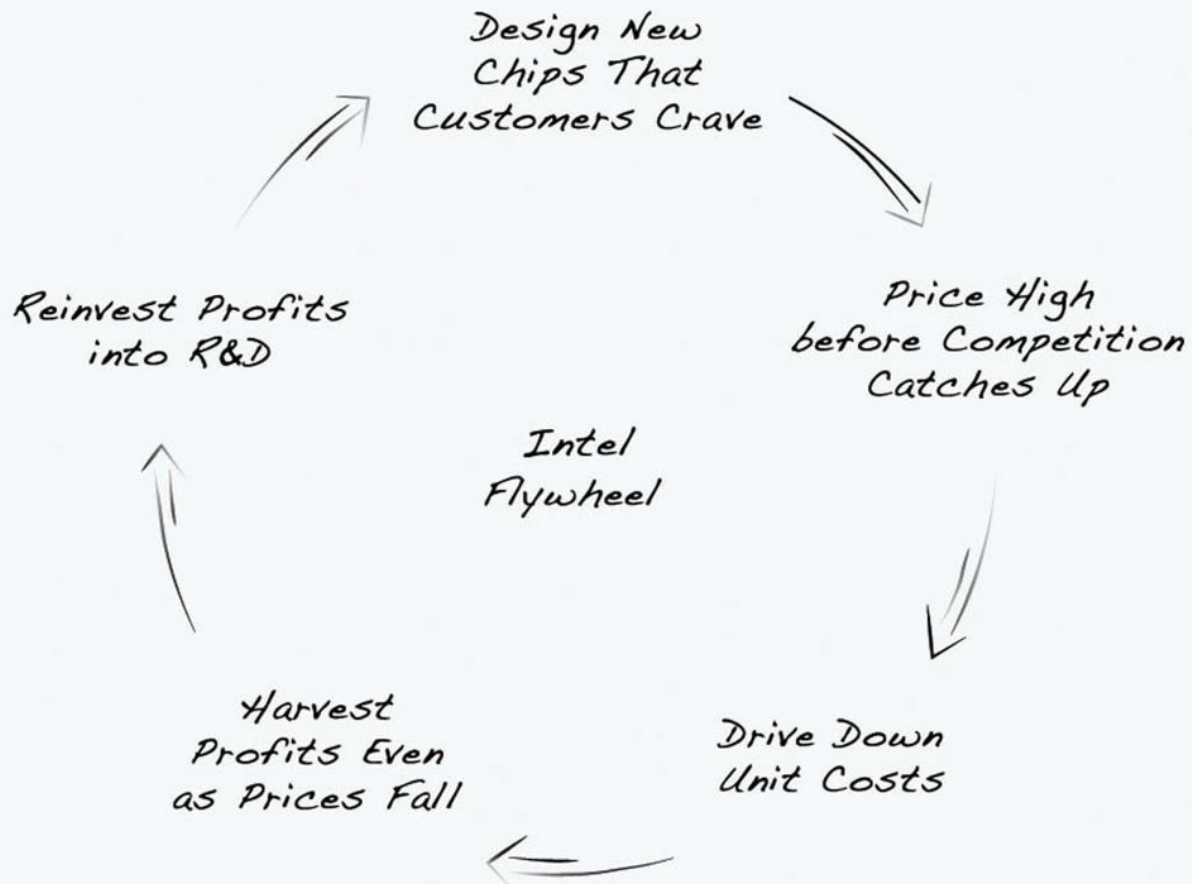
Flywheel - Vauhtipyörä

- Varastoi energiaa

- Mitä nopeampaa pyöritetään sen enemmän vauhtipyörä varastoi energiaa

- Mitä vähemmän kitkaa pyörässä on sen nopeampaa se pyörii ja sitä enemmän se tuottaa energiaa

- Vaikutusta myös siinä mitä suurempi pyörä on ja kuinka paljon se painaa

Asiakaskokemus?

Customer experience (CX) is the product of an interaction between an organization and a customer over the duration of their relationship.

Asiakaskokemuksen rakennuspalikat

Luottamuksen kriisi
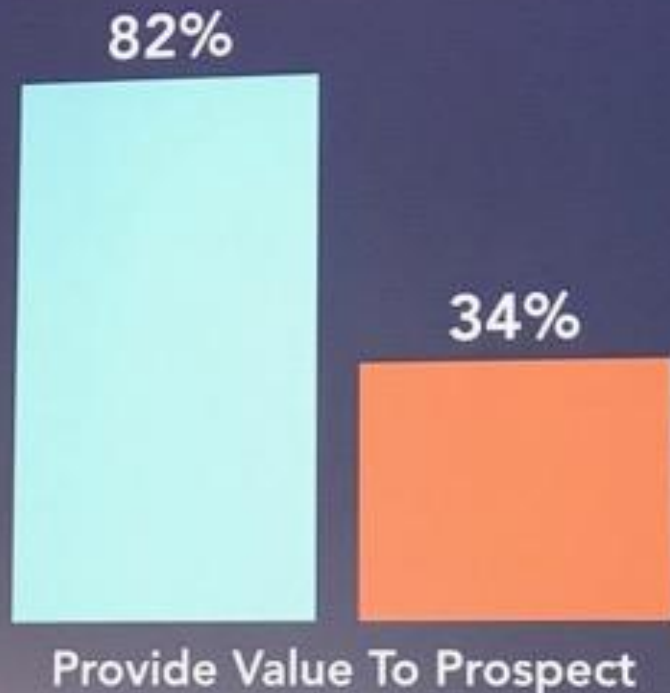
Trust in business has eroded

81% trust the advice of friends and families over business advice

55% don't trust companies they buy from as much as they used to

65% don't trust company press releases

65% do not trust advertisements, **71%** do not trust sponsored social media ads

Base: 2,319 consumers in US and UK
Source: HubSpot Research Trust Survey, Q1 2018

HubSpot Research

Marketing and Sales have a trust problem

Who do you consider
to be trustworthy?

Firefighters	61%
Doctors	57%
Nurses	48%
Scientists	46%
Teachers	46%
Police officers	39%
Dentists	37%
Professional musicians	20%
Software developers	19%
Accountants	19%
Lawyers	16%
Journalists	13%
Baristas	10%
Customer service representatives	10%
Salespeople	5%
Marketers	5%
Stockbrokers	4%
Car salespeople	3%
Politicians	3%
Lobbyists	2%
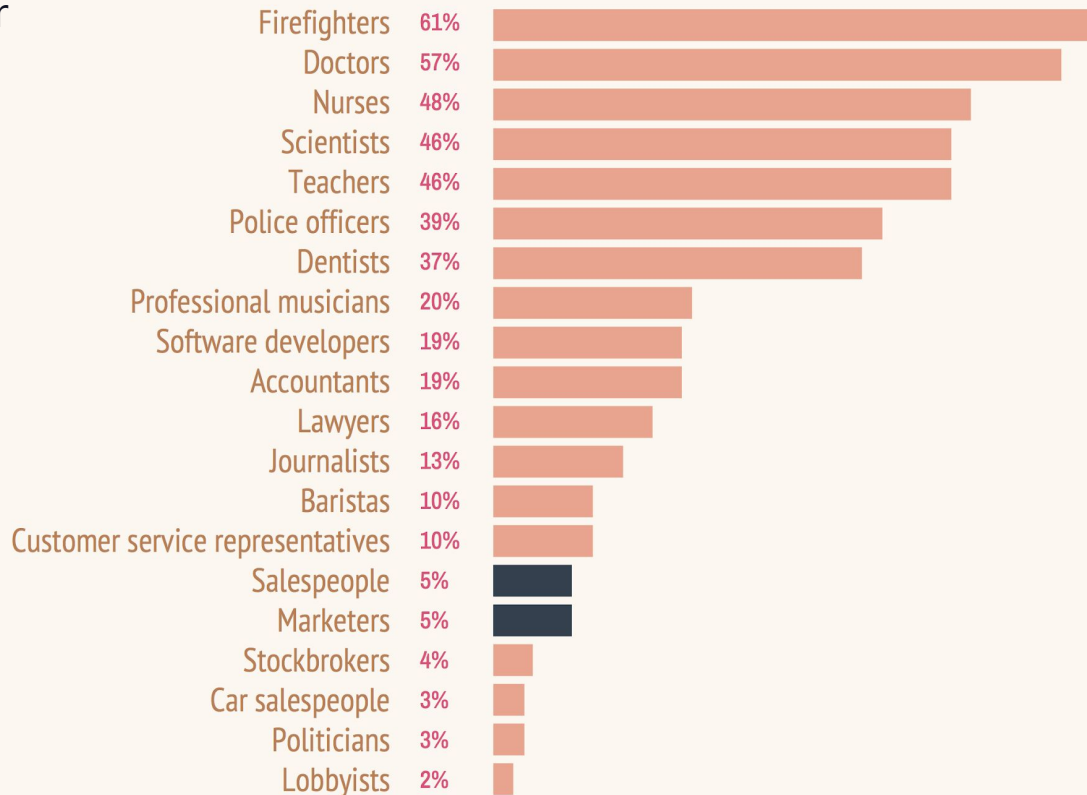
Base: 7,406 consumers in Argentina, Australia, Austria, Belgium, Brazil, Colombia,
Denmark, Finland, France, Germany, Hong Kong, India, Ireland, Japan, Mexico,
Netherlands, New Zealand, Singapore, Spain, Sweden, UK and US
Source: HubSpot Consumer Omnibus, Q4 2017

HubSpot Research

Consumers are impatient

Speed is everything to today's buyers, and patience wears out at 30 minutes.

82%

Percentage of consumers rating an "immediate" response as important/very important when they have a marketing or sales question
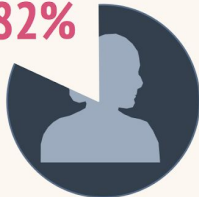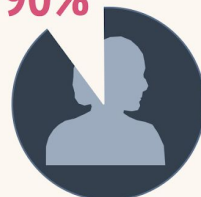
90%

Percentage of consumers rating an "immediate" response as important/very important when they have a support question

59%

75%
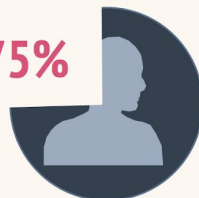
72%
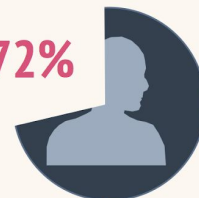
Marketing

Sales

Support

Percentage of consumers who define "immediate" as 30 minutes or less, by customer lifecycle stage

HubSpot Research

Poista kaikki kitka.

"I sell books"

"I sell what ever I want"

Tuote-aikakausi

Tuotteesi tai palvelusi on

10 x PAREMPI

kuin kilpailijoilla

Kokemus-aikakausi

Asiakkaasi kokemus on

10 x KEVYEMPI

kuin kilpailijoilla

ZALANDON SHOWROOM

Jokainen valitsee itse suhtautumisensa muutokseen

Tuote-aikakausi

Kokemus-aikakausi

Buyer → Seller

Buyer → Automation

20% Itsepalvelua

80% Itsepalvelua

sales communications
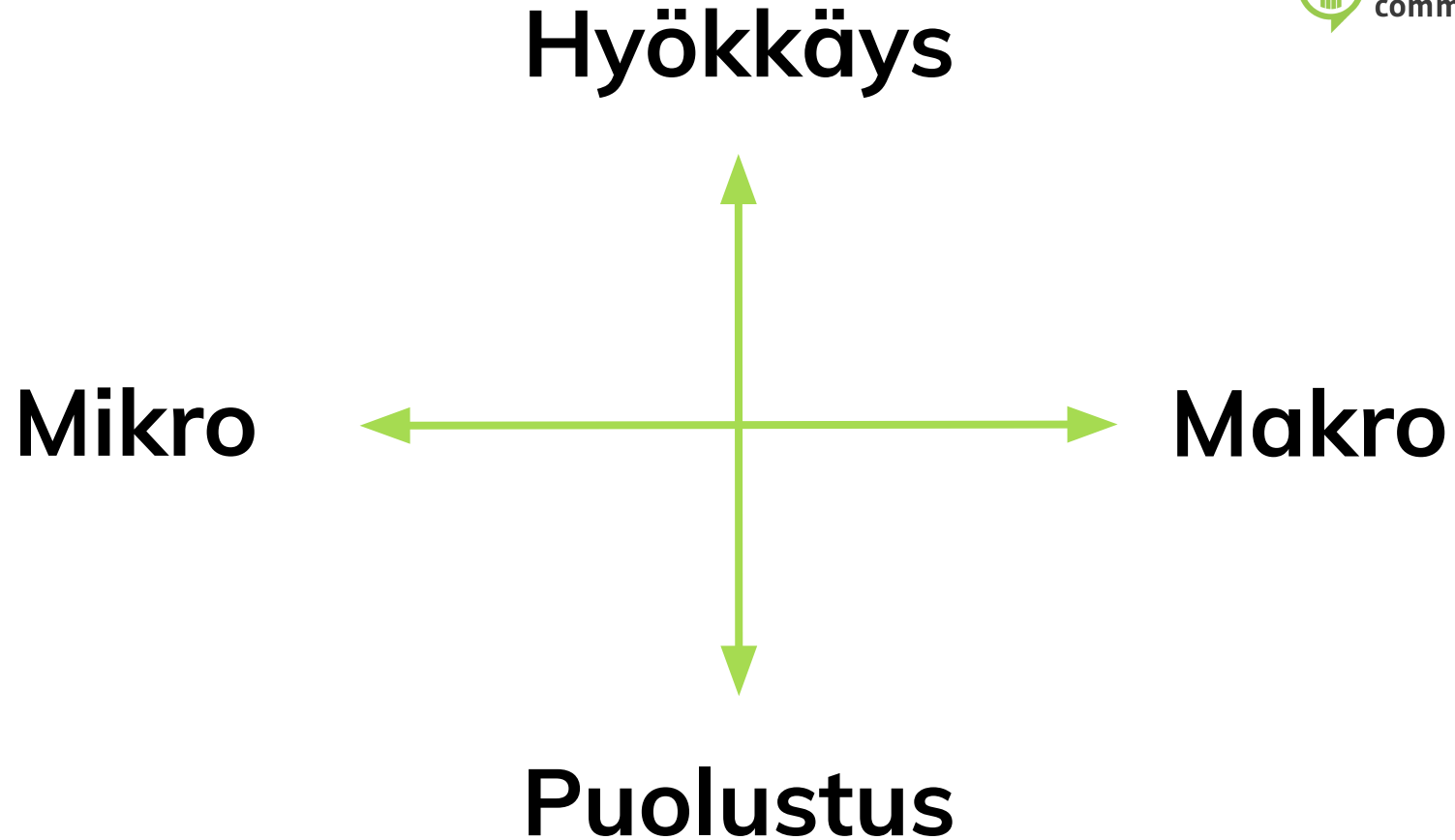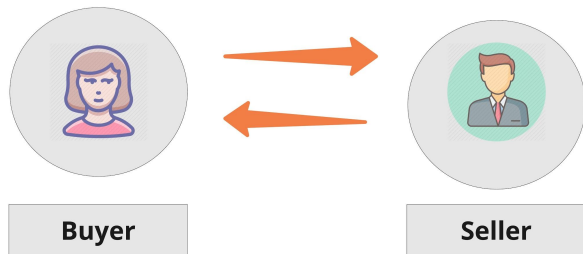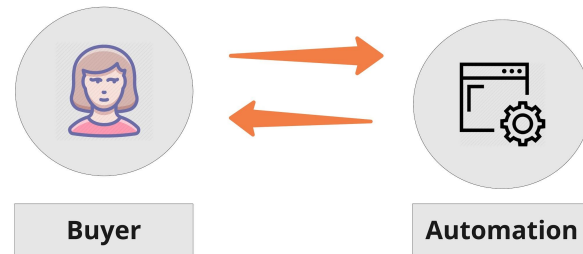
3 mukaan otettavaa asiaa

- Rakenna päätöksesi dataan ja tietoon

- Investoi myynnin, markkinoinnin ja asiakaspalvelun automatiikkaan

- Käytä kerättyä dataa kehittääksesi luodaksesi kitkattomia asiakaskokemuksia

Q&A

THE LEADING HUBSPOT CONSULTANCY IN FINLAND
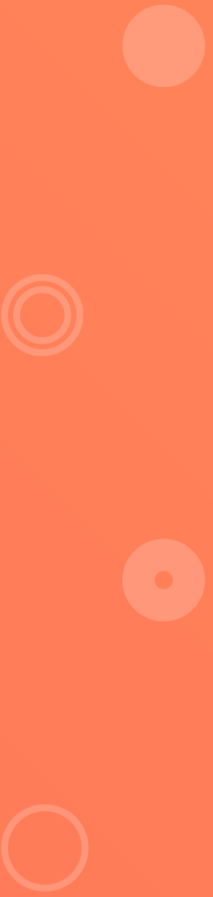
TODAY'S AGENDA

- Introduction to the HubSpot CRM

- Prospecting using HubSpot Sales

- Sales Reporting

- Integrations

- Takeaways

Why implement a CRM?

- Organize contact data

- Align your Sales and Marketing teams

- Forecast sales

- Scale your sales process

- Retain more customers and identify opportunities to upsell

Organizations that use CRMs have increased rates of customer retention and satisfaction

29%
Increase in sales by using a CRM

8-14%
Decrease in average sales cycle

34%
Increase in sales team productivity

6 steps to get started

1. Connect your email inbox and install the Sales extension
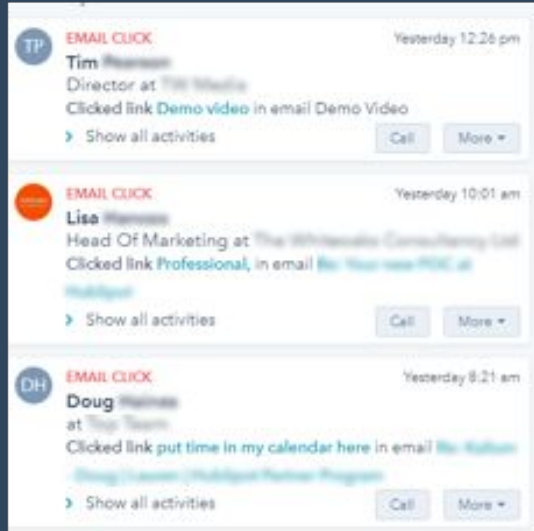
- No need to manually record emails

- Start tracking your conversations with prospects

- Know at any time the status of your deals or the last interaction with a customer

- Get open and click notifications - know who is really engaging with you

2. Import contacts

What would you like to import?

File from computer — Upload any CSV, XLS, or XLSX files with contact, company, deal, ticket, and product information.

Salesforce records — Import Leads, Contacts, Accounts, Opportunities, and Tasks into HubSpot.

An opt-out list — Import a list of people who are disqualified from receiving emails.

Contacts from Gmail — Import contacts straight from your Gmail inbox.

Need help getting started? View import guide

-   Store all of your contacts in one place

-   The more information we have here, the more strategic we can be in our outreach

-   Use the HubSpot mobile app and business card scanner to update records on the go

3. Create and save filters

- Segment contacts to arrive each day and action the most important contacts to follow up with

- Know who has replied/how many times they have been contacted

- Use a strategic approach based on different areas of focus

4. Define your deal stages

| MEETING SCHEDULED | 343,883 | MEETING DELIVERED | 120 | RENEWAL CONTRACT SENT | 78 | RENEWAL SIGNED | 40 | RENEWAL LOST | 7 | ACCOUNT CREATED | 4 |
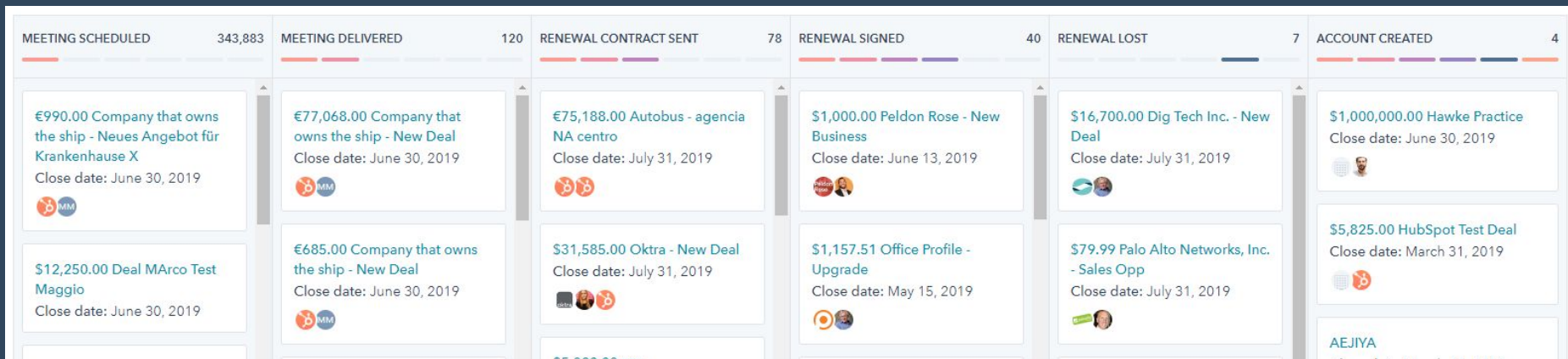
- Lay out your sales process visually

- See where each potential sale is at and identify roadblocks

- Give each stage a probability to forecast likelihood to close

5. Integrate your website

Tracking code | Advanced Tracking | Analytics views | Cookie Policy

Target domain

Domain
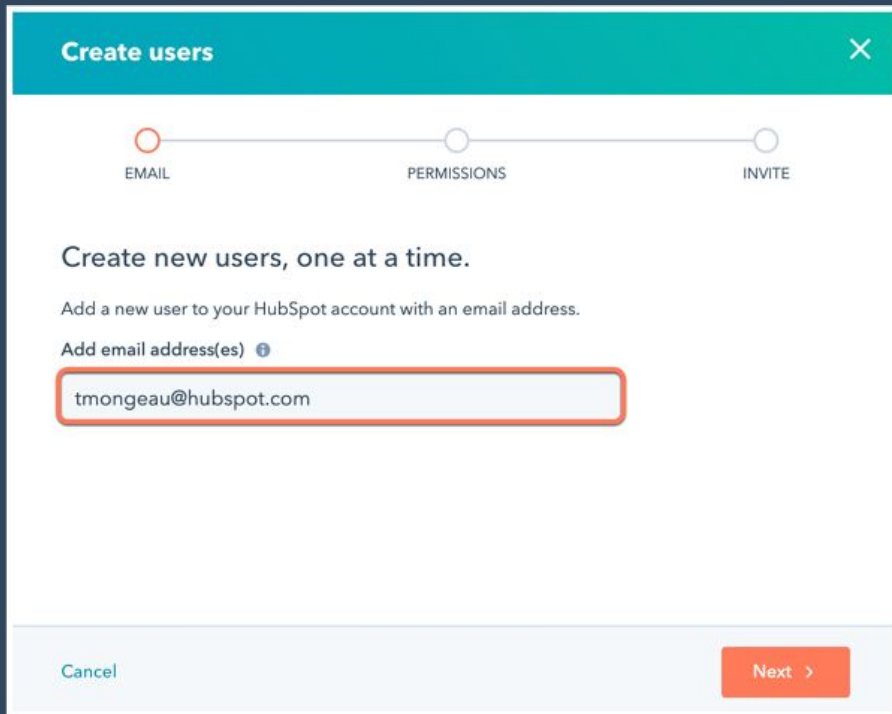
www.hubspot.com

- Track website activity

- Send form submissions (new contacts) directly into HubSpot
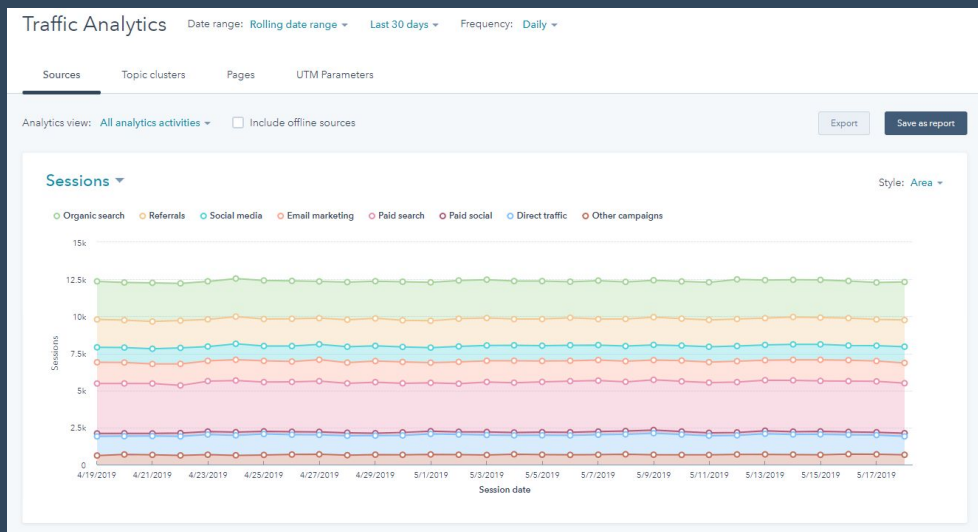
Traffic Analytics   Date range: Rolling date range ▾   Last 30 days ▾   Frequency: Daily ▾

Sources   Topic clusters   Pages   UTM Parameters

Analytics view: All analytics activities ▾   ☐ Include offline sources   Export   Save as report

Sessions ▾   Style: Area ▾

○ Organic search ○ Referrals ○ Social media ○ Email marketing ○ Paid search ○ Paid social ○ Direct traffic ○ Other campaigns

5. Invite your team

- Add as many users as you want and control their access to contacts, tools and features

- Continue to collaborate and always be keeping your data up to date

Sales

1. Remove friction from every part of the customer acquisition process

2. Use your sales process to turn your customers into promoters

Why your business needs a sales process

1. Scalable, predictable and an easy way to learn for new hires

2. Easier to measure which parts of the process work or don't work well

3. Makes it easier to quickly filter out bad-fit prospects

4. Saves time and enables you to qualify out

5. It's a simple, structured and pleasant buying experience for the customer

Prospecting using HubSpot Sales

50% of Sales Time is wasted on unproductive prospecting

Prospecting = $$\frac{\text{Research x Prioritisation x Preparation x Vidyard x Iterative Prospecting}}{\text{Lead List}}$$
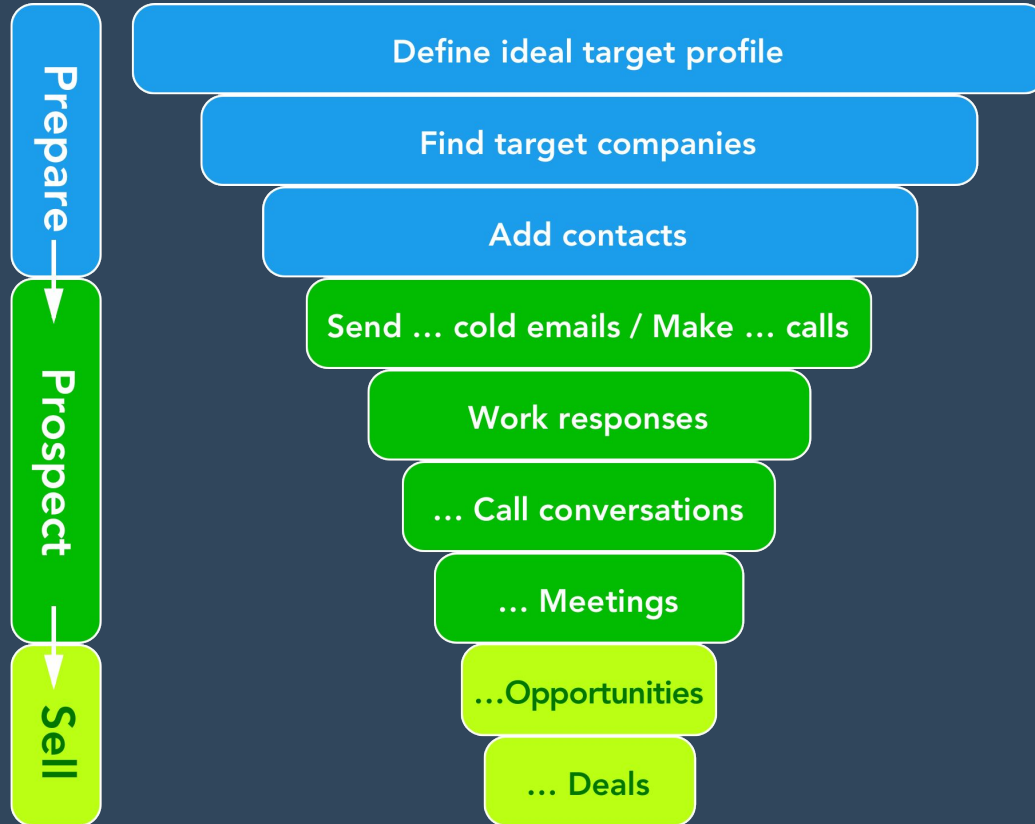
Managing leads: The Process

- QL - 5 min SLA to call back
- CRM Views
  - Recent Visit
  - Pricing Page
  - Recent QLs
- Prospecting Sequences
  - Recent Visits
  - Pricing Page View
  - Getting Started with HubSpot

Be Smart
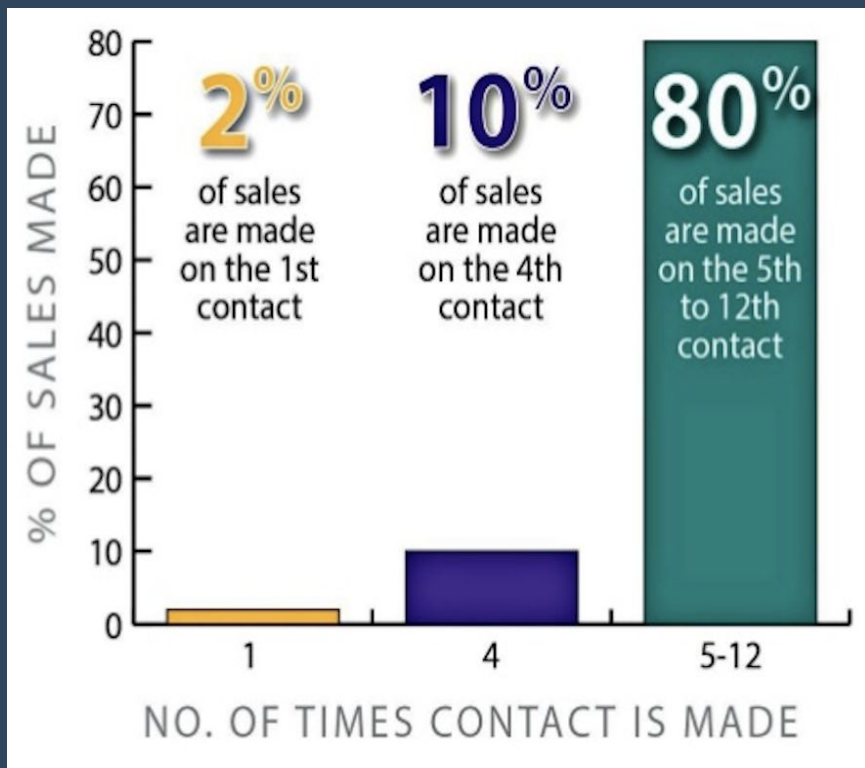
HubSpot Sequences tool

Available from Sales Starter
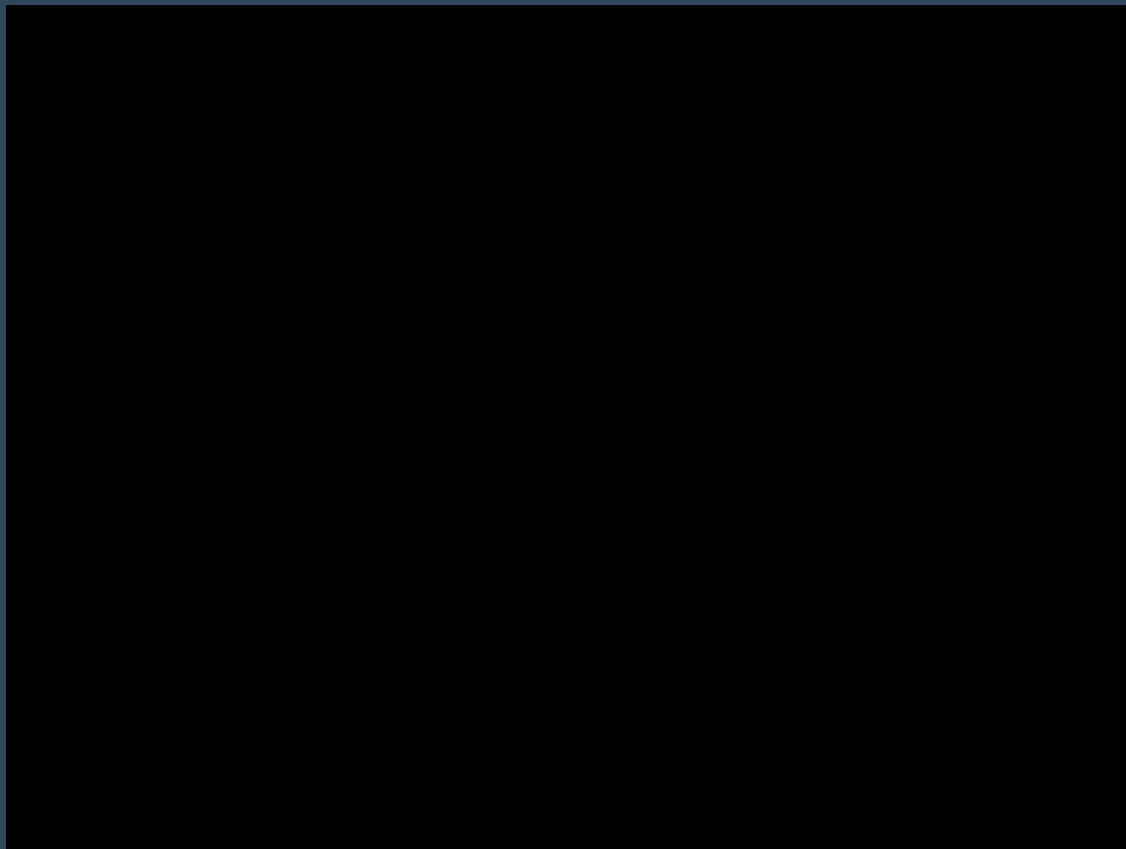
HubSpot Sequences tool - summary

- Create a cadence (timed intervals) for your outreach so you are contacting a company multiple times (based on the rating of the lead)

- Get suggestions - HubSpot automatically pulls in suggestions for content, such as recent twitter posts from that company

- Use personalisation tokens - using the information you already know about the prospect, save time and ensure your outreach feels personal

- Insert tasks and call reminders - calling is not dead yet! Never forget to follow up on hot prospects

Prospecting Sequence

Activity	Process
High / Med Rated Leads	10 attempts: Calls / VM's / VidYards + Emails (Sequences)
Low Rated	5 Attempts: 2 Calls / VM's / VidYards + 3 Emails (Sequence)
New Leads / Conversions	Call within 5m: Connect / VM / VidYards + Enrol in a sequence
Site Revisits	Check their timeline & when you last contacted. If reasonable space of time - reach out and connect

HubSpot Quotes and Products tools

Available with Sales Professional and Enterprise
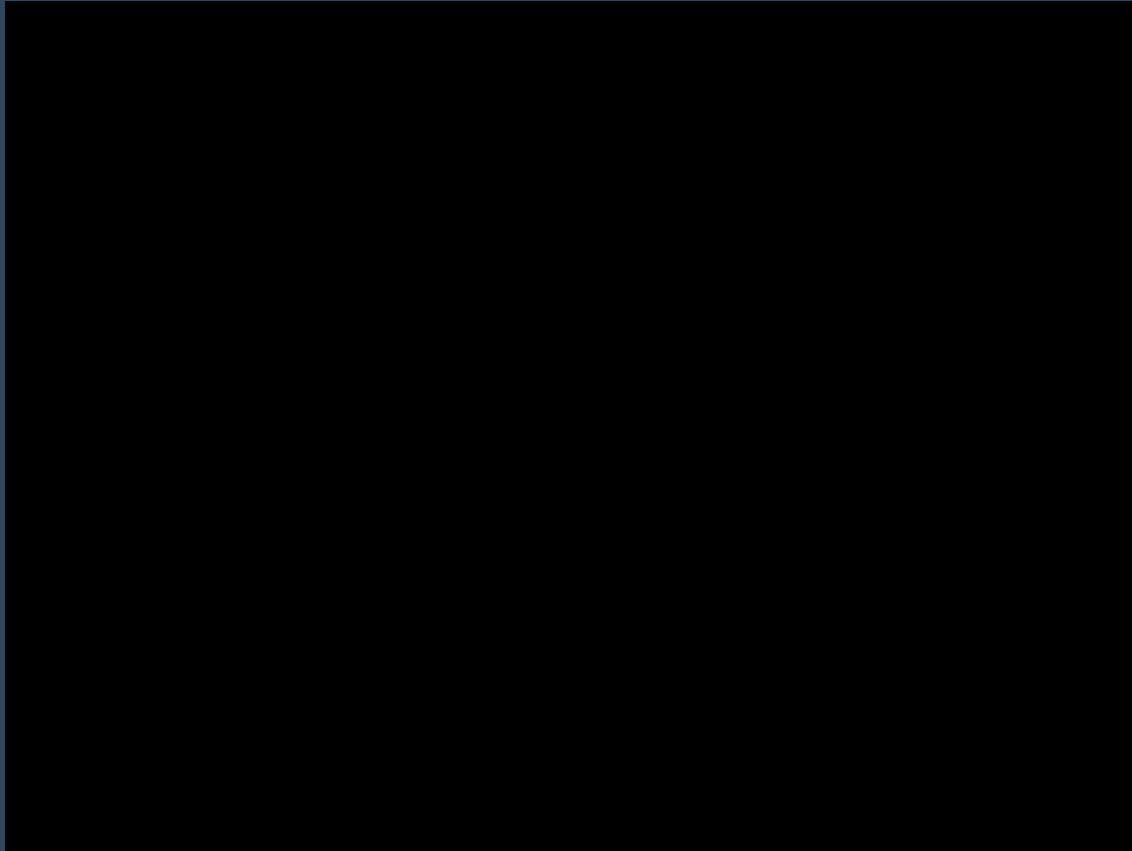
HubSpot Products and Quotes tools - summary

- Import products and services into HubSpot to save time entering and building deal information and quotes

- Start to measure what you sell more of - and understand why!

- Integrate with your Ecommerce store to create abandoned cart campaigns or resell / upsell to your existing customers

- Have more control over what goes out - are your sales people discount happy? Check your quotes before they go to prospects

- Create a seamless buying experience for your customer - they can see exactly what they are purchasing and sign in real time

Sales Metrics

"What gets measured gets managed"

- Peter Drucker
  The Practice of Management

WHAT ARE YOUR SALES CONVERSION RATES?

100 Leads

30 Connects

10 Exploratory

4 Goal Setting

2 Demos

1 Sale
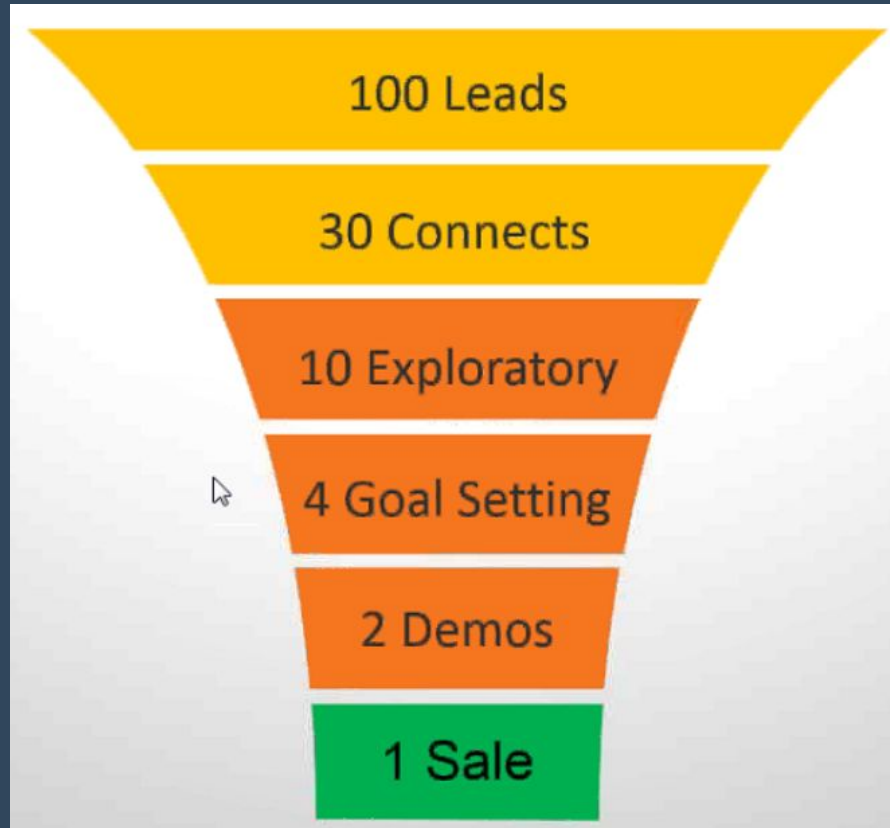
Deal Forecast by Owner ⓘ

Date range: From 11/1/2017 to 12/31/2017 | Teams: Biglytics Sales | Edit report settings

● Created ● Meeting Scheduled ● Meeting Delivered ● Define Value ● Renewal Contract Sent ● Demonstration of Value ● Renewal Signed ● Achieve Business Buy-In ● Negotiation
● Contract Sent ● Closed Won

Owner	Amount
Sheila Kraft	$34,348
Sean Banks	$30,031.10
Seth Lockheart	$37,162.90
Sundeep Shipoor	$34,712.30
Sally Smiles	$26,884.10
Steve Publick	
Shelly Bucks	$17,704
Sam Widgets	$9,392
Sally Page	$18,179.50

0k   5k   10k   15k   20k   25k   30k   35

Actions ▾
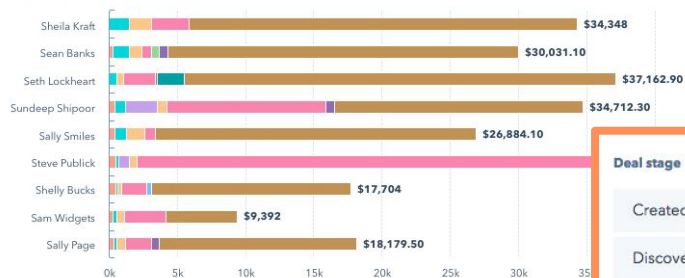
Deal stage	Count of Deals	Conversion
Created	389	61.95%
Discovery	241	88.38%
Define Value	213	77.46%
Demonstration of Value	165	89.7%
Achieve Business Buy-In	148	94.59%
Negotiation	140	92.14%
Contract Sent	129	94.57%
Closed Won	122	
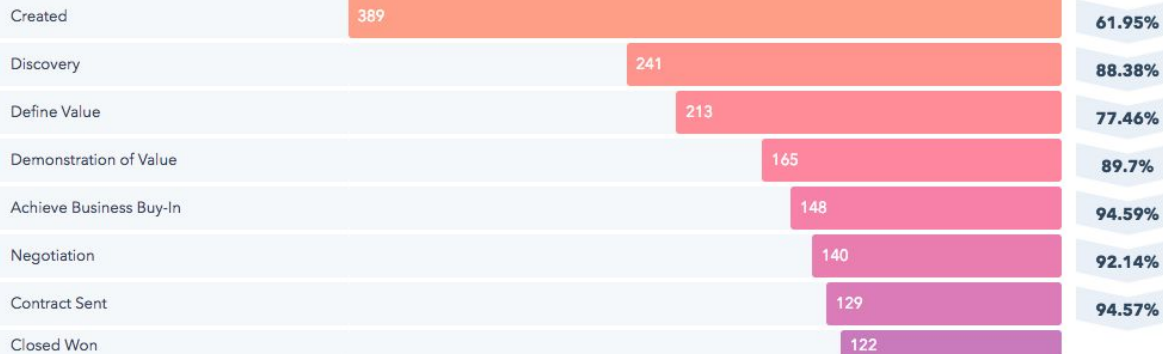
Deal Forecast ⓘ

Date range: This year so far

$3,003,335.30

QUOTA $1,440,500

$1,900,425 $216,000 $414,808.80 $306,453.30

CLOSED WON (100%)   RENEWAL C... ACHIEVE BUSINESS BUY-I... DEFINE VALUE (3...
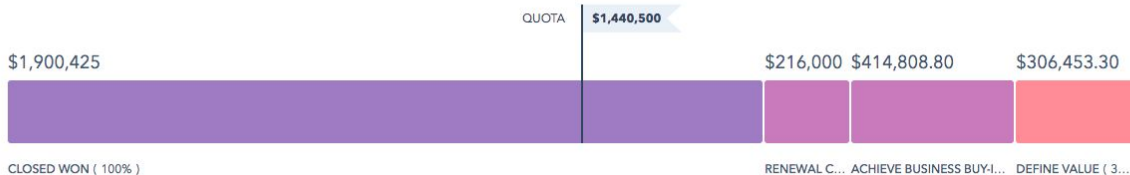
EXAMPLE OF B2B SALES PIPELINE

| CREATED 142	DISCOVERY 153	DEFINE VALUE 173	DEMONSTRATION OF VALUE 47	ACHIEVE BUSINESS BUY-IN 197	NEGOTIATION 219	CONTRACT SENT
$2,719 Red Deal for Mohr - Schuppe Close date: 10 January 2018	$800,000 deal test Close date: 31 January 2018	$30,000 GearBit Software Close date: 31 March 2018	$38,000 zunplex.com - Monthly Reports Consulting -- Close date: 20 July 2018	$1,500 Seller test report 2 - New Deal Close date: 31 January 2018	$26,800 Deal Name - company Close date: 28 February 2018	$30,350 SimpleNexus - New Deal Close date: 31 March 2018
$1,965 Ivory Deal for Pfeffer, Boehm and Dickinson Close date: 10 January 2018	$5 Test Close date: 31 October 2017	$25,610 jerry's deal Close date: 28 February 2018	$10,000 Talkspirit Close date: 31 January 2018	$1,810 Delmotte Pty Ltd - New Deal Close date: 31 January 2018	$4,050 Plum Deal for Kautzer, Brekke and Prohaska Close date: 10 November 2...	$1,400 Violet Deal for Lowe - Altenwerth Close date: 16 February 2018
$1,747 Teal Deal for Swaniawski Inc Close date: 7 January 2018	$8,000 Web redesign Close date: 31 October 2017	$22,000 PlanNet Close date: 27 February 2018	$1,000 Nueva Oportunidad Close date: 31 January 2018	$50,000 test Close date: 31 January 2018	$1,350 Ivory Deal for Fadel, Moore and Koelpin Close date: 9 November 2017	$6,400 vaia-core.com - New Deal Close date: 31 January 2018
$265 Grey Deal for Schiller, Leuschke and Douglas Close date: 5 January 2018	Prospect #1 Close date: 31 October 2017	$0 vaia-core.com - Nuevo negocio Close date: 31 January 2018	$1 Test Close date: 31 January 2018	$450,000 Fuchsia Deal for Bergstrom, Larkin and Thiel Close date: 15 January 2018	$1,072 Tan Deal for Kozey - Feeney Close date: 9 November 2017	$116,200 Example Deal Close date: 31 January 2018
$4,800 Red Deal for Koss, Beatty and Schulist Close date: 5 January 2018	test Close date: 31 October 2017	$6,000 test Close date: 31 January 2018	$256 Mint Green Deal for Bahringer, Walker and Wunsch Close date: 11 January 2018	$3,000 Lavender Deal for Mitchell, Murray and Effertz Close date: 11 January 2018	$2,195 Grey Deal for Larkin and Sons Close date: 8 November 2017	$500 Hubspot New Deal Close date: 31 January 2018
$945 Sky Blue Deal for Hilll and Sons Close date: 5 January 2018	$3,000 XYZ Close date: 31 October 2017	$10,000 Biocity Pharmaceuticals - Privacy Curtains Close date: 31 January 2018	$500 test Close date: 31 December 2...	Google Office - 5 employees Close date: 31 December 2...	$1,463 Orchid Deal for Kreiger, Ratke and Klein Close date: 6 November 2017	$3,410 Andrew Demo Close date: 31 January 2018
	$1,801 Green Deal for Kutch - Wunsch Close date: 31 October 2017	$10,000 test Close date: 31 January 2018	tesyt Close date: 31 December 2...	The Home Depot - Strategy		$1,860 vaia-core.com - New Deal
Total: $1,191,045	Total: $1,457,580.68	Total: $4,129,171	Total: $2,392,153	Total: $8,088,588	Total: $117,034,547	Total: $8,917,835

Integrations

Video Prospecting

1. 82% of all consumer internet traffic will come from video by 2020

2. Reduce (cold) prospecting barrier

3. Very easy way to prospect → Stand out → Immediately add value to potential end clients

Vidyard

- The easiest way to generate new business opportunities → Selling like a marketer

- 300% growth in prospecting response rate

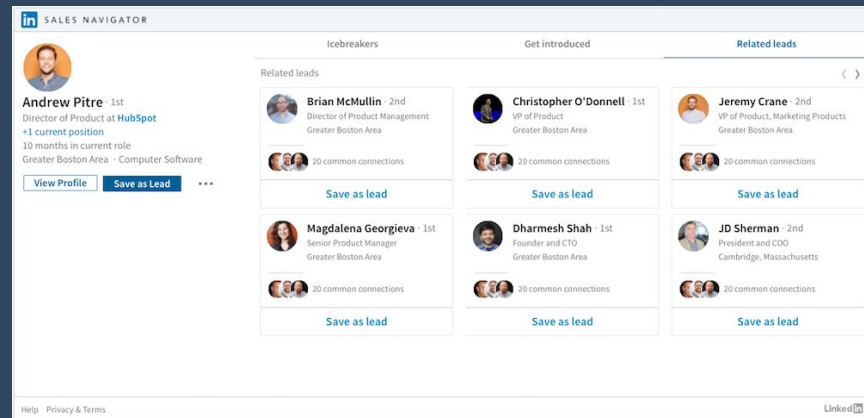- Video - unique approach (for now!) Be an early adapter
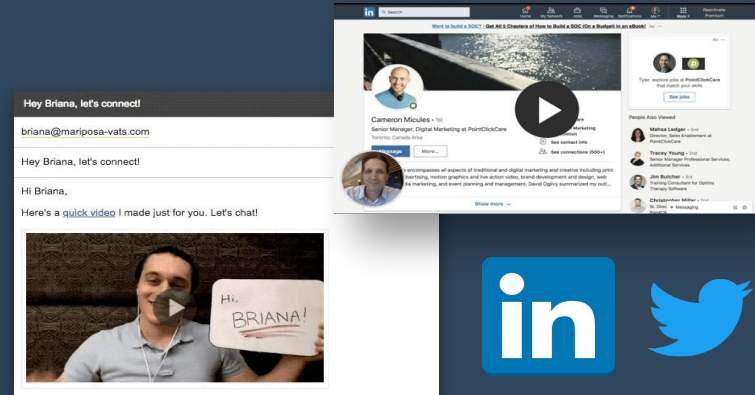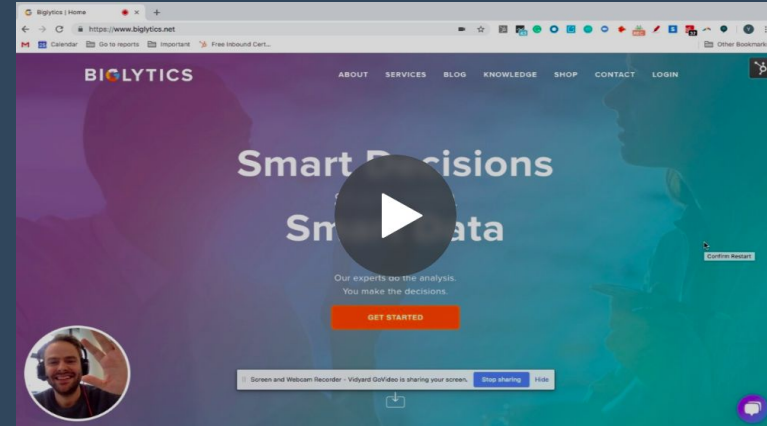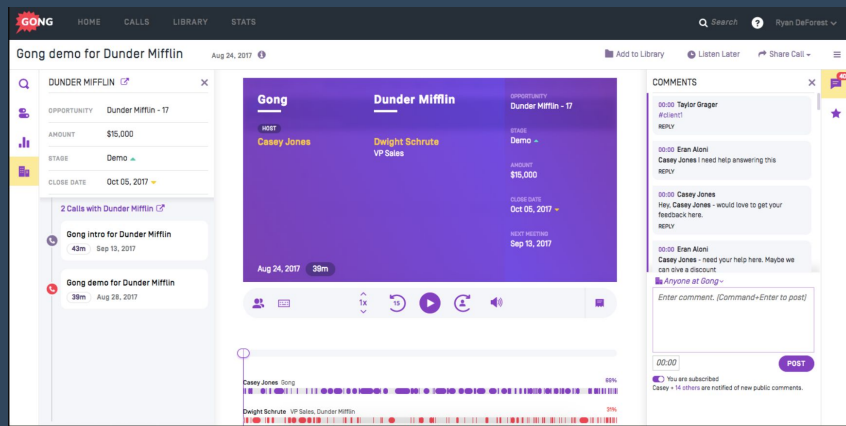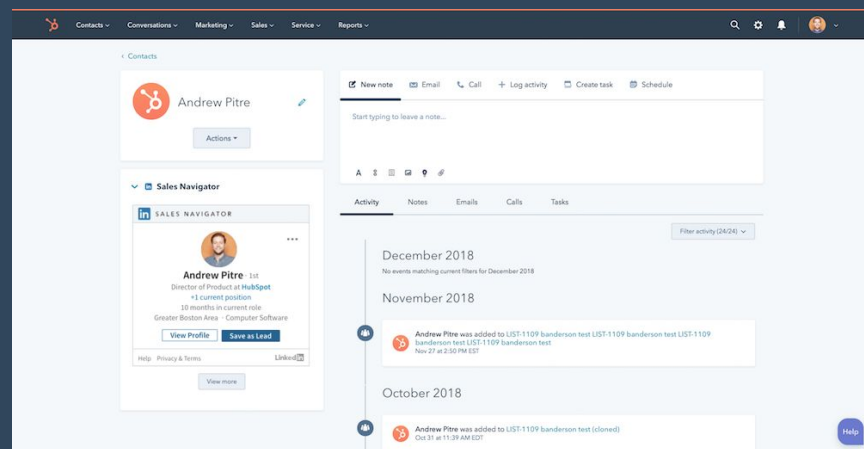
Gong

- Analyzes HubSpot dialer calls and shows you what separates your best reps from the rest
- Captures every customer call, web conference, and email.
- Direct insight into how deals are progressing and what you could be doing better.
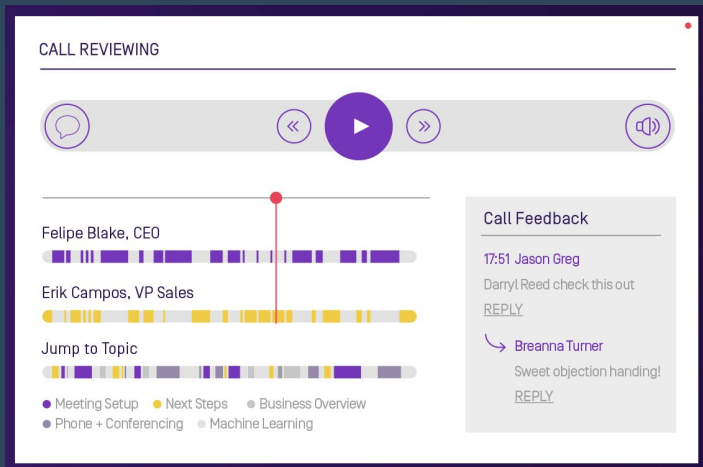
LinkedIn Sales Navigator

- Bring information from Sales Nav directly into HubSpot

- Icebreakers - view shared connections, experiences, and interests, plus a link to the contact's recent activity stream.

- Related leads - quickly find other leads at the same company and add them to your Sales Navigator leads list.

Thank You