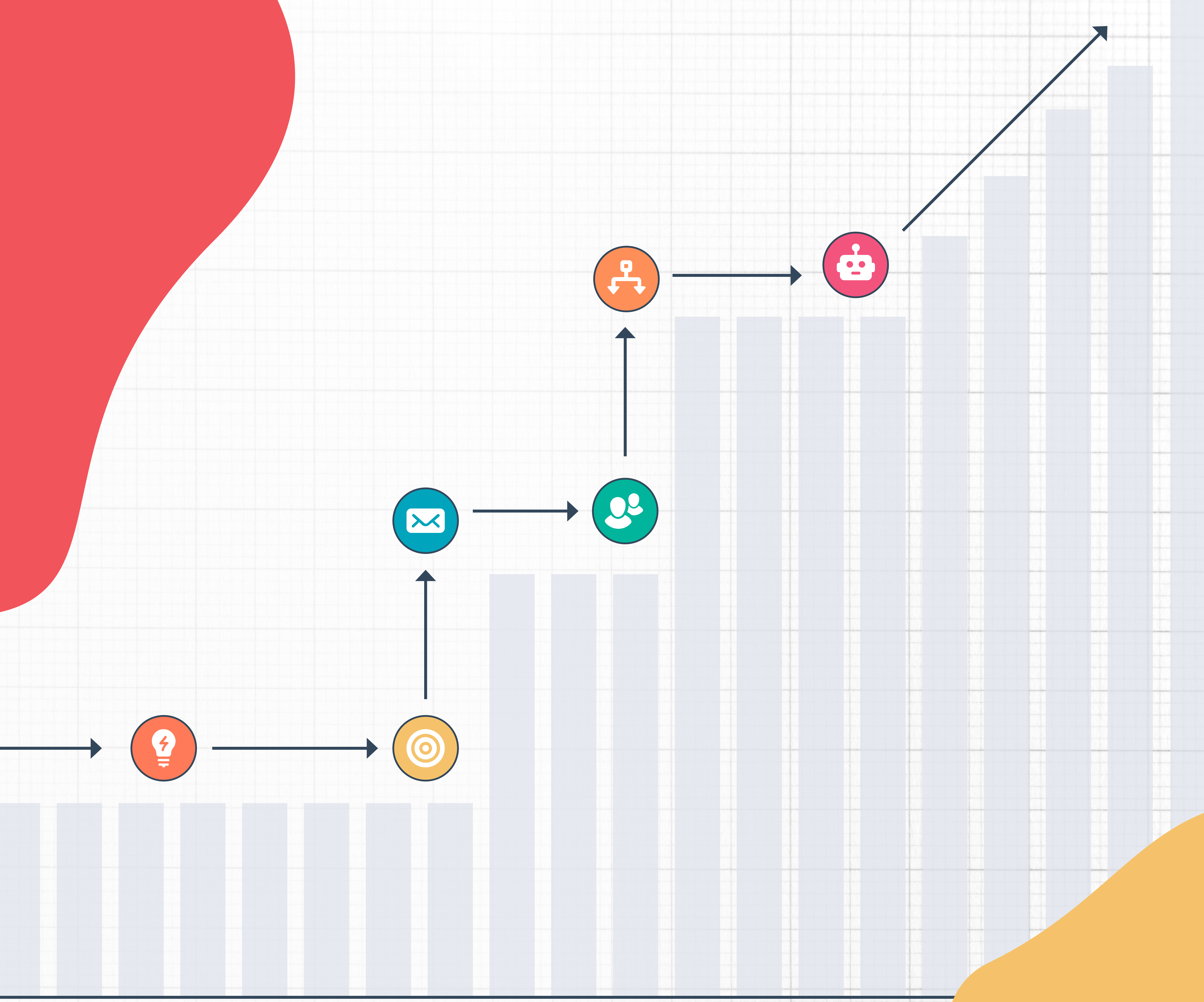


HubSpot

HubSpot Blueprints:

Using Automation to Solve 5 of the Biggest Problems that Businesses Face

Table of Contents

Introduction

As you scale, it gets harder to actually deliver what you set out to build — a great customer experience.

What you've done has gotten you where you are.
Now, though, you have more folks trying to solve for the customer than before.

Different strategies for different teams.
Different teams for different tools.
Different tools for different experiences.

Siloed systems and management misalignment turn into friction.
Friction that your customers — the folks you set out to solve for in the first place — feel.
It doesn't have to be this way.

Remarkable automation unifies teams. It aligns teams around a single source of truth. One unified and reliable view of your customer. Everything your team needs to create the experience your customers deserve from first purchase, to most recent customer success interaction.

To help your teams to market, sell, and service customers at scale, we've created blueprints that show how the HubSpot Flywheel Team uses automation to create their own great customer experience. We hope you'll put them to great use at your own organization.

Chapter 1

How to Scale Sales Prospecting with Email Automation

Identify your high-intent web pages and set up automation to trigger when a ready-to-buy contact lands on them.

Goal

Convert more contacts from your website while saving your sales organization a significant amount of time.

Challenge

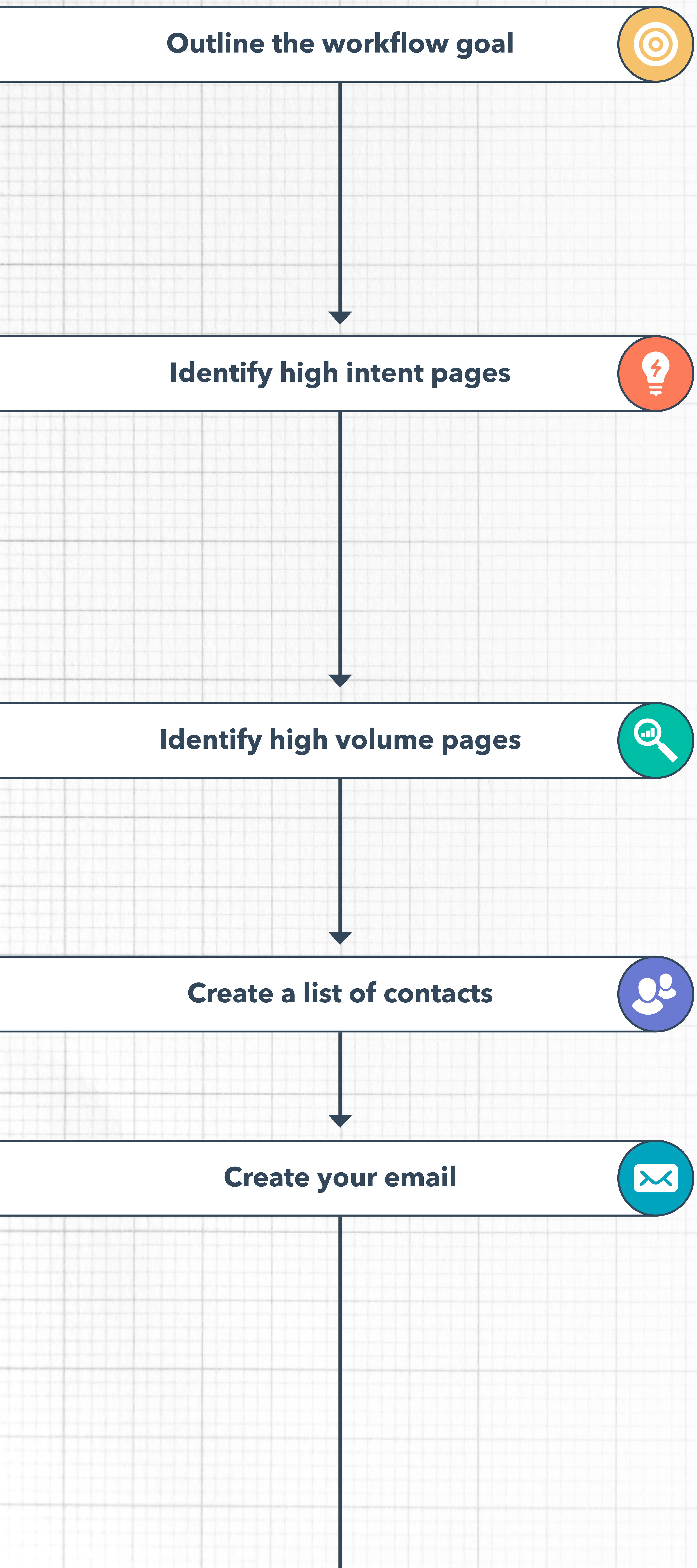
If you're a marketer, you already know all contacts that visit your website are a good fit to talk to Sales. But consider this: while the sales reps in your company are trying to prioritize daily outreach to the best fit companies first, contacts in your database are visiting high intent pages on your website - think product overview or pricing pages - but don't end up converting. How can you help connect these qualified prospects with the right sales rep?

Solution

You can use workflows to send personalized, automated emails to contacts who don't convert shortly after visiting a high intent page. Rather than send these emails from your Marketing team, have these emails come directly from Sales reps. These emails should include a meeting link to the rep's calendar to make it easy for your prospects and leads to connect.

This type of automation solves for the customer by giving them an easy path to learn more from a real human.

Full Blueprint



1. **Outline the goal of this automation.** What specific action are you trying to drive your database to take? Do you want them to fill out a demo form? Do you want them to call your sales line? Make sure you clearly understand your goal.

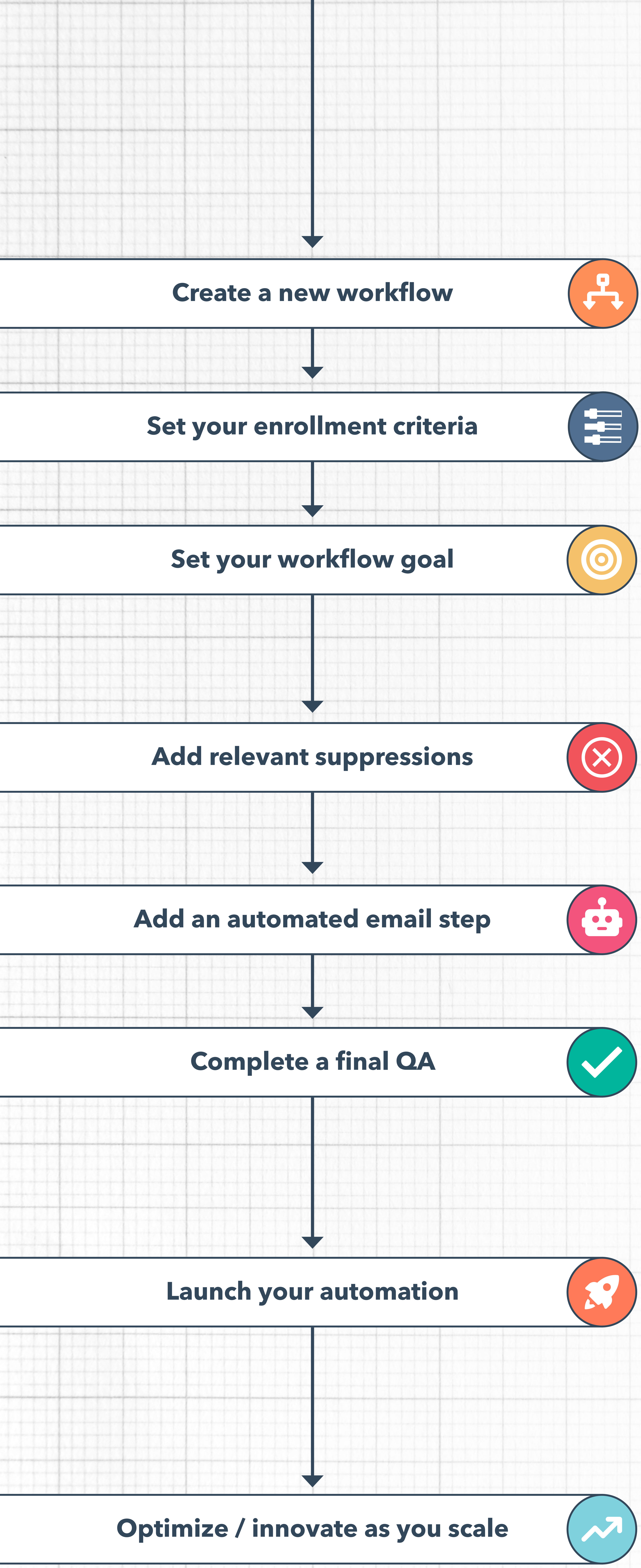
2. **Identify high intent website pages.** We like to think of "high intent" as a page that would designate the visitor as someone who is clearly considering your product or service. Which pages contain product or service information? Which pages contain pricing information? Etc.

3. **Look at the volume of contacts in your database viewing each of these pages you outline in step 1.** Of those pages, which have the highest volume?

4. **Create a list of contacts who have viewed one of your high intent pages with the highest volume.**

5. **Create your external email.** Remind yourself of the goal you set for your automation. How will this email drive the recipient to complete that goal? Pro tip: put yourself in the recipient's shoes. Based on the page they were viewing, what stopped them from converting? What information do they need that they didn't receive?

What objections do they have? This exercise can mean the difference between a good email and a great email.



6. **Workflow time.**
   Create a new workflow.

7. **Set your enrollment criteria using the list you created above.**

8. **Set your workflow goal using the goal you outlined for your automation.**
   This will help you track the success of this automation.

9. **Add any relevant suppressions.**
   Unsubscribes, language, specific segments, etc.

10. **Add an automated email step.**
    Select the email you created above.

11. **Complete a final QA.**
    Walk through the entire workflow from enrollments to goal to suppressions to your email. Double check everything is set up as expected.

12. **Launch your automation.**
    3... 2...1... Launch! Once you've double (and even triple) checked everything, turn your workflow on and watch the magic happen.

13. **Optimize and innovate the automation as you scale.**
    Rinse and repeat for additional high intent actions.

Chapter 1 Take-away

How to Scale Sales Prospecting with Email Automation

- Outline the workflow goal
- Identify high intent website pages
- Identify high volume website pages
- Create a list of contacts who have viewed one of these pages
- Create your email
- Create a new workflow
- Set your enrollment criteria using the list you created
- Set your workflow goal
- Add relevant suppressions
- Add an automated email step
- Complete a final QA
- Launch your automation
- Optimize and innovate as you scale

Chapter 2

How To Enable Better Sales Conversations With Workflows

Increase your likelihood of closing business while creating a more timely and relevant sales process.

Goal

Improve work rates against your most qualified leads while reducing the time it takes for reps to work them.

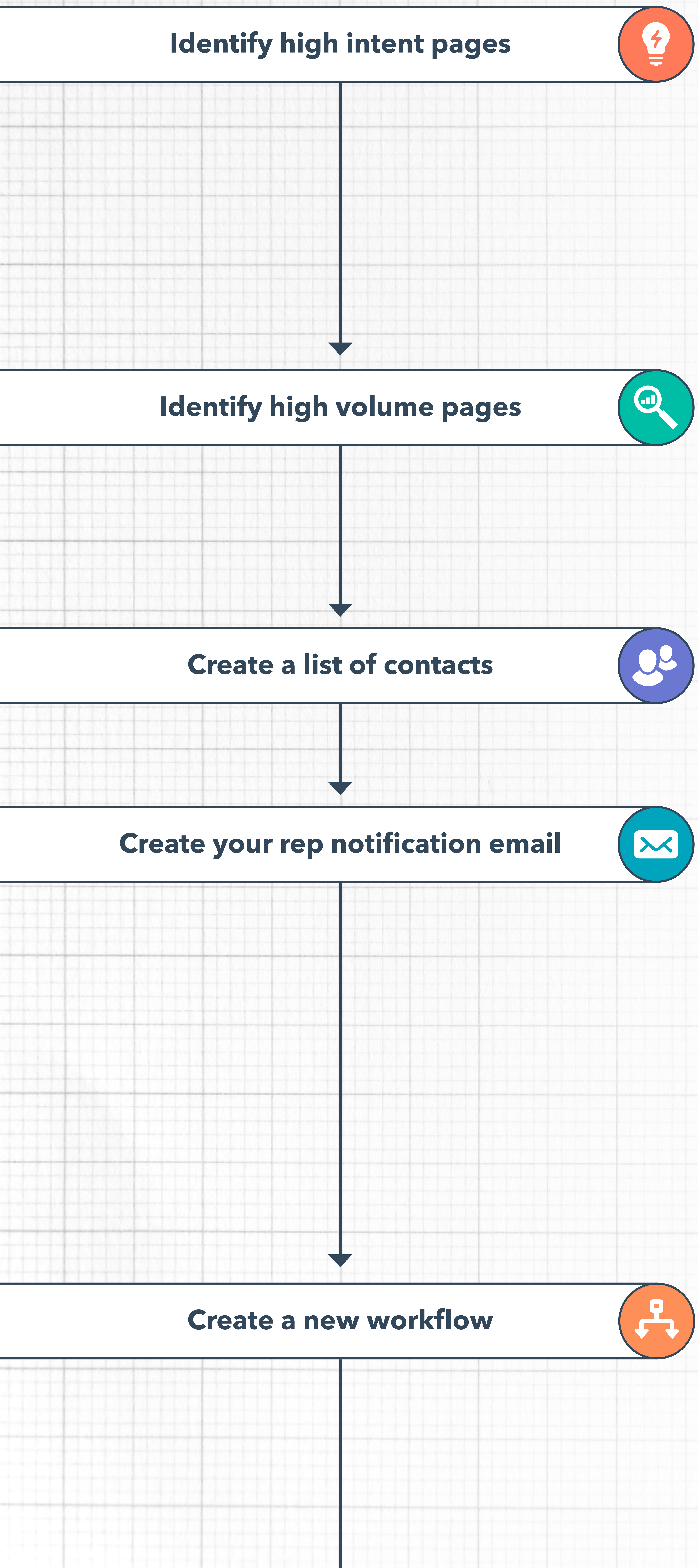
Challenge

If you're in sales, you have a hard job. You have to figure out how to manage your day and prioritize the most qualified leads. You may know that a group of leads downloaded an ebook or viewed a page, but the trick is knowing which of those actions make them sales ready. You also need to make sure that when they do take a high intent action you know about it quickly and can reach out. Whether you have 10s of leads or 100s of leads coming into your pipeline each month, it's hard to separate signal from noise.

Solution

To help reps make sense of the data, you can build a system of workflows that deliver timely notifications to reps on what actions their leads are taking on your website. When a contact takes a high-intent action, the workflow sends an internal notification to their sales owner. The email describes the action taken, by whom, when, and provides reps with a recommended follow-up strategy to take based on that action.

Full Blueprint



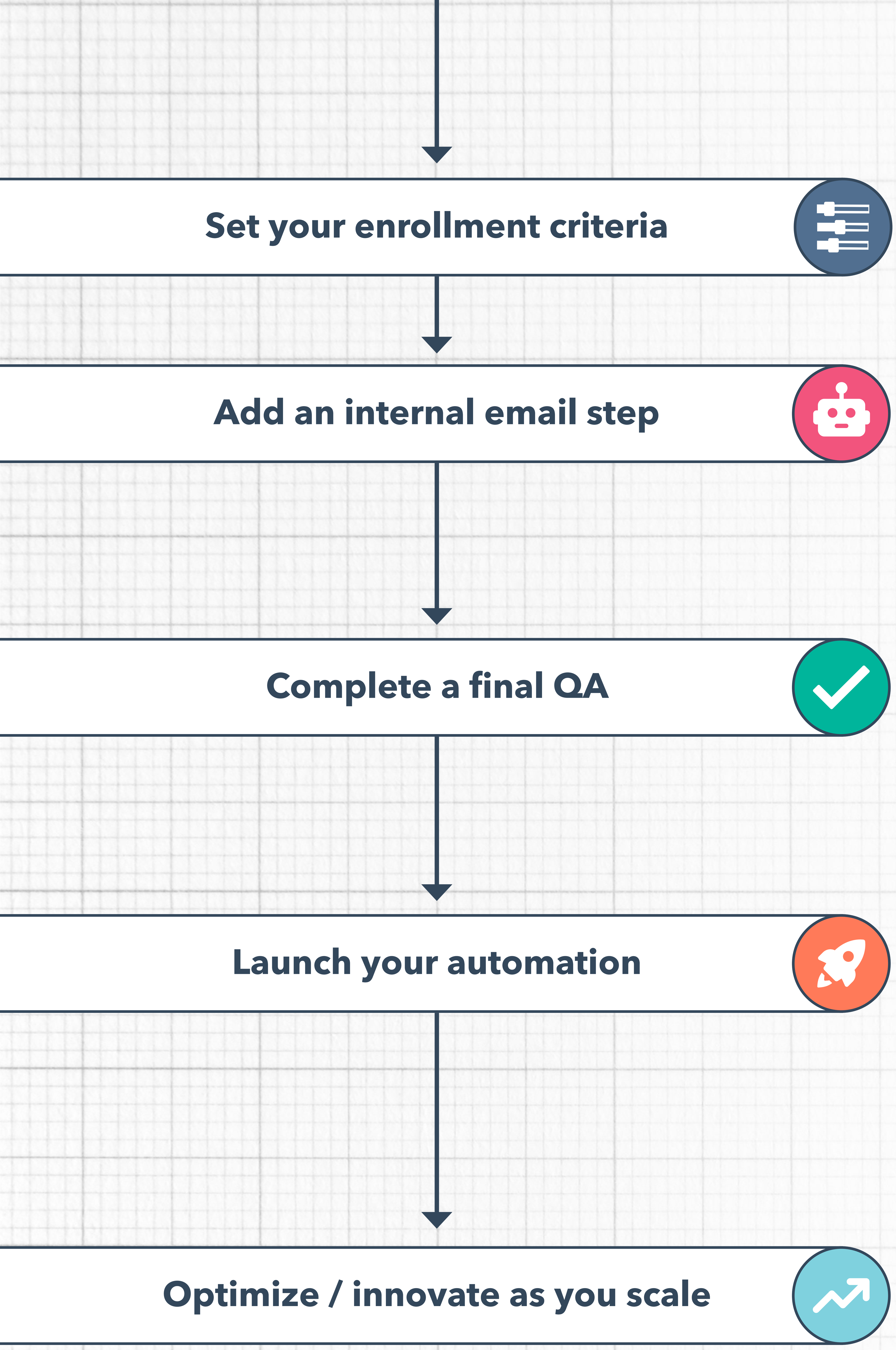
1. **Identify high intent website pages.** We like to think of "high intent" as a page that would designate the visitor as someone who is clearly considering your product or service. Which pages contain product or service information? Which pages contain pricing information? Etc.

2. **Look at the volume of contacts in your database viewing each of these pages you outline in step 1.** Of those pages, which have the highest volume?

3. **Create a list of contacts who have viewed one of your high intent pages with the highest volume.**

4. **Create your internal rep notification email.** This email should provide reps with context by including information about the contact, so use personalization tokens here. What is the contact's name, company information, email and phone number? Next, what is the action that they took? Finally, include suggested next steps for a rep after someone has taken this action.

5. **Workflow time.** Create a new workflow.



6. **Set your enrollment criteria using the list you created above.**

7. **Add an internal step, selecting the email you created above.**
   Select your contact owner (or sales owner) as the recipient.

8. **Complete a final QA.**
   Walk through the entire workflow from enrollments to your email. Make sure everything is accurate.

9. **Launch your automation.**
   3... 2...1... Launch! Once you've double (and even triple) checked everything, turn your workflow on and watch the magic happen.

10. **Optimize and innovate the automation as you scale.**
    Rinse and repeat for additional high intent actions.

Chapter 2 Take-away

How To Enable Better Sales Conversations With Workflows

- Identify high intent website pages
- Identify high volume website pages
- Create a list of contacts who have viewed one of these pages
- Create your rep notification email
- Create a new workflow
- Set your enrollment criteria using the list you created
- Add an internal step, selecting the email you created and select your contact owner (or sales owner) as the recipient
- Complete a final QA
- Launch your automation
- Optimize and innovate as you scale

Chapter 3

How To Drive Qualified Demand To Sales With Conversational Marketing

While most companies want to increase efficiency, it's important to never compromise on the experience for your prospects. Great bots should both solve problems AND delight your prospects.

Goal

Increase your pass to sales rate (percent of conversations passed from live chat agents to sales reps) while keeping customer satisfaction scores high.

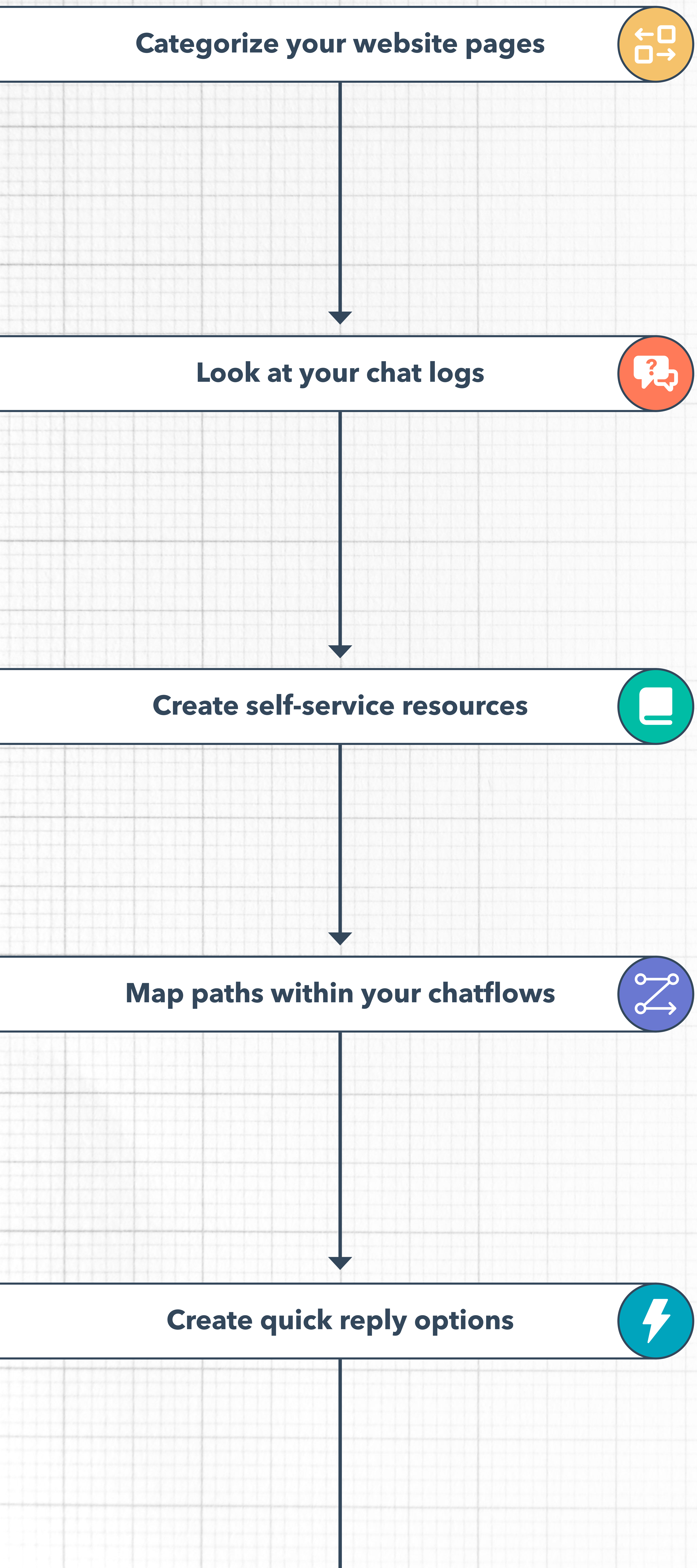
Challenge

When given the option, prospects often choose chat as their preferred method of interacting with companies and brands. Your sales reps want to meet your potential customers where they are, and they spend a significant time looking for which prospects would benefit most from purchasing your products. How can we connect these two more efficiently?

Solution

To solve this challenge, you can build automated bots that ask a series of qualifying questions. When a customer's problems can best be solved by evaluating things further, you'll route them directly to your sales team for a more in-depth consultation. Otherwise, the bot can automatically return the best resource or link to solve the problem, allowing your sales team to focus on best-fit leads from the website, without having to do manual work.

Full Blueprint



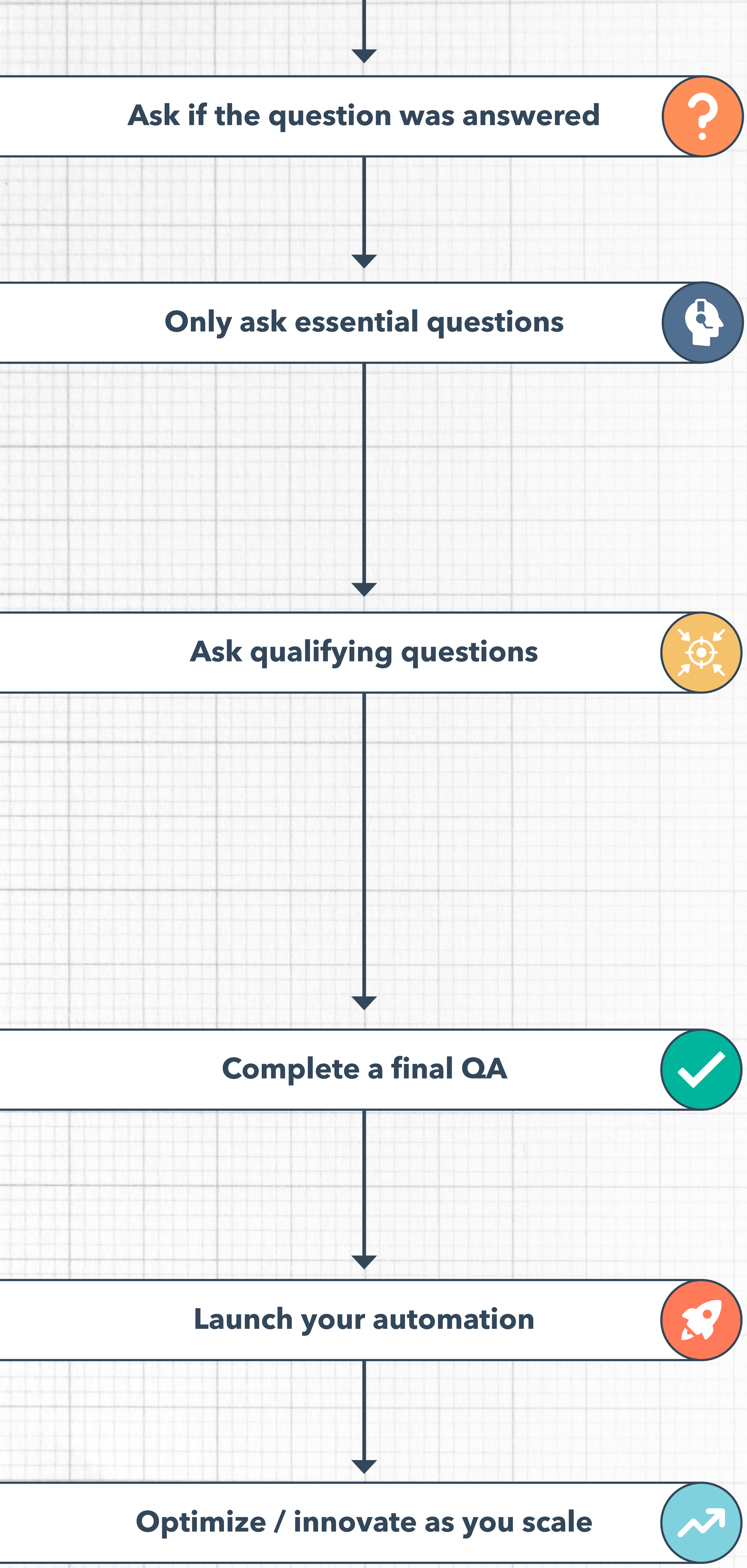
1. **Categorize the pages on your website into two groups.**
   Pages with a lot of volume, but low intent (homepage) and pages with low volume, but high intent (pricing page). Identify what the goal of each of the pages are.

2. **Search for opportunities for automation by looking at your chat logs for the most common questions.**
   If you don’t yet have chat live on your website, ask your sales and support team for the questions they hear over and over.

3. **Create self-service resources.**
   (if you don’t already have them)
   These resources will answer your prospects and customers most common questions that don’t qualify as high-intent.

4. **Map out unique paths within your chatflows that address your prospects and customers most common user problems.**
   Example: I want to learn about pricing, I want to learn about products, I want to talk about strategy, etc.

5. **Within each flow, create quick reply options for questions that are easily answered through your self service resources.**



6. **Always ask if their question was answered.**
   If not, route to a live agent to avoid any friction within the experience.

7. **For flows that route to a sales rep, only ask questions that are essential in the sales process.**
   Be clear about why you are asking the questions, and let the prospect know when you are handing them off to a live agent.

8. **Be intentional about the level of automation you are putting in front of the prospect or customer.**
   If they are on your pricing page, limit the automation and focus on getting them to a sales rep ASAP. If they are on your homepage, try to ask a couple qualifying questions upfront to understand their intent.

9. **Complete a final QA.**
   Test the entire experience yourself before launching. Was anything frustrating? Did the user flow make sense?

10. **Launch your automation.**
    Launch and pay attention to chat logs! What are your customers telling you about their experience?

11. **Optimize and innovate as you scale.**
    Assess the results of your chatflows constantly. Where are there opportunities to pass even more off to your sales reps? Where are you finding lower quality chats sneaking through that could be answered through self service resources? Never stop measuring. If you focus on keeping your customers happy, your sales team will be too.

Chapter 3 Take-away

How To Drive Qualified Demand To Sales With Conversational Marketing

- Categorize the pages on your website
- Look at your chat logs for the most common questions
- Create self-service resources for your most common questions
- Map paths within your chatflows to address your prospects and customers most common user problems
- Within each flow, create quick reply options
- Include a step to ask if their question was answered
- For flows that route to a sales rep, ask a couple qualifying questions
- Complete a final QA
- Launch your automation
- Optimize and innovate as you scale

Chapter 4

How To Answer Customer FAQs With Conversational Marketing

Do right by customers without not straining internal customer success resources.

Goal

Decrease the number of support tickets per customer per day while maintaining or improving customer satisfaction.

Challenge

Your customers and users want answers fast, and they often look to chat to find them. While complex and technical topics are great fits for humans to answer, frequently asked questions often have answers inside self-service, public resources. So when your support volume scales faster than headcount, you need a strategy for your agents to focus their time on high-value interactions with customers, and a way to support the rest.

Solution

You can use bots to automate chat support and route time-sensitive issues to a human. You have a couple of options when it comes to implementing a solution:

1. If you're using HubSpot, you can leverage our Knowledge Base search functionality to help customers find answers to their questions in the Knowledge Base you've built.
2. If not, you can still leverage custom code that uses a Natural language processing service to identify a customer's urgency as well as 'crawl' your own customer help resources to return answers immediately. Using this strategy, you can quickly help customers who ask FAQs and route those who need more help to a human.

Full Blueprint

Analyze common questions

Create self-service resources

Ask what help is needed

Recommend relevant resources

Account for errors or no results

Ask if the question was answered

1. **Analyze the questions your customers are currently asking your support team, and develop a tagging system to analyze this data over time.**

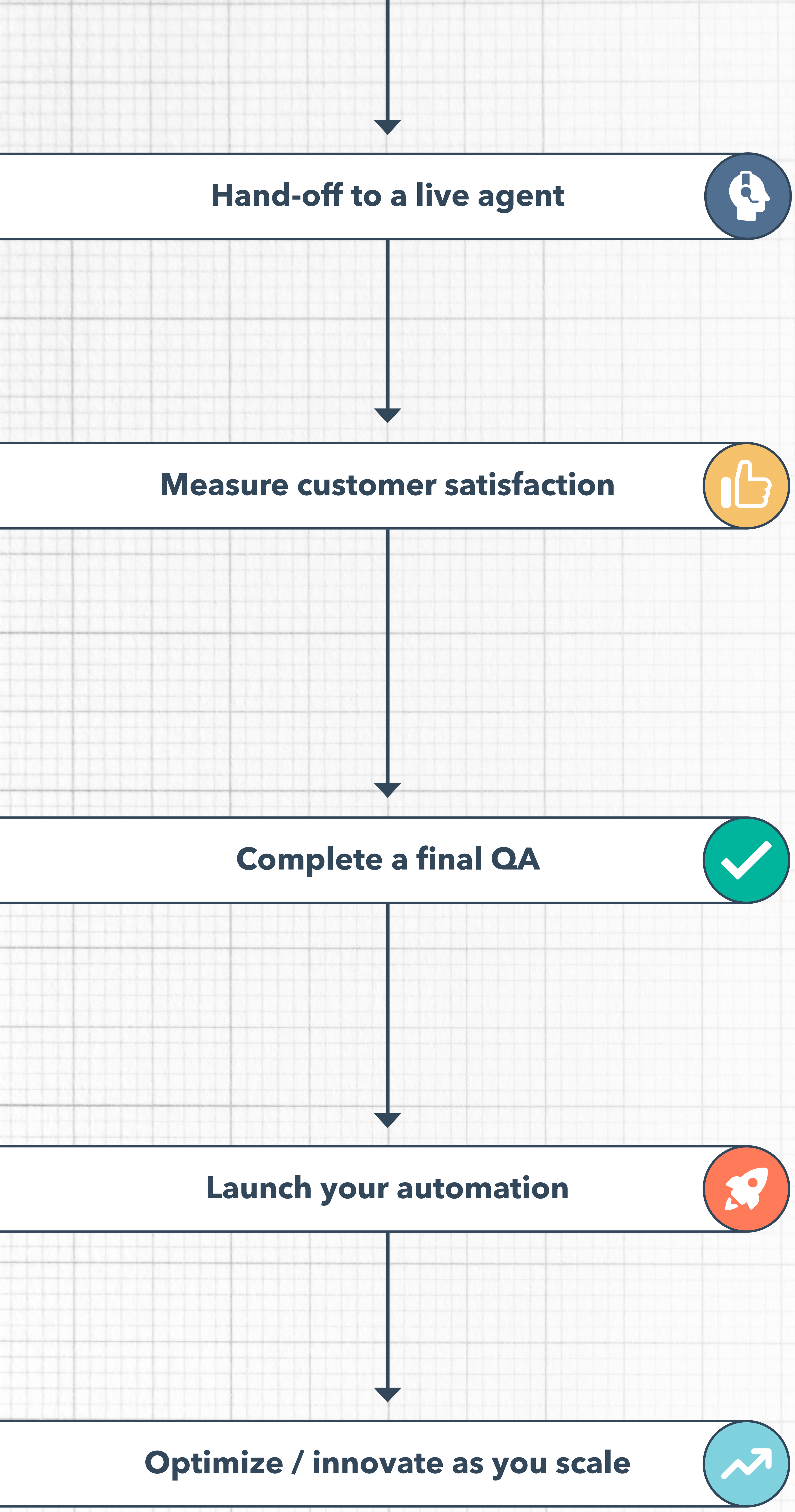
2. **Create self-service resources.**
   Identify the most common questions asked and create self-service resources (if you don't already have them) in a Knowledge Base to answer them.

3. **Within your customer support chatflow, ask your customer what they are looking for help with.**

4. **Use [Knowledge Base search functionality] or [leverage custom code] to search through your help resources and recommend articles to answer the customer's question.**

5. **Make sure to account for errors or no results in the search functionality and direct the customer to a live agent.**

6. **Always ask if their question was answered.**
   If not, route to a live agent to avoid any friction within the experience.



7. Set clear expectations for the customer for when you will hand them off to a live agent and when they can expect to hear from them.

8. Be intentional about the level of automation you are putting in front of the prospect or customer.
Always make sure you measure success of the experience through a customer satisfaction survey (ex: CSAT, NPS, CES).

9. Complete a final QA.
Test the entire experience yourself before launching. Was anything frustrating? Did the user flow make sense?

10. Launch your automation.
Launch and pay attention to chat logs! What are your customers telling you about their experience?

11. Optimize and innovate as you scale.
Assess the results of your chatflows constantly. Where are there opportunities to create better self-service resources to answer questions? Can you experiment with different content formats (images, gifs, video, etc)? How satisfied are your customers with the experience?

Chapter 4 Take-away

How To Answer Customer FAQs With Conversational Marketing

- Analyze common customer questions
- Create self-service resources in Knowledge Base
- Recommend resources based on your customer's questions before handing the conversation to a customer support agent
- Account for errors or no results
- Confirm if the resources answered the customer question
- Hand-off to a live agent when necessary
- Ask for feedback and measure customer satisfaction
- Complete a final QA
- Launch your automation
- Optimize and innovate as you scale

Chapter 5

How To Create A Scalable Advocacy Program With Feedback Surveys

Harness the power of customer advocates without straining customer success or marketing resources.

Goal

Drive more customer reviews by identifying and reaching out to your happiest customers at the right times.

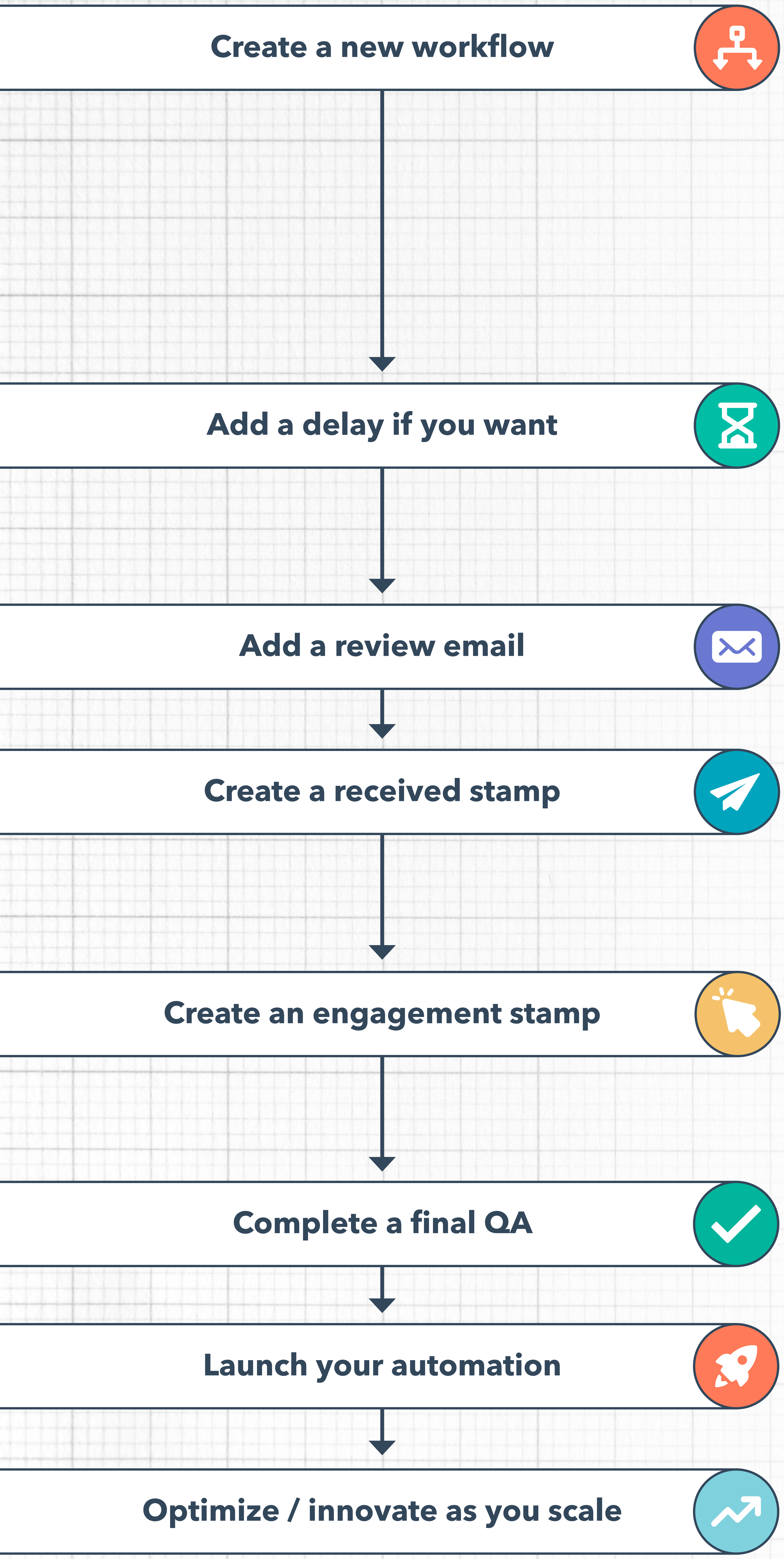
Challenge

Happy customers can be a loud and authentic advocate for your brand. Asking your customers for reviews is one of the most important things you can do to amplify the voices of your promoters and improve your customer acquisition. But knowing who to ask – and when – isn't always straightforward. How do you know who your happy customers are, and the right time to ask them for their support?

Solution

You can use workflows to address the right potential advocates at the right time in their customer journey. The first opportunity to surface true customer satisfaction is after they've completed onboarding. You can do this by sending out a customer satisfaction (or Net Promoter Score) survey. Positive answers in this survey will trigger a workflow that encourages your potential advocates to leave a review over a period of time. Don't forget to record the outcome in your CRM to inform future conversations with your advocate!

Full Blueprint



1. **Create a workflow using Onboarding CSAT = 9 or 10 as an enrollment criteria.** Instead of Onboarding CSAT you can use NPS, or other types of satisfaction scores that you have as properties in your HubSpot CRM.

2. **Add a delay if you don't want to send out a request immediately after you collect the survey score.**

3. **Add an email that solicites a review.**

4. **Create a property to stamp review email received dates and add it to the workflow.**

5. **Create a property to stamp the date when the user clicked on a review link and add it to the workflow.**

6. **Complete a final QA.**

7. **Launch your automation.**

8. **Optimize and innovate the automation as you scale.**

Chapter 5 Take-away

How To Create A Scalable Advocacy Program With Feedback Surveys

- Create a workflow using positive feedback as your enrollment criteria
- Add a delay if you want
- Add a review email
- Create a property to stamp that this email was sent
- Create a property to stamp when someone engages with the email
- Complete a final QA
- Launch your automation
- Optimize and innovate as you scale

Need a little help putting these blueprints into production?

HubSpot: Automation that Unites

Your customers feel the consequences of misaligned teams. With clean and centralized data, your team works together harmoniously to deliver an exceptional customer experience. Great automation fights fragmented data, bringing teams together with a unified view of the customer. You need automation that is:

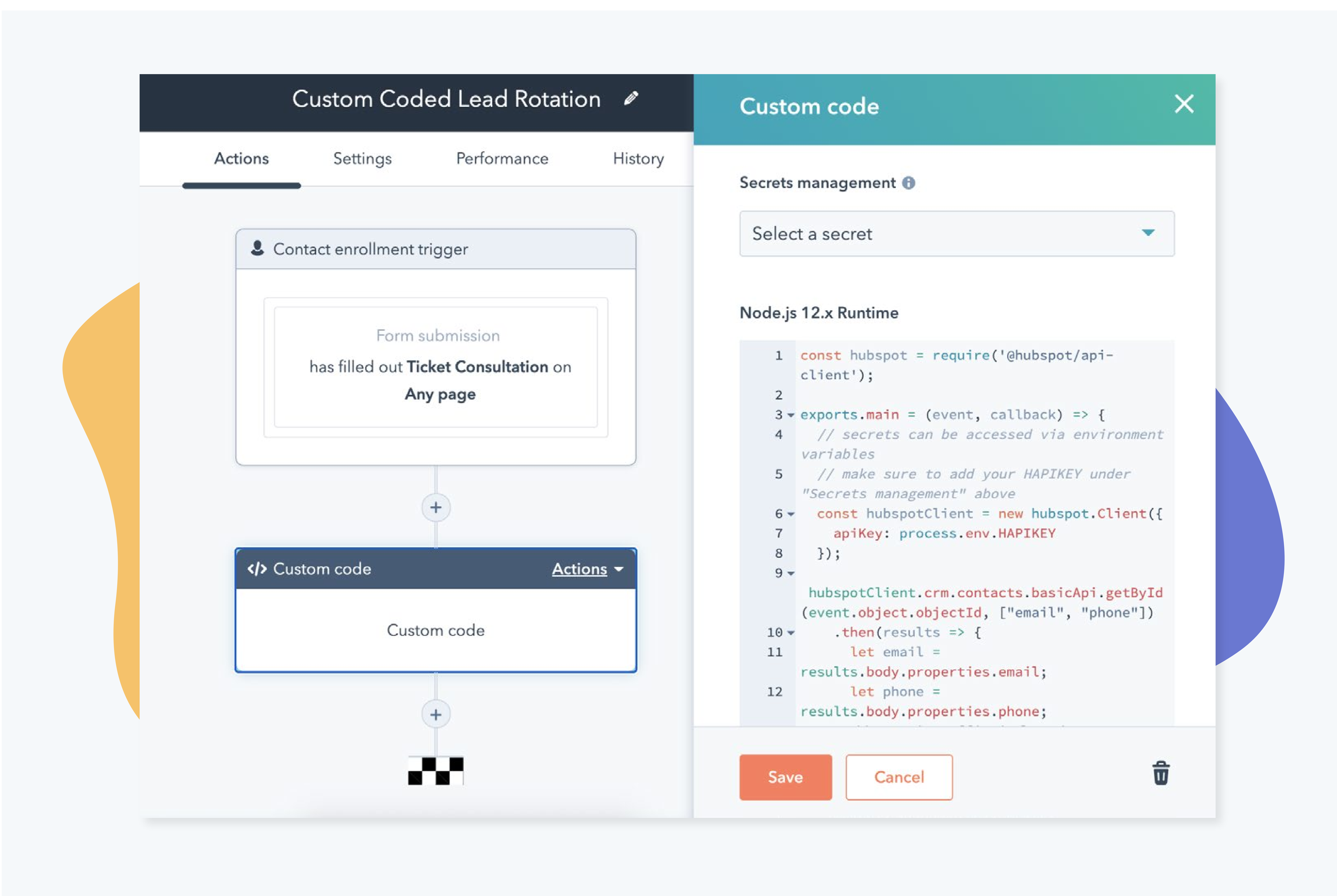
Easy to adopt.
Easy to align.
Easy to adapt.

Put disparate, inflexible systems behind you – find a process that scales with you. Our team uses automation to drive demand and support customers, creating delightful end user experiences.

Automation That Grows With You.

Your business isn't cookie cutter – your automation platform shouldn't be either.

HubSpot's visual automation builder is intuitive, making it easy for your team to get up to speed without costly months of training. You have the flexibility to make sweeping changes to campaigns and processes in seconds, automating across marketing, sales, and customer success. And now with Operations Hub, if you can code it, you can build it with programmable automation.

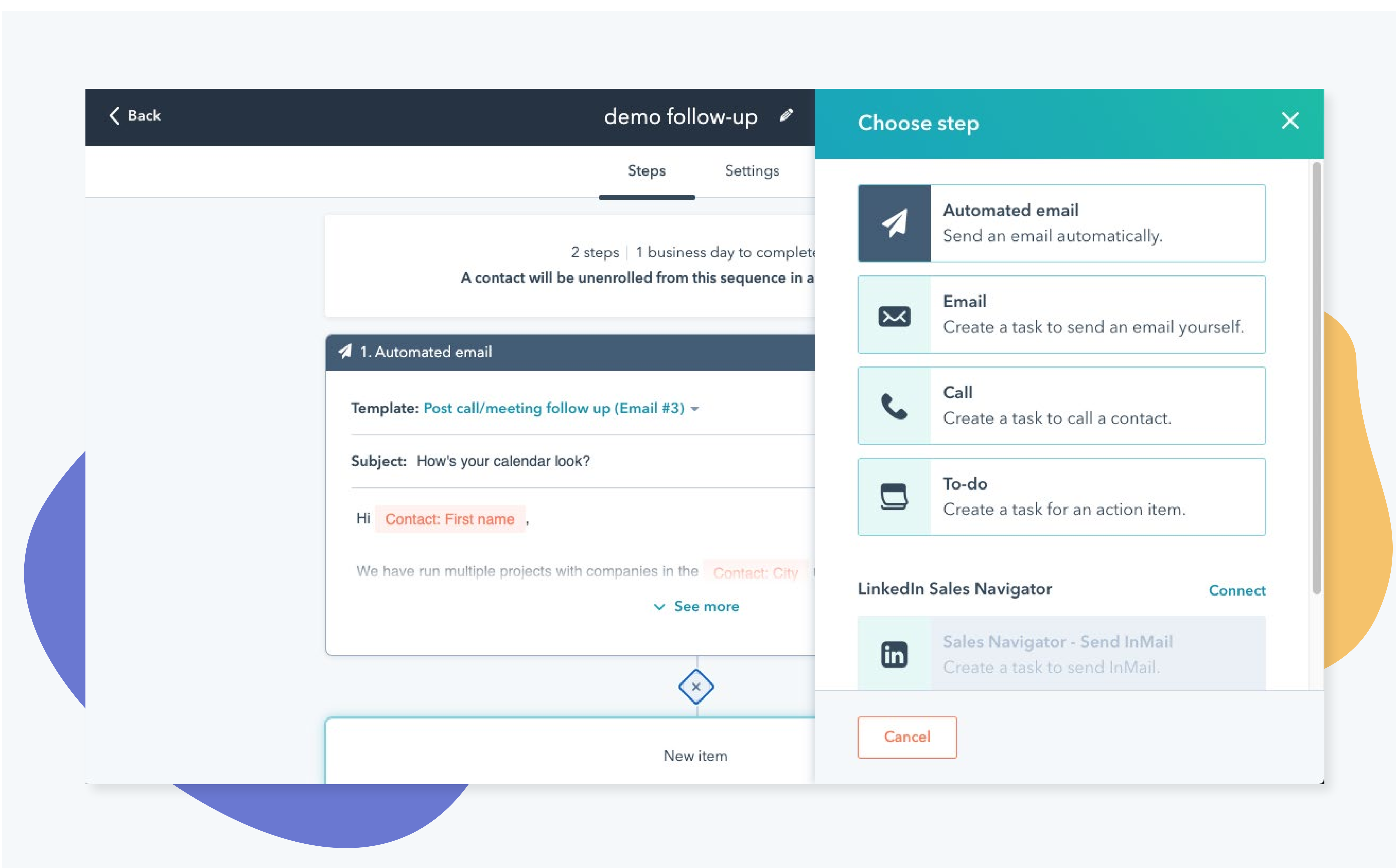


[Check out Operations Hub]

Automation That Deepens Relationships.

Effective marketing isn't that different from mind reading. If you want your audience to tune in, you need to reach them with the right information at the right time.

That's much easier to do if you know what actions contacts take and what content they've already consumed. With HubSpot, you can build omnichannel marketing campaigns based on how visitors are engaging with your site and content in just a few clicks.

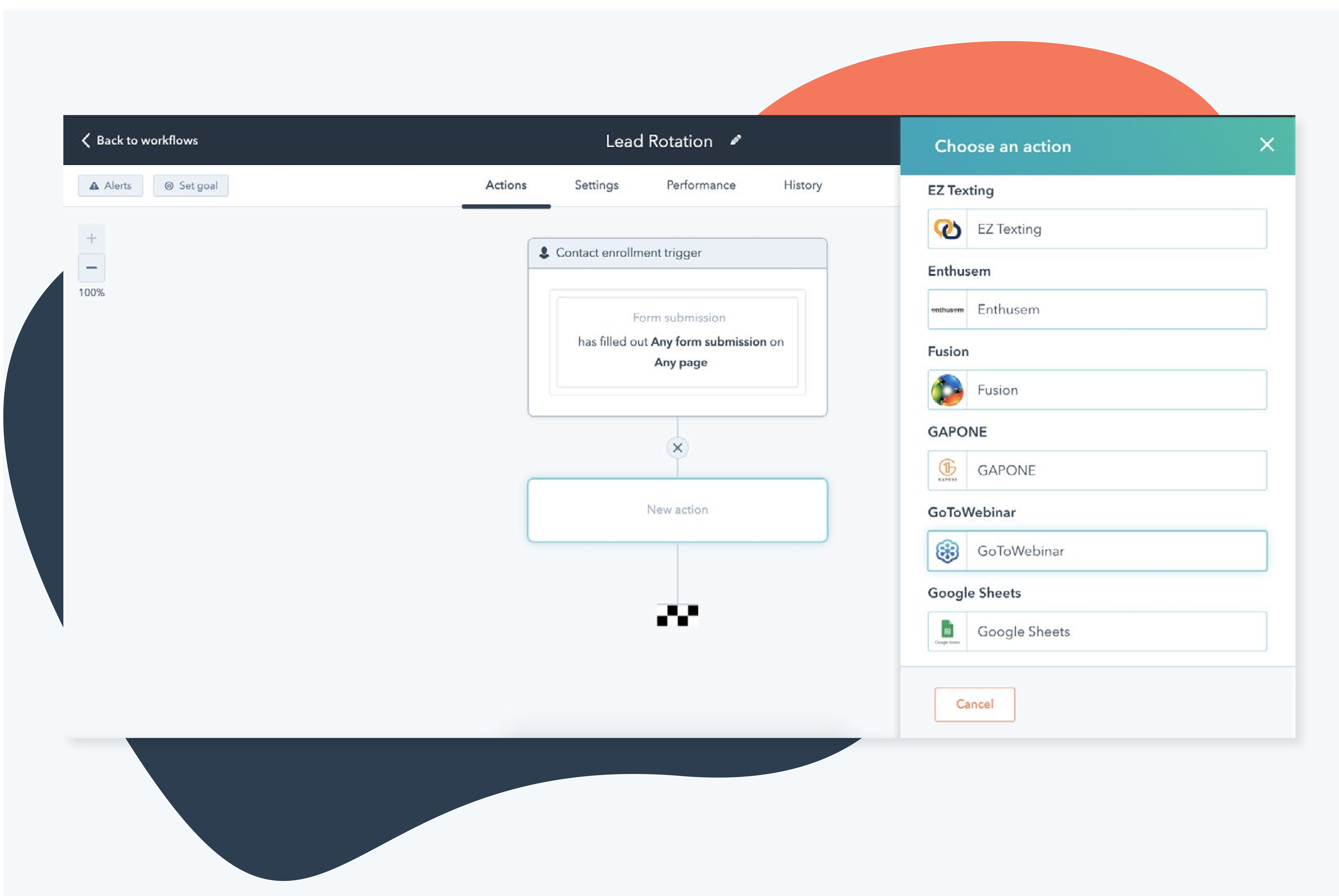


Check out Marketing Automation

Automation That Connects Tools.

As you grow, so does your tech stack. With HubSpot automation, it's easy to integrate all of your tools so all of your teams can work from a single source of truth.

HubSpot workflow integrations allow you to connect with many of your favorite apps in seconds and makes it easy to automate across tools and systems. Plus, with data sync in Operations Hub, you can set up a two-way, real-time, no code set-it-and-forget-it connector with any tool in your tech stack.

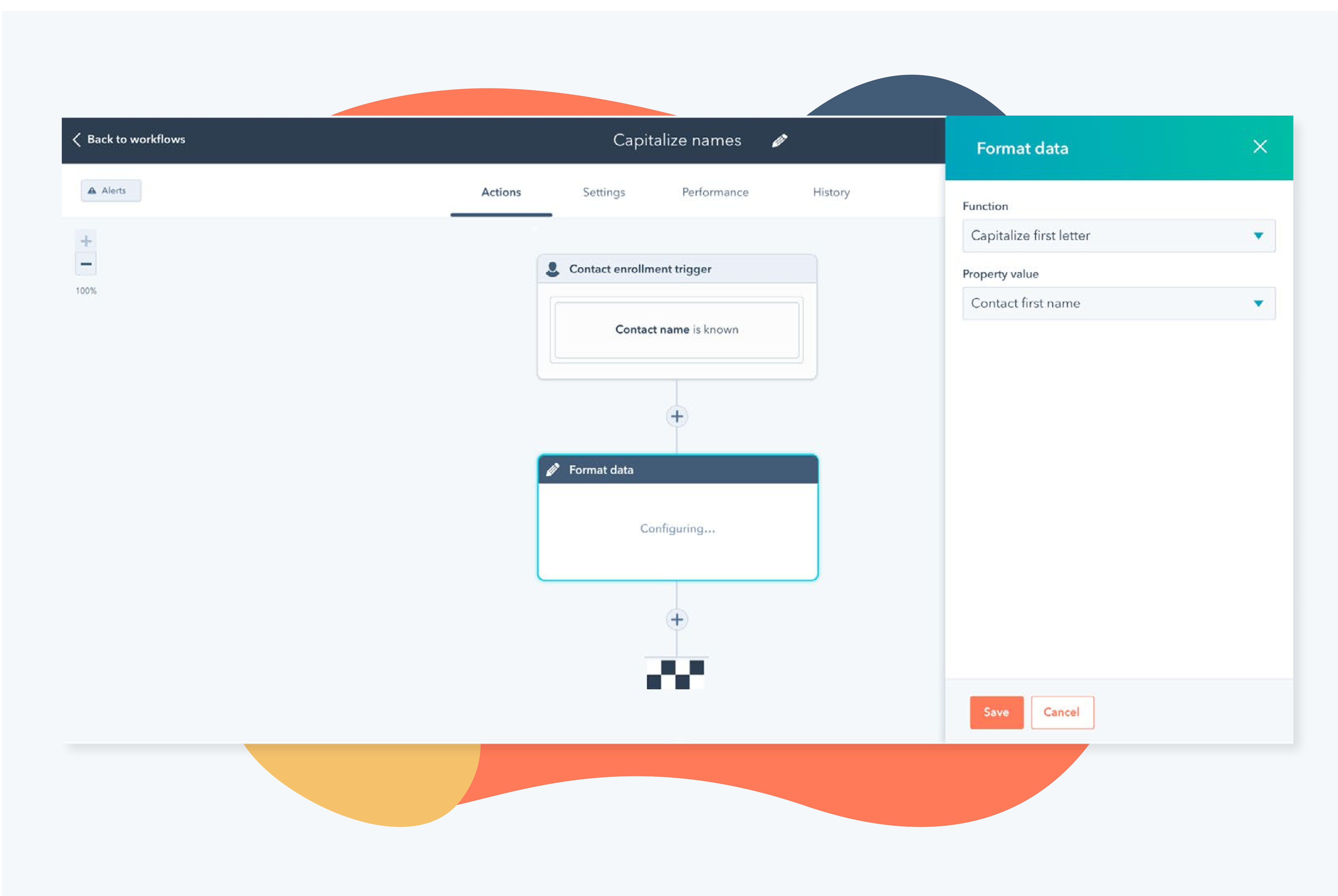


[Check out Workflow Integrations]

Automation That Cleans Data.

Your customer experience is only as good as the data that powers it. When data issues arise, your team and your customers notice.

With HubSpot, ensuring data quality isn't just easy; it's automatic. Data quality automation in Operations Hub will automatically declutter date properties, fix name capitalization, and more - faster than you can say "import and export."



[Check out Operations Hub]