

Lesson 1: Prospecting in HubSpot, Part 1 – Identifying Good-Fit Leads

Lesson Description

When you're prospecting, there's a whole bunch of behind-the-scenes work you have to do to figure out who you should be reaching out to. In this lesson, you'll learn how to filter, organize, and view the contacts in your account. You'll also learn about the HubSpot tools that will help you add new leads to your account.

Videos

- Introduction to Prospecting
- Filtering Your Contacts
- Creating Contacts Manually
- Chatflows
- Filtering for Your Ideal Customer Profile
- Filtering for Interest

Topics

- The importance of focusing on closing customers who will advocate for your business.
- How to identify leads who are a good fit *and* interested in your offering.
- How to organize contacts and companies inside HubSpot CRM.
- Useful standard properties inside HubSpot CRM.
- How chatbots can help your sales efforts.

Quiz Yourself

- Why is it important to close customers who will advocate for your business?
- What standard properties can you use to identify leads who are a good fit for your offering?
- What standard properties can you use to identify leads who are interested in your offering?

Lesson 2: Prospecting in HubSpot, Part 2 – Connecting With Your Contacts

Lesson Description

If you're in sales, you've probably felt the frustration of having a bunch of meaningless tasks standing between you and your quota. Whether that's data entry or internal processes or simply trying to find the right information, there are a lot of things that can get in the way of actually selling. Luckily, Sales Hub has a ton of tools designed to help with this very problem. In this lesson, you'll learn to use these tools to become more efficient in prioritizing and communicating with your leads.

Videos

- Creating Tasks
- Working Through a Task Queue
- Calling Your Contacts
- Using Templates and Documents
- Booking Meetings
- Scheduling Emails and Follow-up Tasks
- Using Sequences and Recommendations

Topics

- How to use tasks and task queues.
- Sales Hub tools you can use to connect with your leads in a personalized way.

Quiz Yourself

- What is a task queue?
- What is an email template?
- What does the documents tool do?
- What does the meetings tool do?
- What is a sequence?

Lesson 3: Closing Sales in HubSpot

Lesson Description

Ultimately, everything you do as a sales rep ought to be focused on generating revenue for your company. In HubSpot CRM, you can use deals to track the progress of your potential sales. In this lesson, you'll learn how to use deals in conjunction with several Sales Hub tools that will help you get more of your sales across the finish line.

Videos

- Creating and Managing Deals
- Creating Call Outlines With Snippets or Playbooks
- Sales Hub Professional and Enterprise – Products, Quotes, Automation, and Video
- Reporting on Your Sales

Topics

- The importance of waiting to create a deal until a sale has a legitimate chance of closing.
- How to create a deal from a contact record.
- Sales Hub tools that help you close more sales.
- The sales dashboard inside HubSpot CRM.

Quiz Yourself

- How can you tell if a sale has a legitimate chance of closing?
- What are the benefits of creating a deal from a contact record?
- What reports are on the sales dashboard by default?