

HubSpot Academy

HubSpot Marketing Software Certification Workbook

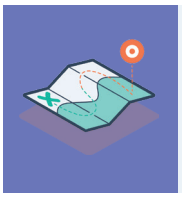


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The Purpose of This Workbook and How to Use It

Welcome! You're here because you want to grow your business and career using HubSpot Marketing Hub.

To start, what is Marketing Hub?

Marketing Hub Professional allows you to match your marketing to your customers at scale. Personalize and automate your marketing to avoid growing pains for your team and your customers.

What does that mean in practice?

Get found online.

HubSpot has all the tools you need to establish your authority online for any given topic. Easily create blogs, use our SEO Tools to optimize them for search, and automatically share them across all your social media channels.

Tools that help you find success:

- Blog & content creation tools
- Social media

Optimize conversion rates.

Go beyond just sharing forms with your prospects. Create landing pages geared towards driving new leads, and A/B test them to ensure your content resonates with your target audience. Create videos that not only engage your site visitors, but allow them to easily convert through forms and CTAs directly within the video.

Tools that help you find success:

- A/B testing
- Landing pages
- Calls-to-action
- Video hosting and management

Automate & personalize your marketing.

Go beyond just email automation by automating everything from your ads audience creation, to your contact segmentation. Use information you already know about your contacts to personalize your marketing messages.

Tools that help you find success:

- Email, ads, social, & task automation
- Smart CTAs, forms, & email

Measure revenue.

Don't just create content, measure its impact. See exactly which marketing assets are driving traffic to your site and attribute contacts, deals, and revenue to your marketing efforts. Run comprehensive campaign reports that tie all your efforts into one report, or create custom reports to dive into your performance on any metric.

Tools that help you find success:

- Website traffic analytics
- Campaign reporting
- Attribution reporting
- Custom reporting

The following activities and resources will help you create and grow a repeatable content process for your business. Each section connects to a lesson featured in the HubSpot Marketing Software Certification.

If you haven't done so already, we highly encourage you to sign up for this course and complete each lesson before working on the practical exercises. This course has become the industry standard for marketing professionals. In fact, more than 14,000 professionals across the globe have completed the HubSpot Marketing Software Certification in the last five years alone!

Here's a list of suggestions to get the most value out of this workbook:

- Save this workbook to the desktop on your computer. That way your progress will be saved correctly as you complete each section.
- If you prefer to have a hard copy to write on, print this PDF.
- Join the Marketing Study Group. We believe the best way to learn marketing is by implementing strategies, sharing ideas, and discussing what you've learned with a group of marketers, just like you.
- Tweet HubSpot Academy (@HubSpotAcademy). We're here to support you, and we want to follow your journey.

Now let's get started!



Vocabulary Building

You will encounter various marketing terms throughout the certification. In the space below, fill out the definitions as you learn each new term.

Term	Definition
Campaign	A connected series of operations designed to bring about a particular result.
Buyer persona	A semi-fictional representation of your ideal customers based on quantitative and qualitative analysis.
Landing pages	Entry
Content strategy	Entry
Call-to-action	Entry
Web form	Entry
Segmentation	Entry
Active list	Entry
Static list	Entry
Marketing automation	Entry
Workflow	Entry
Social monitoring	Entry
Social engagement	Entry
Marketing Reporting	Entry

1 Understanding Marketing Hub



Lesson

- Understanding Marketing Hub



Resources

- How to Set SMART Marketing Goals [Free Template]
- Setting (and Reaching!) Your Marketing Goals With the Goals App
- Product Page: Marketing Hub Software
- Marketing Hub Software

Below, you'll find an example of a SMART marketing goal on the left and adjacent spaces for your own goal on the right. To ensure your goal meets SMART standards, we recommend starting at the top in the "Initial Goal" box and working your way down through each aspect of a SMART goal.

SMART Goal Attributes & Definitions	Example Initial Goal	Your Initial Goal
Specific Without defining exactly what you're trying to improve, it's difficult to outline the steps you need to take to make progress. A specific goal is one that you could share with your CEO in 10 seconds that would clearly explain what you're trying to improve.	I want to generate more leads.	[Write your initial goal here.]

SMART Goal Attributes & Definitions	Example Initial Goal	Your Initial Goal
Measurable It's crucial that your goal is trackable and numeric. Many teams simply say that they want to grow their social media following, for example, but they don't specify by how much they'd like to grow it. As soon as you attach a number to your goal, you'll be able to track exactly how far you've come since you set the goal and how far you have left until you reach it.	I want to generate a greater number of qualified leads from our blog for our sales team.	[Write your specific measurable goal here.}
Attainable While aiming to break records can be beneficial – and here at HubSpot we're all about exceeding our targets – it's important to keep these goals realistic. If your company has historically gained 10 social media followers per month, aiming to grow your social following by 1,000 followers next month would be drastic. Setting unrealistic or overwhelming goals can cause team members to feel discouraged or lose motivation. Instead, set your team and yourself up to succeed by creating goals that are realistic.	Since we generate around 100 leads per month from our blog right now, I want to grow the number of blog-generated leads to 120 per month.	[Write your specific measurable, attainable goal here.]
Relevant Ask yourself why you're setting the goal that you are. How is it going to contribute to the company's bottom line? Ultimately, the marketing goal you set should be tied back to business impact. If it's not, consider how you can change or adjust your initial goal.	I want to grow the number of blog-generated leads to 120 per month because our sales team finds that blog leads convert to customers at 3X the rate of leads from PPC advertising.	[Write your specific measurable, attainable, relevant goal here.}

SMART Goal Attributes & Definitions	Example Initial Goal	Your Initial Goal
Time-bound The final aspect of the SMART framework is one of the most important: setting a timeline for meeting your goal. Without a timeline, you won't be able to determine whether the smaller changes you're making are keeping you on track toward achieving your ultimate goal. Setting a timeline is also key for internal alignment. For example, when you're generating significantly more leads, you'll need to make sure your sales team has the bandwidth to reach out to all of them.	I want to grow the number of blog-generated leads to 120 per month because our sales team finds that blog leads convert to customers at 3X the rate of leads from PPC advertising. I'll reach 120 blog leads generated per month 6 months from today.	[Write your SMART goal here.}

Evaluate Your SMART Goal

Looking at the SMART goal you've listed above, answer the following questions.

What is your smart goal?

Entry

Do you feel that this goal is realistically attainable in the time frame you've set?

Entry

How many hours per week can you dedicate toward achieving this goal?

Entry

Evaluate Your SMART Goal Continued

What is the biggest marketing challenge preventing you from achieving this goal?

Entry

What are three steps you can take to reduce or remove that challenge and succeed in reaching this goal?

Entry



Test your knowledge:

- How does a marketing team use HubSpot CRM?
- How does Marketing Hub work with Sales Hub and Service Hub?
- How can you use all the Marketing Hub tools together?
- Which menus will you be using as a marketing user in HubSpot?

2 Using Buyer Personas in HubSpot



Lesson

- Using Buyer Personas in HubSpot



Resources

- Make My Persona
- 20 Questions to Ask When Creating Buyer Personas

If you don't already have a primary buyer persona established for your business, create one using HubSpot's free Make My Persona tool. In the boxes below, write a quick profile for your primary buyer persona.

Persona #1	Persona Name: {Insert your primary persona's name here}
Background & Demographics	[Insert information about a prototypical customer. What is your persona's typical gender? Age? Where do they live? What's their income level? Which job titles do they commonly hold?]
Identifiers	[What are your persona's preferred forms of communication - social media, email, blogs, apps? Where are they spending their time?]
Goals	[What's your persona's primary goal related to the industry you're in?]
Challenges	[What are the major roadblocks getting in the way of your persona reaching their goals?]
Common Objections	[Why would someone choose not to buy your product/service?]



1 Practical Exercise

Identify the buyer's journey for your primary buyer persona. The goal is to help this buyer through each stage: awareness, consideration, and decision. And while there's no magic number for the amount of content within the buyer's journey, let's start by identifying three pieces of content.

Fill in Your Own: Content Mapping Templates for Every Persona

Persona #1	Lifecycle Stage		
Persona #1 Name: [Type your first persona's name here]	**Awareness** Have realized and expressed symptoms of a potential problem or opportunity	**Consideration** Have clearly defined and given a name to their problem or opportunity	**Decision** Have defined their solution strategy, method, or approach
Problem/opportunity that the above persona needs help with: {Type the core challenges, needs, or goals of your first persona here to keep it top of mind as you generate content ideas.]	**Content Ideas** [Type your content ideas for this persona in the awareness stage here. During the awareness stage, ads should break the ice with a cold audience and build trust.]	**Content Ideas** [Type your content ideas for this persona in the consideration stage here. During the consideration stage, you should provide the buyer with resources to help them determine the solution that's right for them.]	**Content Ideas** [Type your content ideas for this persona in the decision stage here. During the decision stage, you should showcase the value proposition that sets you apart from competitors.]



Test your knowledge:

- Why are buyer personas important?
- Who in the company should help in the buyer persona identification process?
- What types of questions should you ask to define your buyer personas?
- How do you add a buyer persona in HubSpot?

3 Exploring the Contacts Database in HubSpot



Lesson

- Exploring the Contacts Database in HubSpot



Resources

- Contacts User Guide
- What are the different property field types?

No matter how organized your business is, you've likely had "bad" data in your CRM at one point or another. But out of date contact information or incomplete deal records can lead to a negative experience for your customers and frustration across internal teams. Maintaining a clean database is key to growing a business, because you get valuable insight on your leads and customers so you can provide an engaging and delightful experience.

An organized contacts database is:

- **Focused:** Logging in brings you to the records you need to see first; noise is hidden.
- **Contextualized:** It's always clear where a lead came from and what needs to happen next.
- **Actionable:** Visible data informs the next step. Everything can be acted on.

To ensure your contacts are always up-to-date and populated with the most actionable information, complete the following exercises.

Remove contacts that have hard bounced or unsubscribed:

- Create a list of outdated contacts and then delete them from your database.
- This process is outlined here.

Find duplicates:

- Scan for any duplicates and figure out where they might be coming from. If you have a Professional or Enterprise subscription in HubSpot, you can use the duplicate management tool , which uses machine learning to identify duplicate contacts and companies.
- This also includes duplicate properties which can cause headaches. Navigate to your property settings and review any properties that might be similar. If you find duplicate properties, you can use workflows to copy data from one property to another with a Professional or Enterprise subscription.

Filter contacts who have not engaged:

- The dates on properties such as last marketing email open date, recent conversion date, or recent sales email replied date are good indicators of the engagement level of a contact. You can filter contacts based on the date they have most recently engaged and if they haven't had any recent engagements, you can remove them in bulk.



Test your knowledge:

- What is the purpose of a contacts database in HubSpot?
- What is the HubSpot CRM?
- What is the definition of contact management?

4 Understanding Segmentation in HubSpot



Lesson

- Understanding Segmentation in HubSpot



Resources

- Differences between saved filters, active lists, and static lists
- Join the HubSpot Marketing Software Certification study group!

Lists are an important part of your marketing. Beyond email sends, lists can help you identify how many contacts in your database have certain traits in common. But HubSpot Lists becomes an even more powerful tool when you're using lists to create reports.

Looking to get the most out of lists? Build the following lists in your account:

Buyer Persona: Defining your contacts based on their unique challenges and pain points will help with the content of your messages. How many contacts do you have based on each of your personas? Is this higher or lower than you expected?

Entry

Lifecycle Stage: This list type will help you tailor messaging based on where a contact is in terms of their lifespan with your company. What are your current plans to nurture each of these lists of contacts?

Entry

Hard bounced contacts: This list type will shows the number of contact email address that could not be reached due to a permanent error. Your emails could also be bouncing due to a strict email security filter. To protect your email sender reputation, HubSpot excludes these contacts from future emails.

Based on this list, why do you think you aren't reaching these contacts?

Entry

Unengaged contacts: This list type will help with tracking contacts who haven't engaged with your emails for a certain period of time. Based on this list, are you going to attempt re-engaging them or stop sending them emails altogether?

Entry

Source: This list type helps you send messages that are designed to be more relevant to the contacts on this list depending on their source.

Entry

What sources are creating the most qualified contacts? Least qualified?

Entry



Test your knowledge:

- Why is segmentation important?
- How do you build segments?
- What types of segments can you create?
- When should you use a segment vs. a report?

5 Creating Campaigns in HubSpot



Lesson

- Creating Campaigns in HubSpot



Resources

- How do I use the campaign analytics tool
- Planning a Long-Term Content Strategy
- Marketing Campaign Integrations

Great marketing campaigns follow a consistent theme and promote a single or focused idea or goal. Using the template below, create a brief for the next marketing campaign you plan to work on.

Campaign Name:	[Campaign Name]
Campaign Timeline:	MM/DD/YYYY - MM/DD/YYYY

Project Overview:
What problem are we solving? How? Why are we solving this problem? What's the benefit? How does this problem align with our product/service?

Project Deliverables & Scope

What are the deliverables for this campaign?
(e.g., five videos, three interviews & a series of social media posts.)

Do we anticipate any internal/external factors comprising the completion of the above deliverables? If so, how? Why?

Note: It's important to be as specific as possible here to help stakeholders provide accurate estimates for completing each deliverable.

Target Audience

Who are we trying to reach with this campaign?

Primary Audience/Persona:

Secondary Audience/Persona:

Tone of Voice

What are your brand values? How can you use those to shape the tone of this campaign?

What do you want your audience to take away from this campaign? What do you want them to feel?

Campaign Concept Statement

Why does your audience need the solution or idea your campaign is selling? What are the benefits?

What can you say that will make your audience believe your message? What proof can you offer to build trust and validate your message?

Note: Your campaign concept serves as the unified theme - or red thread - for your campaign as a whole. This concept should be used to inform the look, feel, and message attached to all of the deliverables you are creating.

Campaign Exclusions

What is the campaign not going to cover?

What messages, emotions, or features do you want to avoid?

Note: Oftentimes, knowing what you don't say or convey will help you get a better handle on what it is that you actually want to get across. Outlining your exclusions will also help others gain visibility into what's considered "out of scope" for the campaign.

Campaign Inspiration

Use this space to drop in both links and images that effectively demonstrate campaign elements you admire.

Campaign Stakeholders

We recommend using the **DARCI** Accountability Grid to increase efficiency and keep the project focused.

D Decision Maker	**A** Accountable	**R** Responsible	**C** Consulted	**I** Informed
This should be a very short list. These individuals have ultimate and final approval or veto for decisions related to the project.	The single person is fully accountable for making the project happen. The A must also be given sufficient decision-making power. There should never be more than one.	Those responsible for doing the work on the project. There may be a number of R's on a project. R's are responsible for detailing the roadblock and raising questions.	Those from whom input will be solicited..	Those to be kept apprised of relevant developments.
[Name] [Name] [Name]	[Name]	[Name] [Name] [Name]	[Name] [Name] [Name]	[Name] [Name] [Name]



Test your knowledge:

- Why are campaigns important?
- How do campaigns support content strategy?
- Why should your campaign have a goal?
- How do you create a campaign in HubSpot?
- How do you report on a campaign in HubSpot?

6 Understanding Blogging in HubSpot



Lesson

- Understanding Blogging in HubSpot



Resources

- Blog Topic Generator
- How to Create a Successful Blog Strategy: A Step-by-Step Guide
- Creating a Content Strategy in HubSpot

Humans are always coming up with new ideas. Whether we're lying in bed, commuting to work, or going for a run, our minds have a seemingly endless ability to generate new ideas. But as natural and easy as this process might sometimes feel, it gets tricky when your job depends on it.

So here are some exercises to ensure your content ideas never run out! Search the news for information about what's going on in your industry. Take a look at current blogs about your field.

Getting ideas from the topics that are sparking interest elsewhere, provides ample relevant content.

Entry

Look on Google's hot searches and top trends. What topics are trending?

Entry

Use the HubSpot Blog Idea Generator to find additional blog post ideas that support an educational topic your business wants to be known for. Are there any topics that stand out?

Entry

Using your research as a guide, write down the top three ideas for new blog posts you found.

Blog Post Idea #1:

Entry

Blog Post Idea #2:

Entry

Blog Post Idea #3:

Entry



1 Practical Exercise

For almost every piece of content, come up with at least five to 10 different headlines. In the box below, write five different headlines for your business's next blog post.

Headlines for Blog Post Idea #1:

Entry

Headlines for Blog Post Idea #2:

Entry

Headlines for Blog Post Idea #3:

Entry



2 Practical Exercise

Using one of the options you've listed above, start to outline your business's next blog post.

Entry



Test your knowledge:

- Why is blogging important?
- How does blogging support content strategy?
- How does blogging support campaigns?
- How do you create a blog post in HubSpot?
- How do you optimize a blog post in HubSpot?

7 Creating Landing Pages in HubSpot



Lesson

- Creating Landing Pages in HubSpot



Resources

- Create and edit pages in HubSpot
- 19 of the Best Landing Page Design Examples You Need to See in 2021
- 3 Easy Landing Page Optimizations to Try Today

Formatting is probably the best tip you can follow for designing your landing page. Use your design to establish a clear visual hierarchy. Is there any way you could leverage social proof on the page?

Similar to adding case studies or recommendations, try adding social sentiment to your landing pages.

Social sentiment is easier to discover – just search through Twitter or Facebook! And because there's no one "right" way of designing a landing page, you'll want to check out examples from lots of different industries for different stages of the buying process.

Review some of your favorite brands and their landing pages. How do they grab their visitors' attention? In what ways are their pages optimized for conversions? Test your knowledge: What is a landing page? What are some use cases of landing pages?

Take a moment to locate your lowest performing landing page. In HubSpot, this information can be found in the Pages tab of your Traffic Analytics tool. Using the following best practices as a guide. Optimize your landing pages to increase conversions.

Write down your landing page's headline. How does your headline grab your visitors' attention? Does it clearly showcase the value of your offer?

Entry

For example, this HubSpot landing page says, "Free CRM Software With Something for Everyone" This headline gets visitors in the mindset of HubSpot being something anyone can use to improve and expand their business.

How could you make your headline more concise?

Entry

When designing your landing pages, get straight to the point. People came to the page for a reason, make sure your page immediately addresses that need.

What colors are you using throughout the page? Are you using colors that contrast? For example, what color is your CTA compared to the rest of the page?

Entry

You want your main call-to-action on the page to POP off your landing page. Whether it's filling out a form or clicking on a button, you want your reader to easily identify the action they should take.

What elements link the landing page back to your brand?

Entry

Make sure the viewer knows exactly where they are. All your landing pages should clearly convey your company branding, including a strategically placed logo. Don't make it the central point of the page, but have it apparent enough that people register the page as one from your business.

How would you describe the design of the page? Ex: Minimalist? Crowded? Wordy? Sparse? Colorful? Bland? Exciting?

Entry

Avoid visual clutter. While having extravagant visuals sounds like a wondrous idea, A/B tests at HubSpot repeatedly show that including such images doesn't help conversion. How is the landing page formatted? How do headlines, headers, titles, and paragraphs work together to convey your message?

Entry

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Test your knowledge:

- What is a landing page?
- What are some use cases of landing pages?
- What makes an effective landing page?

8 Creating Calls-to-Action in HubSpot



Lesson

- Creating Calls-to-Action in HubSpot



Resources

- Call-to-Action User Guide
- Call-to-Action Examples



1 Practical Exercise

Take a moment to brainstorm 2-3 of your favorite brands or organizations. Navigate to their website. What types of calls-to-action do they use?

Entry

How do they design their images or buttons to stand out?

Entry

What type of language do they use?

Entry

Using the CTAs you've seen as inspiration, brainstorm verbs and phrases that may be effective for capturing your audience's attention in the future.

Entry



Test your knowledge:

- What is a call-to-action button?
- What makes an effective CTA design?

9 Creating Forms in HubSpot



Lesson

- Creating Forms in HubSpot



Resources

- Forms User Guide
- 10 Web Form Examples You'll Want to Copy Immediately

Choose a form on your website to analyze. Using the form as a guide, answer the following questions. Note: You can repeat this exercise, as necessary, with any of your forms.

What kind of form is it: contact, lead generation, registration, order, or survey?

Entry

What is the purpose of the form?

Entry

What is the purpose of each field on the form?

Entry

Are there any security features on the form? For example, are you using a Captcha to prevent spam form submissions?

Entry

How do you address concerns over your customer's data privacy?

Entry

Realistically, how quickly could a contact fill out the form?

Entry

Consider the appearance of your form. What elements of your branding (icons, colors, fonts, etc.) do you currently include, if any?

Entry

How well does your CTA set expectations about what will occur once a visitor submits the form?

Entry

What's one change you could make to the form to improve the conversion rate?

Entry



Test your knowledge:

- What types of webforms can you use to capture information about your website visitors?
- Why should you consider your form's design?
- What are some form design best practices?

10 Understanding Workflows in HubSpot



Lesson

- Understanding Workflows in HubSpot



Resources

- Brainstorming Your Workflow Logic
- How to choose your workflow actions
- How does the "business days only" workflows setting work?

Workflows are the automation engine in HubSpot. They save you time and energy by taking care of repetitive tasks, such as sending emails, creating reminders for reps, updating CRM data, and more. They remove manual work from your employees' plates, so more time can be dedicated to marketing, selling, and servicing your customers.

The best part is that once they're turned on, they work 24/7 to make your job easier.

Use cases for workflows:

External Reach Outs	Internal Processes
• Lead nurturing • Blog subscriber welcome series • New customer welcome series • Referrals or promotions • Request feedback • Re-engagement • Upsell existing customers • Event reminders and follow up • Send email to people who leave a high NPS to provide delight • Provide education around a new product • Reminders about upcoming renewal/refill • Abandoned cart • Upcoming deadlines	• Set, clear, copy properties • Rotate leads between the sales team • Set lead status or lifecycle stage • Surface deals that have been open and untouched • Close deals with no activity in the past six months • Create tasks for manager to reach out to high priority tickets • Automate follow-up when the sales team is busy (ex. Send a “Book a Meeting” email for anyone who submitted a decision stage form) • Create a deal every time a meeting is booked • Create tasks for Sales Ops when quote approval is needed

Use the worksheet template to plan out your workflow:

Workflow name:	Entry
Workflow type:	Entry

Enrollment triggers:

Entry

and/or

and/or

Re-enrollment? ☐ YES ☐ NO

If yes, when? Entry

Goal: Entry

and/or

Use the worksheet template to plan out your workflow:

General Settings:

What days do you want actions to execute?

- ☐ Business days only
- ☐ 7 days/week

What time of day do you want these actions to execute?

Entry

Campaigns associated with:

Entry

Unenrollment and Suppression:

When contacts enroll in this workflow:

- ☐ Do not remove from other workflows
- ☐ Remove them from all other workflows
- ☐ Remove them from specific workflows:

Suppression lists:

1. Entry

2. Entry

Workflow Map:

Use this space to map out your workflow actions.

Entry

Need some inspiration for workflows to run? Here are some of HubSpot's favorites!

Run a Permission Pass Campaign

Purpose: A one-time email campaign that requests any contacts who haven't already used some form of double opt-in to confirm that they would still like to receive emails from you.

Segment: Contacts that have an unconfirmed opt-in status.

Enrollment Trigger: Contact is a member of [List Name].

Actions:

Step 1: Enable re-subscription emails for forms and review forms consent information and email subscription types.

Step 2: Create a list of contacts who have not interacted with your emails recently.

Step 3: Create a new permission pass email to send to your list of contacts.

Step 4: Review your email's post-send metrics.

Step 5: Determine which contacts to opt out of your emails.

Step 6: Opt out your unconfirmed contacts.

Step 7: Repeat. (optional)

Pro tip:

Before setting your workflow live, whiteboard or map out your workflow visually. This can help you catch conflicts or issues early!

Protect Your Personalization

Purpose: Replace fake form answers with personalization-friendly values.

Segment: Contacts with obviously fake company names.

Enrollment Trigger: Create a list of contacts using company names such as (0, -, *, a, aa, asdf, blah, and other variations you see) and use this to enroll them into this workflow.

Actions: Replace property value with Your Company.

Let 'em go!

Purpose: Automatically close deals that stall for an extended period of time.

Segment: Deals with no activity in the last 120 days.

Enrollment Trigger: All deals or even select pipelines you may notice this issue for specifically.

Actions: Set deal stage to Closed Lost.



Test your knowledge:

- What is marketing automation?
- What is a workflow?

11 Understanding Email in HubSpot



Lesson

- Understanding Email in HubSpot



Resources

- Email Signature Generator
- 15 Email Templates for Marketing and Sales
- 100 Subject Lines We Actually Clicked
- Email Newsletter Guide and Lookbook

Marketers need to continually measure and analyze performance. You need to test, optimize, and then test again. With that in mind, take a moment and audit the emails your organization has sent over the last quarter. Using the template on the next page, identify how each email performed based on the following metrics.

Name of Email	Email Topic	Total Emails Sent	Total Emails Delivered	Total Emails Opened	Total Clicks	Leads Generated
The name of the email sent	New e-book or Monthly Email Newsletter	How many email addresses did you send your email to?	Of the email addresses you sent your email to, how many actually landed in an inbox?	Of the email addresses you sent your email to, how many were opened?	How many unique individuals clicked a link in your email?	How many new contacts did you get from email recipients filing out the form on your landing page?
Entry	Entry	Entry	Entry	Entry	Entry	Entry
Entry	Entry	Entry	Entry	Entry	Entry	Entry
Entry	Entry	Entry	Entry	Entry	Entry	Entry
Entry	Entry	Entry	Entry	Entry	Entry	Entry

Using the information you've listed above, calculate the deliverability, open rate and click through rates of each of your emails.

Name of Email	Deliverability	Open rate	Click-through rate
Name of Email	Total Emails Delivered / Total Emails Sent	Total Emails Opened / Total Emails Delivered	Total Clicks / Total Emails Opened
Entry	Entry	Entry	Entry
Entry	Entry	Entry	Entry
Entry	Entry	Entry	Entry
Entry	Entry	Entry	Entry

How do these results compare to performance you've seen in the past?

Entry

Did these email help you reach your marketing goals?

Entry

Were any of these emails a part of an A/B test? If so, which variation won?

Entry

Are there any optimizations you plan to make to your emails in the future?

Entry



Test your knowledge:

- Why is email marketing important?
- How do you get started with email marketing in HubSpot?
- What strategy do you use to market your products and services and nurture relationships in a human and helpful way?
- How should your conversational tools and email marketing work together?

12 Understanding Social Media in HubSpot



Lesson

- Understanding Social Media in HubSpot



Resources

- Blog Post: Powering Up Your Social Media Engagement
- Blog post: A Simple Guide to Creating Twitter Lists and Growing Your Followers
- Blog Post: Instagram Publishing and the Benefits of Having a Business Account
- Blog Post: What You Need to Know About Bulk Uploading Social Media Posts
- Blog Post: Check the Pulse of your Digital Strategy with a Social Media Audit

Before you jump into content creation, you'll need to first understand what type of content resonates the most with your audience and on which social media channels.

Write down the top-performing posts for each social media channel in the boxes on the following page.

Please also specify if your content can help your audience stay informed, entertained, or connected.

Pro tip:
You don't need an equal amount of the three types of content – the type of content you produce needs to be driven by your goals and business strategy.

Once you've compiled your top performing posts, write down the content ideas that help inform, entertain, and connect with your audience. Using your top performing posts as a guide, focus your effort on producing content that resonates most with your audience.

Channel	Top-Performing	INFORM	ENTERTAIN	CONNECT
Facebook	Entry	Entry	Entry	Entry
Twitter	Entry	Entry	Entry	Entry
Instagram	Entry	Entry	Entry	Entry
LinkedIn	Entry	Entry	Entry	Entry
Other Channels	Entry	Entry	Entry	Entry



Test your knowledge:

- How is social media important to your Inbound strategy?
- What are some ways that social media can attract customers to your business?
- What is one thing that you should keep in mind while building your social strategy?
- Why are campaigns important in social media?
- What are some ways to connect your social efforts and campaigns?

13 Understanding Reporting in Marketing Hub



Lesson

- Understanding Reporting in Marketing Hub



Resources

- Knowledge base: How to analyze sources data
- Knowledge base: Understanding dashboard metrics
- Blog Post: Understanding the Difference Between a Page View, Visit, and Session

HubSpot comes with a variety of analytics tools and tool-specific reporting. This can help you answer any of the questions you may have about your content or your customers. Use these questions to start digging into your data.

Contact Create Attribution

Create a contact create attribution report:

- Navigate to **Reports > Reports**.
- Click **Create custom report**.
- Select **Attribution>Contact Create then select Next.**

Using the sample reports, answer the following questions:

Which content type created the most contacts over the last 60 days?

Entry

What interaction sources created the most contacts?

Entry

Which campaign created the most contacts?

Entry

Channel Specific Reports

- Navigate to your traffic analytics reports in HubSpot:
- Navigate to **Reports > Analytics**.
- Click **Traffic Analytics**.
- Ensure the **Source** tab is selected.

Which sources are generating the most sessions? The least number of sessions? Does this align with your expectations?

Entry

Which sources are generating the most new contacts or new customers? Are there any spikes or does the trend remain consistent?

Entry

Which source did you use in your most recent marketing campaign? Did the results help you hit your goal? Does this change how you'll run your next campaign?

Entry

Are there any sources that are performing above or below your expectations? Based on the sources in question, are you going to invest more or less time in them?

Entry



Test your knowledge:

- What role should reporting play in your marketing efforts?
- How often should you check in on your contact create attribution reports?
- What are the benefits of the channel specific reports?
- What are some sample reports you can use to get a sense of your marketing performance?



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