HUBSPOT CERTIFICATION STUDY GUIDE

Your Exam Study Guide

The following guide walks through key lessons from each of the HubSpot Training courses provided in the certification curriculum. Use this additional resource as you prepare for your exam to improve your understanding of inbound and the HubSpot software.

Goal Planning & Strategy

I. Best Practices

- What is the SMART goal setting framework?
- Why is it important to set SMART goals?
- What does the acronym SMART stand for?
- Why is it important to set measurable goals?
- What three SMART goals should you always have set for your inbound marketing?
- How do you access the HubSpot Goals Application?
- What key pieces of information are needed when entering a SMART goal into your HubSpot Goals application?
- What benchmark data does the HubSpot Goals application provide?
- Why is it important to set a due date for your goals?
- Why is it important to examine your current situation before setting SMART goals?

II. Inbound Fundamentals

- What is the Inbound Methodology?
- What are four different phases (or actions) that make up the methodology?
- Why are Buyer Personas and the Buyer's Journey considered fundamentals of inbound?
- What are the benefits of tagging your work to a campaign in HubSpot?

Buyer Personas

I. Why You Need Buyer Personas

- What is a buyer persona?
- What is a buyer persona not?
- How do buyer personas benefit your marketing strategy?
- In what type of organizations (i.e. B2B, B2C, Nonprofit, etc) are buyer personas most useful?

II. How to Create Buyer Personas?

- What are the four steps to creating a buyer persona?
- Why is buyer persona research necessary?
- What categories of information are necessary to build strong buyer personas?
- How is buyer persona research conducted? Which research technique is best?
- Can buyer personas be created without doing research?
- Can buyer personas be created if you don't yet have customers yet?
- What are the persona-building best practices?
- What is the benefit of transforming persona facts into a persona story?

III. Persona Tool Walkthrough

- Why is it important to create personas in the Contacts tool?
- What key points of your buyer persona's story should you highlight in the internal notes section of the Persona?
- What form field are you creating when building out a persona? Why is this field important?
- What automatically generated lists are created when you publish your persona?

Content Creation

I. What is Content?

- What is content?
- How does content fit into the Inbound Methodology?

II. How to Create Remarkable Content

- How can you create remarkable content?
- How do your buyer personas factor into your research?
- How is content different between pre and post-internet eras?
- What are the different steps to a content process?
- What is content defined by?
- How do you determine the purpose of a piece of content?
- What are different formats of content? What's the difference between these formats?
- How do you pick the best format for a piece of content?
- What should you consider when determining the topic?
- What's the Buyer's Journey?
- What different content formats are used in the different Buyer's Journey stages?
- What are the best practices for content creation?
- How does distribution fit into a content process?
- What are the different ways to leverage content with distribution?
- Why is it important to analyze content?
- What are the different metrics that can be used to measure effective content?
- What's the value in repeating a content process?

III. Calendar Tool Walkthrough

- What scheduled or published pieces of content can you see in the Calendar tool?
- What pieces of content can you schedule new or draft versions of?
- What are custom tasks in the Calendar tool?
- Can you edit content directly from the Calendar?

Search Engine Optimization and Keywords

I. What is Search Engine Optimization

- In what ways does SEO help your inbound marketing?
- How do search engines find, understand and rank pages to show in search results?
- What is the difference between paid results and organic results?

II. What are the SEO Best Practices?

- What are keywords and how should you go about picking the right ones for your business?
    - How do your buyer personas factor into your research?
    - How does the Buyer's Journey factor into your research? What are the common types of keyword searches that fit into each stage?
    - In what ways can you expand your list of keywords?
    - How can you determine which keywords people are using to find your site?
    - What is the difference between short and long-tail keywords? How difficult is it to rank for each type?
- What is search intent, and how do search engines use it to produce the most relevant results?
- In what ways should you optimize your pages for search engines?
    - How should you properly optimize the page title? URL? Body? Headers? Image alt-text? Meta description? And why does each matter to search engines?
    - What types of links should you include in your content and why?
    - Why is promoting a good user experience important for SEO? What element should you be mindful of?
    - Why should you optimize for mobile?
- Why is promoting your content important for SEO?
- How do links help search engines understand pages?
    - How do links factor into search engines' determination of whether or not a site is trustworthy?
    - What are inbound links?
    - What makes a link authoritative? Why is link authority important?
    - What strategies can you implement to earn links, and why does each help?
    - What are online directories and why are they important for SEO?
    - If your business is location-specific, how can you optimize for getting found in local searches?

III. Keyword Tool Walkthroughs

- What does "rank" mean?
- What are some of the suggestions the keywords tool will provide?
- What happens when you select the individual keyword phrase inside the HubSpot tool?
- How can you get suggestions on keywords?

Blogging

I. Why Does Blogging Help Your Inbound Marketing?

- How does blogging help to attract new visitors?
- How does blogging help to convert new leads?
- How can your blog help you to build trust with your prospects? Why is this important?

II. How Do You Create a Successful Blog?

- How do you pick an appropriate blog topic?
  - Why should you write about educational content?
  - Should you write about your business?
  - What are ways to brainstorm different topics to blog about?
  - Why is it important to do keyword research around your blog topics?
  - How many topics should you focus on per post, and why?
- Why is it important to create a compelling blog title?
  - What is a working title and how is it different from your topic?
  - Why should you include a long-tail keyword in the title?
  - How can you make the value of the post clear in the title, and why is this important to do?
  - How long should your blog title be, on average?
- Why is it important to format your blog post properly?
  - What is whitespace and how does it affect your blog post?
  - How can you break up the information in your blog post?
  - How can you make your post easily digestible?
  - Why are images important to include in blog posts, and where should they be placed?
- Why is it important to optimize a blog post for search engines?
  - Where should you place your long-tail keyword and why?
  - Is the exact structure and wording of your long-tail keyword important to preserve? Why or why not?
  - Where and why should you include links within the content of your blog post?
- Why should you use your blog to promote your other offers?
  - What types of calls-to-action should you feature on the sidebar? Why?
  - What types of calls-to-action should you feature within a blog post? Why?
- What are the different ways you could promote your blog posts?

- Which metrics should you analyze to track the performance of your blog? What does each metric tell you, and how can you use that knowledge to improve performance?
- How frequently should you blog? Why?

III. Blogging Tool Walkthroughs

- How does the Blogging tool function? How can you effectively use it?
- How can the tool be used to determine which posts are performing best?
- How can you manage authors, topics and comments?
- What are blogging blueprints?
- How do you add images and CTAs to posts?
- Which options are available when publishing a post? How do you publish a post?
- How do you control blog settings? What are those settings?

Social Media

I. Why is social media essential to inbound?

- Where in the Inbound Methodology is Social Media used?

II. How can I use social media effectively?

- What are two ways marketers can segment their social media audience?
- When considering which keywords to monitor, what should you reference to ensure you are monitoring the right people?
- How can your company establish thought leadership using social media?
- Why is it important to create a social media style guide?
- What are the three main components of an optimized social media profile?
- How do you optimize content for Facebook? Twitter? LinkedIn?

III. Social Monitoring Tool Walkthroughs

- How might you exclude your competitors from showing up in your monitoring stream?
- Which social networks can you monitor using the Social Inbox?
- What are the three different types of social monitoring lists you can build?
- Which social networks can HubSpot publish to?
- Where in HubSpot can you look to analyze your social publishing efforts?
- What are the benefits of using HubSpot to publish your social media posts?

Calls-to-Action (CTA)

I. Benefits of Using the Calls-to-Action Tool

- What is a call-to-action, and what is its purpose?
- How does a call-to-action fit into the conversion process?

II. How to Create Quality Calls-to-Action

- Why should a call-to-action be action-oriented?
- How do you identify the right words to use for the copy of a CTA?
- Why should a call-to-action include a relevant keyword in its copy?
- Why should your call-to-action be attention-grabbing?
- What considerations should you take into account when designing a CTA?
- What metrics should you use to identify if a CTA has been appropriately placed on your website?
- Which metrics should you pay attention to when analyzing your calls-to-action?
- What percentages should you be aiming for with each key call-to-action metric?

III. Calls-to-Action Tool Walkthroughs

- How does the Call-to-Action tool function? How can you effectively use it?
- What information can you gain from the main Calls-to-Action dashboard?
- What steps must you complete to create a functioning CTA?
    - What types of design options are available to you when building a call-to-action?
- Why would you use an embed code? How does it work?
- How does a call-to-action connect to the rest of the conversion process?
- What is an “image button” CTA and how does it work?

Landing Pages

I. Benefits of Using the Landing Pages Tool

- What is a landing page, and what is its sole purpose?
- Where does a landing page fit into the conversion process?

II. How to Create Quality Landing Pages

- What is the value exchange that landing pages are based on?
- What are the marks of a successful landing page header and why?
- What information should you include in the copy on a landing page and why?
- How can you help a visitor easily understand your landing page?
- Why should the length of the form and the form fields asked mirror the value of the offer?
- What can you do on your landing page to keep a visitor focused?
- Which metrics should you pay attention to when analyzing your landing pages? What percentage should you aim for?

III. Landing Pages Tool Walkthroughs

- How does the Landing Page tool function?
- Which landing page metrics can be seen on the main Landing Pages dashboard?
- What should you take into consideration when choosing a landing page template?
- What types of options are available when it comes to modifying your landing pages?
- How do you publish a landing page?
- How does a landing page connect to the other pieces of the conversion process?

Forms

I. Why Use the Forms Tool

- Why are forms a critical component of converting visitors into leads?
- How do marketers and salespersons benefit from a well-crafted form?
- How can the forms tool be used with other HubSpot tools?

II. How to Create Quality Forms that Convert

- What is the relationship between a form and a landing page?
- What information can form fields help us to uncover about leads that benefit both the marketing and sales team? Why are these important?
- What is a typical goal for each stage of the buyer's journey that can help guide you in creating a form?
- How can a marketer anticipate the perceived value of an offer? What are some things to consider?

- Why would you want to use a label or placeholder text on a field?
- What are the different field types that can be used when creating a new field?
- What are the pros and cons of each field type? How does each field type impact your contacts database?

III. Forms Tool Walkthroughs

- How do you create a form?
- How do you create new questions to add to a form?
- When should a person use the smart fields and/or progressive profiling features?
- Where do you find the embed code for a website form?
- How does HubSpot ensure real contacts are filling out forms with real email addresses?
- How can you do the following in the software?
    - Receive notifications upon new leads filling out the form?
    - Disable cookie-tracking?
    - Turn off the feature which auto-populates fields?
    - Create a list of email domains to block from submitting a form?

Thank You Pages

I. Benefits of Using Thank You Pages

- What is a thank you page and what is its purpose?
- Why is a thank you page typically a better option than an inline thank you message?

II. How to Create Quality Thank You Pages

- Why is it important to have your website's navigation on your thank you page?
- How can you best deliver a downloadable offer on the thank you page?
- How can you properly set expectations for the delivery of a non-downloadable offer?
- Why is it important to provide additional direction on the thank you page?
- What elements can you include on a the thank you page to move your new lead further into the Buyer's Journey?
- Why is it important to include social media share buttons on your thank you page?

III. Thank You Page Walkthroughs

- How can you create Thank You Pages in HubSpot?
- In which HubSpot tool should you use to create your thank you pages?
- What differs between a template used for to build a landing page versus one used to build a thank you page?
- How do you add content offers such as PDFs to your thank you pages?
- How do you connect thank you page to the rest of the conversion process?

Contacts

I. Benefits of Using the Contacts Tool

- Which types of business contacts do you want to have in your contact database?
- What are the qualities of a good contact database?
- Why is the Contacts application such a valuable tool for:
  - Marketers?
  - Sales reps?
  - An inbound business as a whole?
- Which stages of the Inbound Methodology are most relevant to using the Contacts tool?

II. How to Best Use Contacts to Close and Delight Contacts and Customers

- What are the different ways a contact can be added to HubSpot?
- How can you ensure that your contact database is always up-to-date?
- What is the difference between a contact property and a company property?
- How do contact properties work to store and surface information about your contacts across HubSpot?
- What information is available on the contact profile?
- What does the property "Lifecycle Stage" track?
  - Why is it important to use this property?
  - What does each "Stage" signify (i.e. Subscriber, Lead, Marketing Qualified Lead, Sales Qualified lead, Opportunity, Customer, Evangelist, Other)?
- Who are the main stakeholders in a successful closed-loop marketing strategy?
  - What are the four steps to consider?

II. Contacts Tool Walkthroughs

- How do you create a custom contact property?
- What are the different contact property groups in HubSpot?
- How do you delete a contact from the HubSpot database?
- What effects does "staring" a property on a contact record?
- Who has the ability to "star" a property on a contact record?
- What is the one property that serves as a unique identifier for a contact in HubSpot?
- How do you import contacts into HubSpot? What does that process look like?

Lists

I. Benefits of Using the Lists Tool

- What is a list?
- How does context play an important role in building an inbound business? How does segmentation add context to your marketing?
- How does segmentation improve the results of your marketing efforts?
- Which stages of the inbound methodology are relevant to lists?

II. How to Best Use Segmented Lists of Contacts

- How do the lists you build impact the work you do in other areas of HubSpot?
- How do marketers typically think about segmenting their contacts?
  - What are the two foundational principles should guide the way you think about segmentation?
- What is the difference between implicit and explicit data?
  - What are some examples of explicit and implicit data that HubSpot collects about prospects and customers?
- What metrics should you analyze to determine whether your list segmentation strategy is successful?

III. Lists Tool Walkthroughs

- What are the differences between a smart list and a static list?
  - Can you add individual contacts to both types of lists?
  - Can you see the list logic for both smart and static lists even after you create them?

- What is the difference between "And" logic and "Or" logic? What does each type of logic help you do when it comes to list segmentation?
- What are the different list filtering mechanisms you can use to segment your contacts?
- How do you know a list is okay to import into HubSpot? What needs to be confirmed?

Email

I. Benefits of Using the Email Tool

- Why is email marketing still an important part of your inbound strategy?
- What are some statistics that email marketing is still effective?
- How can email be used to close contacts into customers?
- How can email be used to delight customers into promoters?

II. How to Best Use the Email Tool

- How do content, audience and timing impact the success of your email sends?
- Segmentation is a critical component of successful emails. What are some effective ways to segment your Contacts database?
- What types of content should you send to your contacts at each stage of the buyer's journey?
- What is lead nurturing and how can it help you close leads into customers?
- How can you optimize your emails for mobile readers?
- Why is it important to define a clear goal for your email?
- What are the different elements of an email that you can personalize?
- What are the best practices for writing effective subject lines?
- What metrics are important to focus on when analyzing and improving your email strategy?
- What are some ways you can improve the click-through rate of your emails?

III. Email Tool Walkthroughs

- Which fields are required in order to send an email?
- How do you clone an email? When is it advantageous to clone an email versus creating a new one?
- What is the process for importing a list of contacts for an email send?
- How do you send an email to an individual contact?

- How would you find out which contacts clicked on a specific link within an individual email send?
- What are the different reasons that a contact would be marked as ineligible to receive future emails?

Sources

I. Benefits of Using the Sources Tool

- How does the Sources tool fit into the Inbound Methodology?
- Why is the Sources tool considered your "marketing compass"?

II. How to Best Use the Sources Data to Improve Marketing

- What are the best practices for the Sources tool?
- How often should you be checking the Sources tool?
- What are the different ways you can access the Sources data?
- What questions should you ask yourself when looking at the Sources tool?

III. Sources Tool Walkthroughs

- What's the difference between "Standard View" and "Cumulative View"?
- How do you create a custom Sources Report?
- How do you email a report?
- Who can you send this report to?
- What are the different sources that are shown in the tool?
- What is a default report?
- How are visits, contacts and customers defined?
- What is a visits-to-contacts rate? Contacts-to-customer rate? How can you see this on a sources graph?
- How is each sources categorized?
- What does Offline Sources mean?
- What does "Unknown Keyword (SSL)" mean under Organic Search?
- What is a Tracking URL?