

HubSpot Sales Hub Essentials

Course Description

The HubSpot Sales Hub course is designed to provide sales professionals with comprehensive training on leveraging HubSpot's tools for effective prospecting, connecting with customers, closing sales, and optimizing sales processes. This course is ideal for sales teams looking to streamline their workflows, enhance their communication strategies, and drive higher sales performance through advanced use of HubSpot features. Participants will gain hands-on experience through practical exercises and quizzes, ensuring they can implement what they learn immediately.

Audience

This course is tailored for sales professionals, sales managers, and business development representatives who are either new to HubSpot or looking to deepen their knowledge and skills in using HubSpot's Sales Hub. It is also beneficial for marketing professionals involved in sales enablement and operations managers who oversee sales processes.

Pre-requisite Knowledge/Skills

Basic understanding of sales processes and terminology

Familiarity with CRM systems (prior experience with HubSpot is a plus but not required)

Access to HubSpot Sales Hub (any subscription tier)

Course Objectives

By the end of this course, participants will be able to:

- Efficiently identify and manage good-fit leads using HubSpot's prospecting tools.
- Utilize HubSpot to create and complete sales tasks, make sales calls, generate emails, and book meetings.
- Successfully create and manage deals, add products, and generate quotes in HubSpot.
- Leverage HubSpot's reporting tools to set sales goals, forecast outcomes, and enhance sales strategies.
- Implement frictionless selling strategies to enable and align sales teams, fostering a culture of continuous learning and improvement.

Course Outline

Module 1: Prospecting in HubSpot - Identifying Good-Fit Leads

- An Overview of the Prospecting Workspace
- Adding Contacts to Your CRM
- Managing Your Leads
- Organizing Your Leads
- Using Chatflows to Identify Leads
- Quiz Yourself

Module 2: Prospecting in HubSpot - Connecting with Customers

- Creating Tasks in HubSpot
- Completing Tasks in HubSpot
- How to Make Sales Calls in HubSpot
- How to Generate Sales Emails in HubSpot
- Using Snippets and Playbooks to Create Call Outlines
- Booking Meetings in HubSpot
- Leveraging Automation with Sequences in HubSpot
- Using AI Assistant with Sales Emails
- Practical Exercise

Module 3: Closing Sales with HubSpot

- Create a Task From a Contact Record
- Book a Meeting Using the Meeting Rotations Tool
- Quiz Yourself
- Creating and Managing Deals in HubSpot
- Adding Products to Deals and Generating Quotes in HubSpot

- Practical Exercise

Module 4: Sales Reporting and Upskilling in HubSpot

- Advance a Deal on Your Deal Board in HubSpot
- Quiz Yourself
- Categorizing Your Sales Reporting in HubSpot
- Setting Sales Goals and Forecasting
- Using Conversation Intelligence to Improve Your Calls
- Quiz Yourself

Module 5: Frictionless Sales

- Rethinking Sales with Frictionless Selling
- Join the Inbound Sales Study Group
- Implementing the Frictionless Selling Framework
- How BabelQuest Fights Friction
- Why Your Sales Team Needs to Be Enabled
- Enabling Your Team
- How EZ Text Enables Their Team
- What's Keeping Your Reps from Selling?
- Worksheet: Enable Your Team
- Why You Need to Align with Your Buyers
- Aligning Your Team
- How Do You Align with Your Target Buyers?
- How Usabilla Aligns with Their Buyers
- Worksheet: Align With Your Buyer
- Why Your Sales Team Needs to Be Coached
- Transforming Your Team Through a Culture of Learning
- How Engaging Partners Fosters a Culture of Learning