

HubSpot CRM for Marketing and Sales Professionals

Course Duration: 3 Days (24 Hours)

COURSE DESCRIPTION:

The *HubSpot CRM for Marketing and Sales Professionals* training program is designed to help participants understand and apply core concepts of inbound marketing, CRM-based sales operations, content management, automation, and analytics using HubSpot.

This course provides hands-on experience with HubSpot's powerful Marketing and Sales Hubs, including features like email campaigns, landing pages, workflows, sales pipelines, and performance dashboards. Participants will learn how to build effective marketing campaigns, automate lead nurturing, manage sales deals, and measure ROI—all within a unified platform.

By the end of this course, learners will be equipped to use HubSpot CRM to attract, engage, and delight customers through personalized, data-driven marketing and sales processes.

AUDIENCE PROFILE:

This course is ideal for:

- Marketing executives and digital marketers new to HubSpot
 - Sales professionals and managers looking to adopt a CRM
 - Business owners or startups aiming to build marketing and sales processes
 - Anyone responsible for lead generation, pipeline management, and campaign analysis
 - Teams planning to transition from manual marketing/sales processes to automation
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PREREQUISITES:

Participants should have:

- A basic understanding of CRM, sales, or digital marketing concepts
 - No prior experience with HubSpot is required
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COURSE OBJECTIVES:

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

- Create and manage content including blogs, landing pages, and emails

- Use HubSpot tools to publish and monitor social media campaigns
 - Build marketing workflows and automate lead nurturing
 - Set up and manage sales pipelines and deal stages
 - Track performance using built-in reports and dashboards
 - Collaborate across marketing and sales teams effectively within the CRM
 - Use segmentation, personalization, and automation to improve engagement and conversions
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TABLE OF CONTENTS (TOC):

Module 1: Introduction to HubSpot CRM

- Overview of HubSpot and its Hubs
 - Free vs Paid Features
 - Navigating the HubSpot Dashboard
 - Setting up Users, Teams, and Permissions
 - Managing Contacts and Companies
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Module 2: Content Creation and Management

- HubSpot CMS Overview
 - Creating Blog Posts
 - Designing Landing Pages and Thank You Pages
 - Using CTAs and Forms
 - SEO Optimization in HubSpot Content Tools
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Module 3: Email Marketing

- Types of Marketing Emails (One-off, Automated, A/B Test)
 - Email Editor and Templates
 - Segmentation and Personalization
 - Subscription Types and Compliance (GDPR)
 - Email Performance Analytics
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Module 4: Social Media and Campaigns

- Connecting Social Accounts
- Creating and Scheduling Posts
- Monitoring and Interacting with Leads

- Campaign Tool Overview
 - Social Media Reporting
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Module 5: Marketing Automation

- What Are Workflows?
 - Building a Workflow (Enrollment Triggers, Actions, Delays)
 - Automating Lead Nurturing
 - List Segmentation and Smart Lists
 - Lead Scoring Setup
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Module 6: Sales Hub and Pipeline Management

- Overview of the Sales Hub
 - Creating and Customizing Deal Pipelines
 - Managing Deals and Deal Stages
 - Using Tasks, Notes, and Meeting Scheduling
 - Sales Sequences, Templates, and Snippets
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Module 7: Analytics and Reporting

- Understanding Dashboards
 - Prebuilt vs Custom Reports
 - Website Traffic and Campaign Reports
 - Sales Pipeline Analytics
 - Attribution Reports (Basics)
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Module 8: Collaboration and Productivity Tools

- Using Comments, Mentions, and Notes
 - HubSpot Calendar and Meetings Tool
 - Using the HubSpot Mobile App
 - Activity Feed and Notifications
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Module 9: HubSpot Integrations

- Connecting with Google Workspace (Calendar, Gmail)
 - Microsoft Outlook Integration
 - WhatsApp, Facebook, and Ads Integration
 - Exploring the HubSpot App Marketplace
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Module 10: Data and Contact Management

- Importing and Exporting Contacts
 - Static vs Active Lists
 - De-duplication and Data Cleanup
 - GDPR Compliance Features
 - Managing Contact Properties
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Module 11: Advanced Marketing and Sales Features

- Lead Scoring and Qualification
 - Email Health and Deliverability Tips
 - Custom Behavioral Events (Intro only)
 - Service Hub Overview (Optional)
 - Automation Tips and Best Practices
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Labs – Hands-on Exercises - Hands-on exercises will be provided to ensure participants gain practical, real-world experience with Hubspot CRM. These sessions are intended to offer a broad overview with industrial examples—they're not tailored to specific business requirements.