

KOENIG SOLUTIONS • COURSE OUTLINE

# HubSpot CRM for Marketing and Sales Professionals

Learn to manage content, email, automation, sales pipelines and analytics in HubSpot CRM for marketing and sales.

**3 Days**

24 HOURS

**11**

MODULES

**53**

TOPICS

**1**

HANDS-ON ACTIVITIES

## COURSE OVERVIEW

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.

## WHO THIS COURSE IS FOR

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**

## PREREQUISITES

Participants should have:

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

## What You Will Learn

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

COURSE SYLLABUS

## 11 Modules, 53 Topics

01

### Introduction to HubSpot CRM

TOPICS

Overview of HubSpot and its Hubs · Free vs Paid Features · Navigating the HubSpot Dashboard · Setting up Users, Teams, and Permissions · Managing Contacts and Companies

02

### Content Creation and Management

TOPICS

HubSpot CMS Overview · Creating Blog Posts · Designing Landing Pages and Thank You Pages · Using CTAs and Forms · SEO Optimization in HubSpot Content Tools

03

### Email Marketing

TOPICS

- 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

04

## Social Media and Campaigns

### TOPICS

Connecting Social Accounts · Creating and Scheduling Posts · Monitoring and Interacting with Leads · Campaign Tool Overview · Social Media Reporting

05

## Marketing Automation

### TOPICS

- What Are Workflows?
- Building a Workflow (Enrollment Triggers, Actions, Delays)
- Automating Lead Nurturing
- List Segmentation and Smart Lists
- Lead Scoring Setup

06

## Sales Hub and Pipeline Management

### TOPICS

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

07

## Analytics and Reporting

### TOPICS

Understanding Dashboards · Prebuilt vs Custom Reports · Website Traffic and Campaign Reports · Sales Pipeline Analytics · Attribution Reports (Basics)

08

## Collaboration and Productivity Tools

### TOPICS

Using Comments, Mentions, and Notes · HubSpot Calendar and Meetings Tool · Using the HubSpot Mobile App · Activity Feed and Notifications

09

## HubSpot Integrations

### TOPICS

- Connecting with Google Workspace (Calendar, Gmail)
- Microsoft Outlook Integration
- WhatsApp, Facebook, and Ads Integration
- Exploring the HubSpot App Marketplace

10

## Data and Contact Management

### TOPICS

Importing and Exporting Contacts · Static vs Active Lists · De-duplication and Data Cleanup · GDPR Compliance Features · Managing Contact Properties

11

## Advanced Marketing and Sales Features

### TOPICS

Lead Scoring and Qualification · Email Health and Deliverability Tips · Custom Behavioral Events (Intro only) · Service Hub Overview (Optional) · Automation Tips and Best Practices

### 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.

### NOTES

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#### WHAT IS INCLUDED

## Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

#### ABOUT KOENIG

## Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

#### FLEXIBLE DELIVERY

## Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

## Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

Visit [koenig-solutions.com](https://koenig-solutions.com)

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