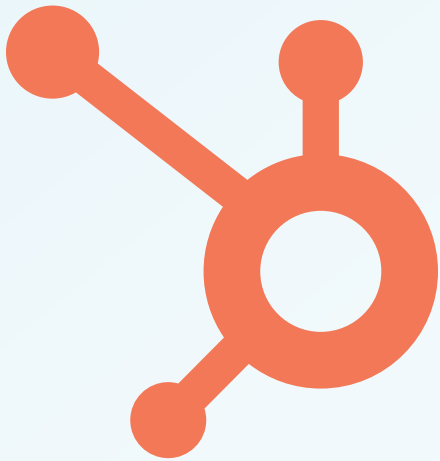


10

THINGS TO
TACKLE
**BEFORE
BUYING
HUBSPOT**

Your guide to HubSpot happiness!



As a HubSpot Partner Agency, we've seen a lot of companies using HubSpot. For some, the platform has served as a major catalyst for growth. For others, HubSpot was a huge waste of money.

So what's the difference?

More often than not, HubSpot fails to work for a company because of problems during the onboarding process.

One of the most common issues is that companies purchase HubSpot before they're really ready to use the platform. This means they end up paying for the tool for months before they can get any benefit from it. Or, companies jump into HubSpot headfirst and use the platform from day one, only to realize much later that they don't have a strategy that leverages all the tool has to offer.

We want to help companies avoid pitfalls like these.

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PRO TIP:

Don't make the mistake of thinking that any of the things on this list will take care of themselves once you purchase HubSpot.

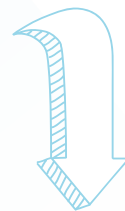
Remember that at the end of the day, HubSpot is just a tool. A hammer can't help you build a house if you don't know how to use it or where the nails are supposed to go.

Similarly, HubSpot can't help your company grow if you don't have the right strategies, people, and processes in place to use it effectively.

To get your company set up for success with HubSpot, make sure you have these 10 things in order before signing on the dotted line:

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Now let's dive into each of these a bit further!





Inbound Buy-In

HubSpot is built to help companies execute successful inbound marketing and sales strategies.

The companies who want to create valuable content for their target audience to attract and form relationships with them before asking them to buy anything are perfect for HubSpot. Companies who want to purchase lists or rely on cold calls to grow are not usually a great fit for HubSpot. Those companies who rely more on outbound efforts will quickly realize that HubSpot's pricing and features are working against them rather than for them.

Many marketers today are realizing that inbound marketing tactics are usually more effective than outbound ones. Those marketers often stumble onto HubSpot and begin advocating for it inside their organization. But, if they convince their team and company leadership to use HubSpot before convincing them to use inbound methods, they're setting themselves up for failure.

If your organization is currently relying on outbound tactics, make sure everyone is ready for the cultural shift to inbound before bringing HubSpot into the fold. Remember, HubSpot is just a tool, it's the strategic shift from outbound to inbound that can really put that tool to work to grow your company.

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Strategy

A good strategy is essential for marketing and sales, but it takes time to develop. Don't make the mistake of paying for expensive software you can't use while you're taking that time to build your strategy.

Before you buy HubSpot, determine what your goals are, your plan of attack for accomplishing those goals, and the tools you're going to use to help you execute that plan. Don't forget that adding HubSpot might add some capabilities you've never had before, such as marketing automation, smart content, and more data about your prospects' behavior than you could've dreamed of. Be sure to consider how those added capabilities can be used in your new strategy.

Don't make the mistake of paying for expensive software you can't use while you're taking that time to build your strategy.

For more information on how to develop a marketing strategy and plan, check out our [comprehensive guide and template](#).



Buyer Personas

One of the great things about HubSpot is that it helps you deliver the right message, through the right channel, at the right time. In other words, it helps you make your marketing content more personalized to who you're trying to reach, taking into consideration their needs, preferences, and stage in the buyer's journey.

But this is impossible to do if you don't truly know your customers. This means that you need to have your buyer personas identified and you should have documented information about each of them. If you've done this work before beginning with HubSpot, you can set the platform up to deliver more personalized (and more effective) messaging from day one.



PRO TIP:

Make sure you use your buyer personas when developing your strategies. A good strategy shows how you'll adapt your messaging and tactics for each persona you're trying to connect with.





Website Improvements

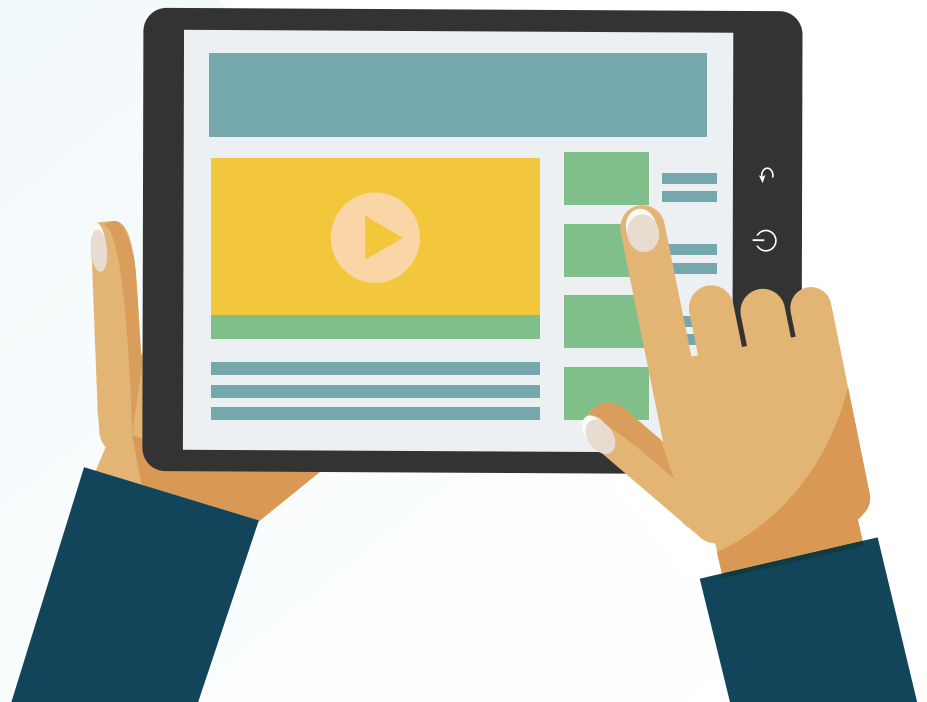
When companies add HubSpot, they almost always make changes to their website at the same time. Sometimes it's a drastic change, such as a complete website redesign, and sometimes it's a series of small changes to bring their website in line with inbound best practices.

Regardless, we recommend making those changes before buying HubSpot so you're not paying for the platform while you're working on them. Get your website where you want it, then add HubSpot. This way you're ready to use the platform right away to drive traffic to the site and convert that traffic to leads.



PRO TIP:

Considering building your website on HubSpot too? HubSpot now sells its CMS as a stand-alone product. This means that you can buy just the CMS while you're building out your new website, then add the rest of HubSpot's features once the website is ready to go.



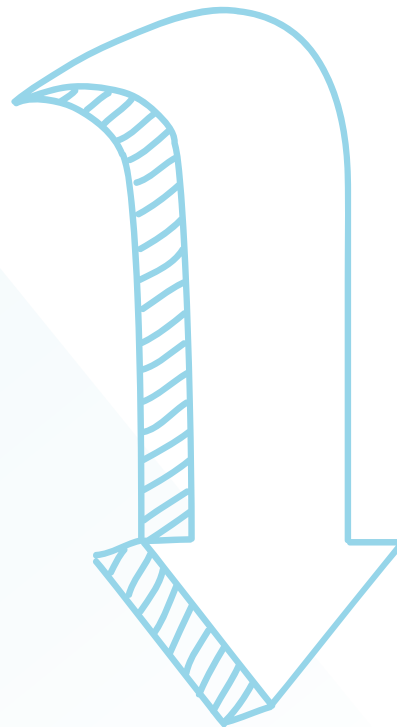


Low-Hanging Fruit

If you're starting inbound marketing for the first time, it often takes about six months before you really start to see results. That can seem like a very long time to wait.

So, whenever we work with a new client that's beginning to use HubSpot, we always work with them to find the low-hanging fruit—opportunities for driving results in the near term. We highly suggest that you also identify these opportunities before you buy HubSpot. This way, once HubSpot is up and running, you can use it to start getting a return on your investment sooner.

Have a bunch of old leads sitting in your CRM? HubSpot's tools make it super easy to see if any of them are interested in restarting a conversation with you.



HERE ARE THREE EXAMPLES OF LOW-HANGING FRUIT OPPORTUNITIES YOU MIGHT BE ABLE TO TAKE ADVANTAGE OF:

1) **Reactivating dead leads.**

Have a bunch of old leads sitting in your CRM? HubSpot's tools make it super easy to see if any of them are interested in restarting a conversation with you. Consider making your first HubSpot campaign a reactivation campaign that uses HubSpot's email, workflow, and landing page tools to deliver a nurturing sequence to your list of old leads, segmented by persona.

2) **Generating leads from popular blog posts.**

If your blog posts don't have clear calls to action on them that drive blog traffic to a lead conversion asset (like an ebook, guide, or quiz), this is a great low-hanging fruit opportunity for you. Identify your most popular blogs, figure out a relevant lead conversion opportunity for each of them, and plan to use HubSpot's blog, call-to-action, and landing page tools to place a call-to-action on each of those posts.

3) **Get more qualified leads from an event.**

Do you have a trade show or other event coming up? Develop a plan for using HubSpot and inbound tactics to get more and better leads from that show. For example, get leads from people who want to request something like a piece of educational content or a case study after visiting your booth. This will typically give you more leads than if you only go after people who are ready to have a sales conversation and it'll give you better qualified leads than people who put their business card in a fishbowl in hopes of winning something.



Lead Conversion Assets

Lead generation is a key component of every inbound strategy. The most common way of generating these leads is offering a piece of valuable content in exchange for their information—we call these pieces of content “lead conversion assets.”

When getting started with inbound, you’ll want at least one lead conversion asset for the top of the funnel and one for the middle. For example, you might have an educational ebook and a detailed case study. By building these out before you sign up for HubSpot, you’ll be able to start your inbound campaigns more quickly.

When getting started with inbound, you’ll want at least one lead conversion asset for the top of the funnel and one for the middle.





Department Alignment

Growing a company today is very difficult if you don't have strong alignment between your marketing, sales, and service departments. Rolling out a comprehensive tool like HubSpot is a great time to work on making that alignment stronger.

You'll want to figure out things like how marketing hands off a lead to sales, what sales expects a qualified lead to look like, how service helps ensure that customers are happy promoters of your company, and much more. We strongly recommend developing a service level agreement (SLA) between your departments before adding HubSpot into the mix.

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Data Quality

Whenever you migrate to a new system, it's always a good idea to make sure you're migrating over clean data. But with HubSpot, there's another advantage to cleaning out your data before making the move.

For its marketing software, HubSpot charges based on the number of contacts in your CRM. If you have a bunch of junk contacts or duplicate records, you can save yourself some money by cleaning them out first.

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Software Integrations

One of the most valuable things about HubSpot is that it puts many of your marketing, sales, and service tools in one place. But we've never seen a company that didn't still need at least one additional tool. Before buying HubSpot, create a list of tools that HubSpot will replace and another list of tools that you'll still need to use.

For the list of tools you'll still need to use, see if HubSpot has an integration available, if you'll need to create an integration using Zapier or an API connection, or if you're going to have problems getting the systems to talk to each other. Be sure to involve your IT department in this process if you have one.

Trust us, it's much better to figure out what problems you might run into before you sign a contract. With that said, HubSpot has really stepped up its integration game lately and we rarely run into integration issues these days that can't be solved.

Before buying HubSpot, create a list of tools that HubSpot will replace and another list of tools that you'll still need to use.



Onboarding Provider

Taking care of the items in this list will make sure you're set up for an easy and effective onboarding experience. HubSpot requires you to go through guided onboarding, and there's a cost associated with it. But did you know that you have options when it comes to onboarding?

One option is to go through onboarding with HubSpot, which will provide you with a consultant who guides you through the process of onboarding over 90 days or so. The other option is to work with a certified HubSpot Partner Agency.

In addition to being able to help you with the things on this list, an agency can also go beyond just consulting to do some of the work involved with setting up the platform.

Did you know that you have options when it comes to HubSpot onboarding?

For a deeper look into the differences between the onboarding options and some help in figuring out which one is best for your company, [check out our blog post on the subject.](#)



Have questions or need some help?

Book your free 30-minute consultation with a HubSpot expert from Simple Strat today!

[SCHEDULE MY FREE CONSULTATION](#)



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