

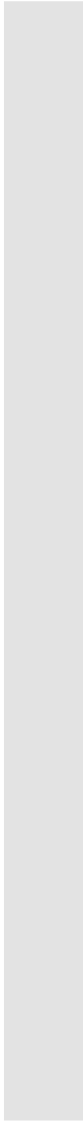
CRM Discovery Session

Sample client · RevTechie

Agenda

- ❑ Session Objectives
- ❑ Session Formats
- ❑ Planned Sessions
- ❑ Q&A

Introductions



Session Objectives

Discovery Defined

The **discovery** phase is the first stage of systems development. It involves the project team, function leads, technical leads, and company leadership working together to collect and produce:

- ▢ project objectives
- ▢ functional and non-functional requirements
- ▢ feature selections
- ▢ system architecture
- ▢ Implementation schedule

At this stage, we ensure every team member has a working understanding of the project objectives and the steps to achieve those objectives.

What we will be looking for



What is working now?



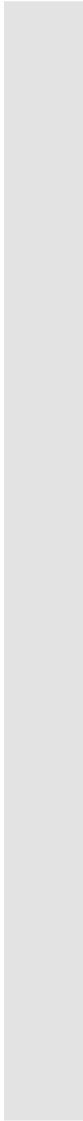
What is not working?



What feels like it could be better?



Session Format



Session Formats



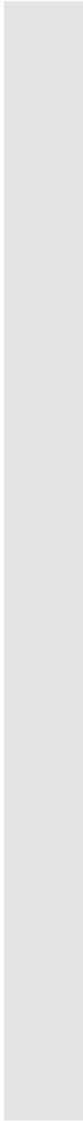
Process Review

- Guided review of current processes
- Led by RevTechie representative
- Approximately 1 hour in length



Click-Through

- Step-by-step click-through of systems or features
 - Led by Client representative
 - Approximately 1 hour in length



Planned Sessions

Planned Sessions

Client Sales Process Discovery:

In this meeting we will review how your clients interact with your sales systems.

Type:

Process Review

Agenda:

Customers and Clients Identification

Primary sales processes

Per Sales process

Interaction points with your systems

Interaction points with your sales staff

RevTechie Owner:

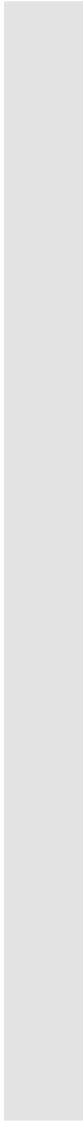
RevTechie consultant

Client Owner:

Client lead



Systems being evaluated



Systems being reviewed

Throughout the course of this evaluation, we will be reviewing all sales support systems and processes.

1. Leads/Company/Deal Management
2. Forms
3. Chat - Flows
4. Social Media
5. Ads Management
6. Email Marketing
 1. Programmable Email Content
7. Marketing Automation
8. SEO Recommendations and Optimizations
9. Predictive Lead Scoring

System Activities and Ownership

System	Activities	Owners
Leads/Company/Deal Management	Manage and Segment Companies based on different parameters using lists Assign Contacts to different users Customize Contacts with up to 1000 custom properties	
Promotional Website		
Salesforce		
Constant Contact		
Zapier		

System Activities and Ownership

System	Activities	Owners



Questions?



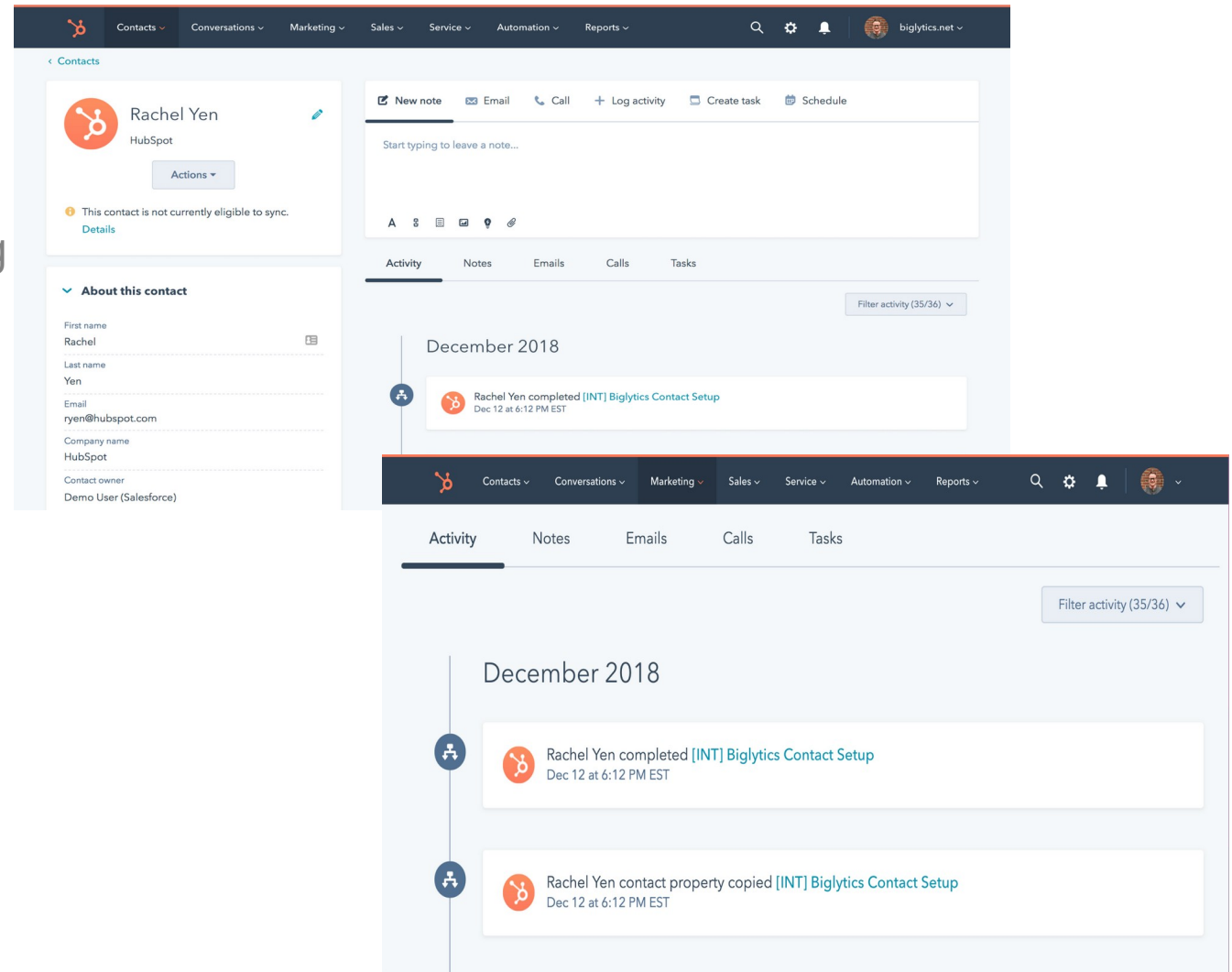
Marketing Hub Enterprise - Features Discover



Powerful CRM and marketing tool

Leads /Companies /Deals Management

1. With Marketing Hub, all your marketing tools and data are on one easy-to-use, powerful platform.
2. You will be able to communicate, store & visualize interaction, keep relationship of all objects like contacts, companies, deals, tasks, activities & events.



Hubspot Forms

1. Standard forms
2. Progressive forms
3. Popup forms.
4. Customized forms
5. Form API (for your custom forms)

The screenshot shows the HubSpot Forms interface for editing a 'Webinar Sign Up' form. A modal dialog titled 'Create a new property' is open, allowing the user to define a new form field property. The dialog contains the following fields:

- Label:** A text input field containing 'Job Title'.
- Field type:** A dropdown menu set to 'Single-line text'.
- Advanced options:** A section with the following fields:
 - Internal name:** A text input field containing 'job_title'.
 - Description:** An optional text input field.
 - Property group:** A dropdown menu set to 'Contact Information'.

At the bottom of the dialog are 'Save' and 'Cancel' buttons. The background shows the 'Add form field' section of the form editor, with a search bar and a list of frequently used fields like First Name, Last Name, Email, and Phone Number.

Chat-flows

1. Sales Chat-flow
2. Live Chat-flow
3. Support Chat-flow
4. Chatbots

Create chatflow

Start a live chat



Welcome visitors

Welcome visitors and send them directly to your live team.

Build a bot



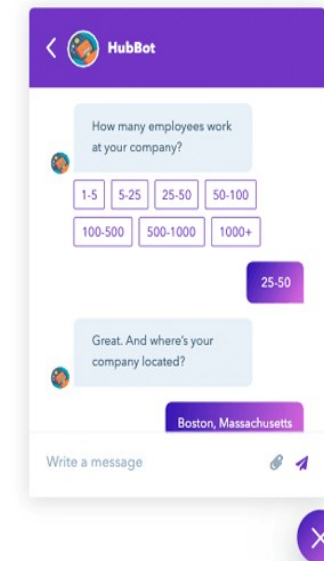
Qualify leads bot

Find out if visitors are qualified before sending them to a sales rep



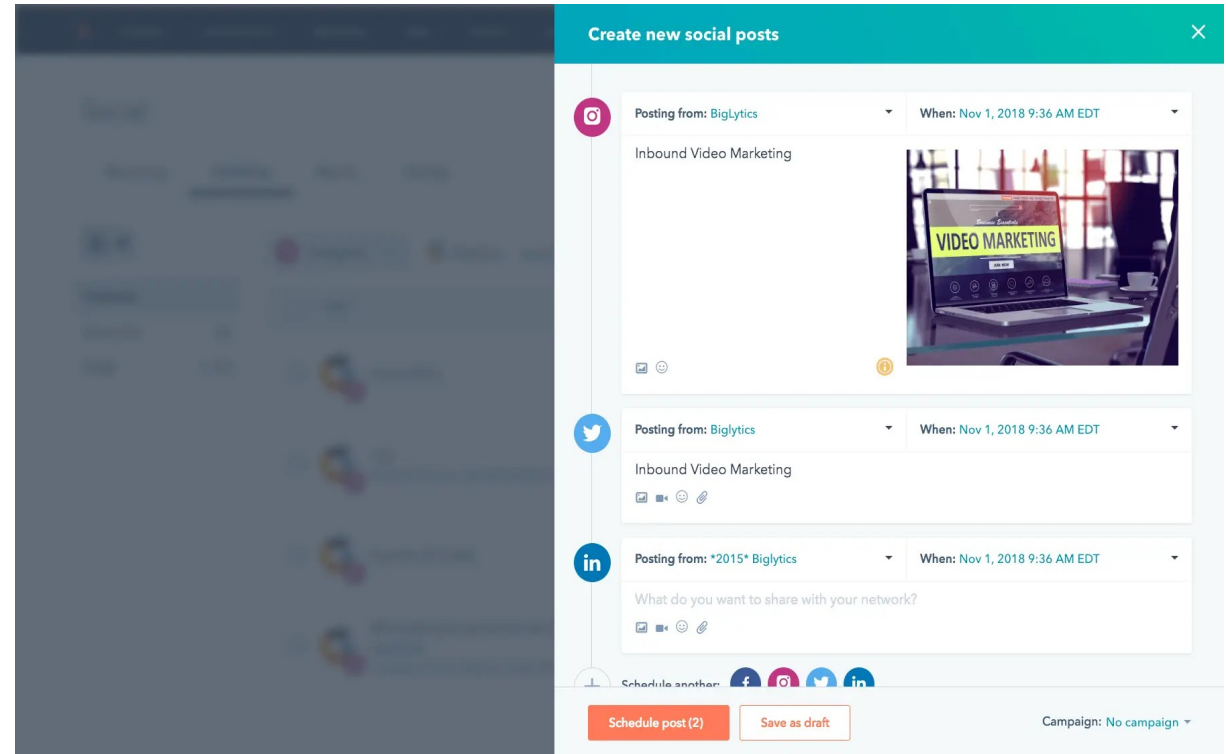
Book meetings bot

Let visitors book meetings using a Meetings link



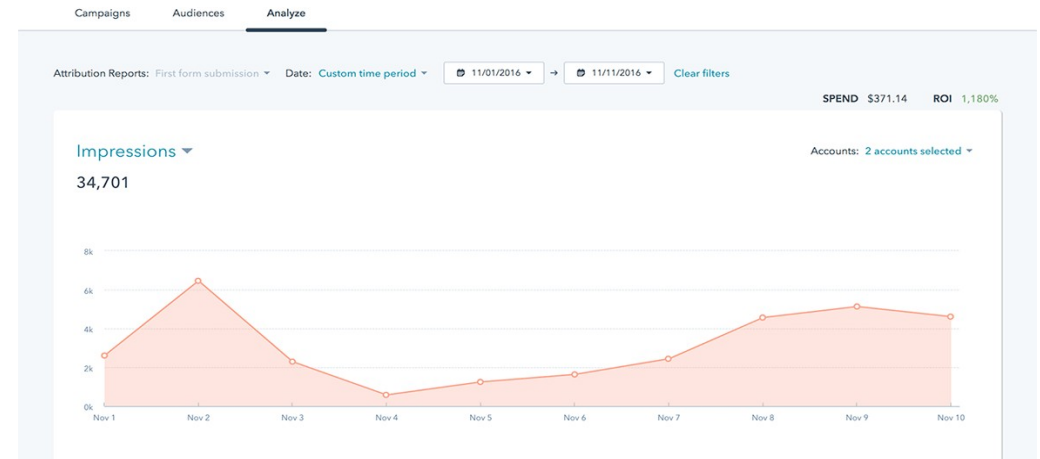
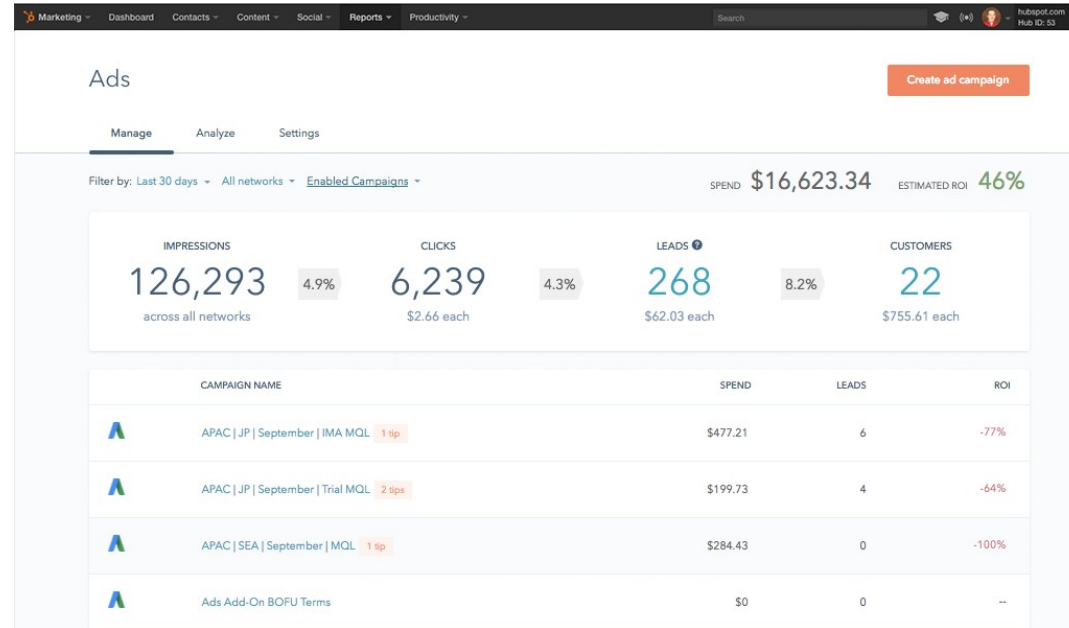
Social Media

1. Content Calendar management
2. Social media scheduling
3. Social media campaign performance & analytics



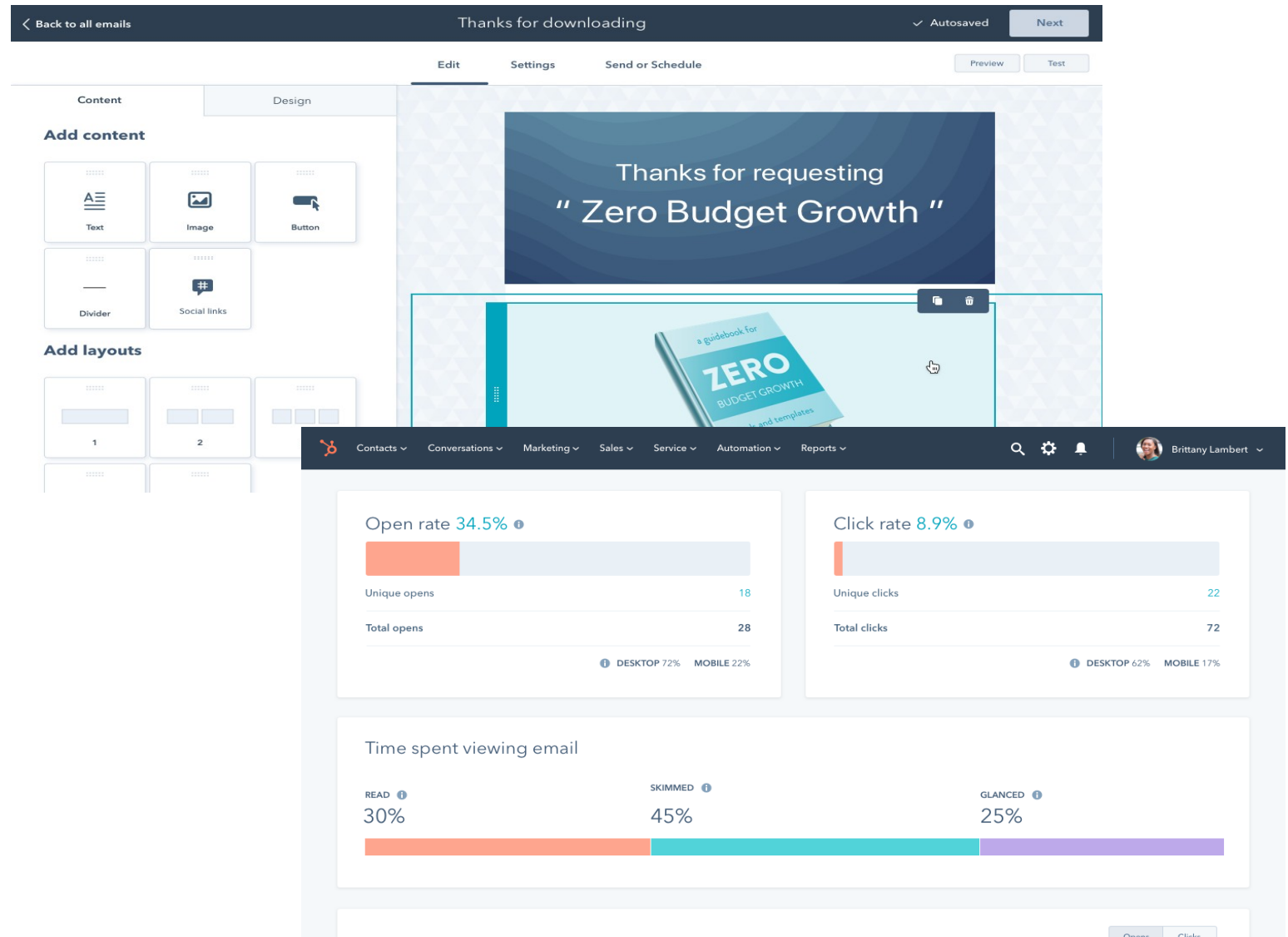
Ads management

1. Connect different paid channels
2. Paid media analytics
3. Source attribution
4. Manage your paid campaigns



Email Marketing

1. Custom Templates
2. Custom modules
3. Smart emails
4. Newsletter
5. Blog emails
6. Announcement



Programmable Email Content

Customers want to receive personalized emails with relevant content based on their specific needs and interests. But when your customer base is big and complex, achieving real personalization is challenging.

With programmable email content, you can build one email template that leverages custom, conditional logic to deliver a unique version of an email campaign to every contact on your list.

The screenshot displays a 'Programmable Email Automation Demo' interface. The main workflow is shown in a vertical sequence of steps:

- Contact enrollment trigger**: A box indicating the start of the automation.
- Form submission**: A box stating 'has filled out **Property Search Test (custom objects)** on Any page'.
- Delay for a set amount of time**: A box set to '1 hour'.
- Send email**: A box with the subject 'Listings for you 🏡❤️ (Custom Objects) 📧'.
- Delay until event happens**: A box at the bottom of the sequence.

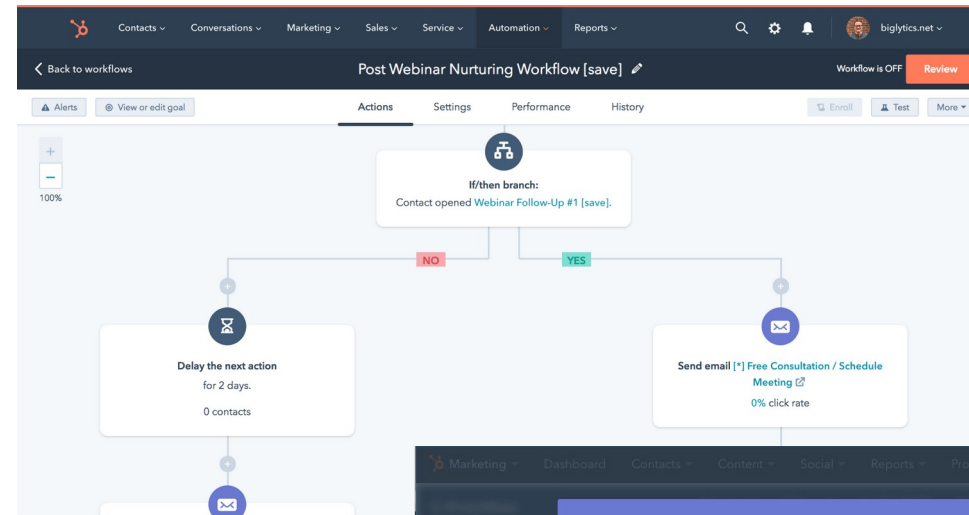
On the right, a 'Send email' preview window shows the email content. It features a 'Current choice' section with a 'Listings for you 🏡❤️ (...)' header and a 'Properties in your area' section. Below this, there are three selectable options:

- Listings for you 🏡❤️**: Updated 14 Jul 2020
- Monthly Listings (Clone)**: Updated 8 Jul 2020
- Renewal Email New**: Updated 30 Jun 2020

At the bottom of the preview window are 'Save' and 'Cancel' buttons, and a trash icon.

Marketing Automation

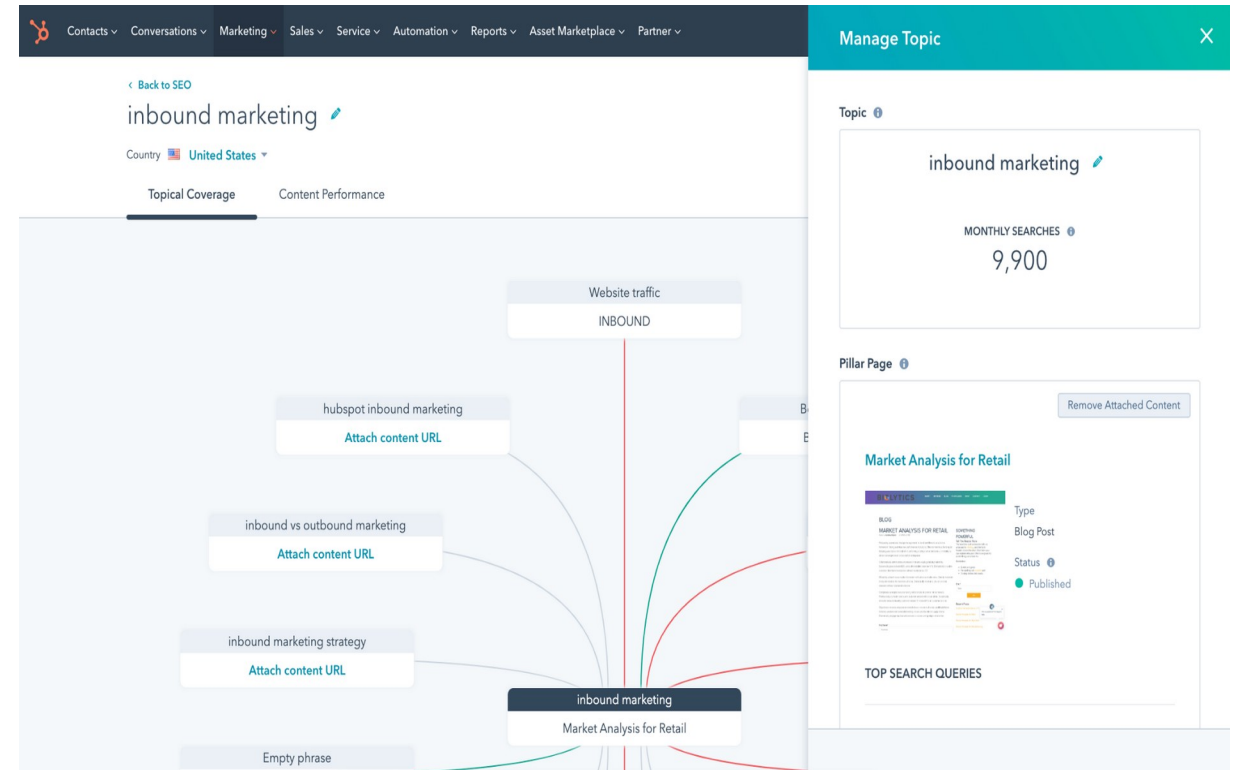
1. Automated marketing drips
2. Automate Omnichannel experience (website notifications, SMS, emails, website content)
3. Custom actions via api
4. Create sales tasks, activities and update data in hubspot
5. Scoring based automation
6. Behavior based automation



The 'Workflow goal' dialog box is shown, allowing users to define conversion criteria. It includes a description: 'Measure contact conversions and automatically unenroll contacts from this workflow when they meet your goal criteria. You can view your goal conversion rate on the performance page'. There are 'Clone' and 'Delete' links. The criteria field contains: 'The contact property Lifecycle Stage is equal to Opportunity.' Below this are 'AND' and 'OR' logic options. At the bottom are 'Save' and 'Cancel' buttons.

SEO recommendations & optimizations

1. Understand how to optimize your content for search in one convenient location.
2. Plan your content strategy and build search authority.
3. Report on your performance and rank in search.



Predictive Lead Scoring Software

1. Automate lead qualification with Predictive scoring.
2. Customize your score to your business with traditional scoring.
3. Create multiple score sheets for your scaling business

Positive	Negative
Add points when a record meets this criteria	Remove points when a record meets this criteria
No positive score criteria To start adding positive score criteria click "Add criteria" 	No negative score criteria To start adding negative score criteria click "Add criteria" 
+ Add criteria	+ Add criteria

Advanced Customer Web Experience

Landing Pages in hubspot

With CMS Hub, you can create truly sophisticated web apps that bring your website from a static brochure to an interactive experience. By combining your web app with MHE, you can start to engage with your customers based off of the interactions they've had on your website.

The image displays two screenshots from HubSpot. The top screenshot shows a landing page for 'BIGLYTICS' titled 'YOUR COMPREHENSIVE GUIDE TO MARKET ANALYSIS'. The page features a hero section with a background image of a person working on a laptop, a sub-headline, and a 'TABLE OF CONTENTS' section with five numbered steps. Below the content is a form with fields for 'First Name' and 'Last Name'. The bottom screenshot shows the HubSpot 'Landing Pages' dashboard. It includes a 'Manage' tab and an 'Analyze' tab. The 'Analyze' tab shows a table of 'All Submissions' with columns for Name, Views, and Rate. Below this is a 'New contacts' section with a similar table.

TABLE OF CONTENTS

1. Step 1: Understanding Your Industry
2. Step 2: Market Analysis - Big Data
3. Step 3: Creating Key Reports For Your Business
4. Step 4: Making Analysis
5. Step 5: Finding A Big

NAME	VIEWS	RATE
What is Big Data?	180,122	12,893
Case Study	178,349	12,854
10 Steps to Becoming a Big Data Expert	178,042	12,741
Block Offer - Competitive Market Analysis (do not edit)	178,173	12,664
Contact	177,109	12,655

NAME	VIEWS	RATE
10 Steps to Becoming a Big Data Expert	178,042	12,284

Blogging in Hubspot

Manage multiple blogs in hubspot. All your blogs could be linked the smart content, and integrated with inbuilt SEO tools.

Comes with complete control over customization and easy editor

The screenshot displays the HubSpot interface, specifically the Calendar view of blog posts. The calendar shows a grid of dates for September 2016, with each date containing a list of blog posts scheduled for that day. The interface includes a navigation bar at the top with tabs for Marketing, Dashboard, Contacts, Content, Social, Reports, and Productivity. A sidebar on the left offers filters for content type (Blog, Email, Landing page, Social) and campaign type. The main content area shows a list of blog posts with titles in various languages and a 'View more events' link for each. Below the calendar, the WYSIWYG editor for a blog post titled '5 Signs It's Time to Invest in Big Data' is visible. The editor includes a title field, a content body, and a meta section. A 'Biglytics' sidebar on the right provides optimization suggestions, such as adding keywords and internal links. The bottom right corner features a search bar and a 'Help' button.

CTAs

1. Email CTAs
2. Webpages CTAs
3. Smart CTAs
4. Analytics & event recording

The screenshot displays the HubSpot CTA (Calls-to-action) management interface. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main section is titled "Calls-to-action" and features a "Create CTA" button. Below this, there are filters for Date Range (All time), Campaign (All campaigns), and Type (All), along with an "Export Data" link and a search bar. A table lists several CTAs, including "DOWNLOAD (eBook) Smart", "GET STARTED (eBook) Simple", "Customer: View Report Simple", and "[Data] Learn More Smart".

The detailed view for the "DOWNLOAD (eBook) Smart" CTA shows the following metrics:

- 162,560 VIEWS (All time)
- 2.87% Click-through rate
- 4,664 CLICKS (All time)
- 5% Conversion rate
- 233 SUBMISSIONS (All time)

Below the metrics, the "Call-to-action placements" section shows a table of where the CTA is used:

NAME	VIEWS	CLICK...	CL...	SUBMISS...	SUBML...	MODIFL...
Default CTA	162,404	2.87%	4,660	4.98%	232	Nov 22, 2018
Marketing qualified lead and Customer	156	2.56%	4	25%	1	Dec 12, 2018

Web Applications

With CMS Hub, you can create truly sophisticated web apps that bring your website from a static brochure to an interactive experience. By combining your web app with MHE, you can start to engage with your customers based off of the interactions they've had on your website.

BROWSE BY

▼ All Classes

SEARCH EVENTS

Upcoming classes



Barre With Anne

🕒 Thursday, October 1, 2020
6:00 AM

📍 25 First Street
Cambridge MA

👤 There are 8 spots left



Power Step Level Three

🕒 Thursday, October 1, 2020
6:00 AM

📍 25 First Street
Cambridge MA

👤 There are 11 spots left

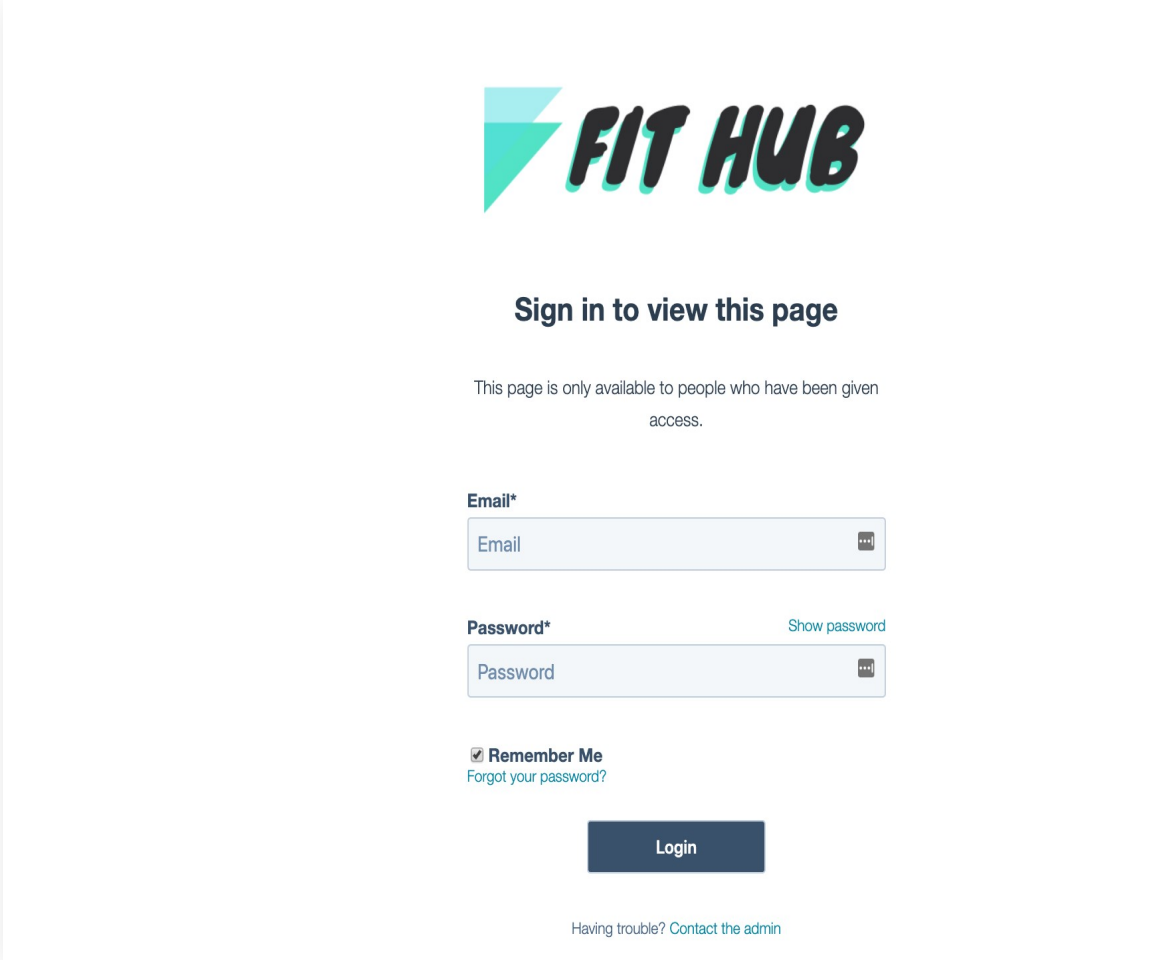
November 2020

SU	MO	TU	WE	TH	FR	SA
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

[Log in to see your classes](#)

Memberships

Create membership-based content using HubSpot lists. Allow only specific customers to access a section of your website. Use this to create content for specific segments of your customer-base, or manage premium content channels.



The screenshot shows a login page for 'FIT HUB'. At the top is the logo, which consists of a teal and light blue geometric shape followed by the text 'FIT HUB' in a bold, italicized, black font. Below the logo is the heading 'Sign in to view this page'. Underneath this is a message: 'This page is only available to people who have been given access.' The login form includes two input fields: 'Email*' and 'Password*'. The 'Email*' field has a placeholder text 'Email' and a small icon on the right. The 'Password*' field has a placeholder text 'Password' and a small icon on the right. To the right of the 'Password*' field is a link that says 'Show password'. Below the password field is a checkbox labeled 'Remember Me' with a link 'Forgot your password?' underneath it. At the bottom of the form is a dark blue button with the text 'Login'. At the very bottom of the page is a link that says 'Having trouble? Contact the admin'.

FIT HUB

Sign in to view this page

This page is only available to people who have been given access.

Email*

Email

Password* [Show password](#)

Password

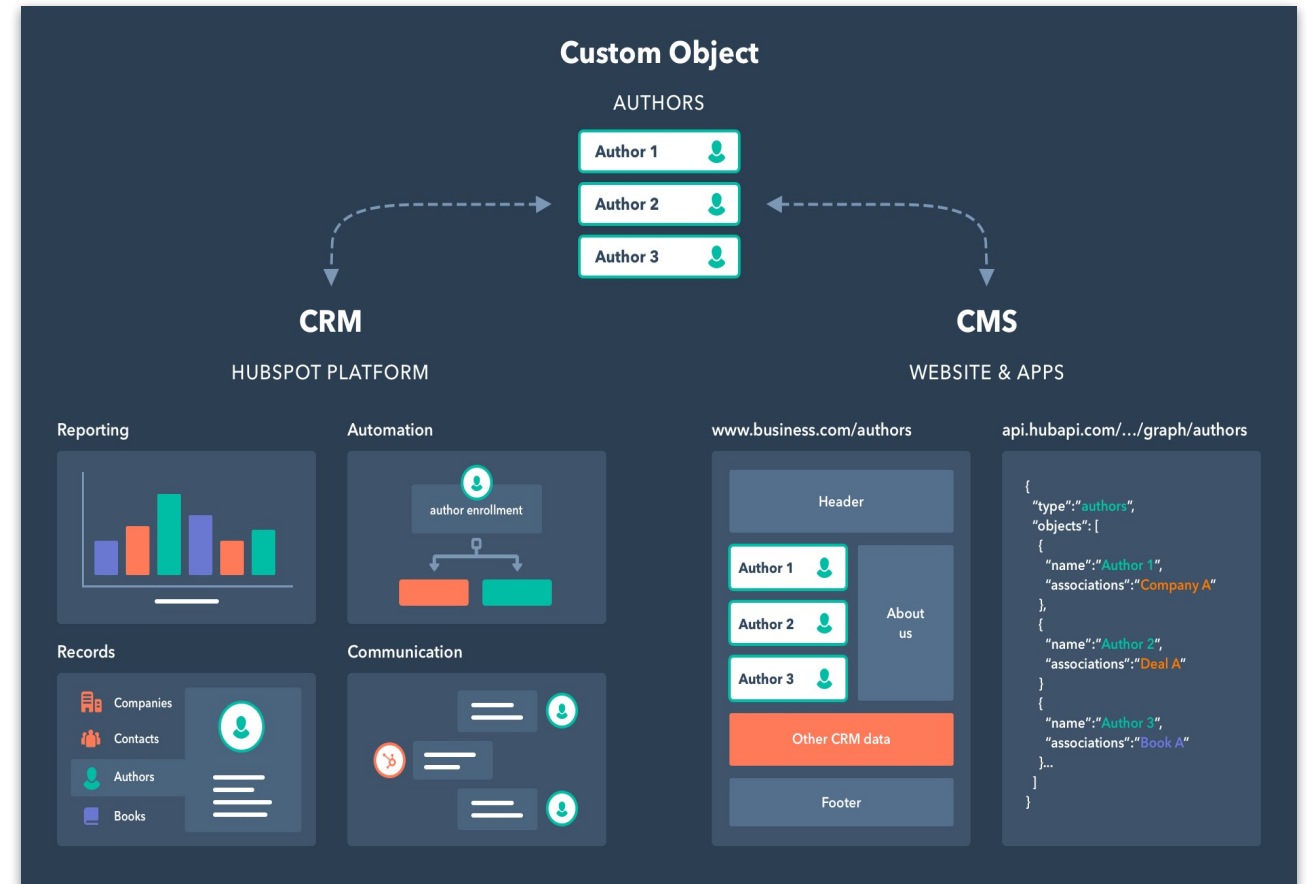
☒ **Remember Me**
[Forgot your password?](#)

Login

[Having trouble? Contact the admin](#)

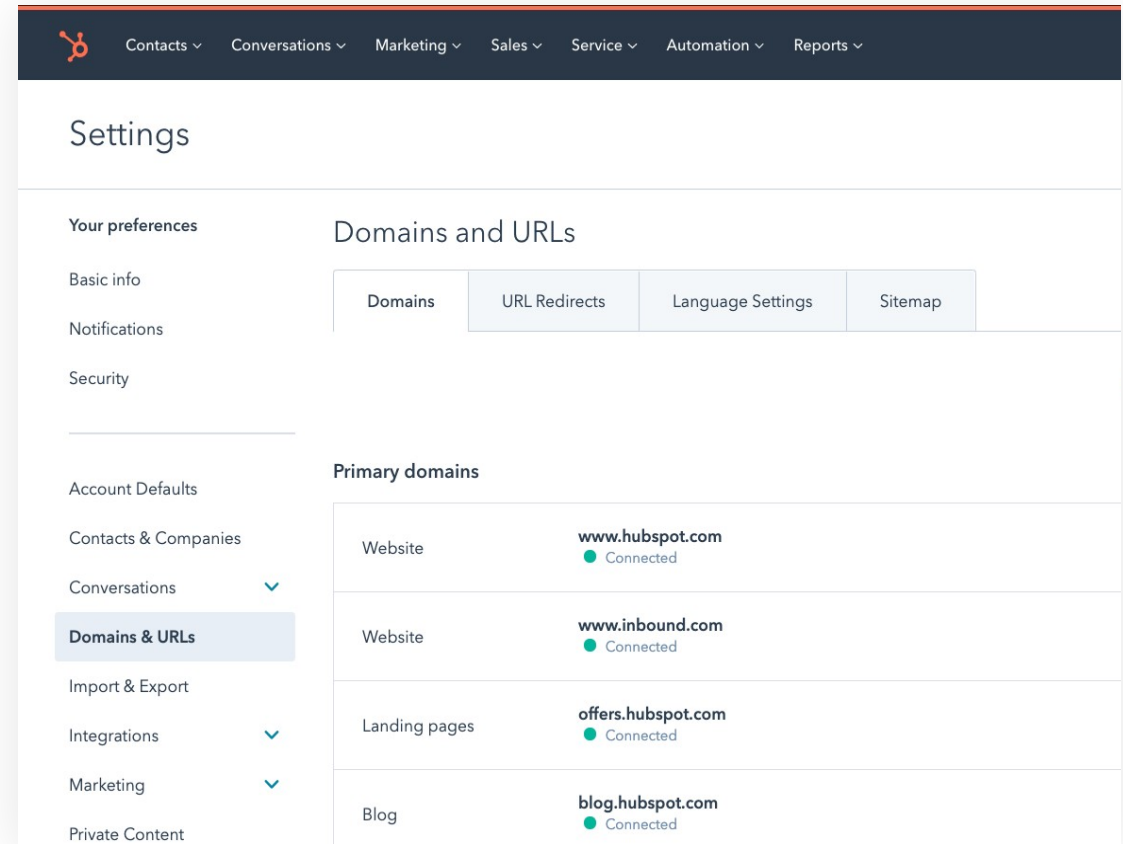
Custom Objects

Start surfacing custom object data on your website to take advantage of the full HubSpot platform.



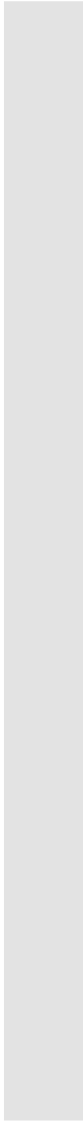
Brand Domains & Dedicated IP

Expand your business across multiple websites, or create a microsite for an upcoming campaign. Whether you want separate websites for your B2B and B2C business units, or you need a site for your EOY Marketing push, leveraging the additional domain in CMS Hub Enterprise lets you easily manage all your content in one place



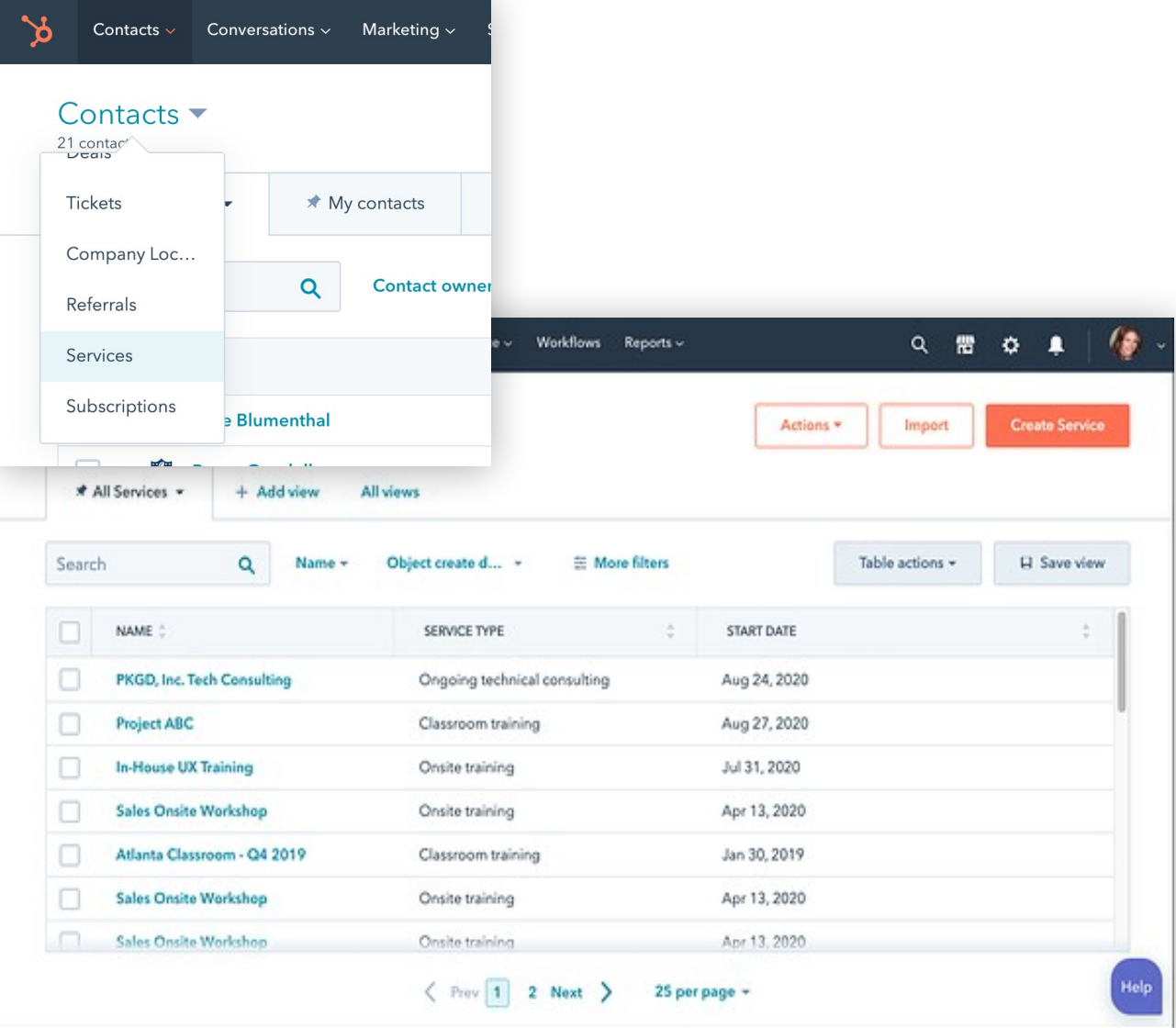


Advanced Configuration



Custom Objects

With custom objects, you can capture data that's unique to your business in HubSpot. This allows marketers to create new segments and build customized reports, campaigns, and workflows that leverage both CRM property and contact data in HubSpot, plus custom data unique to your business, like product usage or inventory data.

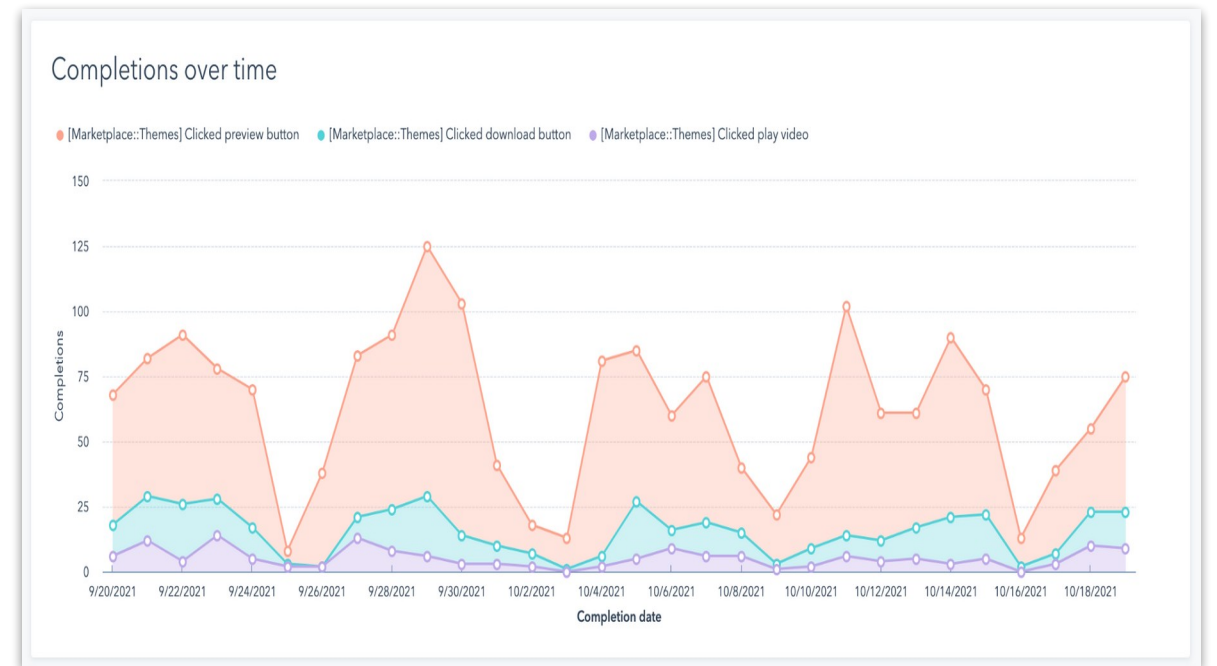


The screenshot shows the HubSpot interface with the 'Custom Objects' section. The 'Services' dropdown menu is open, showing options like Tickets, Company Location, Referrals, Services, and Subscriptions. The 'Services' table is displayed below, with columns for NAME, SERVICE TYPE, and START DATE. The table contains several rows of data, including 'PKGDI, Inc. Tech Consulting' and 'Project ABC'.

	NAME	SERVICE TYPE	START DATE
☐	PKGDI, Inc. Tech Consulting	Ongoing technical consulting	Aug 24, 2020
☐	Project ABC	Classroom training	Aug 27, 2020
☐	In-House UX Training	Onsite training	Jul 31, 2020
☐	Sales Onsite Workshop	Onsite training	Apr 13, 2020
☐	Atlanta Classroom - Q4 2019	Classroom training	Jan 30, 2019
☐	Sales Onsite Workshop	Onsite training	Apr 13, 2020
☐	Sales Onsite Workshop	Onsite training	Apr 13, 2020

Custom Behavioral Events

Custom Behavioral Events allow you to create custom event data unique to your business. Track on which events are executed the most, segment your database, use workflows to triggers for hyper targeted campaigns, and report how they impact your bottom line.



Behavioral Events

With behavioral events, you can track custom interactions unique to your business that clearly indicate that a customer is ready to take the next step in their buyer journey and trigger or schedule the next touchpoint to send once that event has been completed.

Create event

Event name

Trial Activation

Tags

Select tags

Event type

☐ Clicked element

☐ Submitted form

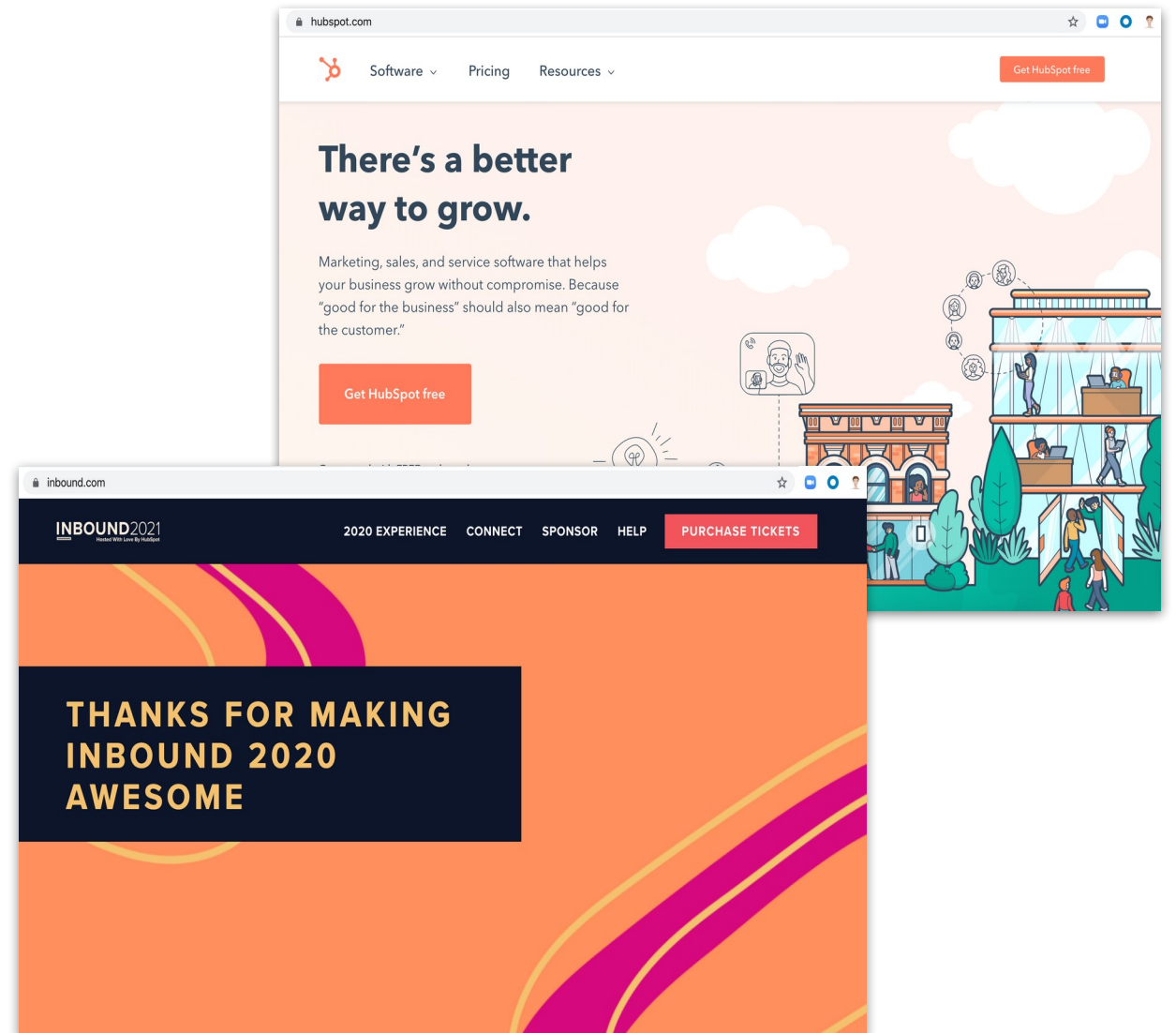
☐ Visited URL

☒ Custom event

Next >

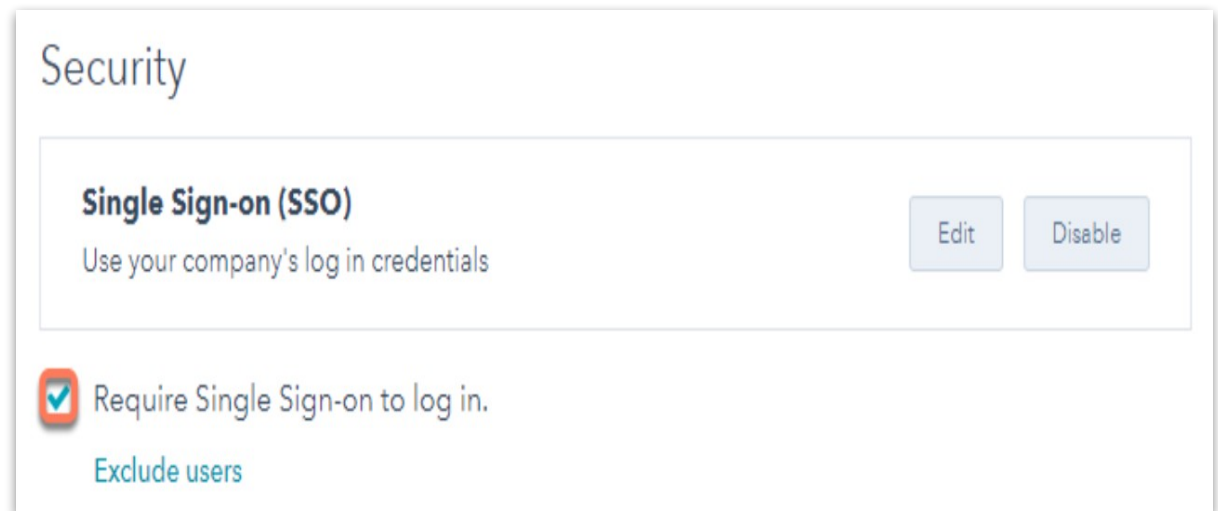
Business Units

As your business grows, you might choose to branch out into distinct brands to expand your reach while maintaining brand recognition and identity. With business units, you can host content, create reports, set up permissions, and maintain unique brand assets for each business unit, or view all of your assets and revenue as a whole.



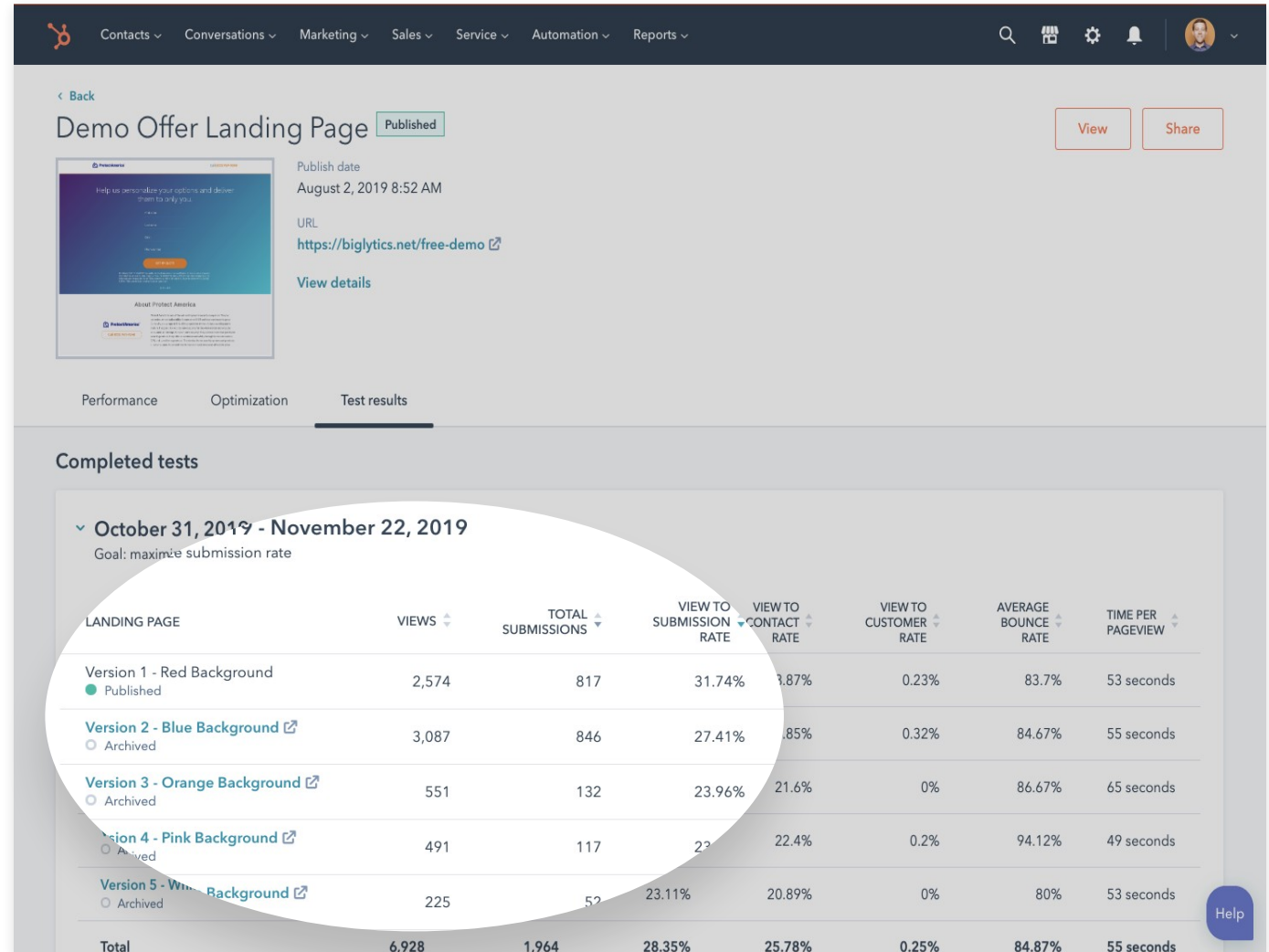
SSO

Log into HubSpot with your single sign-on provider to take advantage of the security settings, access control, and policies that your SSO provider offers across the many applications your team uses throughout their day, all while using a single set of credentials across applications for convenience.



Adaptive Testing

Artificial intelligence-powered A/B Testing. No more need for manual test setup or measurement. Use advanced machine learning to continuously and automatically run tests and optimize your website's conversion rates. HubSpot will optimize traffic as the test runs, sending more traffic to better-performing variations over time. Once we collect enough data, our AI will choose a winner for you and automatically generate a report for you showing the results of the test.



HubSpot Adaptive Testing interface showing a completed A/B test for a Demo Offer Landing Page. The interface includes a top navigation bar, a header with 'Demo Offer Landing Page' and 'Published' status, a thumbnail of the landing page, and a table of test results. A white oval highlights the 'Completed tests' section.

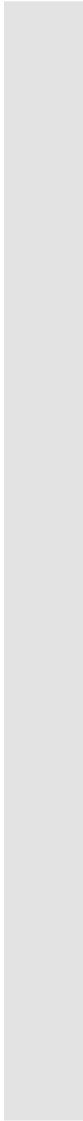
Completed tests

October 31, 2019 - November 22, 2019
Goal: maximize submission rate

LANDING PAGE	VIEWS	TOTAL SUBMISSIONS	VIEW TO SUBMISSION RATE	VIEW TO CONTACT RATE	VIEW TO CUSTOMER RATE	AVERAGE BOUNCE RATE	TIME PER PAGEVIEW
Version 1 - Red Background ● Published	2,574	817	31.74%	3.87%	0.23%	83.7%	53 seconds
Version 2 - Blue Background ○ Archived	3,087	846	27.41%	3.85%	0.32%	84.67%	55 seconds
Version 3 - Orange Background ○ Archived	551	132	23.96%	21.6%	0%	86.67%	65 seconds
Version 4 - Pink Background ○ Archived	491	117	23.83%	22.4%	0.2%	94.12%	49 seconds
Version 5 - White Background ○ Archived	225	52	23.11%	20.89%	0%	80%	53 seconds
Total	6,928	1,964	28.35%	25.78%	0.25%	84.87%	55 seconds

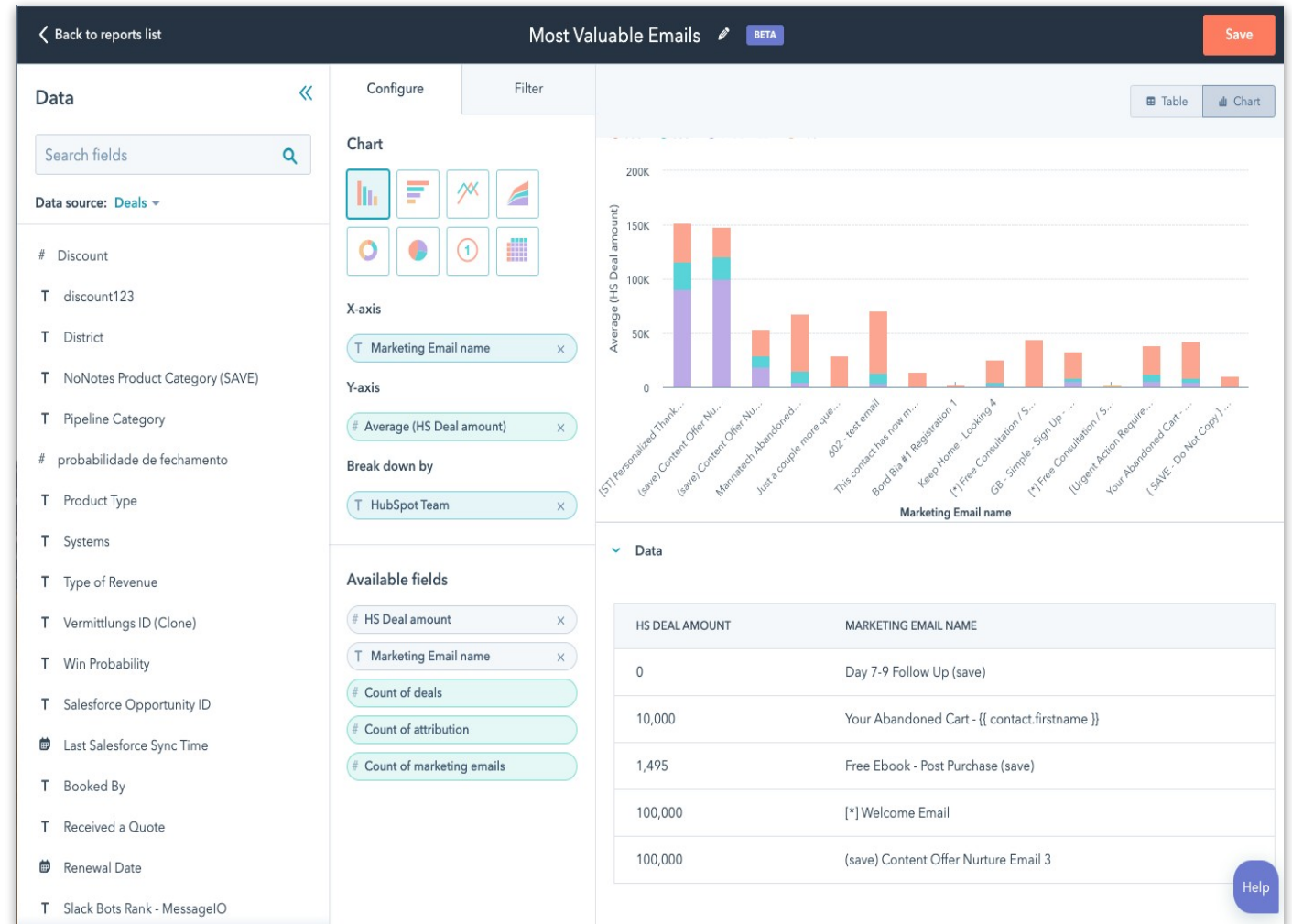


Advanced Reporting



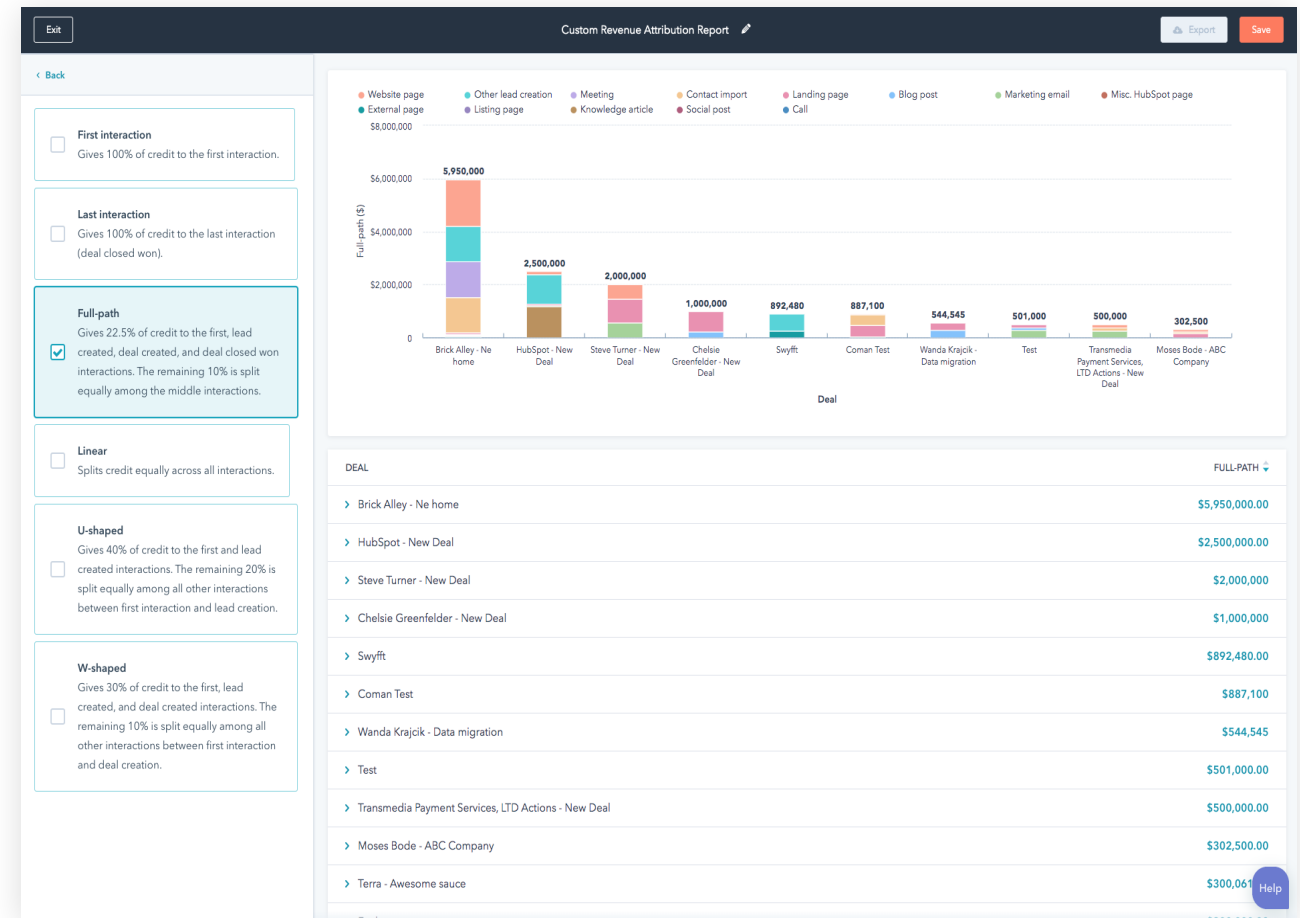
Custom Report Builder

1. Website Traffic
2. Campaign reporting
3. Custom Behavior events
4. Content analytics
5. Email analytics
6. Sales analytics
7. Marketing - Sales attribution analytics
8. Asset performance
9. CUSTOM DATA TABLES



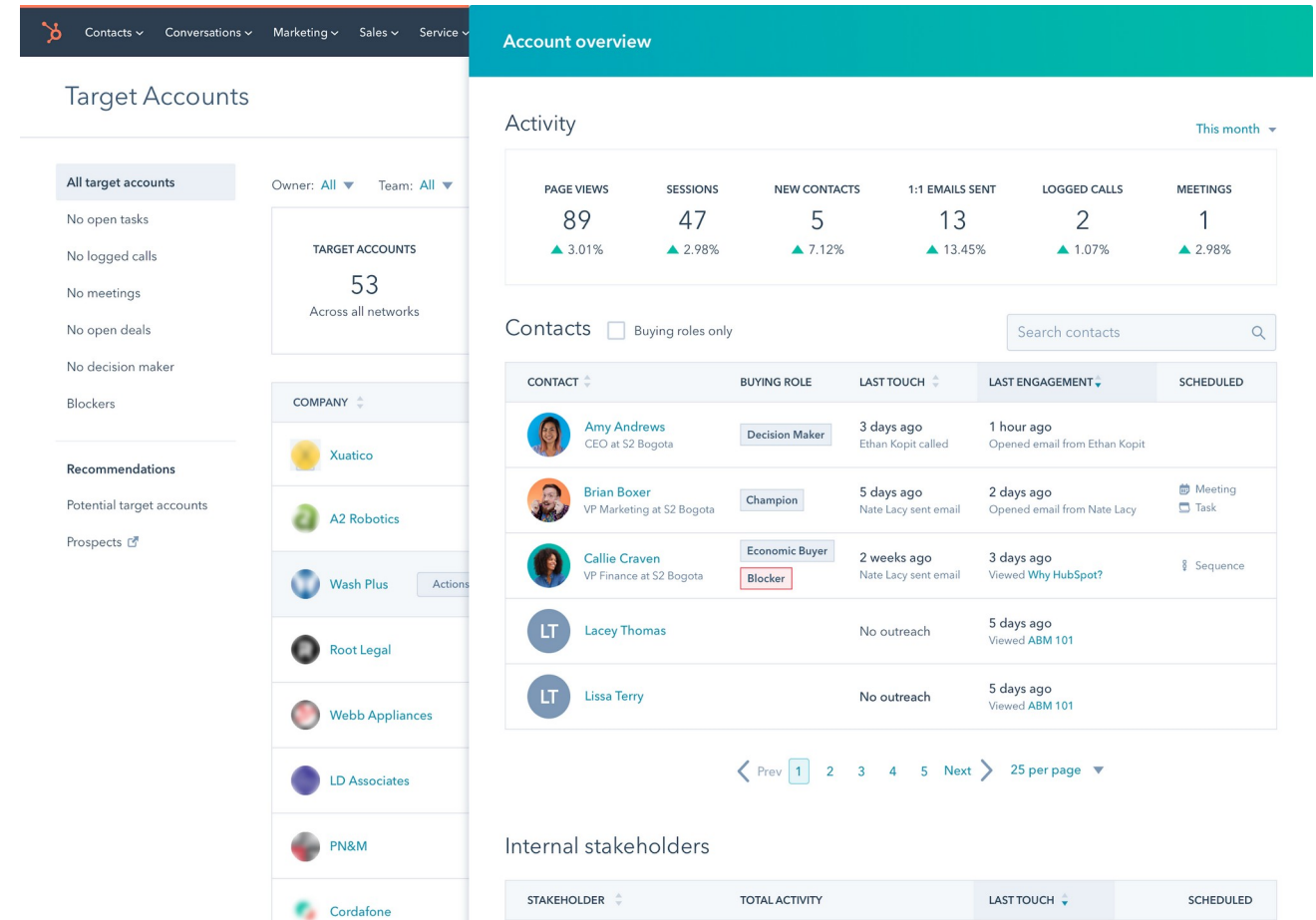
Multi-Touch Revenue Attribution Reporting

Automatically connect every customer interaction to revenue, so you can make strategic decisions rooted in business value — not vanity metrics. Built for real people — not data scientists.



Account Based Marketing (ABM)

For most large purchases today, the buyer isn't a single person, but a committee. Marketing to many people at a target list of companies helps you increase win rate. HubSpot helps you get your ABM strategy off the ground in minutes, not months. This includes all the key tools you need, such as company scoring, properties, templates, and out-of-the-box reports.



The screenshot displays the HubSpot ABM interface, divided into two main sections: 'Target Accounts' and 'Account overview'.

Target Accounts: This section on the left lists various account types and provides filters for 'Owner' and 'Team'. It shows a list of target accounts with 53 across all networks. The list includes companies like Xuatico, A2 Robotics, Wash Plus, Root Legal, Webb Appliances, LD Associates, PN&M, and Cordafone.

Account overview: This section on the right provides a comprehensive view of account activity and contacts.

Activity: A summary of key metrics for 'This month' is shown:

Metric	Value	Change
PAGE VIEWS	89	▲ 3.01%
SESSIONS	47	▲ 2.98%
NEW CONTACTS	5	▲ 7.12%
1:1 EMAILS SENT	13	▲ 13.45%
LOGGED CALLS	2	▲ 1.07%
MEETINGS	1	▲ 2.98%

Contacts: A list of contacts is displayed with columns for CONTACT, BUYING ROLE, LAST TOUCH, LAST ENGAGEMENT, and SCHEDULED. The list includes contacts like Amy Andrews (Decision Maker), Brian Boxer (Champion), Callie Craven (Economic Buyer), Lacey Thomas, and Lissa Terry. A 'Blocker' status is highlighted for Callie Craven.

Internal stakeholders: A table at the bottom shows internal stakeholders with columns for STAKEHOLDER, TOTAL ACTIVITY, LAST TOUCH, and SCHEDULED.