

Hands-On Marketing Training for HubSpot Users

SET YOUR PORTAL UP, BUILD A CAMPAIGN,
AND CREATE YOUR COMPANY'S
PERFORMANCE DASHBOARD



PRE-TRAINING REQUIREMENTS

- Access to a live HubSpot portal or sandbox (Marketing & Sales)
- At least one goal for us to work on for your company (ex: increase number of demos being booked)
- A desire to learn and take your skills to the next level

TRAINING AGENDA

DAY 1:

MORNING

- HubSpot overview & navigation basics
- Understand how HubSpot's databases connect
- Create and manage users and teams
- Complete any unfinished company configuration, connect your domains, and set up proper website tracking
- Learn fool-proof imports
 - Keep your data clean
 - Immediately identify and resolve errors
- Build lists and know when to use them: active, static, inclusion, exclusion, and more
- Build an optimized landing page and lead capture flow

AFTERNOON:

- Learn how to deploy sales enablement tools, and answer common technical questions
- Workflow and sequences use cases: when to use one vs. the other
- Known HubSpot limitations and how to get past them
- Create your sales and marketing SLA

DAY 2:

MORNING

- Prepare to send marketing emails, flawlessly
- Email marketing best practices: create targeted segments, cadences, and understand privacy laws
- Learn the types of marketing emails, and processes to fully Q/A your marketing emails before they go out
- Get introduced to advanced features: A/B testing, smart modules
- Build a 5-email nurture campaign

AFTERNOON:

- Data Management Fundamentals: configure and work with custom properties, workflows
- Track performance by connecting assets to the campaigns tool
- Build your company's HubSpot performance dashboard for tracking success

