

A photograph of two women sitting at a wooden desk in a modern office. They are both smiling and looking at a laptop. The woman on the right is wearing glasses and a denim jacket, while the woman on the left is also wearing glasses and a light-colored shirt. The background shows office shelves and hanging lamps.

HubShots

Getting the Most Out of Hubspot

For a New User

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Introduction

Welcome to our guide on getting the most out of HubSpot for new users.

This ebook is designed to help you understand and navigate the powerful tools and features offered by HubSpot, a leading CRM platform with tools for marketing, sales, customer service, content management, and operations.

Whether you're a small business owner looking to streamline your marketing efforts, a sales manager seeking to improve your team's performance, or a customer service representative aiming to enhance customer relationships, HubSpot has tools that can help you achieve your goals.

In this ebook, we'll walk you through the basics of setting up your HubSpot account, understanding the key features of each Hub, and how to use the free tools available. We'll also provide tips on organizing your marketing campaigns and joining the HubSpot community for additional support and resources.

Chapter 01

Getting Started with HubSpot



Step 1

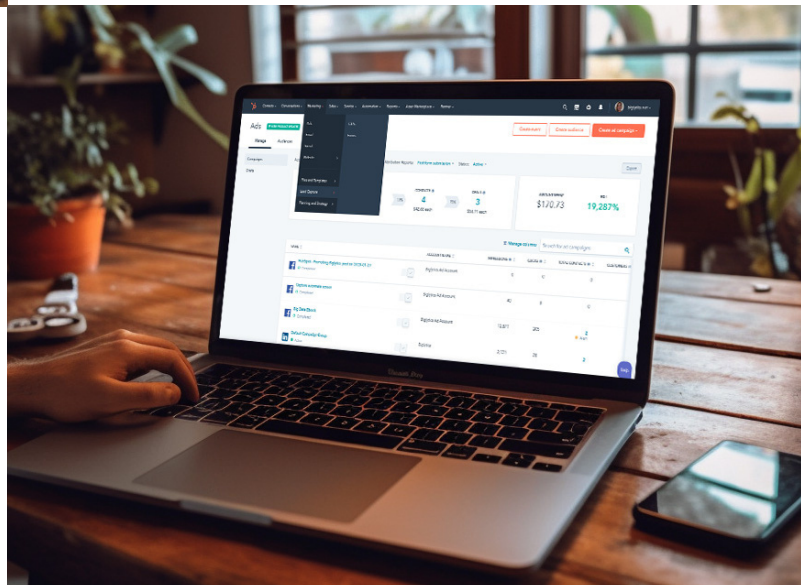
Signing Up and Logging In

To start using HubSpot, you'll first need to sign up for an account. Visit the [HubSpot sign up page](#) and follow the prompts to create your account. Once your account is set up, you can log in at any time by visiting the [HubSpot login page](#).

Step 2

Understanding the Dashboard

After logging in, you'll be taken to your HubSpot dashboard. This is your home base for everything you'll do in HubSpot. The dashboard provides a high-level overview of your marketing, sales, service, and operations data. You can customize your dashboard to display the most relevant reports for your business.

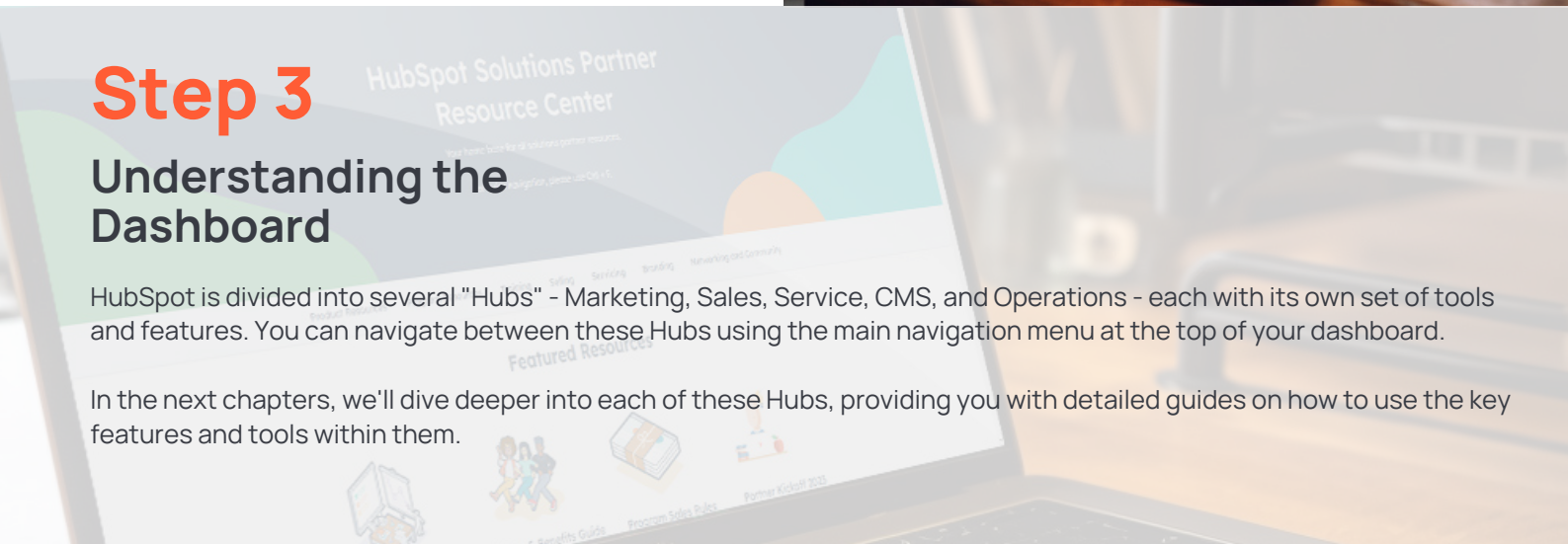


Step 3

Understanding the Dashboard

HubSpot is divided into several "Hubs" - Marketing, Sales, Service, CMS, and Operations - each with its own set of tools and features. You can navigate between these Hubs using the main navigation menu at the top of your dashboard.

In the next chapters, we'll dive deeper into each of these Hubs, providing you with detailed guides on how to use the key features and tools within them.



Chapter 02

Understanding Contacts and Companies



1. Importing Contacts and Companies

One of the first steps in setting up your HubSpot account is importing your contacts and companies. HubSpot provides several methods for importing data, including uploading a CSV file, integrating with other software, or manually adding contacts and companies.

To import contacts and companies, navigate to your contacts or companies page, click on the "Actions" dropdown, and select "Import." Follow the prompts to upload your data.

2. Understanding Contact and Company Records

Once your contacts and companies are imported, you can view and manage their information through individual record pages. These pages contain all the information about a contact or company, including their interactions with your business, their contact information, and any custom properties you've set up.

3. Creating Custom Properties and Segments

HubSpot allows you to create custom properties for your contacts and companies, enabling you to capture and store specific information that's relevant to your business.

You can also create segments, or lists of contacts or companies based on specific criteria. This can help you target specific groups with your marketing, sales, and service efforts.

Chapter 03

Using the Marketing Hub



1. Creating a Landing Page

HubSpot's Marketing Hub includes a powerful landing page builder. To create a landing page, navigate to the Marketing tab in your dashboard, select "Website," then "Landing Pages." Click "Create" and select a template to get started.

2. Setting Up Forms

Forms are crucial for capturing lead information. To create a form, navigate to the Marketing tab, select "Lead Capture," then "Forms." Click "Create form" and follow the prompts to add fields, set up notifications, and choose what happens after a visitor submits the form.

3. Sending and Analyzing Marketing Emails

HubSpot's email tool allows you to create beautiful, personalized emails without any coding. Navigate to the Marketing tab, select "Email," then click "Create email" to get started. After sending your emails, you can analyze their performance right in HubSpot.

Chapter 04

Using the Sales Hub

1. Setting Up and Using the CRM

HubSpot's Sales Hub is built around a powerful CRM that helps you manage your relationships with customers and prospects. To get started, navigate to the Sales tab in your dashboard. Here, you'll find tools to manage your contacts, companies, deals, and tasks.

2. Understanding the Sales Pipeline and Deal Stages

The sales pipeline in HubSpot is a visual representation of your sales process, with each deal stage representing a step in that process. You can customize your pipeline and deal stages to match your sales process.

3. Creating and Managing Tasks and Appointments

Tasks in HubSpot help you keep track of all the activities you need to do. You can create tasks for yourself or assign them to other team members. Additionally, HubSpot's meetings tool allows you to schedule appointments with your contacts directly from your HubSpot account.



Chapter 05

Using the Service Hub

1. Setting Up and Using the Ticketing System

HubSpot's Service Hub includes a ticketing system that helps you track customer issues. To create a ticket, navigate to the Service tab in your dashboard, select "Tickets," then click "Create ticket."

2. Understanding the Knowledge Base and Feedback Tools

The knowledge base tool allows you to create help articles that your customers can access to find answers to their questions. The feedback tool allows you to gather and analyze customer feedback to improve your products and services.

3. Creating and Managing Service Reports

Service reports help you track and analyze your customer service performance. You can create custom service reports to track the metrics that matter most to your business.



Chapter 06

Using the CMS Hub

1. Creating and Managing Website Pages and Blog Posts

With the CMS Hub, you can create and manage website pages and blog posts directly within HubSpot. Navigate to the Marketing tab, select "Website," then choose "Website Pages" or "Blog" to get started.

2. Optimizing Your Content for Search Engines

HubSpot's SEO tool provides recommendations to help you optimize your content for search engines. You can access this tool by navigating to the Marketing tab, selecting "Planning and Strategy," then choosing "SEO."

3. Using the Drag-and-Drop Editor

HubSpot's drag-and-drop editor makes it easy to create beautiful, professional-looking pages without any coding. Simply select a template, then drag and drop elements onto the page.



Chapter 07

Using the Operations Hub

1. Syncing, Cleaning, and Curating Customer Data

The Operations Hub includes tools to help you manage your customer data. You can sync data from other software, clean up your data to ensure it's accurate and up-to-date, and curate your data to create a single, unified view of each customer.

2. Automating Business Processes

With HubSpot's workflow tool, you can automate your business processes to save time and ensure consistency. Navigate to the Automation tab, then select "Workflows" to get started.

3. Managing Team Permissions

HubSpot allows you to manage who has access to what in your HubSpot account. Navigate to the Settings tab, then select "Users & Teams" to manage permissions.

Chapter 08

Using the Free Tools

HubSpot offers a suite of free tools that provide a powerful introduction to its capabilities. These tools include:



- **Forms:** Capture lead information directly on your website.
- **Email Marketing:** Create, personalize, and optimize your emails without designers or IT.
- **Ad Management:** Track the success of your ads and see which ones are converting leads.
- **Landing Pages:** Convert more visitors into qualified leads with high-converting pages.
- **Ticketing:** Track customer issues through a ticketing system.
- **Email Scheduling:** Schedule emails to send at the optimal time.
- **Live Chat/Basic Bots:** Connect with website visitors in real time to convert new leads, close more deals, and provide better support to your customers.
- **Shared Inbox:** View, manage, and reply to all your conversations from one universal inbox.
- **Contact Management:** Keep track of the leads you're converting in a centralized database.
- **Deal Pipeline:** Manage your pipeline and speed up your sales team with time-saving productivity tools.
- **Quotes:** Create and share professional-looking proposals and quotes in minutes.
- **Meeting Scheduling:** Eliminate the back and forth of meeting scheduling with HubSpot Meetings.
- **Website Pages:** Create stunning website pages to showcase your business.
- **Blog:** Attract more visitors to your site with a blog that's easy to create and update.
- **Drag-and-Drop Editor:** Create and edit pages without the help of IT or a designer.
- **Basic SEO Recommendations:** Get SEO suggestions tailored to your content so you can rank higher in search.
- **Data Sync:** Sync your data across all your tools and databases with programmable automation.
- **Historical Sync:** Get a historical report of all your data.
- **Default Field Mappings:** Map your fields automatically with smart field mappings.
- **App Marketplace Integrations:** Connect your favorite apps and web services to HubSpot.

Chapter 09

Organizing Your Marketing Campaigns



HubSpot's campaigns tool allows you to organize your marketing efforts and track their success. You can create campaigns, add assets to them, and monitor their performance.

This tool is available with Marketing Hub Professional or Enterprise.



Chapter 10

Joining the HubSpot Community



The [HubSpot Community](#) is a valuable resource for getting more out of your HubSpot tools. You can engage with other users, see examples from peers, get tips and advice from experts, learn how to troubleshoot common issues, and submit feedback to the Product team.

CONGRATULATIONS!

You've taken a big step towards mastering HubSpot. This guide has provided you with an overview of the key features and tools within HubSpot's Hubs, and how to use them to improve your marketing, sales, service, and operations efforts.

Remember, HubSpot is a powerful platform, but it's also flexible. Don't be afraid to experiment and find the best ways to use it for your unique business needs. And remember, the HubSpot Community is always there to provide support and inspiration.

We hope this guide has been helpful and has given you the confidence to dive in and start getting the most out of HubSpot. Happy HubSpotting!

HubShots

Want to Learn More?

Want to learn more? Visit the [HubSpot Academy](#) for free online training courses, or check out the [HubSpot Knowledge Base](#) for more detailed guides and tutorials.



References:

- [HubSpot KB article](#)
- [HubSpot Getting Started page](#)
- [ChatGPT thread](#)

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