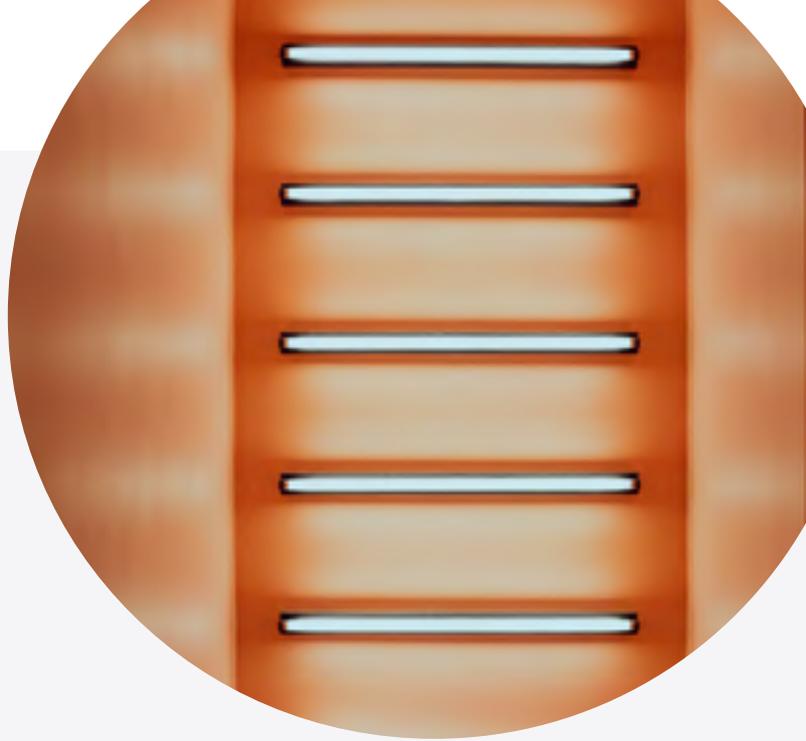




THE BBD BOOM TEAM'S

26 Best HubSpot Features to Embrace in 2020



Contents

Introduction	03
Meet the team	04
Our favourite features	06
Productivity	06
Content creation	09
Customer service	11
Insights	13
Get in touch	15



Introduction

It's a new month, new quarter, new year, new decade... we've been hearing all of these for the last few months, constantly being told what else we should be doing or investing in to help us meet our goals.

But wouldn't it be great if we could find a way to transform our marketing, sales and service plans using tools and platforms we've already invested in? Wouldn't it make more of a difference to improve the ROI on our existing platforms?

That's why we've pulled our team together to create this guide of 26 existing HubSpot features you can embrace this year – one per fortnight – to start making the most of your HubSpot investment. Let's hear from our team about what you should be using more...

Meet the team

A few members of the BBD Boom team have come together to share their favourite HubSpot features for you. This group is comprised of members of different teams, all with different specialties and backgrounds, to help highlight features from every corner of HubSpot. The following team members will be sharing feature recommendations in this ebook:



Adam Lewis,
Founder and Solutions Architect

As the designer of most of our client solutions, Adam knows HubSpot inside and out. His job is to recommend the perfect feature or strategy for every task, which means he's familiar with every corner of the HubSpot ecosystem.



Emma Lynch,
Founder and Head of Client Success

When there's a problem the team can't solve, Emma is always the next stop. Her HubSpot knowledge is paramount to the Client Success side of her role. She specialises in making all the different parts of HubSpot work seamlessly together to create the ultimate flywheel, optimising and improving every step of the process.



Sam Gale | Client Success Manager

As a Client Success Manager, Sam's role is to make sure that every problem finds the right solution quickly. Luckily, most problems have a HubSpot solution. Her background in content marketing means that the content-related features are her favourites.



Alex Forward | Inbound Growth Specialist

While Alex has to have a good general knowledge of HubSpot in order to make recommendations to potential clients, the Inbound Growth Specialist spends all day every day living and breathing Sales Hub. HubSpot's sales-related features make his job infinitely more efficient, and the tools he recommends today will be ones he uses day in and day out.



Elysha Shave | Inbound Specialist

We call Elysha the HubSpot whisperer. She spends all day every day inside the platform, onboarding new users, auditing existing portals and finding solutions to the trickiest of problems. If there's a HubSpot feature, Elysha knows how to use it, how to set it up and how to optimise it.



Tommy Price | Inbound Executive

Tommy specialises in paid media, analytics, integrations and SEO within HubSpot. No matter how well a campaign or initiative is performing, he is always coming up with ways to make it even better or to replicate that success elsewhere. He loves the more technical side of marketing, sales and service, and the features he recommends reflect that.



Imogen Where | Inbound Executive

Our go-to marketing executive, Immy is a pro at using HubSpot's features to make her job more efficient and more effective. She works mostly on client campaign setup, meaning she knows the HubSpot marketing features inside and out, and she's always one of the first to answer when someone asks a question about them.

Our favourite features

Whatever Hub you have, and at whatever level, there are features we love that you can use to help improve your productivity, your content creation, your customer service and your insights. Here's the list:

Productivity

Tasks

Adam: "Gone are the days of using your inbox as a to-do list. Tasks are HubSpot's solution to more focused sales activity. You can set them for yourself, or you can build workflows that create tasks based on certain triggers. My favourite example from our client work is a Bad Timing Workflow – if someone marks a deal as Closed: Lost with the reason 'Bad Timing,' the automation creates a task for 3, 6 or 12 months from that day for the sales person to follow up with the prospect."

Sales Hub Free

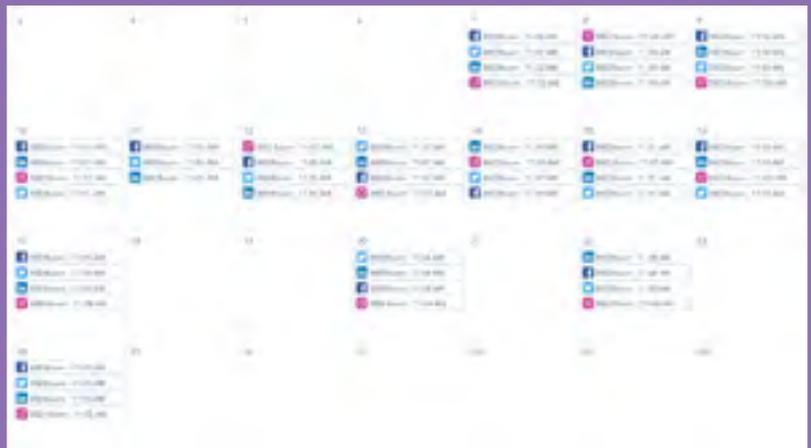
Sales Hub Starter

Sales Hub Pro

Sales Hub Enterprise

Social calendar view

Immy: "Sometimes it can be difficult to visualise your social media calendar when you're scheduling, which makes it hard to identify gaps and duplicates. The calendar view makes it clear what content is scheduled for what platform on what day, so you never miss a day of posting."



Marketing Hub Pro

Marketing Hub Enterprise

Snippets

Elysha: “If you find yourself typing the same thing over and over, snippets are a great feature for you. I see it work best for sales reps that spend a lot of time typing and re-typing details of their product or service. Snippets allow them to quickly insert a commonly used bit of text to save time. It also helps standardise responses so that sales managers know everyone is using the same language to describe their offering.

The snippets are really useful for service pros as well. It can help them answer questions and solve problems so much faster if the answer is ready in a snippet.”

Sales Hub Free

Sales Hub Starter

Sales Hub Pro

Sales Hub Enterprise

Service Hub Free

Service Hub Starter

Service Hub Pro

Service Hub Enterprise

Templates

Adam: “We have a lot of content that goes out and a lot of offline data sources like events, so email templates have made our sales reps’ lives a lot easier. Any time someone comes back from an event with data to import and we want to send a sequence, we just use the events template and change the basic details. It saves a ton of time and helps standardise our outreach efforts.”

Sales Hub Free

Sales Hub Starter

Sales Hub Pro

Sales Hub Enterprise

Service Hub Free

Service Hub Starter

Service Hub Pro

Service Hub Enterprise

Sales sequences

Alex: “Like Adam is saying about templates, we also have pre-built sequences for these different scenarios, and it massively helps my productivity. I don’t have to set tasks to send follow-up emails when I reach out to someone; I just tweak the sequence to the person, initiate the first email, and wait for either a response, a task or a meeting.”

Sales Hub Pro

Sales Hub Enterprise

Meeting tool

Elysha: "So many people using HubSpot aren't utilising the meeting tool because they don't realise it integrates with their calendars. From creating buffer time between meetings to generating video chat links, there are so many options to make it work for you. It's not just another tool for sales reps to learn, it's a background feature that seamlessly blends with their existing processes."

Alex: "I love the meeting tool because it really streamlines the process of connecting with someone. The ball is in their court to book a meeting at a time that suits them, and I don't even have to send an invite or generate a link because the Zoom integration does that for me."

Sales Hub Free

Sales Hub Starter

Sales Hub Pro

Sales Hub Enterprise

Service Hub Free

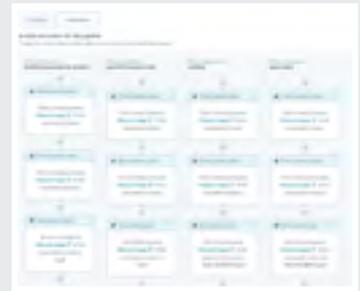
Service Hub Starter

Service Hub Pro

Service Hub Enterprise

Pipeline automations

Elysha: "Marketers embrace workflows and automations really well, but sales people seem less likely to adopt. HubSpot's pipeline automations, however, usually win them over. You can set the trigger as a deal reaching a certain stage and then change company and contact properties, set tasks, and even send emails. This is hugely powerful, yet very few people are using it effectively."



Sales Hub Pro

Sales Hub Enterprise

Quote builder

Alex: "When I started with BBD Boom this autumn, I found the number of products and services a bit overwhelming at first, making it hard to speak with prospects and give them accurate numbers. The quote tool made all of that stress go away. By creating all of our services as products within our HubSpot portal, the team has made it so that all I have to do is click a few buttons and tick a few boxes to generate an accurate quote."

Sales Hub Pro

Sales Hub Enterprise

Content creation

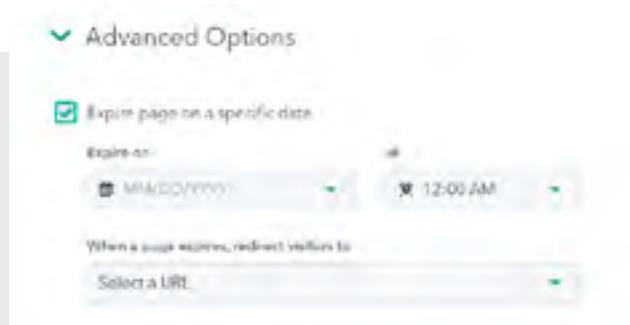
Page expiration

Sam: "We have some clients that have as many as 10 campaigns per month that we have to push live. For some of them, it can be time-consuming to try to remember when they need to come down, especially for time-sensitive landing pages like webinar signups. But with page expiration, I can set the time and date I want a page to unpublish, and even set a redirect link so people aren't left on an error page."

Marketing Hub Pro

Marketing Hub Enterprise

HubSpot CMS



Drag & Drop Editor

Immy: "Some emails and landing pages require professionally designed and developed templates, but a lot of the time budget or urgency necessitates a simpler fix. The drag-and-drop editor makes it really easy to create beautiful emails and landing pages without involving a developer. The best bit is, it's even available for emails on the free version of Marketing Hub now!"

Marketing Hub Free

Marketing Hub Starter

Marketing Hub Pro

Marketing Hub Enterprise

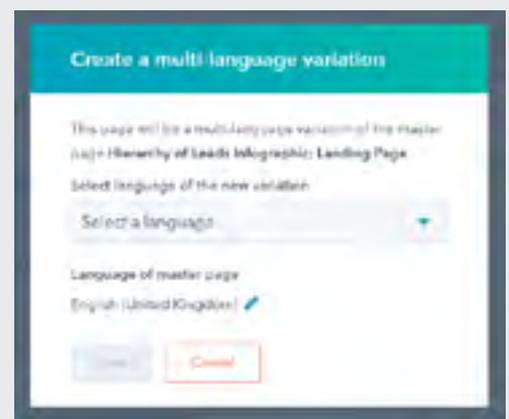
Multi-language variation

Sam: "If you have audiences all across the globe, HubSpot can help you better reach those audiences by creating versions of your pages in different languages. You'll still have to do the translation, but the HubSpot multi-language feature will mean that subsequent translations will be linked to your primary language page for SEO purposes. You can also set it so that visitors to a certain language page will be automatically sent to pages in their language when available in the future."

Marketing Hub Pro

Marketing Hub Enterprise

HubSpot CMS



Workflow testing

Immy: "My job would take twice as long without this feature. When you're building a workflow, there's a little button in the top right that allows you to test it, showing you what contacts would be enrolled and what their outcome would be. This makes it much easier and quicker to test your work."

Sales Hub Pro

Sales Hub Enterprise

Marketing Hub Pro

Marketing Hub Enterprise

Service Hub Pro

Service Hub Enterprise

Content staging

Sam: "We recently released our new website, and the content staging tool made it infinitely easier. I could see exactly how everything would look, how it would interact, and more without having to push it live or deal with tricky sandbox platforms."

HubSpot CMS

Audience builder tool

Tommy: "HubSpot recently made it so that you can create paid ads from within the portal, and the audience builder tool has been my favourite feature of that upgrade by far."

Marketing Hub Free

Marketing Hub Starter

Marketing Hub Pro

Marketing Hub Enterprise

Customer service

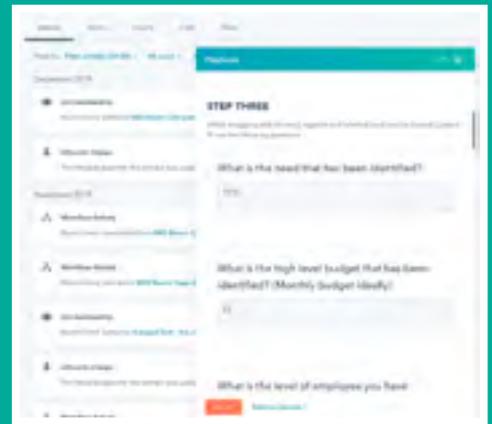
Ticketing

Tommy: "Not only do we help set up ticketing for our clients, but we use it internally as well for our HubSpot support and integrations clients. It may be a core feature of Service Hub, but it's worth a mention here because of how much easier it makes it to help our clients. It's part of the free Service Hub offering as well, which means if you're not already on Service Hub it makes it easy to get a taste of how effective this tool is."

- Service Hub Free
- Service Hub Starter
- Service Hub Pro
- Service Hub Enterprise

Playbooks

Sam: "You can use playbooks for either sales or service, but I've found the helpful features to be different for each. For a sales playbook, my favourite option is the Q&A module. When your sales team log communication with contacts, they can pull up the appropriate playbook and type in the answers to the questions in the Q&A boxes. That information then gets saved to the contact so that other sales reps, sales managers and later even customer service reps are able to see their answers in order to gain context."



- Sales Hub Enterprise
- Service Hub Enterprise

Conversation inbox

Elysha: "With sales, marketing and service all communicating within HubSpot, the conversation inbox helps keep those conversations organised. You can then assign follow-up to certain team members, which means they don't have to sift through irrelevant comms to find out what they need to follow up on."

- Sales Hub Free
- Sales Hub Starter
- Sales Hub Pro
- Sales Hub Enterprise
- Service Hub Free
- Service Hub Starter
- Service Hub Pro
- Service Hub Enterprise
- Marketing Hub Free
- Marketing Hub Starter
- Marketing Hub Pro
- Marketing Hub Enterprise



Knowledge Base

Sam: "Another huge yet underutilised feature of Service Hub is the Knowledge Base, which basically allows you to create your own wiki. Not only is this great for SEO, but it enables you to help customers help themselves by searching for answers to their questions."

Service Hub Pro

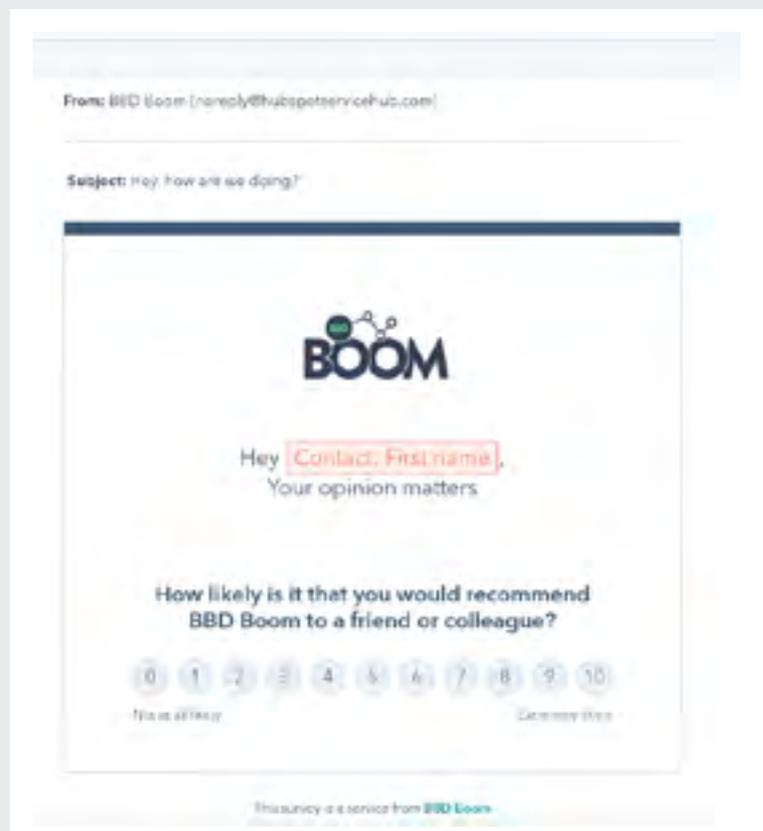
Service Hub Enterprise

Surveys

Emma: "As Head of Client Success, it's important to me to measure our clients' satisfaction, and surveys are a great way to do that. The survey tool is easy to use and of course fully integrated, making it easy to action the results manually or through workflows."

Service Hub Pro

Service Hub Enterprise



Insights

Progressive form questions

Tommy: “As people visit our site time and time again, we don’t want to keep asking them for the same information. We already know their email, their first name and their phone number. Instead, we want to ask them more interesting, insightful questions each time they come back. Progressive forms allow you to do that. We use them on our campaign forms (like the one you filled out to download this ebook), and the number of questions asked on each return is limited so that no one is ever overwhelmed with form fields.”

Marketing Hub Pro

Marketing Hub Enterprise

Knowledge Base Search Reporting

Sam: “As mentioned previously, the knowledge base tool is incredibly useful, but this feature makes it even more helpful for every department. With search reporting, you can see what topics in your knowledge base are most searched for. This allows you to create marketing, sales and service content to better address those queries ahead of time or create more detailed content around those topics.”

Service Hub Pro

Service Hub Enterprise

Lead scoring

Elysha: “HubSpot has two kinds of lead scoring – predictive and manual. We like to use the manual option because it allows for more customisation than predictive, and every client will be different in terms of what behaviour is significant and what thresholds to set for changing lifecycle stages or assigning tasks.”

Sales Hub Pro

Sales Hub Enterprise

Marketing Hub Pro

Marketing Hub Enterprise

Service Hub Pro

Service Hub Enterprise

Lead scoring

Alex: "I use lead scoring side-by-side with my custom property "quality score" to determine first who is the best fit but then, within the ideal fits, who is most engaged and most likely to respond well to outreach."

Sales Hub Pro

Sales Hub Enterprise

Marketing Hub Pro

Marketing Hub Enterprise

Service Hub Pro

Service Hub Enterprise

URL tracking

Tommy: "With so many campaigns going out all the time, we have to be able to track user journeys and see where leads and visitors have originated in order to properly attribute revenue and other metrics. URL tracking means that we can do all of that within HubSpot rather than having to use multiple platforms."

Marketing Hub Pro

Marketing Hub Enterprise



Prospect tool

Alex: "The prospect tool is hidden away, but it's quite powerful. Whilst you don't get any details about the individual people who have visited your site unless they've entered the CRM, you can find out which companies are poking around. The prospect tool tells you how many users from each company have viewed your site, as well as how many total page views that company is responsible for. This can help give you a starting point when deciding who to reach out to with cold emails or calls."

Sam: "The prospect tool is an account-based marketer's DREAM. I can see all in one place what companies are interacting with our content and therefore could be targeted with ads, sent customised content, and more without them every filling out a form."

Sales Hub Free

Sales Hub Starter

Sales Hub Pro

Sales Hub Enterprise

Hard bounced list

Elysha: "This is a new HubSpot feature that saves a lot of time and offers a lot of insight. Before, if you wanted to avoid sending emails to hard bounces, you had to go through every email and add all the contacts who hard bounced to a list. Now, under Website > Email > More Tools, it will let you either create a list of all hard bounced contacts or add them to an existing list."

Marketing Hub Free

Marketing Hub Starter

Marketing Hub Pro

Marketing Hub Enterprise

Google Search Console integration

Tommy: "HubSpot has some amazing SEO tools, but for companies that want to make it a key initiative nothing beats Google Search Console. The native integration makes it much easier to see how your site is performing and optimise it for better visibility."

Marketing Hub Pro

Marketing Hub Enterprise

Make the most of your HubSpot investment in 2020

Still stuck for ways to make the most of HubSpot this year?

Get in touch with our team to organise an audit of your HubSpot portal, where we'll analyse everything and offer recommendations for improving your productivity, content creation, customer service and insight.

[Click here to book a meeting.](#)



Email: grow@bbdboom.com | Call: 01202 800464