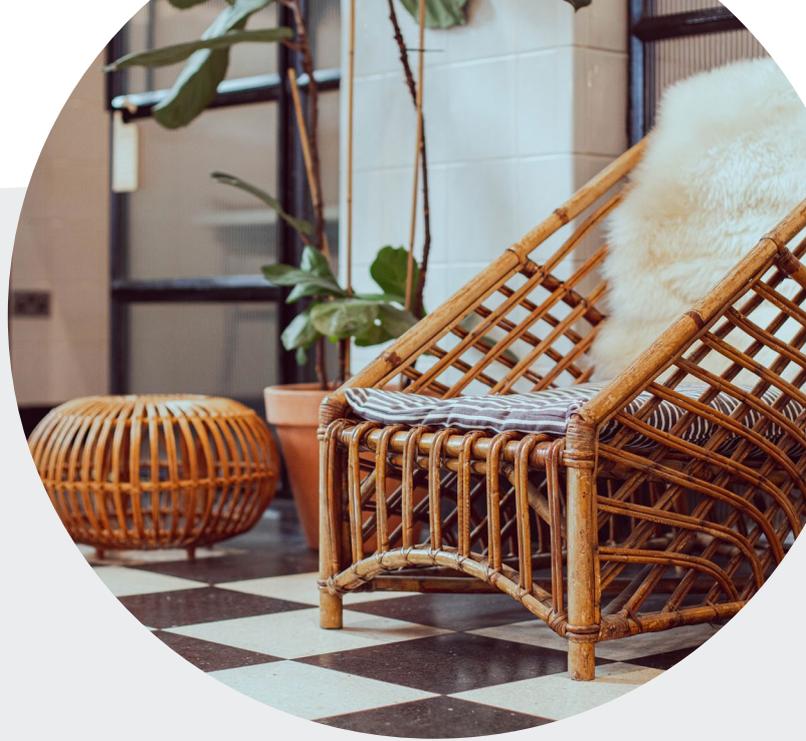


B2B
**GROWTH
WEBINAR
SERIES**



Advanced Automation Strategies

With **BBD Boom &
Nicholas Holland of HubSpot**



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Introduction

In our latest B2B Growth Webinar, Boom's co-founder and solutions architect; Adam Lewis sat down with Global Vice President of HubSpot Marketing; Nicholas Holland, to discuss advanced HubSpot automation strategies for 2020. Our webinar series is aimed at ambitious B2B businesses who are looking to grow faster. We aim to share thinking strategies, technology, sales marketing best practice, and for you to go away with practical tips and advice that can be implemented today, tomorrow, and the future.

As a recovering agency owner, Nicholas Holland did a lot of digital transformation, web and mobile applications, and was about 40 to 45 employees at his peak before selling to them to raise venture funds to start a SaaS

platform. This was aimed at salespeople, allowing them to create single web pages, pitch pages, product pages, and proposals. This was initially when he struck a relationship with HubSpot. After about three years of talking about how the sales persona and marketing persona intersects at a time where they were just starting to get into CRM, HubSpot put an offer in. Although rejecting the offer, they stayed in touch until about four years ago when they approached him again with a remote working offer at the innovations lab in Ireland. It was there when Nick began to gain ownership of HubSpot's marketing products that we see today. Not only focusing on the products and where marketing is going at a vision level, but also on how to match that to the right value and location in the market.



Changes in the Marketplace

Firstly, we as businesses are seeing customers diversify into more and more channels. These channels such as Messenger or WhatsApp see users becoming as comfortable with clicking ads as they were clicking natural search links. Even the dominant business medium of email is seeing a shift towards ephemeral messaging, with things like Slack and HipChat. Social is having a dramatic change with the increase of micro communities and ways to privately message each other. What's happening for us businesses, is that we have all of these different solutions cropping up to meet customers and their ever evolving communication needs.

When you pull back and you talk to us as marketers, there's nothing really that's changed. We have seen mediums change and widen over the years. That's really where we have to ask ourselves "are you where your customers are?" For example, think about SMS. There was a while when SMS had really tanked in its performance in the United States. It was noisy, expensive, and people were starting to use it poorly. On the flip side, you started to have companies like Twilio and Google who are trying to modernise it. SMS is no longer just blank text messages. Now you've got

things like multimedia, interactions, and even buttons. The medium itself is starting to have a really strong resurgence, to the point of us having to ask ourselves "What is the role of SMS in business communications?".

Marketing is really about sending the right message at the right time to the right people. Now, with the breadth

of channels out there, you have to send messages across multiple mediums if you want to be where your customers are.

But how do you effectively target those messages?

That gets really difficult, because not only do you have one

dimension, you are now trying to target multiple channels using multiple voices to get through to customers with multiple needs. Therefore, targeting, automation, and personalisation are as important as ever.



Targeting is reducing the size of your world and goes hand in hand with personalisation. In fact, you almost have to target to personalise, but they are not the same thing. The way to describe personalisation is if I were to message everybody in a specific town rather than a country. I may be much more targeted, but I might still have a message that is

not very relevant to the individual person. So personalisation is a spectrum of attention; the more personalised a message is, the more attention someone will give you. For example, if I send a message saying "Hey, Adam, here's my offer," it's more impactful than just saying, "Here's an offer". Even more so, if I were to say "Hey, Adam, here's the offer because you're interested in

X, and two years ago, you bought this and also found out that your warranty is about to expire". So when you take that targeting, personalisation, and automation, you get that TAP acronym. When layered over the breadth of channels that we are dealing with, we now see the right message being sent at the right time to the right people. And to pull all of that off, it takes orchestration.

Orchestration is really the Achilles heel of every small business looking to broaden their marketing. In order to successfully orchestrate, you need something to help you be able to manage the channels and data, orchestrate campaigns, report on it, and be able to do things like set users who are going to be touching different parts of it.

So to sum up, you really need to be asking yourself a series of questions.

Are you on the right channels where your customers are?

Are you leveraging the depth of data that you have to really do better targeting and personalisation?

Are you using automation to make sure that you're doing these things at scale at the right time?

How do you personally feel with your orchestration?

Do you feel really tight on your reports?

Are you running Crisp campaigns?

Are you doing optimisations?

And are you set up to scale?

Should this marketing thing actually work?



Marketers at the Revenue Table – Showing Revenue Attribution

There's a joke in marketing that people love to say, which is, "Half of my marketing is working, I just don't know which half." And that leads to us as marketers being constantly asked for more. The reality is, because we don't have tight instrumentation, we don't really know what's working, thus breaking our credibility. So you've got this pull on you, where you have this pressure to deliver on leads, revenue, and value, but ultimately, it is very difficult to pinpoint the one thing that works. Because of this, you never get a pat on the back from the executives that the top sales people get. Marketing is incredibly important, it's just very difficult to get the credit that you deserve.

So how do you do that? Firstly, marketers need to start understanding that the activities that they do really have a revenue impact. Therefore, they should be a big driver of trying to get revenue into their marketing systems. HubSpot can be either a primary or secondary CRM. And this is a new term that a lot of organisations are starting to recognise. A secondary CRM is one that just shadows your other CRM. So as an example, let's say you use Salesforce. Many customers of B2B businesses use Salesforce, but at the end of the day, the

marketer still has to do quite a bit of work in a powerful platform like HubSpot. So they'll use HubSpot as a secondary CRM. Once you have revenue tied into HubSpot in particular, it gives you the ability to start tying your marketing actions back out to what actually closed revenue. This takes a lot of fancy maths and machine learning, but ultimately what it comes back with is multi-touch revenue attribution (MTRA). Multi-touch attribution relates revenue in the form of "credit" to customer interactions in HubSpot, so you can better understand how the marketing and sales activities are creating revenue for your business. Within HubSpot, this is a system built right at your fingertips.



Something to consider though, is that many marketers are at varying levels of maturity in your marketing journey. A lot of marketers are just trying to get the fundamentals in there. Do you have forms that feed directly into your CRM? Do you have your ads at least thinking up in a place where you can tie out all of your lead gen activities to your ads? Do you have basic things like a pop-up for conversion rate optimisation? These are the things within the HubSpot starter tool. Then whenever things begin to scale, there are pro tools. That's where automation comes in. Then whenever you're ready to tie that to revenue, you can start to report on what works and what does not.

There are six different models, and for people that are new to attribution, reporting, and modeling, this might be a bit overwhelming. If anybody is familiar with Google Attribution and Google Analytics, there are parallels. One thing to consider is that everybody's business is different. Every marketer has different ways that they nurture and weigh things. HubSpot offers multiple models in which with one click you can reorient everything, but this is not without prep work, like data integration, making it very complex to get it going.

First, interactions. You want to see what was the very first thing that a paid customer interacted with. That could be a blog article, an ad, or an email. This is where a U-model

can be used. This gives credit to the first interaction, then credits the thing that happened right before they became a lead. This could be a piece of gated content or an email. It then splits everything else evenly. This means you can answer the question of, "What was the very first thing that brought them in?" and "What was the thing that finally got them to raise their hand and become a lead?" Some marketers basically give no credit to everything else, as they only want to know what was the one thing that drove this activity. But for some, a full path view is preferred, splitting all of the things evenly across the major stages.

Something seen with sales-driven organisations is that a sales guy goes out to an event, meets a concept, puts it in the CRM, never speaks to them for a year, a campaign kicks in, and the sales individual closes a deal. In the olden days, that would have been attributed 100% to sales because he was the one who originated it. Now we can show that although they put them in the CRM, through the marketing campaign and nurture strategy, they had 50 emails over the last year, and they've been to one of our webinars. So marketing can actually say that they contributed most value to the business.

Most Effective Conversion Paths – How can we prove that?

Conversion rate optimisation (CRO) is the term that a lot of people use in the industry. Conversion rate optimisation is like going to the gym. It's something everybody knows they should do but also something people struggle to find the time for. Also, we also feel it can be quite daunting. If setting up an AB test is something you've never done, once you begin to do it, it blows people's minds as it's not as simple as they think. The easiest way to do this is something called adaptive testing. It uses a fancy machine learning term called multi-armed bandit, but what it ultimately does is let you go inside HubSpot and make variations of a page. So the fastest way that we've seen marketers do this is they'll clone a page, then change something like a header, a button, or the entire design.

So it really captures the different types of ways that people go from AB testing towards

multivariate testing. HubSpot can do both of those. If you want to go change a CTA, an image, or header, that's more like in the multivariate testing. Sometimes you really want to go in there and just do a dramatic change, which would warrant an AB

test. For example, if the first offer on this page is like, "Adam, we're going to give you free shoes", but on the other offer it says "We're going to give you a free consultation". So one is like a promo and one is like a consultation, you can then start to run and see how those perform.

It basically starts to split test traffic for you. It listens and finds a signal as to which one is working, which one's not, it begins to revalidate if its hypothesis is correct, and over time, it takes a winner. That's it. You don't even have to come back into it.



Account Based Marketing

We don't call it Account Based Marketing (ABM) inside of HubSpot. HubSpot calls it a target account strategy. ABM is often criticised, due to it using LinkedIn scraping and bought lists in order to fill up the top of their funnel. But now there are ways to drive the top of an ABM funnel organically and legitimately. Advertising through networks has really done a great job of letting you find your people, your demographics, your buyer, etc. You can do ads that are targeted directly to them in a mode that they're willing to engage with. It means that clients will be attracted to these, rather than them being an annoyance or

problematic. The other thing that's happening is people are running things like content marketing and broad-based marketing. Through this, they basically take accounts and elevate them up to sales. So one of the ways we'll describe that here is through nets and spears. Say we wanted to start to run a very powerful marketing campaign, a net. You can run nets and capture people at a low cost. Whenever you finally get people in that net, you can then set your sales team up to start spearing them.





We started to see that if you want to do ABM, you want to effectively have a way of knowing what your Ideal Customer Profile (ICP) is. It could be a number of employees, it could be a region that they're in, it can be an industry. Then you want to get into what a persona would look like. Are you selling to the IT manager? Are you selling to the treasurer? Are you selling to the CEO? Then in that target account, you then get to see which ones you have the right buyers roles for and which ones you don't. Then you can identify who you want to start engaging with. For example, say that you are selling to banks, you then say from an ideal customer profile point of view, I only want to sell it to banks who basically have between \$500 million and \$1 billion in revenue under management. You then start to say, "I only sell to the chief security officer", so you define that role. Now, you set up a target list with your sales team of all those people inside

of whichever country you're in that you want to go after. And all of that is like an orchestra working towards basically closing that account. One of the coolest scenarios we've seen recently is how a marketing team found that if they market to a particular persona in the company, it greatly reduces the amount of rejection or pushback that person will give whenever they are finally in the room. They then have ad campaigns specifically targeted towards the person who is always the deal maker.

Target accounts are a set of groups that you want to work with the sales team on. The buyer persona gives you the ability to effectively put the right message to that. HubSpot makes it easy for you to start doing things like ads, emails, smart content, where the site allows for personalisation for the right buyer.

Do I need to upgrade my HubSpot?

If we are talking about multi-touch revenue attribution or adaptive testing, then you would have that in the HubSpot Enterprise package. A marketer has to be a little bit more mature in their marketing journey to do those things. If there's bits of this that you want, but you don't want to upgrade or spend more money, there are hacks and tricks that can be done. Using some of the custom properties that we've done for other clients, Boom can assist you in getting close to some of these features. One of the things that we love about HubSpot is the ability to plug in external IT systems and data sources that people have in their organisations that enrich the automation and marketing activity. We can now use external data and feed that into the marketing automation, making it even more intelligent and relevant to the business.

The average small company, defined as 25 employees or below, has over 20 SaaS applications that they use. The average large or medium sized company, one that has closer to 200 employees, has over 100. In HubSpot's early days, one of the big value propositions was that it was an all-in-one. So if you were a marketer, you were still trying to figure out how to basically meet all the demands of your business with limited resources. There was a

lot of value in having all of your tools at your fingertips, but with all your content creation, project management, or analytic tools that you want to be part of your marketing stack, HubSpot began on a path of becoming an integration platform, now with around 400 integrations. If you're on MailChimp, WordPress, and Typeform, and you've strung it together with Zapier, that's cool, but your days are limited. And what's meant by that is that if you're growing, your days are limited in being able to hold all that together with duct tape. Furthermore, with organisations like these, when the question of "What is your reporting process?" comes up, the answer is that it is usually non-existent, or they have a very elaborate setup to gather data from all of these different resources into a bespoke Excel report.



Because of this, organisations ask “Wouldn’t it be nice to just have one place where everything plugs in, one place where you had a system of truth in terms of reporting, and one place where you could begin to know that if something worked into it?”. HubSpot integrates to the point where you start to see it enriched throughout your experience. One of the ways that this happens is in the automation tool. HubSpot has something called workflow extensions. Let’s go back to SMS for an example. Even though HubSpot does not have SMS, there’s many SMS solutions available in the marketplace. Now whenever you are using HubSpot’s native automation tool, you could actually just make a step that says “if this happens, send a SMS message”. You can now plug so much stuff in there and still not change your day-to-day workflow.

As a HubSpot Elite Partner, here’s an example of how Boom used this in our client work. This is a business that in terms of prospecting, they need to know how many domains under management a particular company has, so how many .coms, .uks, etc. So whenever a new contact or account is created in HubSpot, it sends what we call a web hook to another database, which we then query domain name server database. It pulls back that data into the record that the sales reps are looking at so they can instantly see, “Okay, so this company has 1,000 domains under management. That puts us in the top tier of the accounts that

we want to work with”. So not only from a sales point of view does that mean the target account is going to be treated differently, we also now on the automation side say, “Okay, we’re going to start sending content to those people, bearing in mind that they are a top tier, they’re a big user and a big potential client of ours”. So it’s incredibly useful to bring that in. With workflow extensions, we’ve got web hooks where data can go back and forth. It can be synced in real time, it can go one way, etc. There’s so much that can be done. So if that’s something of interest to you, let’s know.

One of the things that’s starting to get more popular stateside right now is gifting. There is a company called Sendoso and it allows you to send gifts at scale. At the end of the day, sending out bulk gifts costs real money, and it’s very difficult if you are doing a batch and need to send out glossy folders to 10,000 people. On the flip side, when you do the things just described, you’ve now brought the world down to a targeted account set. You then further reduced it down to the ideal customer profile, so you can say of these 50 accounts, I’m willing to drop some money because you know that there is a long lifetime value or significant deal size. Being able to reduce the world from everyone to target accounts down to an ICP, you can go really hard and heavy at those accounts to really gain their attention when they’re dressed.

Which Reporting Integration delivers the most advanced reporting?

Everybody's usage is on a spectrum nowadays, where everyone's needs are different. Generally, a lot of people like Databox. It has a very quick, easy integration that allows you to see dashboards of many different disparate data sources. If you want to see reports on Twitter, Facebook, Pinterest and you also use MailChimp outside of HubSpot, Databox lets you have a dashboard that shows all of that, without blending the data. It's a really great starting point for people who are wanting to start doing cool dashboarding and things like that.

The next one, if you're wanting to get into something very powerful, consider Domo. They have an integration in HubSpot's marketplace that originally cost \$5,000 a year. And if it's not free now when you log in, they're making it

free, which is pretty awesome. Their solutions however, when you start to buy, move up into the tens of thousands of dollars. It's very expensive, but it's as powerful as you need it to be from a BI standpoint.

Another favourite is Supermetrics. The way to look at that, is that you could build the best reporting platform in the absolute world and no one will give up their spreadsheets. They will still want to pull it in there, they will want to do ad hoc manipulation and so on. Supermetrics is incredibly valuable and gives you a lot of flexibility outside of the HubSpot platform with other data. After that, go look at Databox with their next level dashboarding and external data sources. Then, go look at Domo if you have a very huge BI, or if you're using Redshift or Snowflake or other kinds of big data lakes.



Security and Permissions

HubSpot traditionally had a reputation as being unsuitable for very large organisations, which has been proved to be less and less true. But whatever system you're using, the organisational complexity is getting bigger. As mentioned earlier, sales and marketing alignment means that all teams need to be logging in and doing stuff, but people assume that the more people there are using it, the more cause for concern around security and permissioning. At 3,500 employees, HubSpot uses their own software across the whole company. This includes their CRM, CMS, and marketing automation platform. If a 3,500-person company can use it, most of HubSpot's target customers can too. Ultimately, what happens is as your organisation gets more complex, you really just need to add a couple of just sanity checks instead of adding bureaucracy and a bunch of asinine controls that you have to maintain.

At HubSpot, they have a HubSpot for the startups team, and then a marketing proper team. You don't want them messing with parts of the platform that they shouldn't have to. So they started working on partitioning, where you can split your users in the teams. Then, you can go in there and say, "This particular

workflow is only available for team A and this particular form is only available for team B". And that gives you a peace of mind, that now people have access to the things that they need to have access to. This becomes more useful as your organisation grows in actual staff size.

We also put SSO in there as part of that governance. This becomes valuable when you add a new piece of software to the stack, as you want to be able to have a single place to add users. The real place that SSO has become valuable for our customers, is that we all have employee turnover. And you want to eliminate that pain of going into 22 SaaS applications and saying, "Okay, where's Tammy? Delete. Okay, next one, where Tammy? Delete". So SSO really becomes a bit about managing de-provisioning when you have turnover.



Conversation Marketing

For a long time, I thought this was just pop-ups and live chat. But now we're talking about chatbots, live chat and Facebook messenger. I think live chat is probably the easiest way to get involved in this process. Let's say you're trying to buy a car. Would you prefer to fill out a form and then have sales reps call you day in and day out, all throughout your day trying to find out when you're going to come into the dealership and buy a car? Or would you be more comfortable chatting with somebody and asking, "Hey, do you have any Teslas on the lot today? May I see a picture of which colour?" And someone says, "Hey, where are you located?". You just want to ask these questions, you don't want to be sold to right now as you're still in the middle of information gathering. What I just described is how we all feel. All of us would prefer to have this interesting fast chat communication than to say one size fits all. We all want to call in and



get on the phone and have a demo. I know as marketers, we love to drive some demos and we really want those powerful salespeople on the phone. But that's just not the way the world is moving. So whenever I talk to a marketer and I say, "Why have you not put live chat up there?" A lot of times it's just like, "I don't have the time. It's too hard. I don't know if people would actually want to do it". HubSpot has focussed on trying to make this easy. The same JavaScript that powers everything powers the live chat, so there's no extra work. Also, people are worried all the time about hours, "What if I'm not there? What if I can't answer fast enough?". That's where bots come in. People overthink bots, but they are just automation. Imagine if you emailed somebody after hours and it just replied saying, "Hey, thanks for emailing. It's after hours right now. Would you like somebody to call you back in the morning? If so, just click yes and add your phone number".



So bots don't have to be intimidating. HubSpot has many bot templates that simply just ask people if they want to be called back or set a meeting on someone's calendar. It's super easy to then rotate things directly to sales people. You want to get your sales team excited. Tell them, "Hey, we're going to pre-qualify if these are good leads, and if someone wants to talk to sales, we're going to put it right onto your cell phone". You're going to have a lot of very happy sales people. Outside of that though, what a lot of our customers wanted was really awesome ways to target stuff. If it's an unknown, unqualified person, you'd want to do a pop-up form that says, "Hey, here's more information" or "Look, here's some content

offers". But if it's somebody who you already know and have already become a lead or a target account, you'll start to see how it all comes together. If somebody comes to your site who's a target account owned by Adam, you can right off the bat route that to Adam. You just made Adam your best friend. So there's levels there of maturity that you can go through. With HubSpot, you can sign up for free and start using the conversational marketing stuff, including bot templates, all the way up to the point of doing very granular targeting. You've got a way to serve all your customers a better, faster route to conversion and sales. All starting off for free.

I'm not an enterprise, so do I need HubSpot Enterprise?

The topic of this webinar was advanced marketers. And one of the things learned from this was that HubSpot Marketing Enterprise is not just aimed at enterprise companies. It means that you have sophisticated, more complex needs. There are a ton of six-person companies out in Silicon Valley that are needing Enterprise, because they are funded organisations that are building very complex marketing structures. But ultimately, if you want to save money, Enterprise is good if you have over 50,000 contacts. If you have multiple marketing teams that you need to keep isolated from each other, or if you're running multiple brands in your franchise, you need Enterprise. If you're using the ABM approach, it's in Pro. But a lot of times, the thing that comes right after ABM is, "I want to know how much revenue I drove with the sales team", which then creates the need for Enterprise.

And then we didn't talk about custom events, or in other words, behavioral marketing. Some

marketers are really good at spotting. Like if a person goes to this page, this page, and this page, they're basically evaluating us, or they're in shopping mode. So if you use custom events to tag behaviours of your customers; someone who's really engaged, opening emails, you can then drive that into lead scores, which then once again helps your sales team, helps you to drive more ad spend, and helps you really get more targeted. That's it.

So for more advice, if you are an Enterprise user and you want to get some of these features on lock that are maybe in beta, or if you need help to fast track any setup of attribution reporting and so on, [let us know](#). Furthermore, if you are a Pro user, we could talk about upgrading and pricing for that. And of course, we're always available to give any advice about automation and some of the advanced stuff.

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