BabelQuest

HubSpot Elite Solutions Partner Program

UNLOCKING POTENTIAL

What, When and How Should I Automate?

5 SMART automation blueprints to help your sales and marketing operations grow better

CONTENTS

INTRODUCTION

Striking the perfect balance with automation

As you scale, it gets harder to actually deliver what you set out to build — a great customer experience.

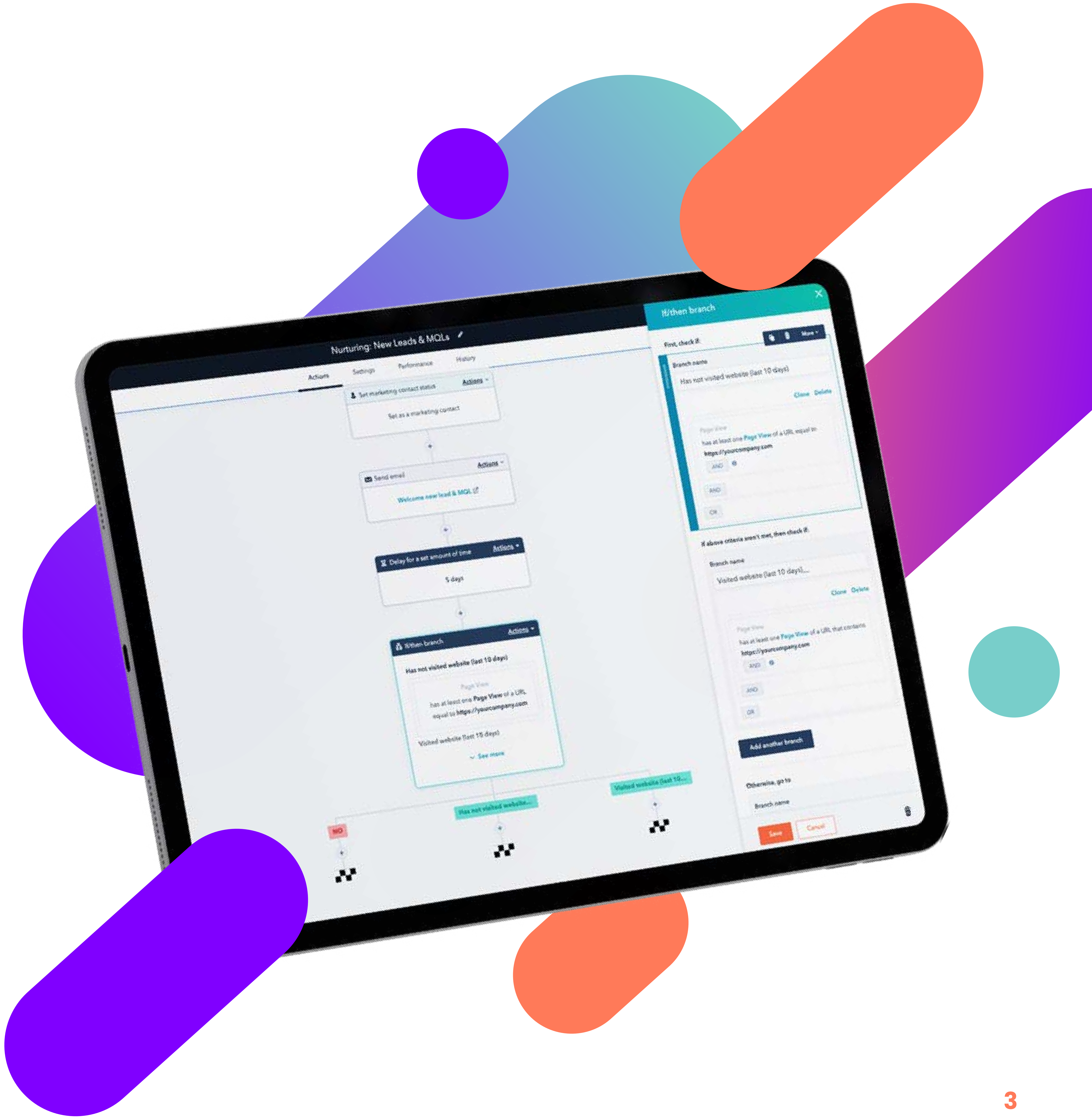
What you've done has got you to where you are. But as you've grown, you've got more teams and bigger departments than ever before, all trying to solve for the customer.

Different strategies for different teams. Different teams for different tools. Different tools for different experiences. Siloed systems turn into friction. Friction that your customers — the people you set out to solve for in the first place — feel. It doesn't have to be this way.

Remarkable automation unifies teams. It aligns teams around a single source of truth. But it's also crucial to recognise the significance of balance in this journey.

Effective automation is not about replacing the human element; it's about enhancing it. It's about knowing what to automate to drive efficiency and what not to automate to preserve the personal touch.

To help your teams to market, sell, and service customers at scale, we've created blueprints that show how you can use automation to create great customer experiences, whilst maintaining the vital human connection. We hope you'll put them to great use.



THE WHAT AND WHEN: CHOOSING THE RIGHT TASKS FOR AUTOMATION

Not everything should be automated; instead, it's about pinpointing the right opportunities to enhance efficiency and effectiveness.

Start by defining your goals. Are you looking to reduce manual labour? Provide a consistent response? Avoid human error? Knowing this will then help inform what should and shouldn't be automated in your business.

You should use automation for:

1. Rule-based activities

If they did this, then do that. For example, if they downloaded a guide then send them the PDF. If they requested a quote then send them an email. If they responded with negative feedback then notify their account manager.

2. Lead scoring:

If they're a hot lead, let Sales know. Using HubSpot scoring functionality, set up some behavioural and demographic rules to let Sales know who is a hot lead.

3. Creating tasks:

Help Sales stay on top of their leads by creating tasks. If a contact was sent an important email but doesn't open it then create a task for their account manager to get in touch.

4. Data management:

Making sure your data was clean was a manual task but not anymore! With workflows and automation you can clean up property fields, copy missing data from records and get notified if something doesn't look right.

You should use automation with caution for:

1. Deleting contacts:

Ideally this should always be removed manually by creating lists and having a person look it over but sometimes there is a need to do this automatically. Use our HubSpot Hack for full details on how to do this here.

2. Notifying one person:

The problem here is if you're using a notification for something important and time-sensitive. What if they were on holiday, or on annual leave? We recommend notifying a team or doing a round-robin notification to make sure it's always covered, where possible.

3. Complicated automation:

Avoid creating workflows with loads of branch logic because this makes it hard to keep on track and change in future. Keep it as simple as possible and you'll help futureproof your automation!

1. SCALING SALES PROSPECTING

The when:

Use this blueprint when you need to connect your Sales team to leads showing high-intent actions on the website.

The what:

Contacts in your database are visiting high-intent pages on your website — think product overview or pricing pages — all the time. You want to convert more of these contacts, but your salespeople are already busy prioritising daily outreach to the best-fit companies first.

The how:

You need to identify your high-intent web pages and set up automation to trigger when a ready-to-buy contact lands on them. Send them an email directly from a sales rep with a meeting link to the rep's calendar to make it easy for your prospects and leads to connect.

Let's look at the blueprint and see if you can implement this within your own business.

Full blueprint

1. Outline the workflow goal

What specific action are you trying to drive your database to take? Do you want them to fill out a demo form? Do you want them to call your sales line? Make sure you clearly understand your goal.

2. Identify high intent website pages

Traffic to 'high intent' pages can be thought of as visitors who're actively considering your product or service. Which pages contain product or service information? Which pages contain pricing information? Etc.

3. Identify high volume website pages

Look at the volume of contacts in your database viewing each of these pages you outline in step 1. Of those pages, which have the highest volume?

4. Create a list of contacts who have viewed one of these pages

Create an active list that automatically adds contacts who have viewed one of your high intent pages with the highest volume.

SCALING SALES PROSPECTING

5. Create your email

Remind yourself of the goal you set for your automation. How will this email drive the recipient to complete that goal? Pro tip: put yourself in the recipient's shoes. Based on the page they were viewing, what stopped them from converting? What information do they need that they didn't receive? What objections do they have? This exercise can mean the difference between a good email and a great email.

Don't forget to set up the email so it's sent in the name of the contact owner. This can be done by inserting 'personalisation tokens', enabling multiple sales reps to use the same workflow while keeping the emails personalised to each of them.

6. Create a new workflow

Roll up your sleeves and, using the information gathered, create a new workflow.

7. Set your enrollment criteria using the list you created

Set your enrollment criteria using the list you created above.

8. Set your workflow goal

Set your workflow goal using the goal you outlined for your automation. This will help you track the success of this automation.

9. Add relevant suppressions

Think unsubscribes, language, specific segments, contacts without an owner, etc.

10. Add an automated email step

Select the email you created above.

11. Complete a final QA

Walk through the entire workflow from enrollments to goal to suppressions to your email. Double check everything is set up as expected. (In HubSpot, you can actually test the whole workflow and it sends all the emails straight away to check.)

12. Launch your automation

3… 2…1… Launch! Once you've double (and even triple) checked everything, turn your workflow on and watch the magic happen.

13. Optimise and innovate as you scale

Rinse and repeat for additional high intent actions.

Looking for more help on scaling your sales prospecting? Read our HubSpot Hacks on:

- How to use HubSpot to track what your leads are doing on your website
- HubSpot Sales: How to create competitor battle card playbooks
- HubSpot Sales: How to improve response rate by embedding personal videos into sequences

2. MAXIMISING CONVERSATIONS WITH SEQUENCES

Increase your likelihood of closing business with sequences.

The when:

Use this blueprint when you want to minimise the time it takes for Sales reps to engage with highly qualified leads.

The what:

Sales reps are under pressure, constantly, so being able to help them get in touch with qualified leads will benefit everyone. You may already know that a group of leads downloaded an ebook or viewed a page, but the trick is knowing which of those actions make them sales-ready. Whether you have tens of leads or hundreds of leads coming into your pipeline each month, it's hard to separate signal from noise.

The how:

You can build a lead scoring system to qualify leads and support that with a workflow that delivers timely notifications to reps on what actions their leads are taking on your website.

When a contact takes a high-intent action and pushes them over the threshold of their lead score, the workflow sends an internal notification to their sales owner. The email describes the action taken, by whom, when, and provides reps with a recommended follow-up strategy to take based on that action.

Full blueprint

1. Create a lead scoring matrix

We recommend using a three-pronged approach; a contact's demographics, a company's demographics and the actions they have taken. By building it like this, rather than in the traditional way you can in a 'decay' feature which means leads will move in and out of the 'target score' depending on when they last engaged.

2. Create your rep notification email

This email should provide reps with context by including information about the contact, so use personalisation tokens here. What is the contact's name, company information, email and phone number? Next, what is the action that they took? Finally, include suggested next steps for a rep after someone has taken this action. For this example, we want to recommend enrolling them in a Sales Sequence.

Top tip: Never automatically enrol contacts in a sales sequence because all leads should be qualified first by a real person to avoid duplicate communications

3. Create a new workflow

Roll up your sleeves and, using the information gathered, create a new workflow.

4. Set your enrollment criteria

Set your enrollment criteria as reaching your pre-determined lead score threshold.

MAXIMISING CONVERSATIONS WITH SEQUENCES

5. Add an action to change property

Select your contact owner (or sales owner) as the recipient.

6. Complete a final QA

Walk through the entire workflow from enrollments to your email. Make sure everything is accurate.

7. Launch your automation

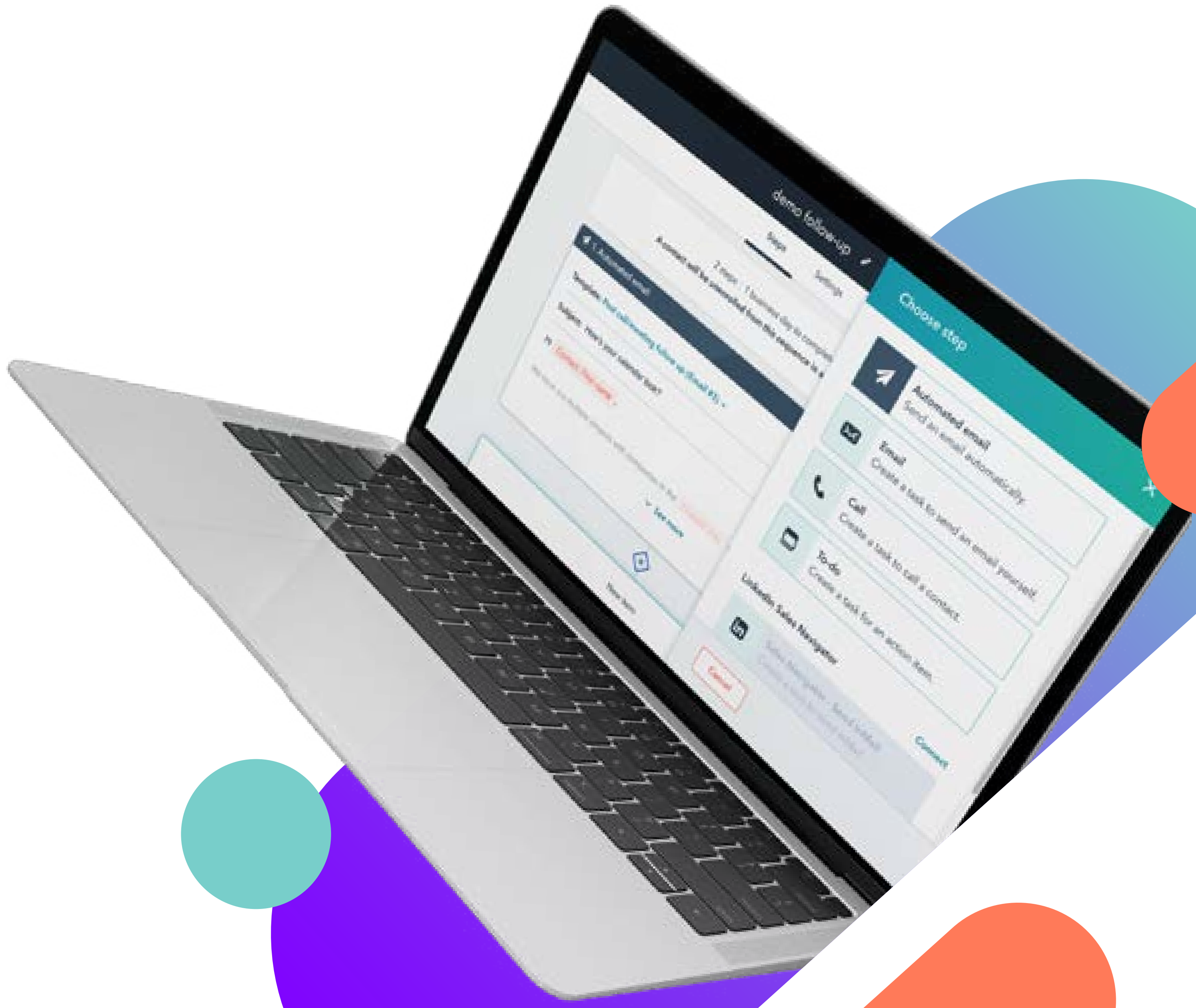
3… 2…1… Launch! Once you've double (and even triple) checked everything, turn your workflow on and watch the magic happen.

8. Optimise and innovate as you scale

Rinse and repeat for additional high intent actions.

Looking for more help on maximising your sales conversations? Read our HubSpot Hacks on:

- HubSpot Automation: Build marketing-led Sales nurture for abandoned SQLs
- HubSpot Sales: Get savvy at creating a calling queue
- HubSpot Sales: How to use snippets as an alternative to playbooks (for free hubspot users)
- HubSpot AI: How to use HubSpot's AI content assistant to write outreach emails



3. ACCELERATING QUALIFIED CONTACTS WITH CHATBOT

The when:

Use this blueprint when you want to increase your pass-to-sales rate (percent of conversations passed from live chat agents to sales reps) while keeping customer satisfaction scores high.

The what:

Trawling through all your chat interactions can take more time than most agents have, particularly if you receive large volumes of live chat traffic.

How can you make it easier for your agents to find and connect with the prospects who'd benefit most from purchasing your products while still delivering a helpful chat experience?

The how:

To solve this challenge, you can build automated chatbots that ask a series of qualifying questions. When a customer's problems can best be solved by evaluating things further, you'll route them directly to your sales team for a more in-depth consultation. Otherwise, the bot can automatically return the best resource or link to solve the problem, allowing your sales team to focus on best-fit leads from the website, without having to do manual work.

Full blueprint

1. Categorise the pages on your website

Categorise the pages on your website into two groups. Pages with a lot of volume, but low intent (homepage) and pages with low volume, but high intent (pricing page). Identify what the goal of each of the pages are.:

2. Look at your chat logs for the most common questions

Search for opportunities for automation by looking at your chat logs for the most common questions. If you don't yet have chat live on your website, ask your sales and support team for the questions they hear over and over.

3. Create self-service resources for your most common questions

(If you don't already have them.) These resources will answer your prospects and customers most common questions that don't qualify as high-intent.

4. Map paths within your chatflows to address your prospects and customers most common user problems

Map out unique paths within your chatflows that address your buyers' most common user problems. Example: I want to learn about pricing, I want to learn about products, I want to talk about strategy, etc.

ACCELERATING QUALIFIED CONTACTS WITH CHATBOT

5. Create quick reply options

Within each flow, create quick reply options for questions that are easily answered through your self service resources.

6. Include a step to ask if their question was answered

If not, route to a live agent to avoid any friction within the experience.

7. Only ask essential questions

For flows that route to a sales rep, only ask questions that are essential in the sales process. Be clear about why you are asking the questions, and let the prospect know when you are handing them off to a live agent.

8. Ask qualifying questions

Be intentional about the level of automation you are putting in front of the prospect or customer. If they are on your pricing page, limit the automation and focus on getting them to a sales rep ASAP. If they are on your homepage, try to ask a couple qualifying questions upfront to understand their intent.

9. Complete a final QA

Test the entire experience yourself before launching. Was anything frustrating? Did the user flow make sense?

10. Launch your automation

Launch and pay attention to chat logs! What are your customers telling you about their experience?

11. Optimise and innovate as you scale

Assess the results of your chatflows constantly. Where are there opportunities to pass even more off to your sales reps? Where are you finding lower quality chats sneaking through that could be answered through self service resources? Never stop measuring. If you focus on keeping your customers happy, your sales team will be too.

Looking for more ways to use a Chatbot? Read our HubSpot Hacks on:

- HubSpot Service: How to use a Chatbot to increase time on site after a conversion
- HubSpot Service Hub: How to personalise your chatbot experience for your customer
- HubSpot Service Hub: Build a chatbot to field different types of customer queries

4. REFRESH YOUR DATA FOR MARKETING AND SALES

HubSpot chatbots aren't just good for answering questions, they can also be used to get contacts to update their CRM records from within the chat window.

The when:

Use this blueprint when you want to make sure your data is up-to-date and clean.

The what:

Traditional methods often involve lengthy forms and manual data entry, which can deter contacts from providing updated details.

Instead, this approach empowers your contacts to effortlessly and conveniently update their information directly through a chat window. It simplifies the process, making it more user-friendly and encouraging contact engagement.

The how:

To execute this blueprint effectively, you'll create a new automated ChatBot specifically designed for the purpose of collecting updated information from your contacts. This ChatBot will initiate conversations with your contacts, prompting them to review and update their existing details.

Full blueprint

1. Create the bot

Begin by building the chatbot within the 'Conversations' > 'Chatflows' section.

2. Craft a clear welcome message

Design a succinct and straightforward welcome message that conveys the bot's purpose and the desired action ('ask') for the contact.

3. Ask relevant questions

Incorporate an 'Ask question' step to inquire about the specific information contacts wish to modify. Utilise personalsation tokens to present the relevant data.

4. Create actions

For each response, create corresponding actions. Importantly, map the collected responses to the appropriate property fields in your CRM records.

5. Path selection

Revisit the initial question step and implement path selection using 'Go to action based on response.' This step functions as an 'if/then' branch, directing contacts to the relevant follow-up questions based on their responses.

REFRESH YOUR DATA FOR MARKETING AND SALES

6. User prompt

Conclude the chatflow by providing a simple message that instructs the user to refresh their page to view their updated information.

7. Complete a final QA

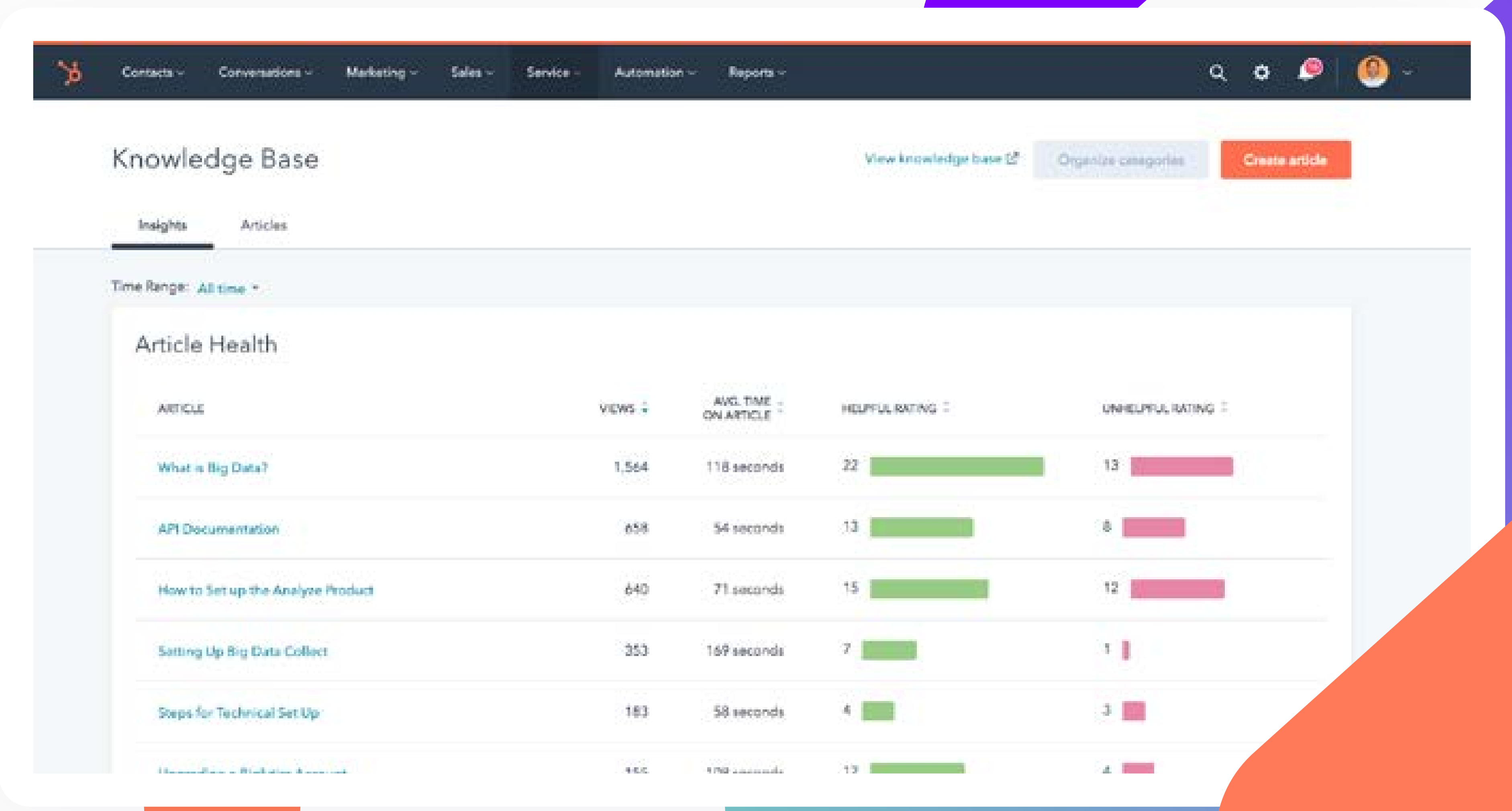
Test the entire experience yourself before launching. Was anything frustrating? Did the user flow make sense?

8. Launch your automation

Launch and pay attention to what properties get changed! What are your customers telling you about your data quality?

9. Optimise and innovate as you scale

Assess the results of your chatflows constantly.



Looking for more ways to use your data to be smart? Read our HubSpot Hacks on:

- HubSpot Landing Pages: Creating personalised landing pages to nurture contacts
- HubSpot Marketing: How to create dynamic CTAs on your website to target your database effectively
- HubSpot Marketing: Create a smart email to send different content to different lists of contacts

5. TAILORING A SCALABLE ADVOCACY PROGRAM WITH FEEDBACK

Harness the power of customer advocates without straining customer success or marketing resources.

The when:

This blueprint should be used when you want to ensure consistent outreach for reviews without impacting your teams resource levels.

The what:

To drive more customer reviews you need to identify and reach out to your happiest customers at the right times. After all, happy customers can be a loud and authentic advocate for your brand.

Asking your customers for reviews is one of the most important things you can do to amplify the voices of your promoters and improve your customer acquisition. But knowing who to ask — and when — isn't always straightforward. How do you know who your happy customers are, and the right time to ask them for their support?

The how:

You can use workflows to address the right potential advocates at the right time in their customer journey. The first opportunity to surface true customer satisfaction is after they've completed onboarding. You can do this by sending out a customer satisfaction (or Net Promoter Score) survey. Positive answers in this survey will trigger a workflow that encourages your potential advocates to leave a review over a period of time.

Don't forget to record the outcome in your CRM to inform future conversations with your advocate!

Full blueprint

1. Create a new workflow

Create a workflow using Onboarding CSAT = 9 or 10 as an enrollment criteria. Instead of Onboarding CSAT you can use NPS, or other types of satisfaction scores that you have as properties in your HubSpot CRM.

2. Add a delay if you want

Add a delay if you don't want to send out a request immediately after you collect the survey score.

3. Add a review email

Add an email that solicits a review.

4. Create a received stamp

Create a property to stamp review email received dates and add it to the workflow.

5. Create an engagement stamp

Create a property to stamp the date when the user clicked on a review link and add it to the workflow.

6. Complete a final QA

Complete a final QA.

TAILORING A SCALABLE ADVOCACY PROGRAM WITH FEEDBACK

6. Complete a final QA

Complete a final QA.

7. Launch your automation

Launch your automation.

8. Optimise and innovate as you scale

Optimise and innovate the automation as you scale.

Looking for more ways to use your service tools? Read our HubSpot Hacks on:

- HubSpot Automation: Use workflows to set up automation for customer survey responses
- HubSpot Automation: How we Automated our NPS process
- HubSpot Workflows: How to automate onboarding for new customers
- HubSpot Service Hub: Build a self-service Customer Portal

BONUS MINI BLUEPRINTS: DATA MANAGEMENT

Streamline your data management to produce clean and accurate information for your sales and marketing teams.

When it comes to data management, simple automation is the key for success. Its main objective is to simplify complex or time-consuming tasks, ensuring that data is clean, consistent, and up-to-date.

1. Capitalise the first letter

Ever received a personalised email with your name in all lowercase, spoiling the personal touch? All because that's how you entered it in a form once upon a time? Use this mini blueprint to fix that.

Create a workflow that is triggered by the 'First Name' being 'Known'. Add a 'Format data' action and select 'First Name' as the property, and select 'Format' as 'Capitalise first letter'.

2. Fix email addresses

Ever wondered why that newsletter you signed up for never came? Maybe it's because you accidentally said your email address was john.smith@gmail.con. Such errors will clog up your portal with inaccurate data and prevent contacts from being communicated to. Use this blueprint to fix common mistakes in email addresses.

Create a workflow that is triggered by the 'Email domain' containing '.con'. Add a 'Format data' action, select 'Email domain' as the property, and select 'Format' as 'Replace characters' and 'Replacement characters' should be '.com'.

3. Set non-marketing contacts

Managing the number of marketing contacts in a portal can be a real challenge, especially when you need to keep a large database of Contacts for other purposes than marketing. Use this mini blueprint to keep on top of it automatically.

Create a list of relevant criteria like; hard bounced, unsubscribed, employees, competitors, and disqualified. Create a workflow that enrols based on [List membership] AND [Marketing Contact status is any of Marketing Contact]. Make sure re-enrollment is turned on. Add another action to Set marketing contact status as a non-marketing contact. Get in touch to discuss your business needs and together, we'll ensure that your automation strategy isn't just about doing things efficiently; it's about doing the right things efficiently.

NEXT STEPS: ELEVATE YOUR AUTOMATION WITH OUR SUPPORT SERVICES

Unlock the full potential of your automation capabilities by accessing our elite Support service.

HubSpot is your ticket to discovering automation that not only brings your teams together but also revolutionises the way your customers experience your brand. But, HubSpot's vast toolbox and constant updates can feel a bit overwhelming. It's like having a shiny new toy with endless possibilities, where do you start?

That's where our dedicated HubSpot Support Services come in - to ensure your journey with HubSpot is seamless and successful. You'll get a pack of points which you can use for anything from evaluating your current automation set-up to building you out-of-the-box workflows. It doesn't stop at automation either. With our Support service, you can access expertise from any of our teams.

We're your partners in achieving the delicate balance between the machine and the human touch. It's a realm where automation isn't merely about the 'set it and forget it' mantra, but rather about strategically pinpointing the precise moments where automation can truly shine.

But remember, one size doesn't fit all.

Get in touch