



TrackStreet HubSpot Playbook



TrackStreet HubSpot Playbook - Topics

- New Industries
 - Adjusted to reduce crossover
- New Sources
- Logging Activity
- Important Properties
- New Workflows
- Deals
- Lists
 - Vertical focused
 - Can sort to create campaigns based on personas, source, etc.
- Demo Account Processes and Tracking



New Industries by AE (Hunter)

Claudia Hudson

- Beauty/Cosmetics
- Health/Nutrition
- Mechanical or Industrial Engineering
- Music
- Computer Equipment & Peripherals
- Medical Device, Test, & Measurement Equipment
- Telecommunication Equipment & Accessories
- Plastic, Paper, Packaging & Containers
- Photographic & Optical Equipment
- Industrial Machinery & Equipment
- Electronics
- Legal

Georgia Cooper

- Outdoor
- Apparel & Fashion
- Marine, RV, Moto
- Automotive
- Pet

Future AE

- Chemicals & Related Products
- Furniture
- Hand, Power & Lawn-care Tools
- Household
- Toys/Baby/Games
- Sporting Goods - Non Sport, Equipment
- Sporting Goods, Eye Wear
- Firearms, Accessories, Hunting



Hunter & Management Assignments

Management

- Ryan - Farmers
 - Enterprise / Key Accounts
 - 400+ Million
- Jason Bennett - Hunters
 - Agencies

Farmers

- Ryan
 - Enterprise / Key Accounts
 - 400+ Million
- Brian
 - All Industries



Important Properties

Contacts

- Sales Status
- Source
- Industry

Companies

- Priority
- LifeCycle Stage
- Source
- Industry

Deals

- Deal Stage
- Probability
- Source
- Industry
- Associated contacts:
 - Make sure to set contact as Primary Product User and/or Primary Sales Contact where appropriate (otherwise they will not receive the welcome email)



New Workflows

Sets Properties for

- Deals
- Contact
- Company

Good news!

- All Properties updated related to Customer & Churned Customer.
 - Accurately pull customer references, logos for trade shows, and avoid contacting churned
- Deals
 - Deal Stages
 - Probability: Changes to “0”
- Company
 - LifeCycle Stage:
 - Other
 - Customer
 - Priority:
 - Closed / Lost - **Now means Churned**
 - Sales Lost - **Means deal lost**

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Logging Activity

- Calls, Emails, In-Person
- After making the call/email, update the Sales Status from “New” to an option below:
 - Attempted contact: If voicemail, live message, or email left
 - In contact with/Educating: If connection made and next steps determined
 - Scheduled Demo: Change after scheduling on the AE’s calendar
 - Dead/Not a good prospect: ONLY if they are not qualified
 - Recycle/Re-engage 6 months: If they are qualified but not ready yet
 - Recycle/Re-engage 1 year: If they are qualified but not ready or not interested.
- If not able to call in HubSpot, you can log calls manually
- Set task for next step using tasks



Demo Recording Process

1. Confirm Demo through email day before or that morning
2. Demo No Show
 - Reschedule demo
 - Update Sales Status of contact to “Demo No Show” until Demo is rescheduled
3. Completed Demo
 - Add and new participants to the company profile
 - Update Sales Status to everyone on the call to “Demo No Show” until Demo is rescheduled
 - Confirm that Source and Industry is correct for all contacts
 - Workflow triggered to change Lifecycle in Company Page
4. Go to company page and create Deal in pipeline
 - TrackStreet Pipeline
 - Extended Deal Pipeline
 - Coronageddon Project Pipeline

Demo Account Processes and Tracking

https://docs.google.com/spreadsheets/d/1a2PMyLzUK9LerHM1RsQ0jSvJLG_1VL2F_gSXZctmY9w/edit#gid=1021644674

- Submit approval request to your manager with justification using the above chart
- If approved, copy and paste into Excel the sheet from the “SETUP SHEET” tab
- Ask the lead to send the completed spreadsheet
- Send completed sheet to Lisa Rosen (Lisa@trackstreet.com)
- Once the trial data is ready, schedule the demo
- Add demo account to the first tab, “DEMO SET UP and APPROVALS.”

***Amazon Analytics** demos must be approved by Andrew



Deals and Pipeline in HubSpot

Must go in Linear Order 2>3>4>5

2 - Sales Accepted

- Amount - Total include set-up fee
- Close date - 90 days, unless they say it will take longer
- Create date - Day created
- Deal Type - New Business
 - Add-on Business for Farmers
- BDR: Don't use
- Source: Review if correct
- Probability: Discretion of AE
 - 40-60 to start
 - 100 to "5 Closed Won"
- Select the modules they are interested in
- Even if proposal has additional modules, only add what you think they will have

- UPC Swap Fee
 - Column C - \$ Value per Sku: "\$10"
- Payment Terms

3 - Made shortlist: After ending the proposal. Sean will send a proposal to AE, then AE changes Deal Stage to 3.

4 - Contract: Sent out Sales order for Andrew and customer's signature. Make sure both parties have signed before moving to stage 5. Signed version saved in GDrive by Lisa.

5 - Closed Won: Accounting and CSM notified

- **Total Amount: Signed Annual Amount in Contract (do not include set-up fee)**

Future changes:

- Lists for campaigns and targeting verticals
- Landing pages - Claudia
- Marketing Automations
- Parent/Child Associations
- Daily clean-up of bad contacts:

https://docs.google.com/spreadsheets/d/1T6_osgNRS1C0iQb_iqmTz0gmFv1cy_vIIMB3AW-dC_M/edit#gid=0

Q&A