HubSpot For Marketing & Sales Training Course

Drive better marketing and sales performance with HubSpot

Course Dates

Please note: This course is currently only available in-house

With a quarter of a million customers across more than 135 countries, HubSpot has achieved significant user growth in recent years.

While HubSpot offers a wide range of powerful tools, from advanced automation workflows and lead scoring, to pipeline management and revenue attribution, many teams find that harnessing these features effectively can be challenging.

This course is built to bridge that gap, helping participants master the platform's more complex functionality and translate it into measurable business results.

We'll use your own HubSpot instance throughout the course, ensuring that every discussion is directly relevant to your business processes, data and goals. Whether it's optimising campaign performance, aligning sales and marketing handovers, or making the most of HubSpot's reporting and analytics, your team will leave with actionable skills they can put to work immediately.

The course can be structured as a one or two-day workshop, depending on your requirements.

We will ensure you not only gain confidence using HubSpot, but also learn how to unlock its full value, driving efficiency and ultimately achieving better commercial outcomes.

Course Programme

Managing Leads and Prospects in HubSpot

- HubSpot's CRM and data structure and why it's important to know
- Overview of HubSpot's sales workspace and AI tools
- The buyer's journey, lifecycles, lead scoring and qualifying leads
- Pipelines, deal stages and how to use deal tags
- ABM, target accounts, ideal customer profile tiers, buying roles and personas
- Data enrichment, intelligence tab and settings
- Using the sales enablement tools
- Building reports and dashboards

Marketing in HubSpot

- Overview of benefits of Marketing Hub and HubSpot for Marketers
- Building active and static segments
- Tracking attribution, sources and custom sources
- Building data capture forms and hidden properties

- Connecting social and advertising accounts; social monitoring and posting
- Use marketing campaigns to track, manage and report on campaigns and campaign ROI
- Buyer intent considerations
- Building landing pages and call-to-action buttons
- Creating a blog using AI
- How to build marketing dashboards and reports

Marketing Emails in HubSpot

- Marketing contacts and how to manage them
- The difference between 1-1 emails and marketing emails
- Email sending domain, verification and deliverability
- Build an active segment with complex filters
- Creating marketing emails for lead nurture; adding personalisation; using the AI tools, A/B testing and smart content
- How to send a regular email, settings and unengaged contacts
- Subscription types and set-up preference pages
- Manage bounces and undelivered emails
- Email reporting and email health
- Recap and questions

Automation in HubSpot

- The benefits of automation and the differences between Sequences and Workflows
- How to plan a sequence
- Workflow uses and objectives; short vs longer complex workflows
- Understanding workflow elements; enrolment filters, actions, settings and publishing
- Creating a lead nurture workflow and workflows for target accounts
- Create workflows for a closed / won Deal, with tasks and notifications
- Recap, questions, useful links, product updates, apps & Integrations, HubSpot's app and the Breeze App.

Benefits

Following the HubSpot Marketing & Sales course, you will understand:

✓ How to manage and track contacts in HubSpot using lifecycles and leads
✓ How to qualify leads
✓ The benefits of HubSpot's sales workspace
✓ How to use pipelines, deal stages, deal tags and when to create a deal
✓ The benefits of using target accounts and ideal customer profiles
✓ The sales enablement tools such as email templates and the meetings tool
✓ The benefits of using the Marketing Hub including creating blogs, landing pages, building segments and data capture forms
✓ How to build and send a marketing email and segment content
✓ Email health and using A/B testing to improve opens and clicks
✓ The benefits of automation and the difference between sequences and workflows
✓ How to build a workflow and the different uses
✓ How to create and edit dashboards and reports

All attendees receive an attendance certificate and digital copies of the course materials.

Audience

This HubSpot course is suitable for marketing and sales teams with access to Professional or Enterprise Marketing and Sales hubs. A Paid Sales Seat will also be needed to access the Sales workspace.
The course can be delivered across one or two days, depending on your requirements. All courses are bespoke and will use your HubSpot account to make the learning more relevant.

What people say