

BECOME AN INBOUND SALES NINJA: ONE START-UP'S ULTIMATE PLAYBOOK FOR SALES SUCCESS WITH HUBSPOT SALES-HUB

NICK SALVATORIELLO

WORKING IN SALES @ IMPACTBND.COM:

HUBSPOT'S 2017-2018 AGENCY PARTNER OF THE YEAR

MIT START-UP CODE CONFERENCE 2019

HI I'M NICK SAL NICE TO MEET YOU!

MY BACKGROUND

- 3rd year appearing at MIT Start-Up Code conference
- 4.5 years on the team at HubSpot Inc.
(April 2011- November 2015)
- 3-time presenter at INBOUND @ BCEC
- 2nd year working full time on a sales team using sales tech like HubSpot Sales Hub

THANK YOU FOR JOINING US TODAY!



THIS IS THE 1 NOTE YOU MUST CAPTURE TODAY:

Visit

IMPACTBND.COM/NINJA

to get the deck, all resources, and keep in touch

BREAKING DOWN THE TOPIC:

BECOME AN INBOUND SALES NINJA: ONE
TEAM'S ULTIMATE PLAYBOOK FOR SUCCESS
WITH HUBSPOT SALES HUB

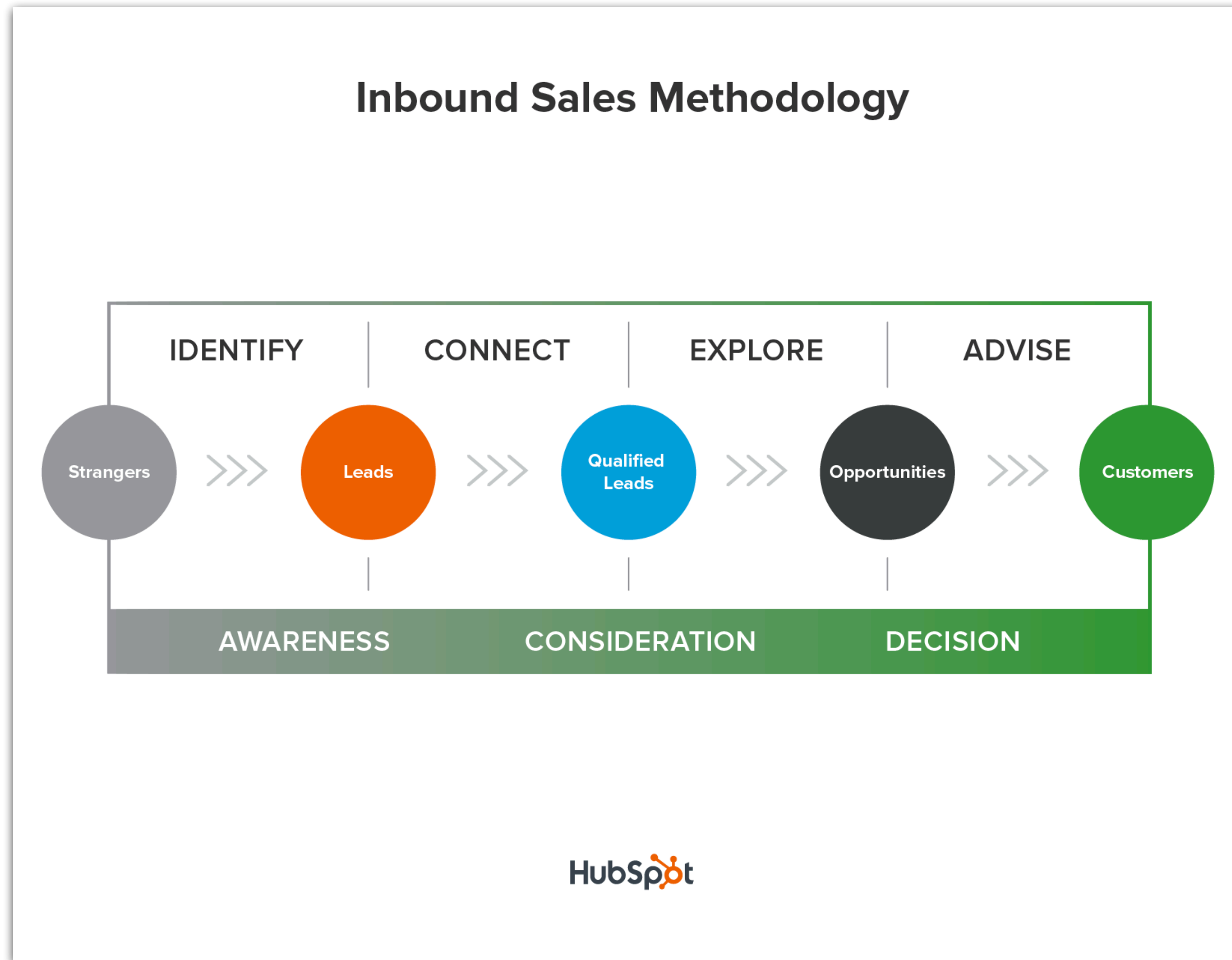
✓ INBOUND SALES NINJA?

✓ ONE TEAM?

✓ ULTIMATE PLAYBOOK?

✓ HUBSPOT SALES HUB?

WHAT DOES INBOUND SALES MEAN?



WHO HERE IS NOW OR INTENDS TO BE “IN SALES”?

WHAT DOES INBOUND SALES MEAN?

ASK MY BOSS, IMPACT'S FIRST HEAD OF SALES:



“Inbound Selling or Sales (to me) is the art of guiding a prospect through a **personalized** buying journey on their terms while further **educating** and **challenging** them to make the **best decision for them** and their organization.”

-Tom DiScipio, Chief Revenue Officer and Partner, IMPACT

WHAT DOES INBOUND SALES MEAN?

ASK HUBSPOT'S FIRST HEAD OF SALES:



“Inbound salespeople focus on their prospect's pain points, act as a **trusted consultant**, and adapt their sales process to the buyer journey.”

-Mark Roberge

HubSpot's first rep and former VP of Sales

[Inbound Sales: How to Sell the Way Prospects Buy](#)

YOU CAN LEARN ALL ABOUT THE FUNDAMENTALS IF YOU HAVEN'T ALREADY

The screenshot shows the HubSpot Impact certification exam results page. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, and Partner. The main content area displays the exam results for the 'Inbound Sales Certification Intro Video' (2 minutes). The user, Nick Salvatoriello, scored 57/60, which is 'Nicely done'. A red arrow points from the score to the 'Learning Center' link in the right sidebar. The sidebar also shows the user's profile, account information, and a 'Sign out' button. The bottom of the page features a 'Retake the exam' button and a 'Back to Learning Tracks' button.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾ Partner ▾

IMPACT 116

< Back to tracks

Inbound Sales

⏪

Inbound Sales Certification Intro Video
2 minutes

➤ **Inbound Sales Fundamentals**
2 Videos | Total 17:40

➤ **Prioritizing Active Buyers Over Passive Buyers**
5 Videos | Total 28:42

➤ **Earning the Attention of Today's Empowered Buyer**
4 Videos | Total 31:37

You scored
57/60

Nicely done

Sorry, a breakdown isn't available for this exam

IMPACT
145335

Account & Billing
Integrations
Learning Center
Products & Add-ons

New menu options

Sign out Privacy policy

Retake the exam Back to Learning Tracks

IMPACTBND.COM/GET-HUBSPOT





Source: [Wikipedia](#)

WHAT DO WE MEAN BY BEING A 'NINJA' AT IT?

YOU'RE PRACTICED + SUBTLE:

- Practicing and preparing over time.
- Your weapons, techniques are hidden.
- Not like a clown with novelty gadgets being like "look at me! Look what I can do!"
- When done well, your craft is unnoticeable - it's that natural.



ASK OUR SALES COACH:

**“THE ART OF SALESMANSHIP
IS THE ABSENCE OF
SALESMANSHIP.”**

-Jack Carrol of SalesLinks.com

KEY RESOURCES

AS A TEAM, WE CONSUMED ALL
OF THESE BOOKS IN YEAR 1

They Ask You Answer:

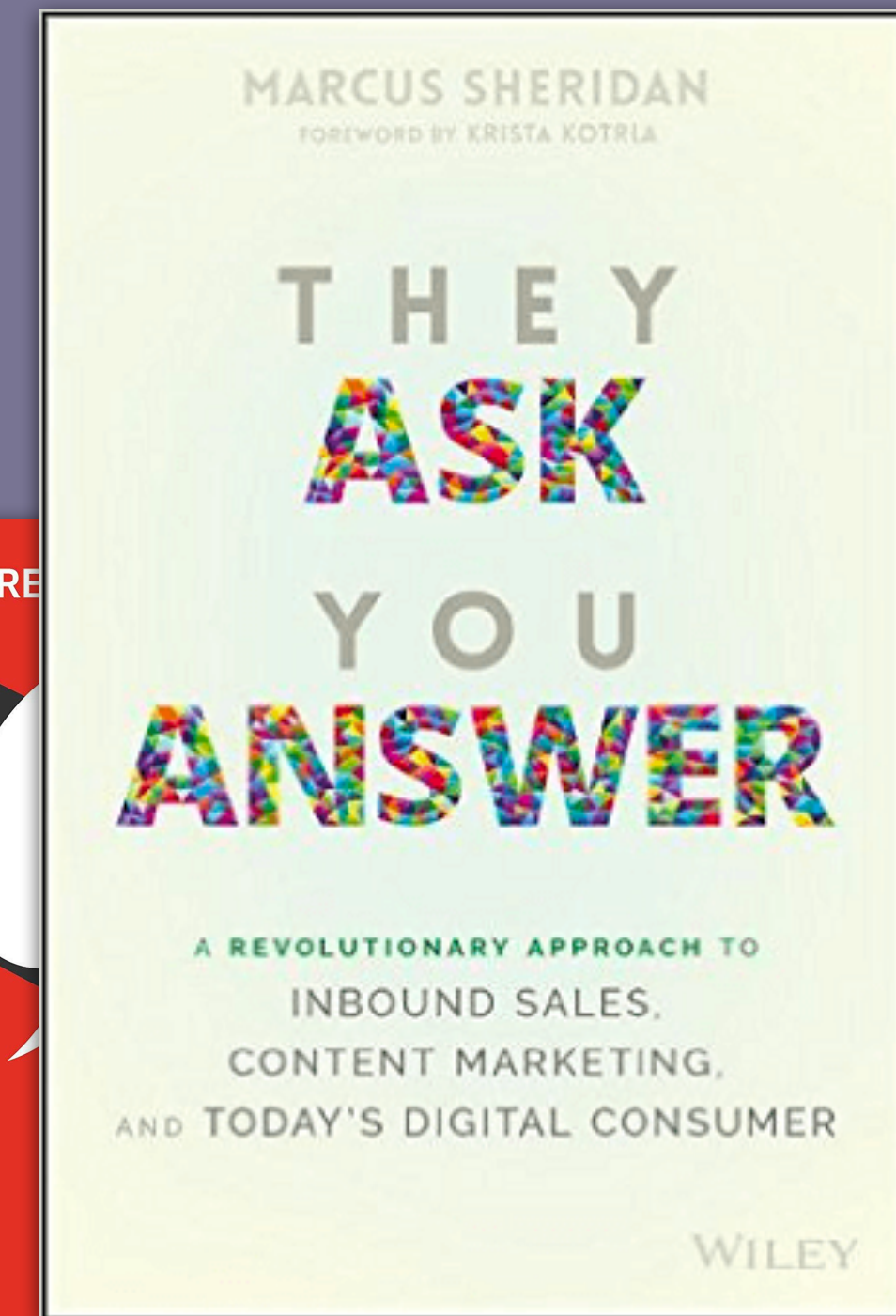
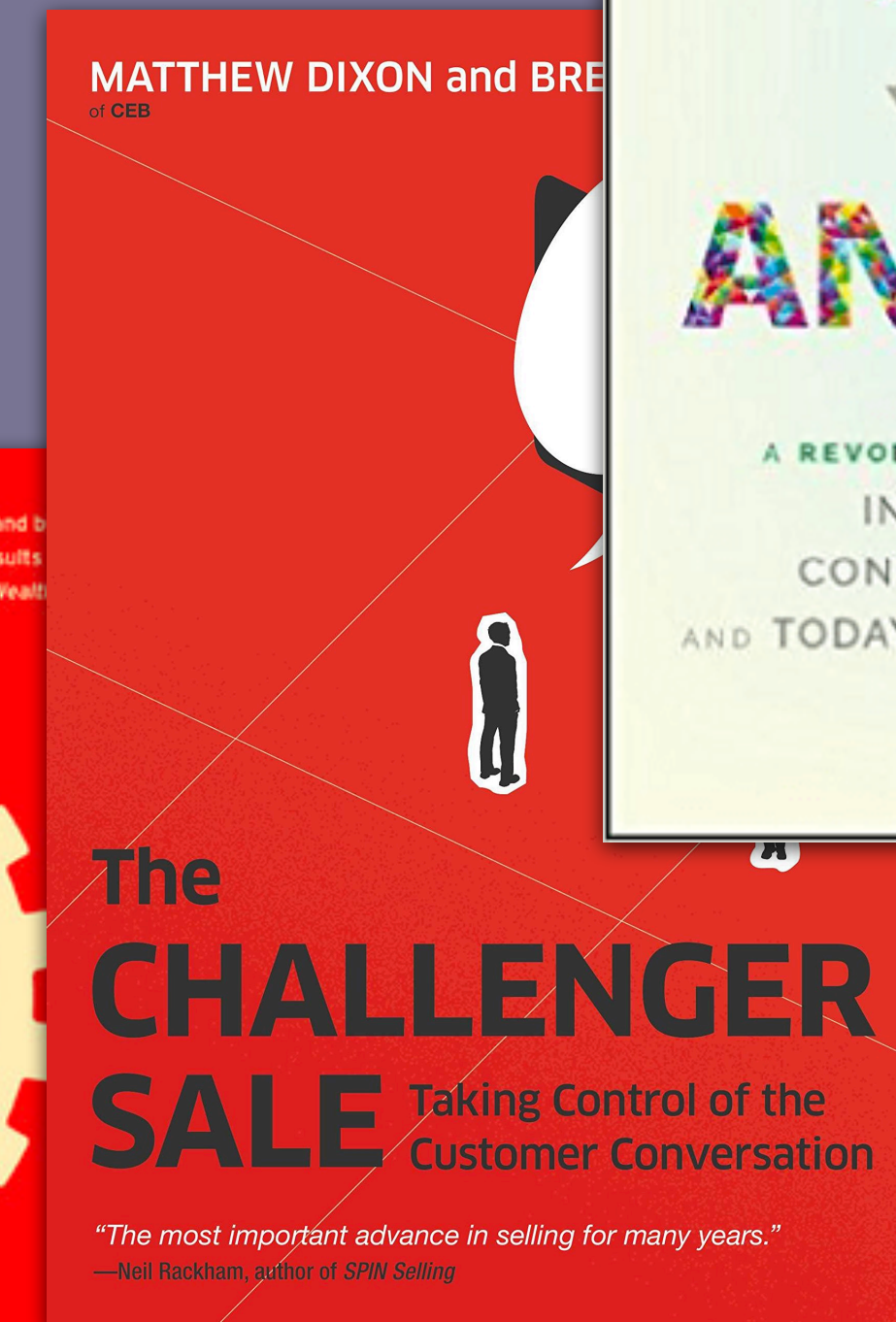
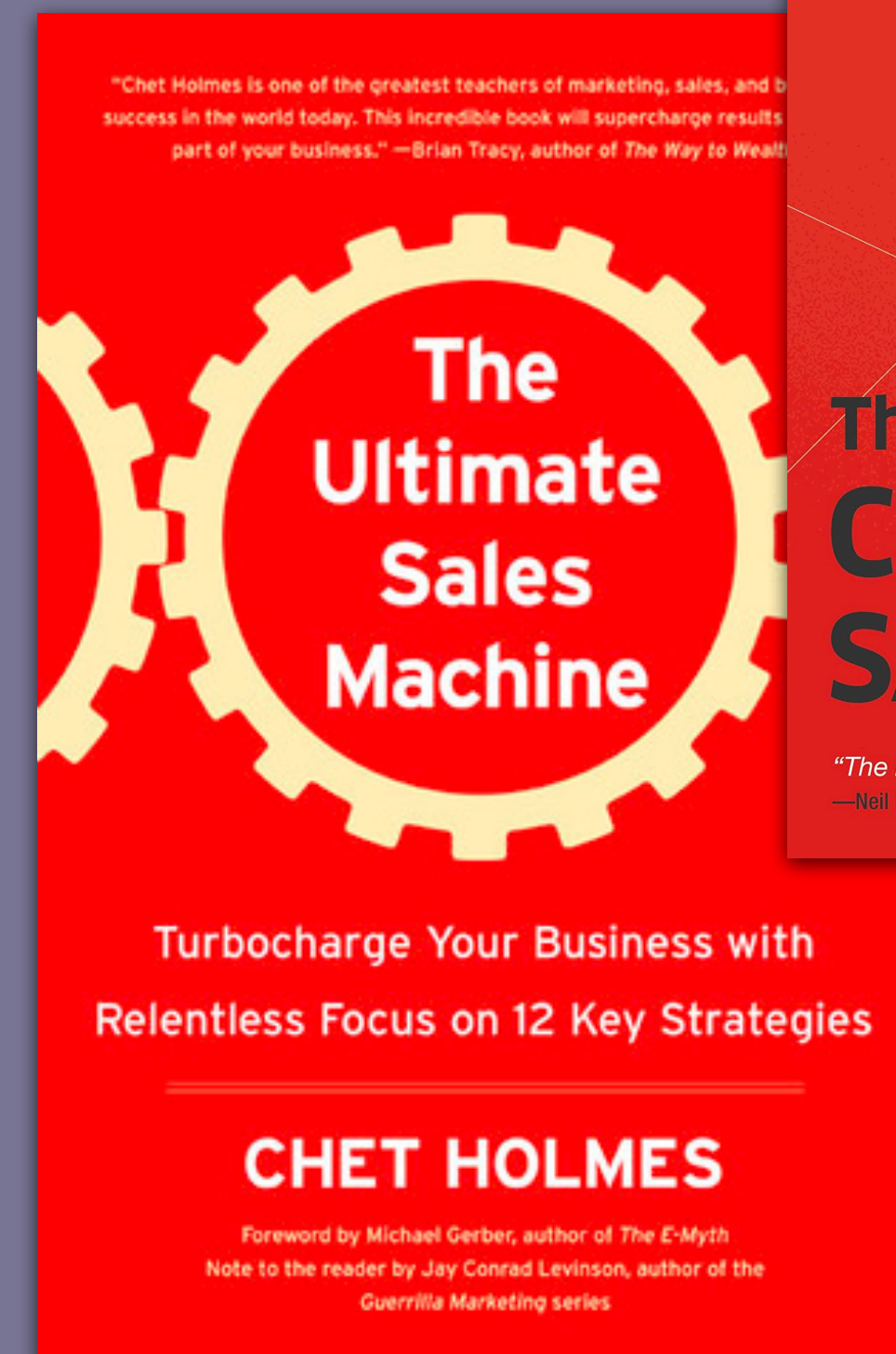
Why you want it: A really easy to follow guide on inbound sales/content marketing by the most successful HubSpotter I've ever met.

The Challenger Sale:

Why you want it: It's a guide for reps and managers to be better teachers/advisors in sales.

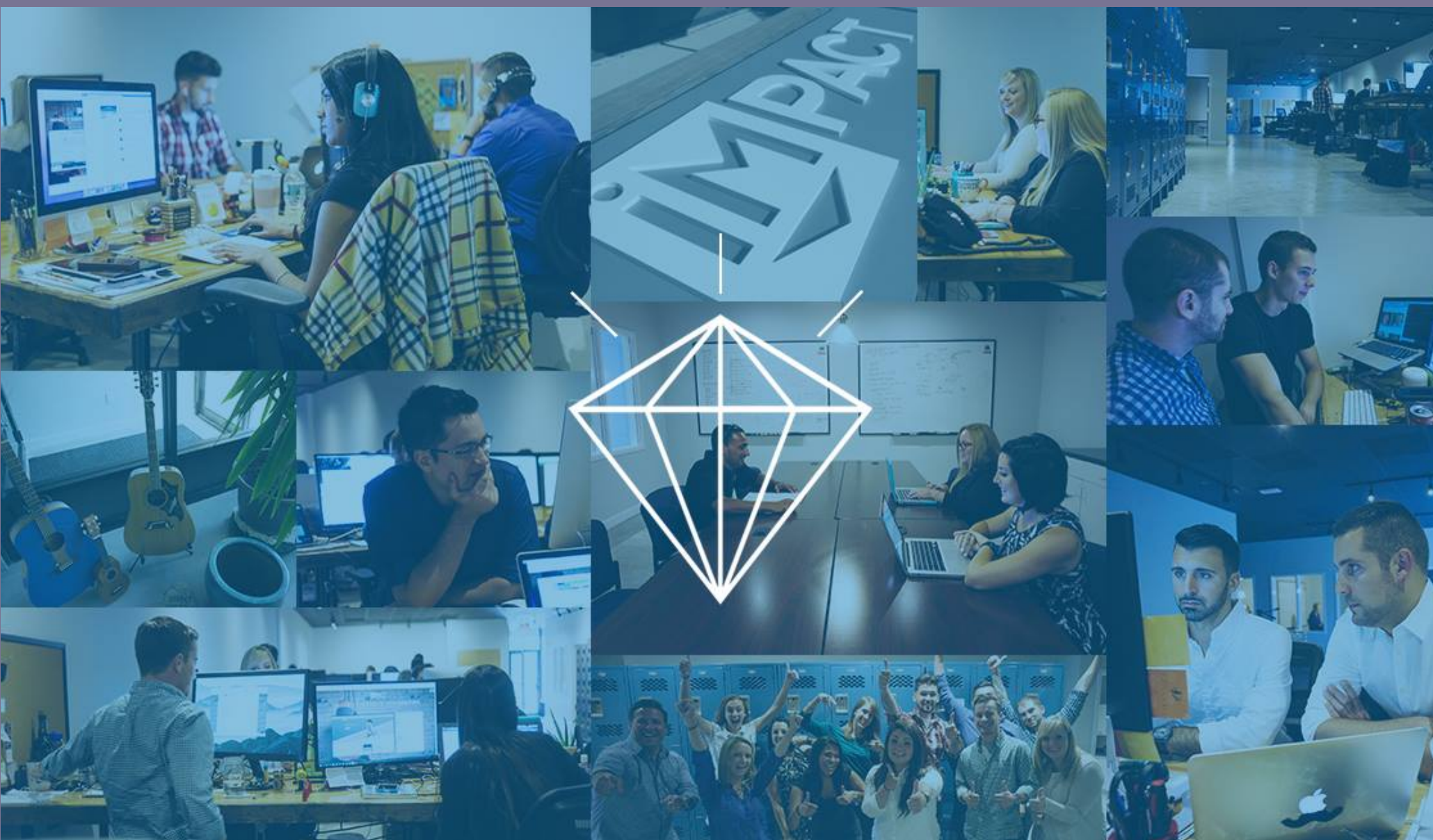
The Ultimate Sales Machine:

Why you want it: Bring all you've learned about marketing and sales together in a complete guide that is VERY inboundy.



WHAT DO WE MEAN BY 'ONE TEAM'?

THIS IS WHAT IMPACT DID, GIVEN
OUR SITUATION, BUT IT'S PROBABLY
NOT THAT DIFFERENT FROM YOURS....

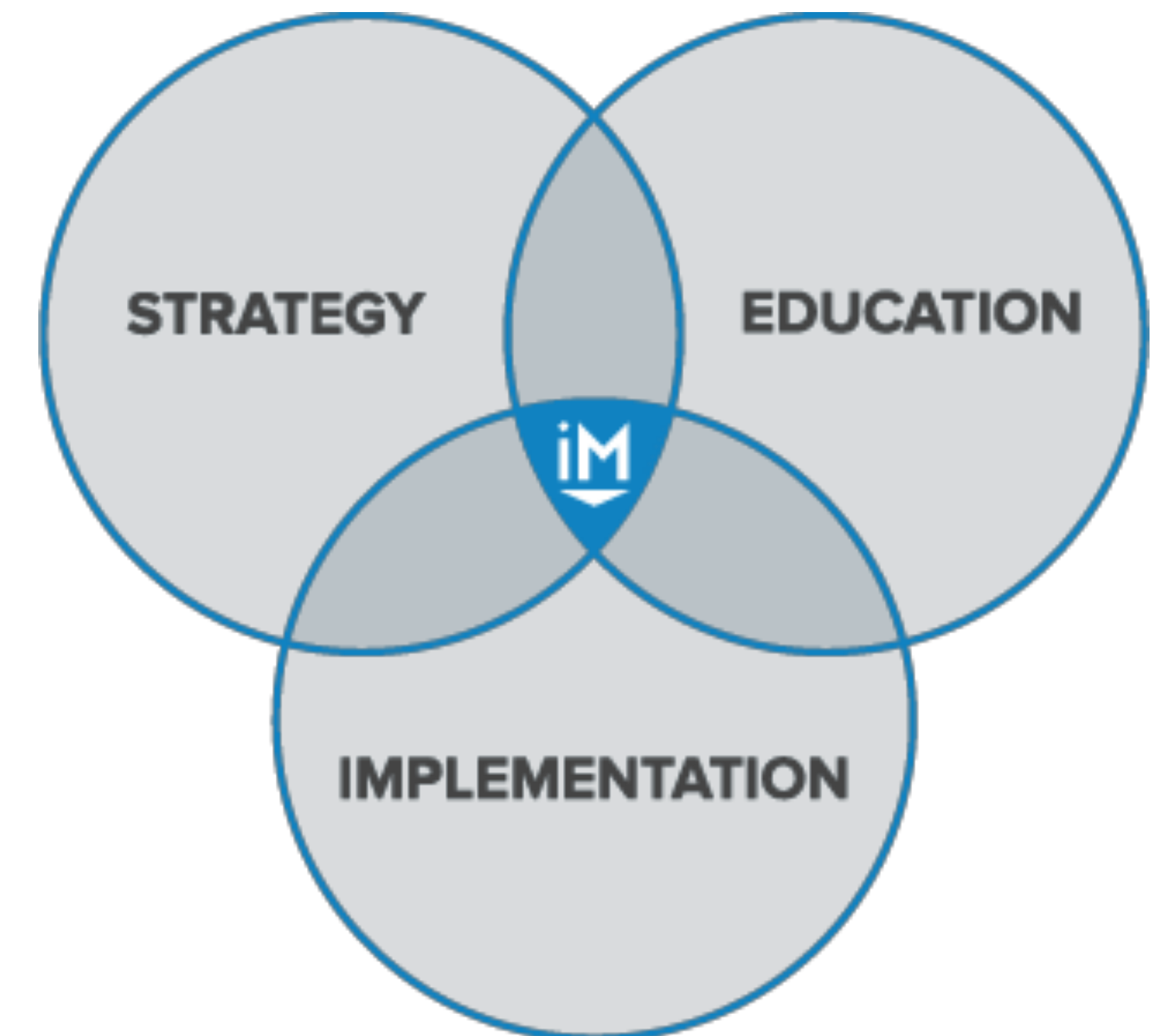




Other vital stats:

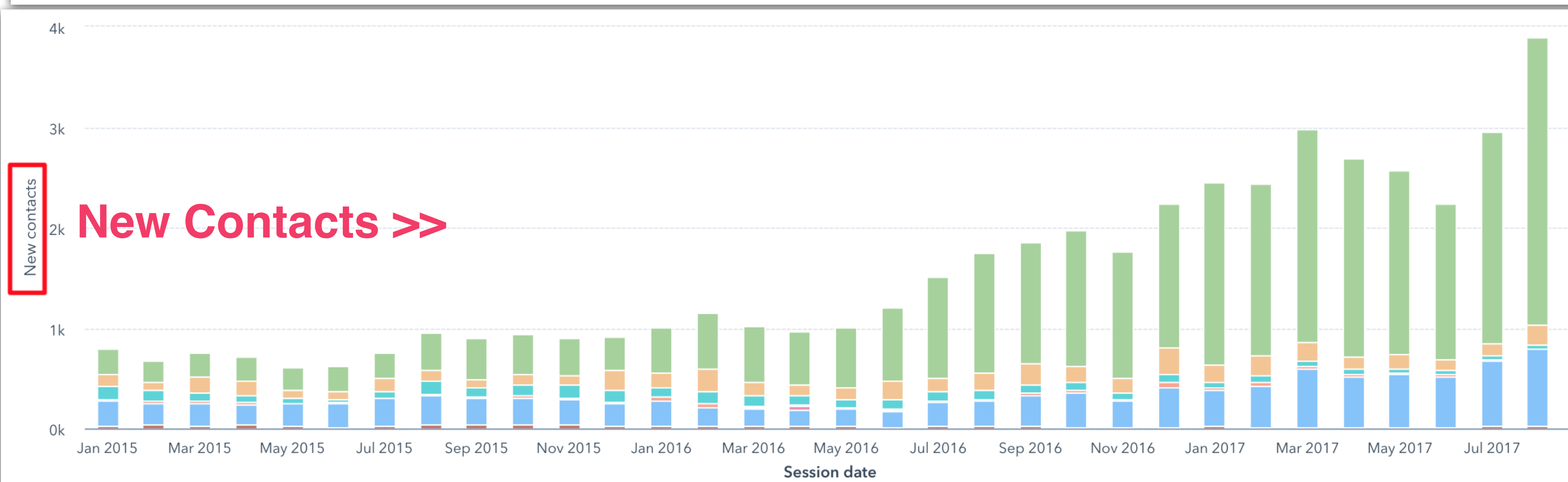
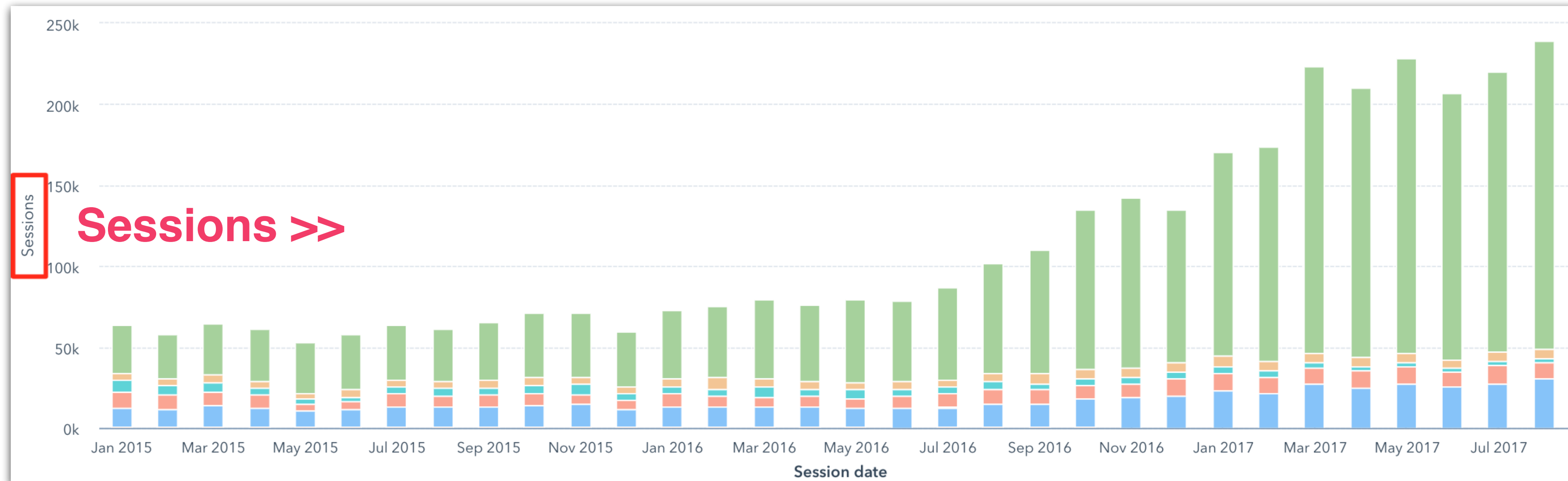
- 60+ full time staff members ranging from inbound strategists, trainers, marketers, designers, developers
- 50+ organizations currently retain us as their 'go-to' agency and resource for all things inbound
- Retainer (subscription) clients spend an average of \$85k/year with us.
- Retainer clients work with us for an average of 2 years

Learn more: impactbnd.com



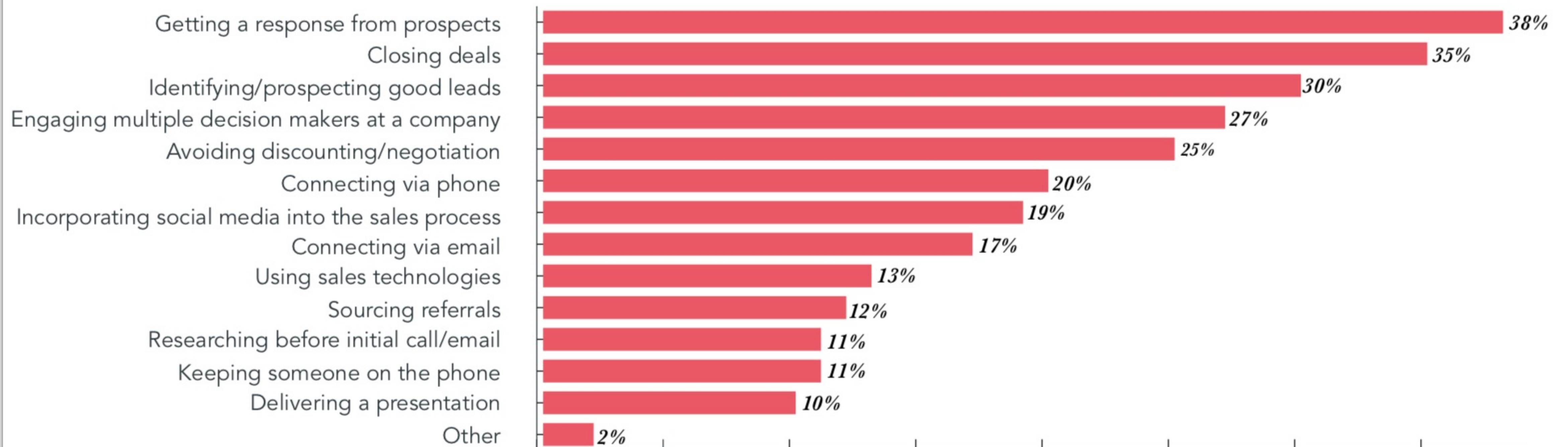
WHAT IS IMPACT'S SITUATION?

REAPING THE REWARDS FROM CONSISTENT
INVESTMENT IN INBOUND/CONTENT MARKETING



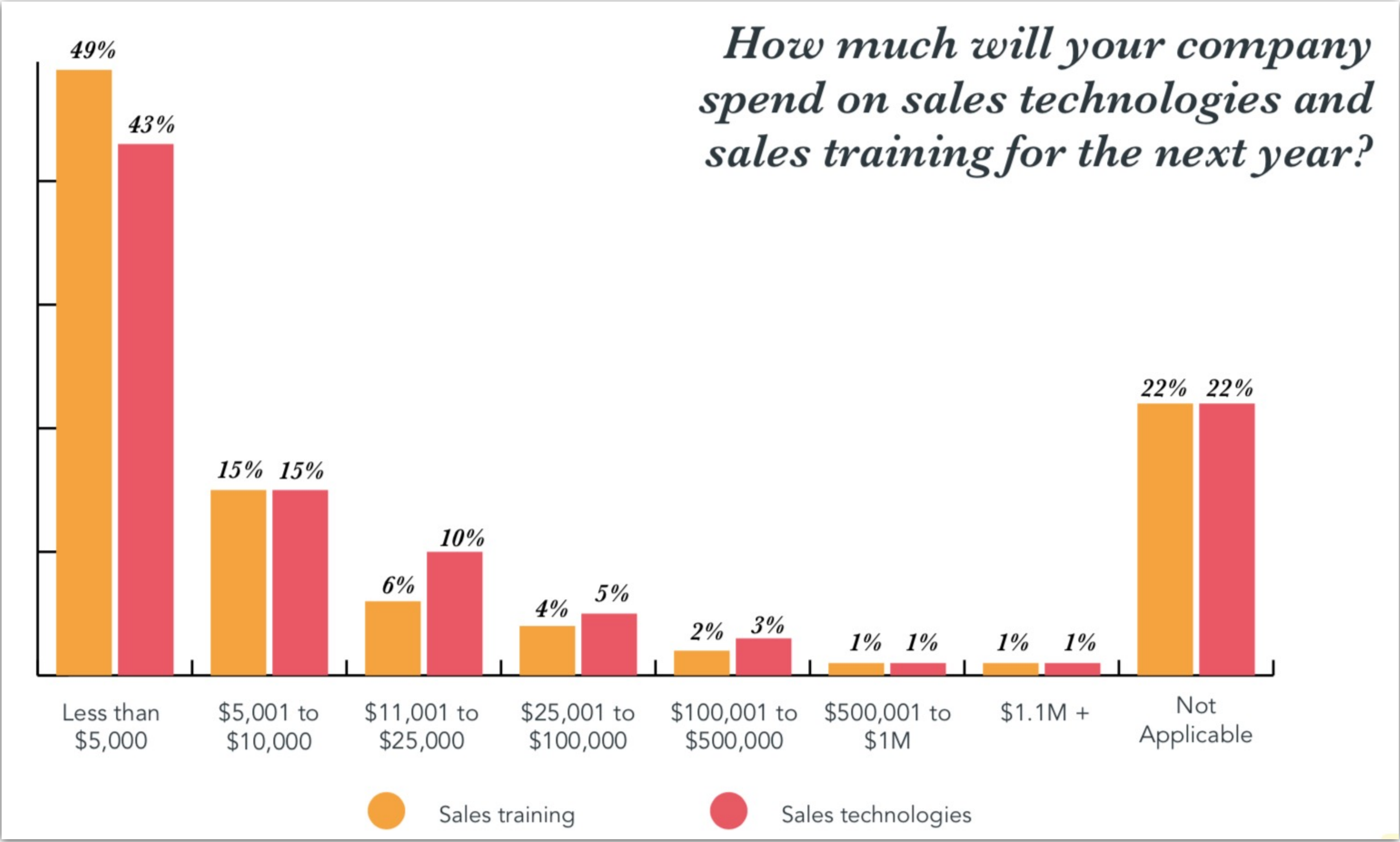
SALES STILL HAS ITS CHALLENGES...

What is more difficult to do in sales compared to 2 to 3 years ago?



Source: The State of Inbound Report

MOST COMPANIES ARE STILL UNDERINVESTING IN SALES...



Source: The State of Inbound Report

THE CLOSE OF OUR 1ST YEAR USING SALES HUB



all
WE DID IT!

Services Revenue

\$382,259

Best **Services Revenue Month Ever** at IMPACT!
10 New Deals in December!

iMPACT

\$4m in Service Revenue in 2017

COMPARABLY 2017 Best Company for CULTURE

HUBSPOT IMPACT AWARDS 2017 PARTNER OF THE YEAR

GREAT PLACE TO WORK® CERTIFIED 2017 USA

COMPARABLY 2017 Best Company for WOMEN

COMPARABLY 2017 Best Company for CULTURE

@BobRuffolo

IMPACT'S 2020 VISION

IMPACT's Leadership Team, using staff interview/survey input, invested 2-days off-site with a consulting firm to draft it.

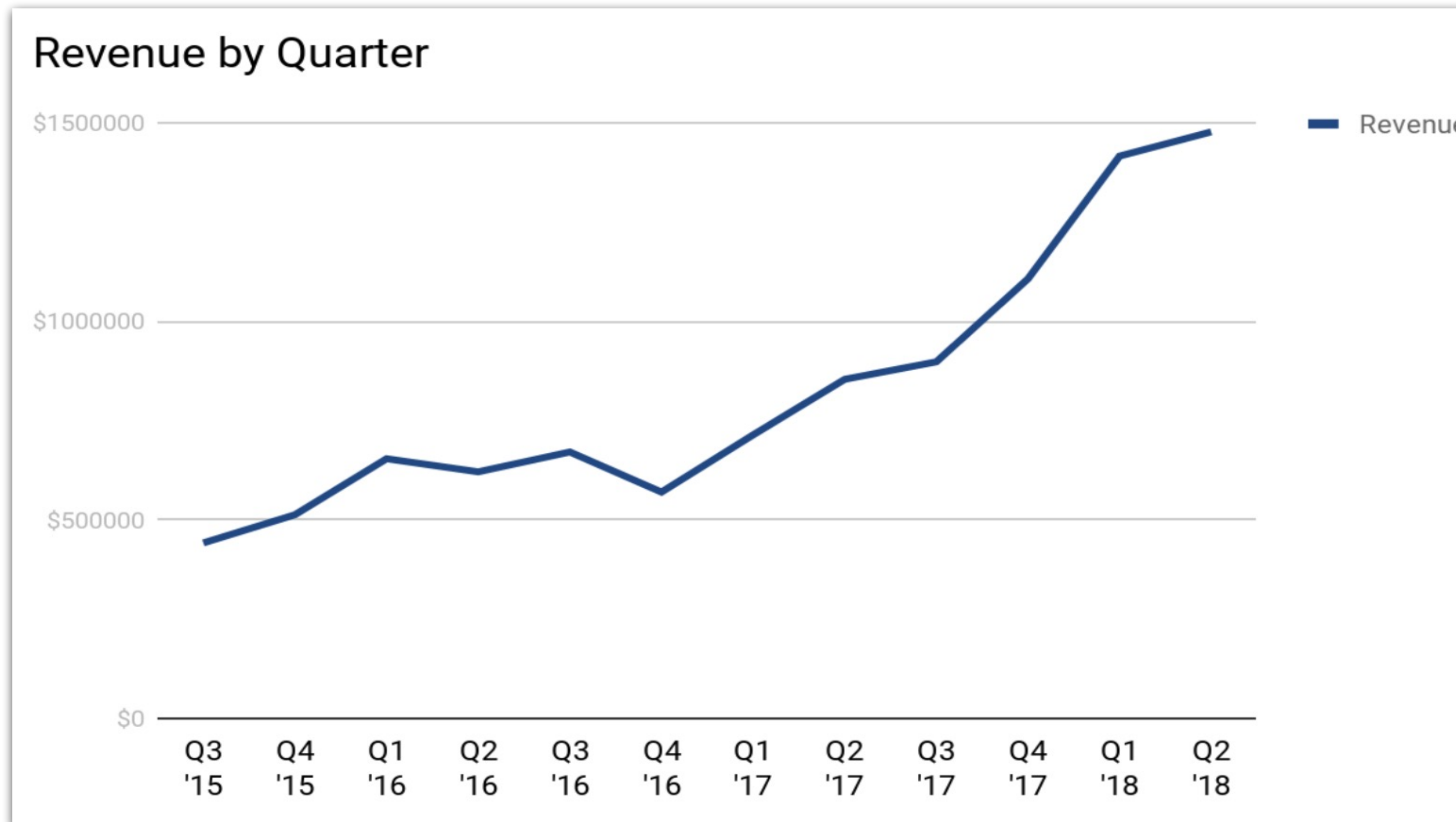
Our CEO reviews elements of the vision in each monthly All-Hands.



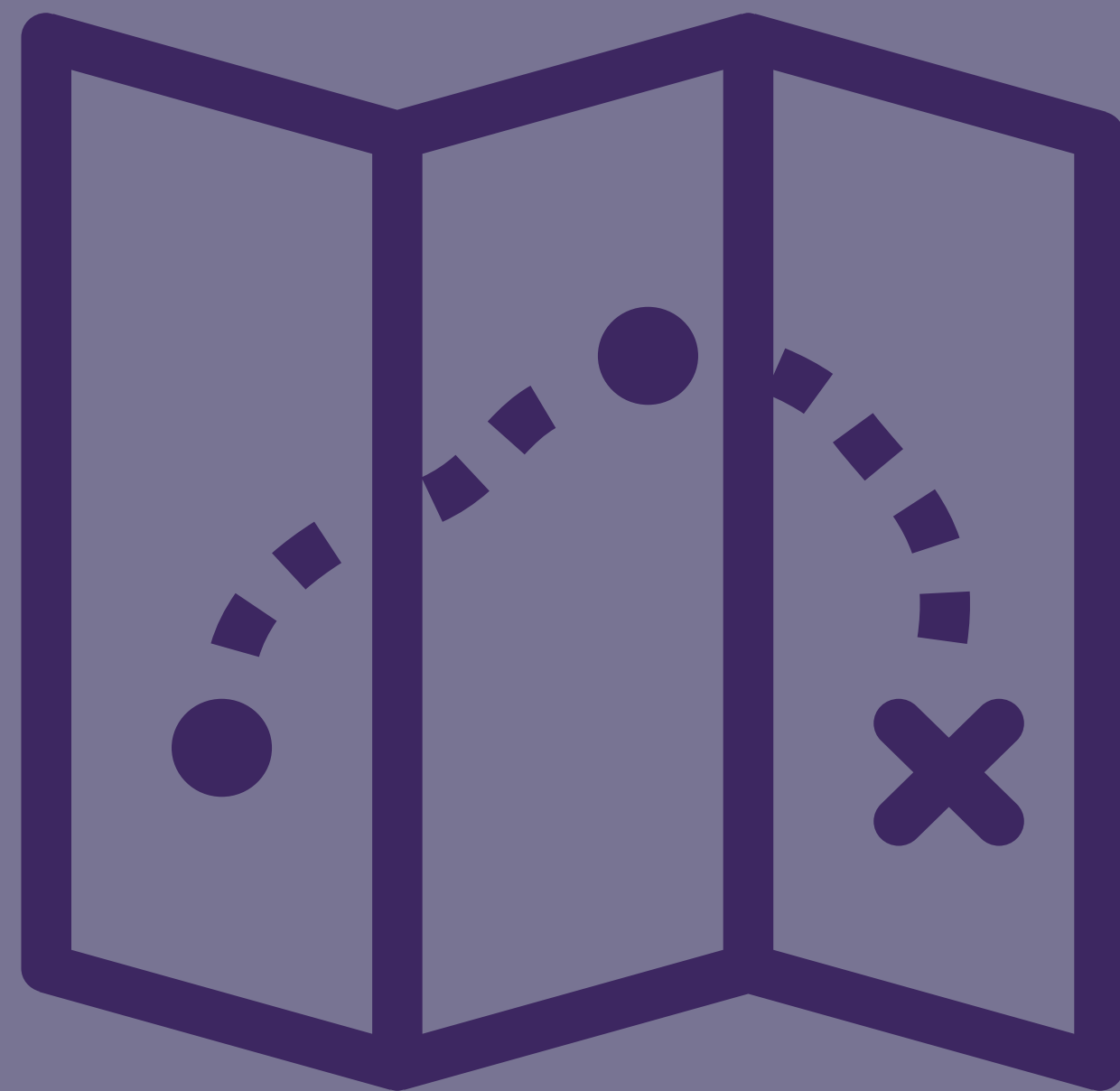
- \$10m in revenue and 25% net profit
- Measurables: 1 million monthly website visitors, > 50,000 engaged members in our community, 1,000 attendees at IMPACT Live 2020
- Premier destination for people that want to have more

- Websites
- Our people
- Our solutions
- IMPACT's best in the

REVENUE GOALS CALLED FOR GROWING \$10 MILLION/YEAR RUN RATE BY END OF 2019



For us, that meant our sales, marketing and services teams working together to grow by \$3 million+/year



WHAT DO WE MEAN BY 'ULTIMATE PLAYBOOK'?

BECAUSE IT'S ADAPTABLE AROUND YOUR
GOALS, NOT JUST AROUND GETTING
EVERY FEATURE USED.

Time-Saving Sales Tools You Can Start Using for Free

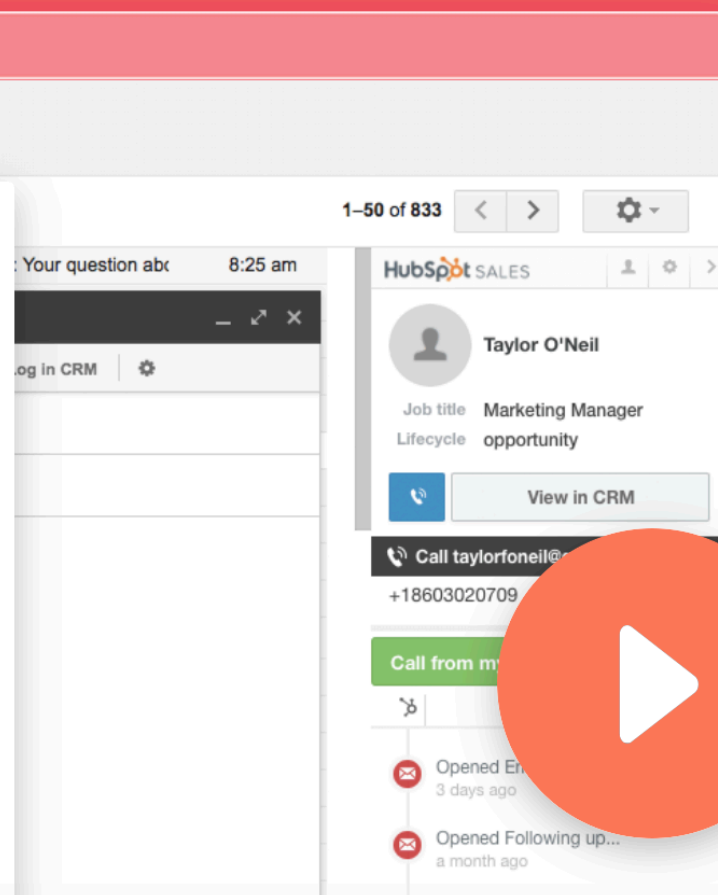
Get notified the moment a lead opens your email, track every interaction automatically, and organize all your activities in one place with HubSpot's sales software. Start for free, and upgrade as you grow.

Don't take our word for it.
Try it yourself for free.

Get set up in seconds, and save hours spent on menial tasks & manual data entry.

Get started

Free for an unlimited time. Works with Gmail and Outlook.



WHAT IS HUBSPOT'S 'SALES HUB'?

*“TIME-SAVING CRM + SALES TOOLS THAT HELP YOU
GET DEEPER INSIGHTS INTO YOUR PROSPECTS,
AUTOMATE THE TASKS YOU HATE,
AND CLOSE MORE DEALS FASTER.”*

THEY'RE FREE TO TRY:

IMPACTBND.COM/GET-HUBSPOT

**THE BEST PLAY IS IMPLEMENTING 1-2
REGULAR USES FOR EACH FEATURE
UNTIL IT FORMS A HABIT.
SALES PEOPLE RUN OFF OF HABITS.**

@NICKSALINBOUND

HOW OUR TEAM ADOPTED CRM + SALES HUB



(A HIGHLIGHT REEL)

GOALS IMPACT SET FOR HUBSPOT SALES HUB

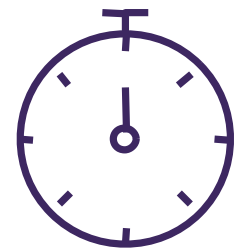
FEATURE ADOPTION FOLLOWED
OUR TEAM'S GOALS:



CENTRALIZE INFO
TRACKING



STANDARDIZE PROCESSES



INCREASE EFFICIENCY



EXTRACT INSIGHTS



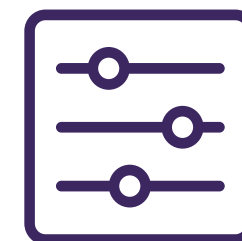
CLOSING DEALS FASTER



FOCUSING ON CUSTOMER
SUCCESS



EXPANDING OUR INBOUND
SALES TOOLSET



SUSTAINING TEAM SUCCESS AS
WE GROW

OUR PLAYBOOK FOR INBOUND SUCCESS

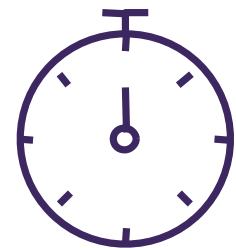
WITH HUBSPOT SALES HUB



**CENTRALIZE INFO
TRACKING**



STANDARDIZE PROCESSES



INCREASE EFFICIENCY



EXTRACT INSIGHTS



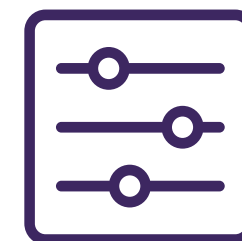
CLOSING DEALS FASTER



FOCUSING ON CUSTOMER
SUCCESS



EXPANDING OUR INBOUND
SALES TOOLSET



SUSTAINING TEAM SUCCESS AS
WE GROW

ALL CONTACTS TRACKED IN CRM

“IF IT’S NOT IN THE CRM, IT DOESN’T EXIST”

ContactsConversationsMarketingSalesServiceAutomationReportsPartner

SearchSettings2NotificationsIMPACT

Deals

TableBoardSearch for a dealActionsImportCreate deal

All dealsAll saved filters >PipelineAgency ServicesAll deals199 dealsOptionsAdd filter

DEAL NAME	DEAL STAGE	CLOSE DATE	DEAL OWNER	AMOUNT
	Sales Presentation Completed	Oct 31, 2018	Melanie Collins (mcollin...	\$60,000
	Stalled	Sep 30, 2018	Marc Amigone (mamig...	\$2,500
	Stalled	Aug 1, 2018	Marc Amigone (mamig...	\$20,650
	Connect Call Completed	Jul 31, 2018	Myriah Anderson (man...	-
	Exploratory Booked	Jul 31, 2018	Vin Gaeta (vgaeta@imp...	-
	Exploratory Completed	Jul 31, 2018	Marc Amigone (mamig...	\$30,000
	Sales Presentation Booked	Jul 31, 2018	Marc Amigone (mamig...	\$2,500
	Exploratory Completed	Jul 31, 2018	Melanie Collins (mcollin...	-
	Exploratory Completed	Jul 31, 2018	Marc Amigone (mamig...	\$2,500
	Sales Presentation Booked	Jul 31, 2018	Marc Amigone (mamig...	\$2,500
	Exploratory Booked	Jul 31, 2018	Myriah Anderson (man...	-
	Connect Call Completed	Jul 31, 2018	Myriah Anderson (man...	-

<Prev12345678Next>25 per page

Help

EVERYTHING ATTACHED TO THE DEAL RECORD

The screenshot displays a CRM interface with a dark navigation bar at the top containing the following menu items: Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, and Partner. On the right side of the navigation bar are icons for search, settings, notifications, and a user profile. The main content area is divided into two columns. The left column features two white panels. The top panel, titled 'Attachments', contains a file entry 'Yale 90-day Brainstorming with Pat P and Jason R 6.28.18.mp4' with a size of '111.83 MB' and a close button. Below this are 'Upload' and 'Choose existing file' buttons. A blue arrow points from this panel to the right column. The bottom panel, titled 'PandaDoc', has a 'Create Document' button and an 'Actions' dropdown menu. The right column contains a text area with the following content: 'WE need a final page for each topic (think by product type) >> we need the 2nd coming of the buyer's guide', 'Drift/Chat: Pat has been playing with Drift, wasn't sure what results he's really expecting. He's been wanting to do this for a while (and their live concierge in store is one of their signature differentiators - schedule an appointment/match them to a rep). Main challenge is doing it in such a way that it doesn't show for EVERYone, it doesn't distract those people who would be better off using the search bar or other places in the nav O having people miinterpret what it's used for', and 'Next steps: -Pat is awesome and he's going to grab time on my calendar for a part 2 and he wants to get back on retainer with us.' Below the text is a list of tags: 'CC @Myriah Anderson @Tom DiScipio @Jason Linde @Jason Rose' and a 'Collapse' link. A blue arrow points from this text area to the bottom panel. The bottom panel shows a meeting record with a user profile icon, the text 'You had a meeting with Pat Palingo', and 'Edit' and 'Actions' links. Below this, the names 'Pat Palingo and Nick Salvatoriello' are listed, along with the 'Start time' 'June 19 at 3:35 pm'.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾ Partner ▾

Attachments

Yale 90-day Brainstorming with Pat P and Jason R 6.28.18.mp4
111.83 MB

Upload Choose existing file

PandaDoc

Create Document Actions ▾

Powered by PandaDoc

WE need a final page for each topic (think by product type) >> we need the 2nd coming of the buyer's guide"

Drift/Chat: Pat has been playing with Drift, wasn't sure what results he's really expecting. He's been wanting to do this for a while (and their live concierge in store is one of their signature differentiators - schedule an appointment/match them to a rep). Main challenge is doing it in such a way that it doesn't show for EVERYone, it doesn't distract those people who would be better off using the search bar or other places in the nav O having people miinterpret what it's used for

-

Next steps:

-Pat is awesome and he's going to grab time on my calendar for a part 2 and he wants to get back on retainer with us.

CC @Myriah Anderson @Tom DiScipio @Jason Linde @Jason Rose

Collapse

You had a meeting with Pat Palingo


Edit Actions ▾

Pat Palingo and Nick Salvatoriello

Start time
June 19 at 3:35 pm

PIPELINES FOR EVERYTHING WE SELL

START WITH BASIC ONES AND BUILD OUT FROM THERE



Contacts ▾

Conversations ▾

Marketing ▾




Sales ▾


Service ▾

Automation ▾

Reports ▾

Partner ▾



 IMPACT ▾

Reports & Analytics Tracking

Sales ▾

Branding

Call & meeting types

Calling

Deals

Log emails in CRM

Meetings

























Products & Quotes

Tasks

Service ▾

Users & Teams

Deal Pipelines and Stages

PIPELINE	DEAL STAGES		
   Agency Services	21	<div>Edit</div>	<div>Delete</div>
   Media Sponsorship Pipeline	10	<div>Edit</div>	<div>Delete</div>
   THINK - FB Ads	14	<div>Edit</div>	<div>Delete</div>
   Carina's Test Pipeline	5	<div>Edit</div>	<div>Delete</div>
   Education (Workshops & Consulting)	8	<div>Edit</div>	<div>Delete</div>
   Live Sponsorship Pipeline	10	<div>Edit</div>	<div>Delete</div>
   Continuations & Upsells	5	<div>Edit</div>	<div>Delete</div>
   [OLD] New Business Pipeline	8	<div>Edit</div>	<div>Delete</div>

Help

ALL REPORTS ON DASHBOARDS

THERE'S SOME GREAT DEFAULTS TO START WITH
AND YOU CAN ADJUST FROM THERE

Sales Professional Dashboard ▾

Filter dashboard

Da

Sales Perform

Date range: This qua

COI

Search dashboards

Q

Recently viewed

Sales Professional Dashboard

Sales and Success Dashboard

Sales Dashboard

Marketing Dashboard

HubSpot dashboards

Marketing Dashboard

Sales Dashboard

Service Dashboard

Web Analytics Dashboard

Visibility: Shared

Actions ▾

CONTACTS WORKED

1,596

▲ 8.28%

➡

NEW DEALS CREATED

781

▲ 388.13%

➡

DEALS CLOSED WON

22

▲ 120%

TRACK AND MANAGE “DEMAND” FOR EXPLORATORY CALLS/NEW OPPS

MQL Generated ⓘ

Date range: All time

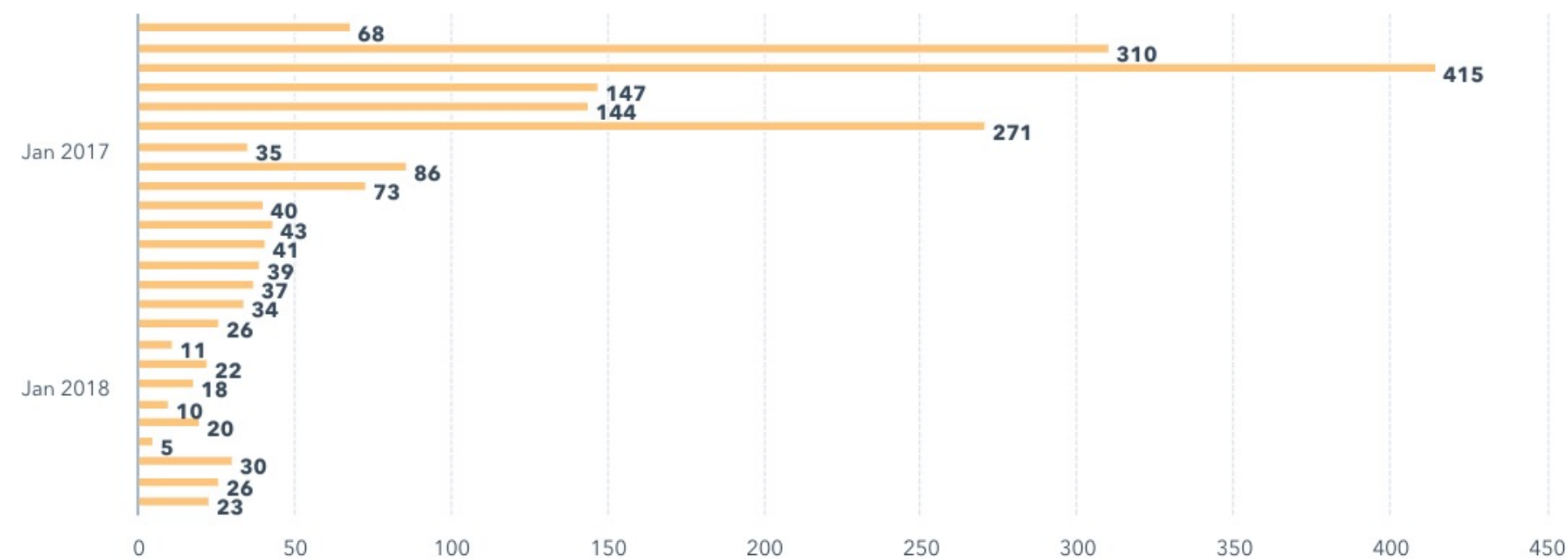
● Count of Contacts



SQL Generated ⓘ

Date range: All time

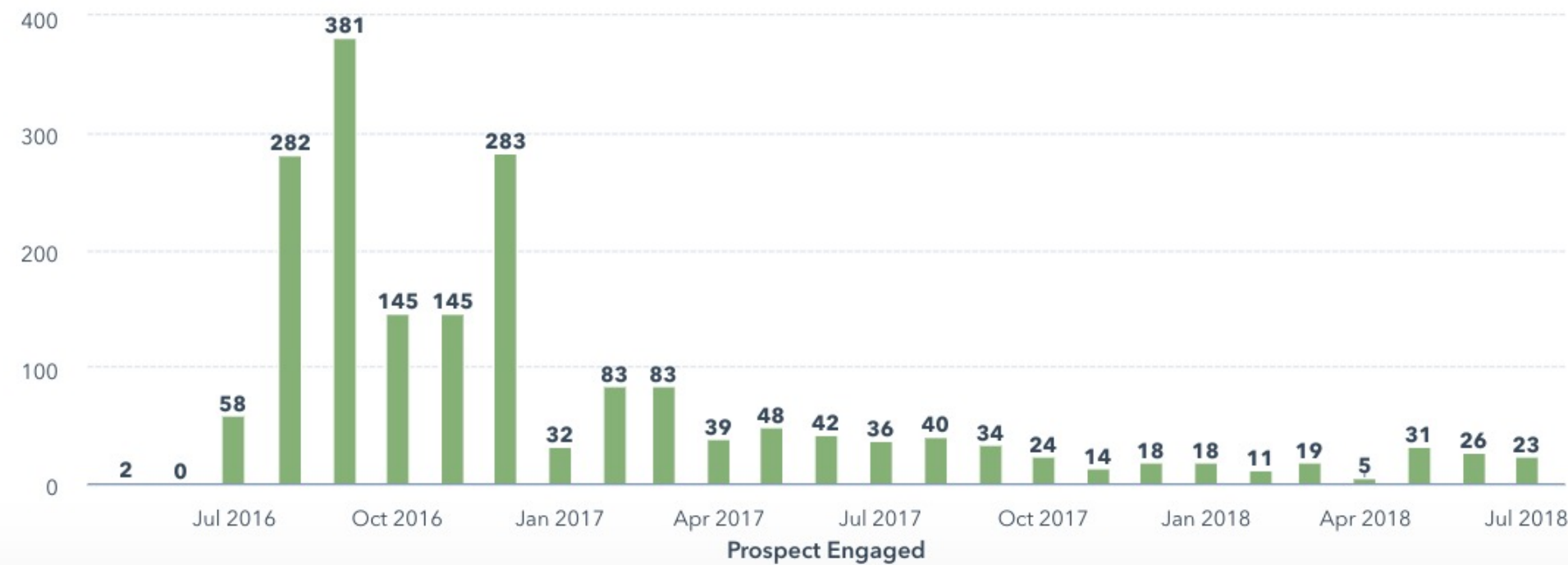
● Count of Contacts



Prospects Engaged by Month ⓘ

Date range: All time

● Count of Contacts



Prospects Booked (inc. BOFU) ⓘ

Date range: All time | Frequency: Quarterly

● Count of Contacts



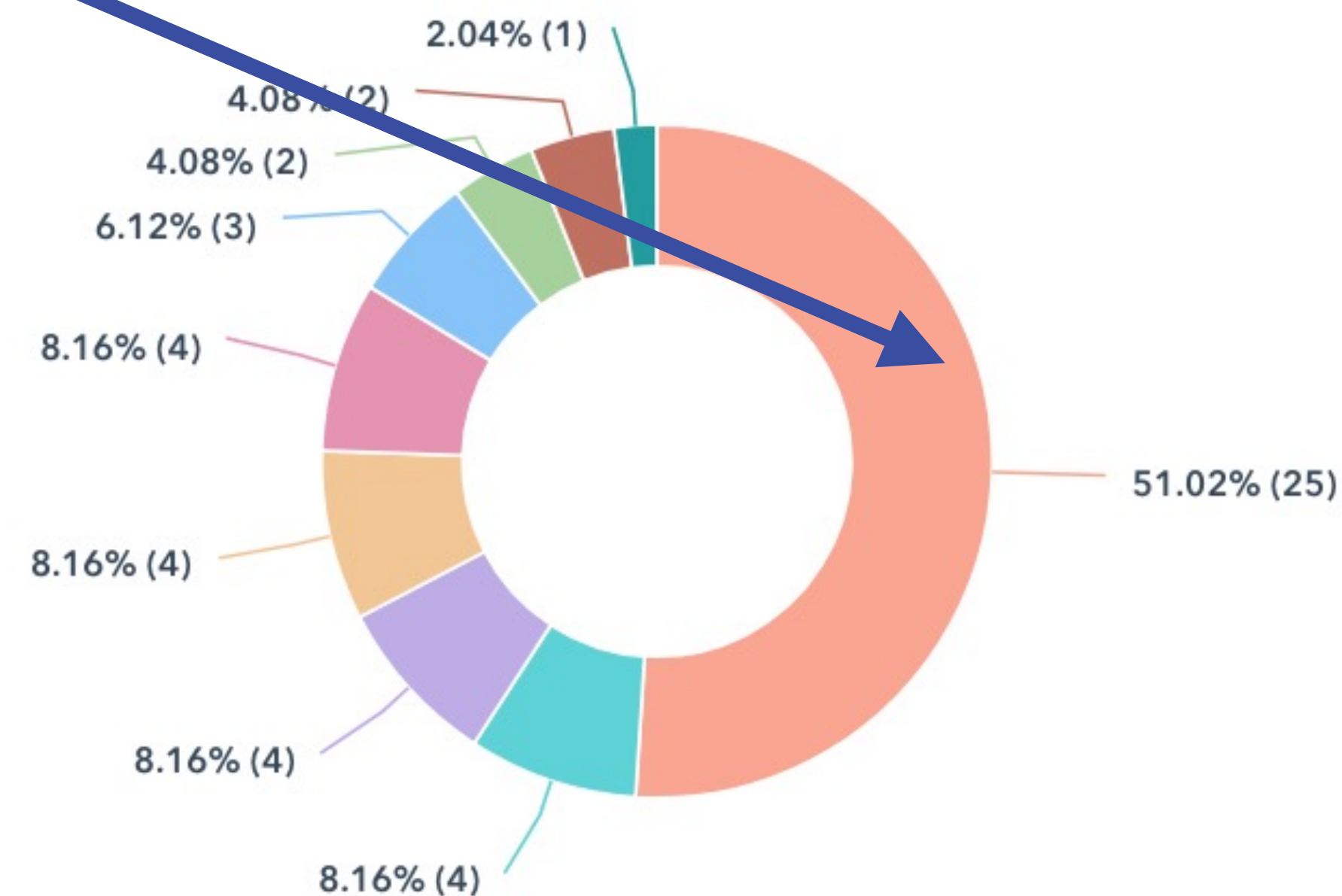
REPORTS ON WHERE OUR DEALS WERE COMING FROM

WE FOCUSED WHERE WE FOUND THE MOST SUCCESS
(INBOUND LEADS VS. OUTBOUND PROSPECTING)

By Deal Source (active) ⓘ

Date range: Last quarter

Consultation Requested Current Client Drift Other Referral Previous Client Sales Lion Referral
Client Referral Partner Directory Hunted



REPORTS: ON HOW MANY DEALS I HAD IN EACH STAGE OF MY PIPELINE

Nick's Active Deals ⓘ

Date range: This year so far | Owners: Nick Salvatoriello

DEAL STAGE	COUNT OF ...
Closed Lost...	11
Closed Won!	10
Stalled	5
Exploratory Completed	4
Total	42

<

Prev

1

2

3

Next

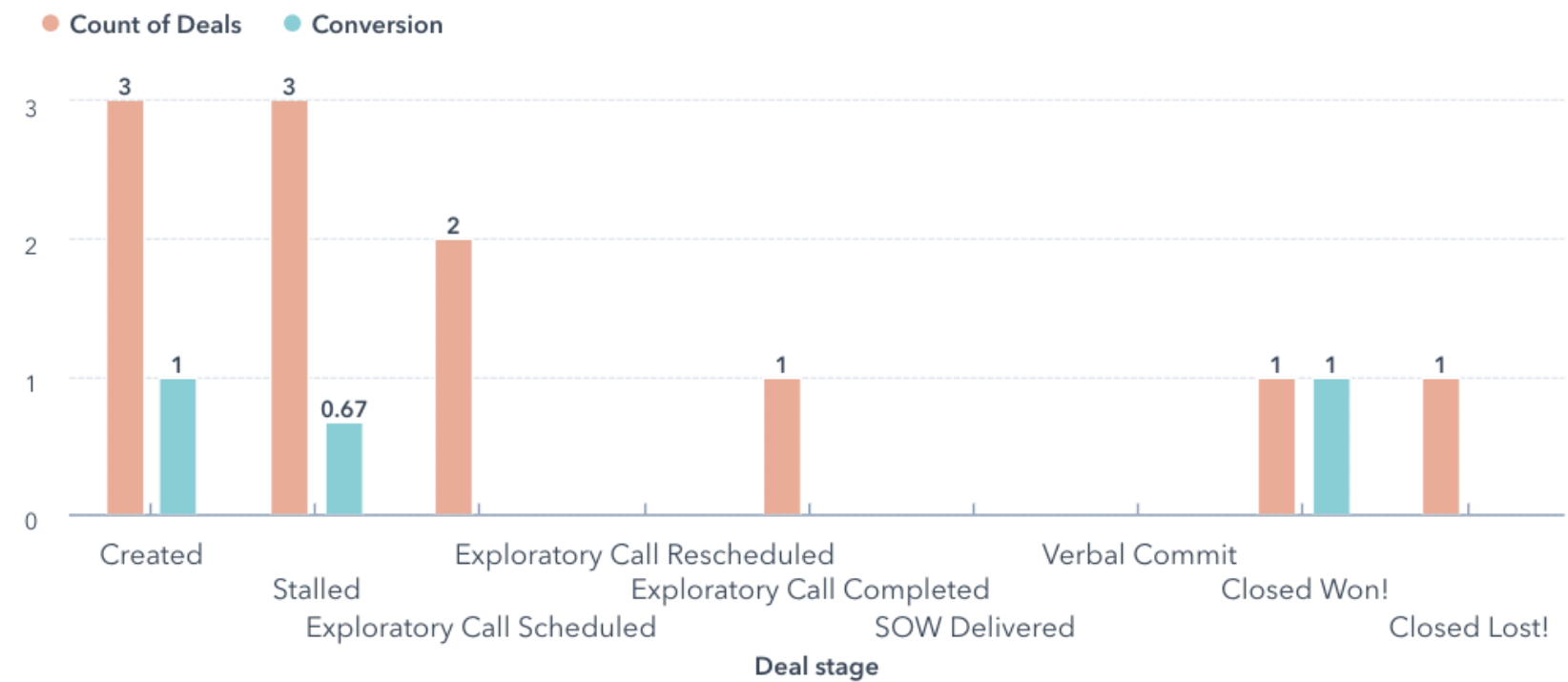
>

ALL REPS AND ALL DEALS ON ONE DASHBOARD

ALLOWS MANAGERS TO COACH AND ADVISE ACCORDINGLY
(SOMETIMES ABOUT FEATURE UTILIZATION)

Deals Pipeline - Education ⓘ

Date range: This quarter so far



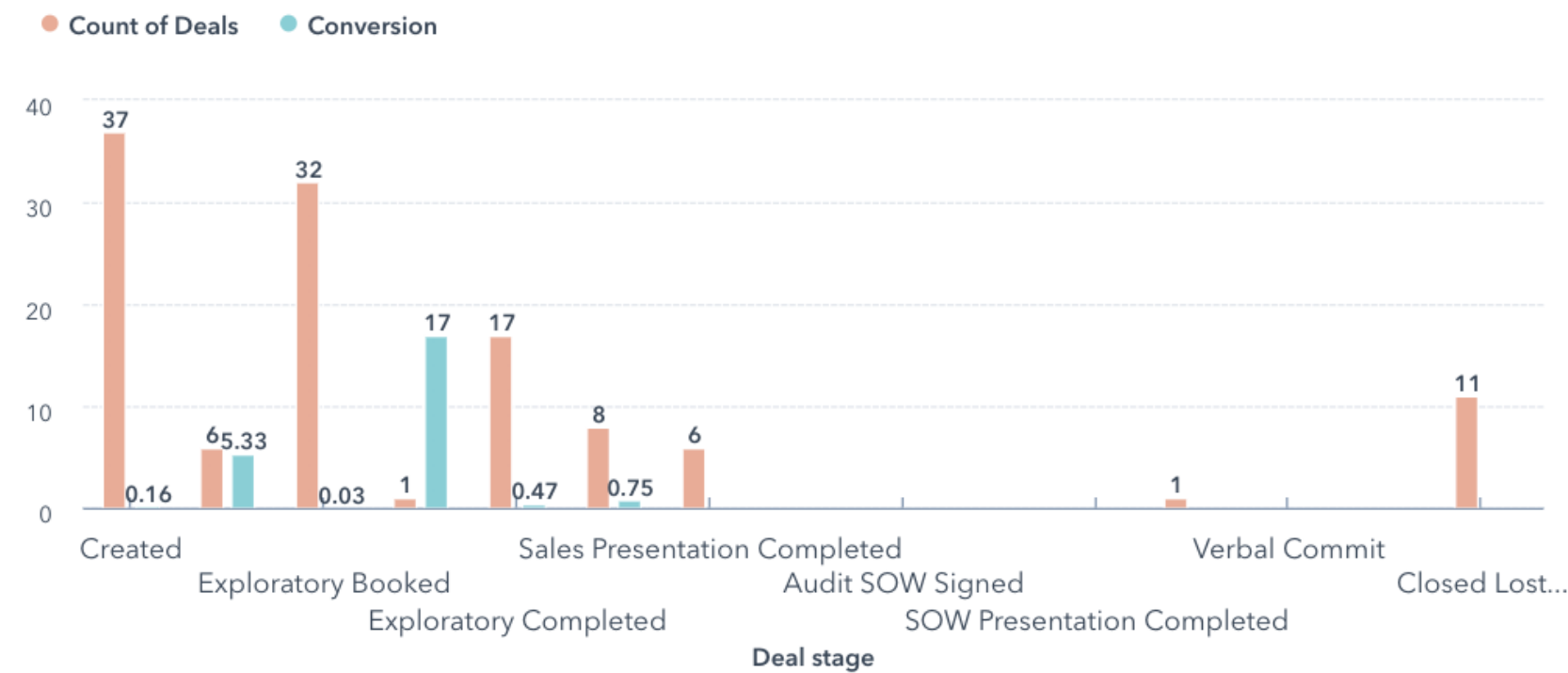
Deals Pipeline- Melanie ⓘ

Date range: This quarter so far | Owners: Melanie Collins



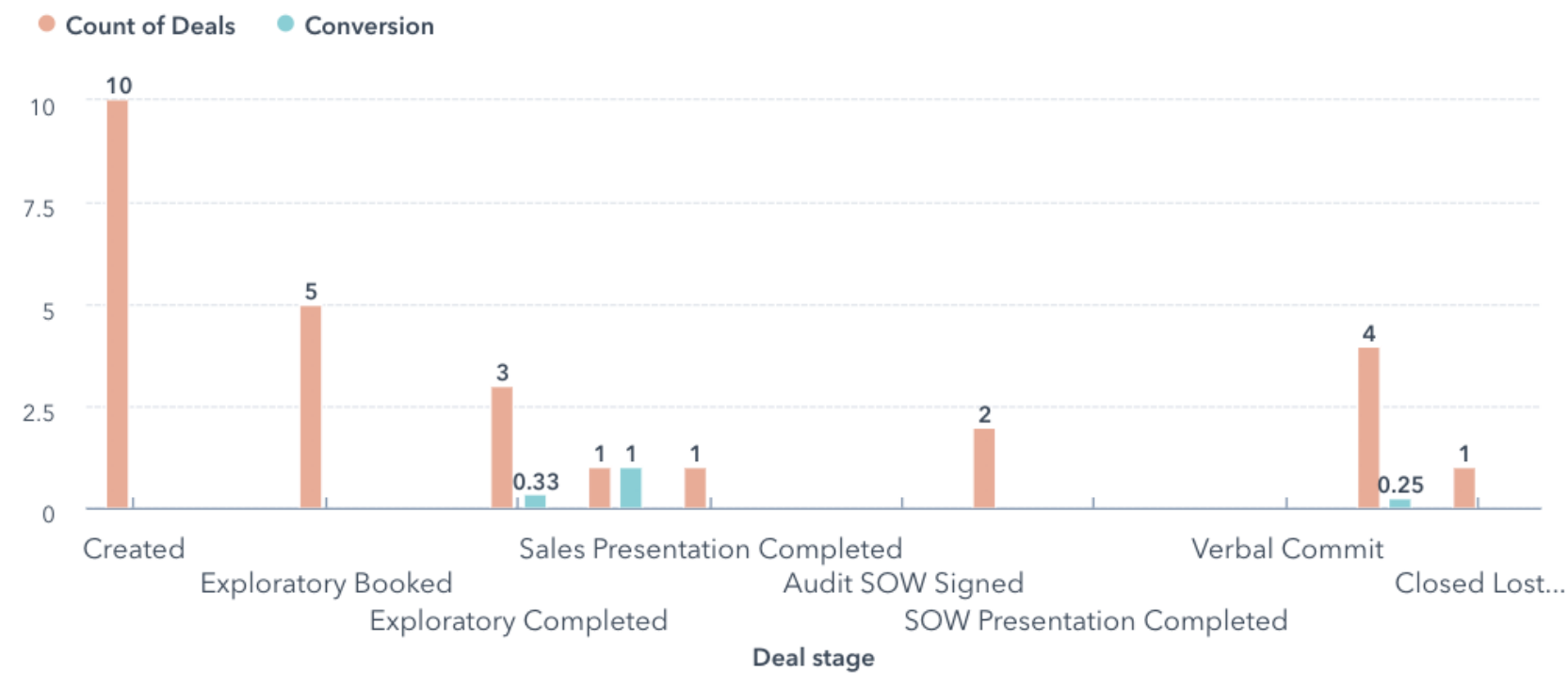
Deals Pipeline- Marc ⓘ

Date range: This quarter so far | Owners: Marc Amigone



Deals Pipeline- Nick ⓘ

Date range: This quarter so far | Owners: Nick Salvatoriello



REPORTS: ON HOW DEAL SOURCES WERE TRANSLATING INTO REVENUE

ARE THERE SOURCES THAT SHOW A BETTER FIT THAN OTHERS? EMERGING CHANNELS FOR NEW OPPS?

Deal Source / Won Deal Source ⓘ

Date range: This year so far



OUR PLAYBOOK FOR INBOUND SUCCESS

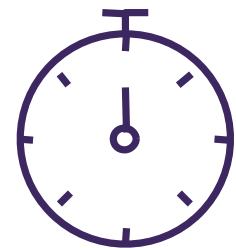
WITH HUBSPOT SALES HUB



CENTRALIZE INFO
TRACKING



STANDARDIZE PROCESSES



INCREASE EFFICIENCY



EXTRACT INSIGHTS



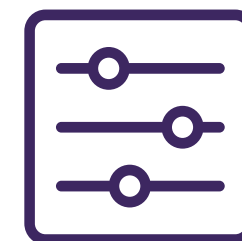
CLOSING DEALS FASTER



FOCUSING ON CUSTOMER
SUCCESS



EXPANDING OUR INBOUND
SALES TOOLSET



SUSTAINING TEAM SUCCESS AS
WE GROW

WHAT IS OUR TEAM'S BASIC SALES PROCESS?

1. **Connect Call** (get our script we drafted)
2. **Exploratory/Goals Call** (I pick an outline and drop into my CRM deal notes.
Inspired by GPCT CI BA article)
3. **“Demo” Call** (Deck on how we operate, Meet a Services Team member)
4. **Proposal + Estimate Presented** (Deck with Goals/Trends/Insights and Quote)
5. **Master Services Agreement + Statement of Work Finalized** (Review both docs on a call and confirm timeline and commitment before sending over)
6. **Closed Won** (Complete Closing Checklist, Host internal kick-off)

PIPELINE DEAL STAGES THAT MIRRORED OUR SALES PROCESS

[Back to deal settings](#)

[OLD] New Business Pipeline

Configure

Automation

STAGE NAME	WIN PROBABILITY	UPDATE STAGE PROPERTIES
<div><div></div><div>Exploratory Booked</div></div>	<div>10%</div> <div></div>	
<div><div></div><div>Goal Setting & Planning Booked</div></div>	<div>20%</div> <div></div>	Amount , Close Date , Deal Description , Has HubSpot? , and Exp...
<div><div></div><div>HubSpot Demo / Tactical Meeting Booked</div></div>	<div>30%</div> <div></div>	
<div><div></div><div>SOW Presentation Booked</div></div>	<div>40%</div> <div></div>	Why it might not close by close date , Why it will close by close d...
<div><div></div><div>SOW Presented</div></div>	<div>50%</div> <div></div>	Why it might not close by close date and Why it will close by clos...
<div><div></div><div>Verbal Agreement</div></div>	<div>90%</div> <div></div>	
<div><div></div><div>Closed Won</div></div>	<div>Won</div> <div></div>	Closed Won Reason and Close Date
<div><div></div><div>Closed Lost</div></div>	<div>Lost</div> <div></div>	Closed Lost Reason and Close Date

NOT A GOOD FIT? ALWAYS AT HELP WITH FREE RESOURCES. IT'S INBOUNDY.

Name: Post-Explore: Not ready/just starting = try free tools, check back with us later

 Shared ▾

 Sales Process ▾

Subject: Follow up from our discussion - free tools/resources

Good talking with you just now. As a recap, our basic conclusion was it might be a bit early for an engagement with IMPACT.

I did promise I would send along some resources though, in hopes we can help you folks "virtually" via some of the content/tools that we have put out that have been helpful to companies like yours:

- *[A link to subscribe to the IMPACT marketing blog](#) (subscribe to keep in touch + this page is a good example of a page you should build to convert your future US site visitors into newsletter and/or blog subscribers as well.) .
- *Run some numbers on [IMPACT's ROI Calculator](#) (calculate your goals and how your budgets/performance might impact them, no pun intended ;)
- *[A simple tool to help you brainstorm blog titles based on topics you want to write about](#). Sometimes the title is the biggest challenge to getting started! We can dig into this data with you down the road.

I hope you find these resources useful and that you'll check back in with us in a few months once you've run some marketing

REQUIRED DEAL INPUTS IN ORDER TO MOVE DEALS AHEAD

[Back to deal settings](#)

[OLD] New Business Pipeline

Configure

Automation

STAGE NAME	WIN PROBABILITY	UPDATE STAGE PROPERTIES
<div><div></div><div>Exploratory Booked</div></div>	<div>10%</div> <div></div>	
<div><div></div><div>Goal Setting & Planning Booked</div></div>	<div>20%</div> <div></div>	Amount , Close Date , Deal Description , Has HubSpot? , and Exp...
<div><div></div><div>HubSpot Demo / Tactical Meeting Booked</div></div>	<div>30%</div> <div></div>	
<div><div></div><div>SOW Presentation Booked</div></div>	<div>40%</div> <div></div>	Why it might not close by close date , Why it will close by close d...
<div><div></div><div>SOW Presented</div></div>	<div>50%</div> <div></div>	Why it might not close by close date and Why it will close by clos...
<div><div></div><div>Verbal Agreement</div></div>	<div>90%</div> <div></div>	
<div><div></div><div>Closed Won</div></div>	<div>Won</div> <div></div>	Closed Won Reason and Close Date
<div><div></div><div>Closed Lost</div></div>	<div>Lost</div> <div></div>	Closed Lost Reason and Close Date

REQUIRED FIELDS TO MOVE DEALS AHEAD (FOR BOTH PARTIES)

Awesome! We're Excited to Talk to You

Before our call, it would be very helpful if we were able to learn a little more about you and what you're looking to accomplish.

Please take 5 minutes to complete the form below :)

By hiring a marketing agency, what is your organization hoping to achieve? What would the headline of a successful case study to read?*

What are the most important metrics you track?*

If your website was performing 10x better than it is right now, what would be different?*

Who owns content marketing in your organization?*

How much does the average customer spend with you over a lifetime (LTV)?*

EMAIL TEMPLATES FOR POST EXPLORATORY CALL FOLLOW UP

View: All ▾		explore
	NAME ▴▾	CREATED BY ▴▾
<input type="checkbox"/>	BOFU Explore Schedule Questionnaire	Shandia Drummond
<input type="checkbox"/>	Post-Explore: Build it yourself internal proposal resources Nick Sal	Nick Salvatoriello
<input type="checkbox"/>	Post-Explore: Not ready/just starting = try free tools, check back with us later	Nick Salvatoriello
<input type="checkbox"/>	Pre-Explore - budget concerns / can't afford our minimum deal size Nick	Nick Salvatoriello

Resource: More template ideas from HubSpot

OUR PLAYBOOK FOR INBOUND SUCCESS

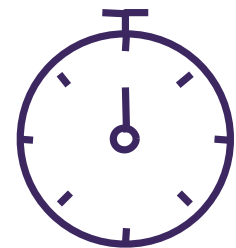
WITH HUBSPOT SALES HUB



CENTRALIZE INFO
TRACKING



STANDARDIZE PROCESSES



INCREASE EFFICIENCY



EXTRACT INSIGHTS



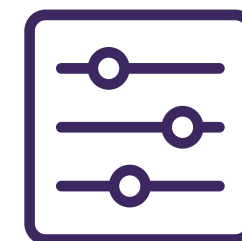
CLOSING DEALS FASTER



FOCUSING ON CUSTOMER
SUCCESS



EXPANDING OUR INBOUND
SALES TOOLSET



SUSTAINING TEAM SUCCESS AS
WE GROW

HIRE A LEAD MANAGER / CONNECTION SPECIALIST



Myriah Andersen



In charge of all consultation requests and making sure no lead is left behind.



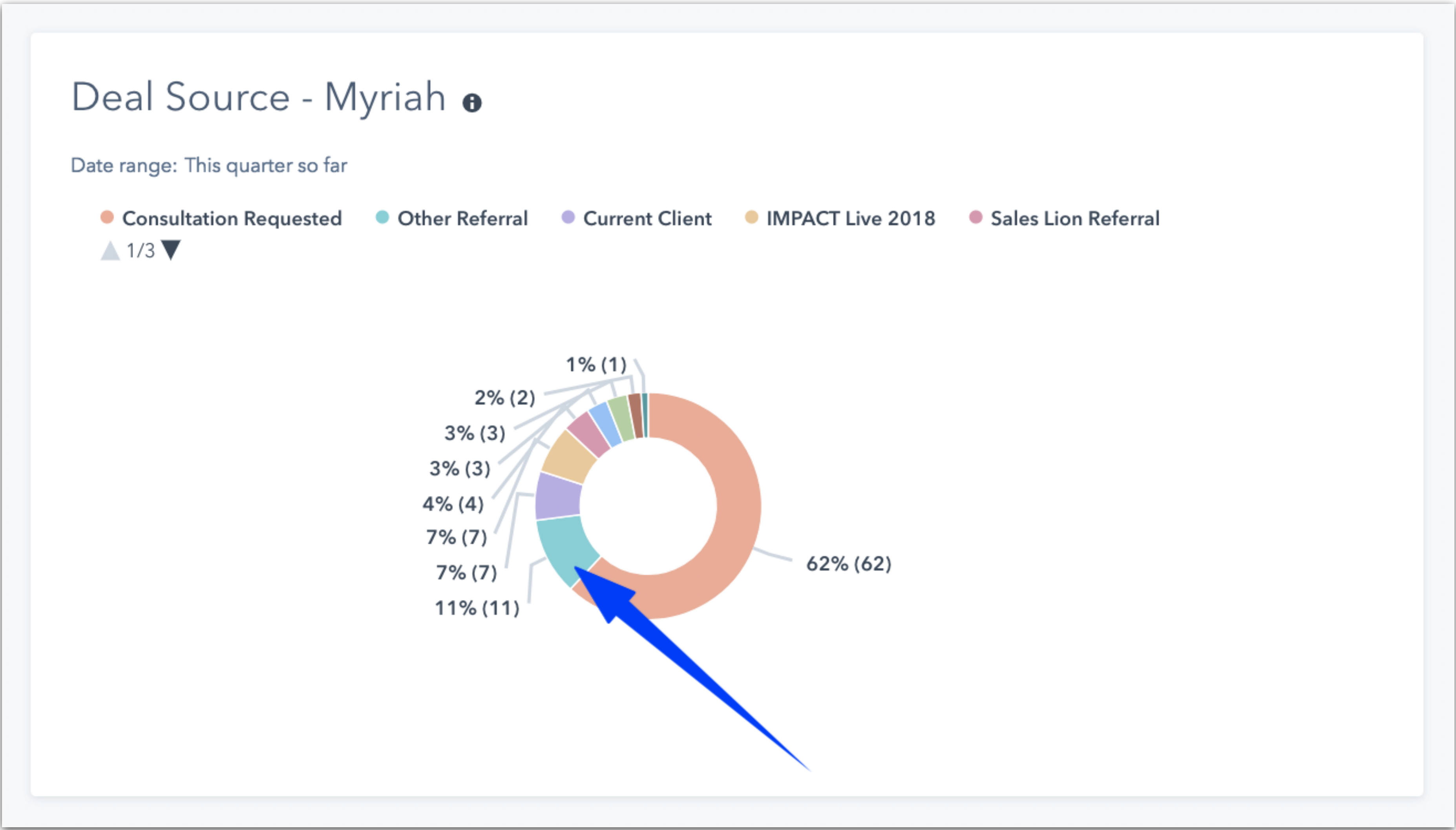
Also sometimes known as:

- Business Development Rep (BDR)
- “The Front Desk”
- Sales Team’s Gatekeeper / Filter

Sometimes can double as:


- Outbound Sales Development Rep (SDR)
- Marketing + Sales Tech Integrator
- Head of Online Community


LEAD MANAGER / CONNECTION SPECIALIST: TRACKED ON THE DASHBOARD



Learn More: [AFTER 50+ SALES CONNECT CALLS, HERE ARE 10 THINGS I LEARNED ABOUT BEING EFFECTIVE.](#)

LEAD MANAGER ENTERS CONNECT CALL + DEAL INFO BEFORE BOOKING US



**Myriah Anderson** (manderson@impactbnd.com) left a note about ██████████ ██████████
Aug 23 at 1:22 PM EDT [Edit](#) [Actions](#) ▼

Connect Call Notes:

██████████ leads the sales team - no background in digital marketing
He has been tasked with finding an agency for the company to work with
They are a lead generator for a ██████████
They generate about 405k leads per month
40% of leads are coming through paid: adwords, fb
The rest are organic
Been in investing in SEO efforts
Use HubSpot - primary reason ██████████ reached out
Looking to work on month to month basis, would do a year contract
Need content creation, optimization of HubSpot CRM to better utilize, paid help
Had an agency for three years and ended relationship with agency. Have a couple consultants during transition phase
Budget: Open - depends on services. Talked about where ours start at minimum and that falls within what they are able to invest.

Timeline: Making decision by Sept. 7th and kicking off by Sept17th

Create deal ✕

Deal name *

Pipeline *

Deal stage *

Deal owner *

Create date *

Business Development Representative *

Deal Source *

Company

Contact

DEALS ‘CARD VIEW’ = MY HOME PAGE

Deals ▾

All deals

All saved filters >

Pipeline

Continuations & ... ▾

All dealsOptions ▾

EXPLORARY CALL COMPLE

\$6,000

HubSpot Support/Coac

Retainer

Close date: August 31,

WON250

\$72,000

Add-on/continuation deal

Close date: February 7, 2018

\$60,000

Close date: January 31, 2018

\$19,465

- traffic + lead generation campaign execution retainer

Close date: January 29, 2018

Total: \$8,645,814.50

LOST1,120

- New Deal

Close date: February 7, 2018

\$30,000

Close date: February 2, 2018

New Deal

Close date: January 31, 2018

Total: \$28,205,802

16

CLOSED LOST3

post-website launch

retainer: A90 SOW [CSM

on]

Close date: August 21, 2018

\$11,700

Campaign Development

Close date: April 18, 2018

SET UP SELF-SERVICE MEETING BOOKING

Invite description ⓘ

You have been invited to a Zoom.us online meeting

Join the meeting: <https://zoom.us/my/nicksal>

On a computer, use any browser and go to: <https://zoom.us/join>

On a phone or tablet, launch the Zoom app

Language ⓘ

English

The language your meeting link is displayed in

Date and number format

United States

The date and number styling in your meeting link

Reminder emails

☐ > Send reminder emails to prospects and customers who book meetings through this link

✓ Advanced Settings **NEW**

Minimum notice time

4 hours

Minimum amount of time before a meeting can be booked

Buffer time

15 minutes


Padding around your meetings you can't be booked for

When a meeting can be scheduled **NEW**

3 weeks

Set the amount of weeks in advance, or a custom date range, people can book in your calendar

iMPACT

**Find a time to meet Nick**

< July >

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

How long do you need?

15 min

30 min

60 min

What time works best?

UTC -04:00 Eastern Time ▾

8:35 am

10:00 am

1:05 pm

STAYING IN THE APP, STAYING IN THE FLOW...

New noteEmailCallLog activityCreate taskSchedule

ToChoose a recipientCcBcc

FromNick Salvatoriello (nsal@impactbnd.com)

SubjectAdd a subject

Type something brilliant...

Nick Salvatoriello
Inbound Marketing Specialist
IMPACT Branding & Design LLC
Phone: (203) 265-4377
Email: nsal@impactbnd.com
Web: http://www.impactbnd.com
Linkedin: Connect with me
IMPACT helps people and their organizations succeed.

A🔗📎☰💡✍️📎🎥

ActivityNotesEmailsCallsTasks

July 2018

You created a task for yourselfEditActions

Send follow up email to prospect confirming next week's agendaDue Date07/23/2018

Activity
Notes
Emails
Calls
Tasks

July 2018

You created a task for yourself

Edit
Actions

☒

Draft Statement Of Work and share for review internally

Due Date
07/20/2018

Utilize notes from Deal Record and SOW Template for post-launch support retainers

Type	Assigned to	Email reminder	Queue
To-do	Nick Salvatoriello	07/20/2018 at 8:00 AM	Nick's July 2018 Big Win Tasks





Associated with

Website redesign + rebuild on HubSpot

'TASKS' = MY 2ND HOMEPAGE

Nick Salvatoriello ▾ All types ▾ All time ▾

Search for a task

<input type="checkbox"/>	TITLE ▴ ▾	TYPE ▴ ▾	ASSOCIATED WITH	DUE DATE ▴ ▾
<input type="checkbox"/>	It's been a year since you marked this lead as closed lost...		 Daniel Murphy	Aug 16, 2018 4:40 PM
<input type="checkbox"/>	Draft PPC Mgt SOW based SOW from Tom via			Aug 14, 2018
<input type="checkbox"/>	It's been a year since you marked this lead as c			Aug 10, 2018
<input type="checkbox"/>	Email Katie + Bill, are we ready for finalizing qu		Suppor...	Jul 31, 2018
<input type="checkbox"/>	Send follow up email to prospect confirming n			Jul 23, 2018
<input type="checkbox"/>	Draft Statement Of Work and share for review i			Jul 20, 2018
<input type="checkbox"/>	Call Ross today to discuss Estimate/SOW			Jul 18, 2018 9:00 AM
<input type="checkbox"/>	Check back on Steve's progress, wanna meet Kevin?		 Steve Brooks	Jul 11, 2018
<input type="checkbox"/>	Get back to James with alternative plans to move ahead i...		 Sonitrol New England	Jun 28, 2018

Create a follow up task?

We'll create a task for you to follow up with Daniel Murphy in 3 business days ▾

Add task

Cancel

☐ Don't ask me again

OUR PLAYBOOK FOR INBOUND SUCCESS

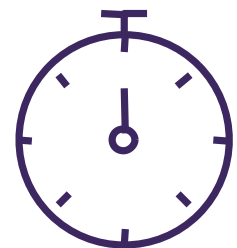
WITH HUBSPOT SALES HUB



CENTRALIZE INFO
TRACKING



STANDARDIZE PROCESSES



INCREASE EFFICIENCY



EXTRACT INSIGHTS



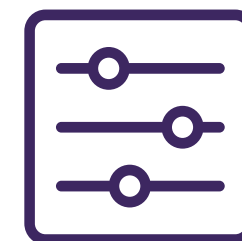
CLOSING DEALS FASTER



FOCUSING ON CUSTOMER
SUCCESS



EXPANDING OUR INBOUND
SALES TOOLSET



SUSTAINING TEAM SUCCESS AS
WE GROW



**"IT'S REALLY ABOUT TAKING
THESE INDIVIDUAL PIECES OF
DATA AND CORRELATING THEM
TO EACH OTHER TO SEE IF THE
SALES PROCESS CAN HELP
INFLUENCE THEM."**

DAKOTA HERSEY

@IMPACTBND

TOP REASONS FOR CLOSED/ WON OR CLOSED/LOST

Conducting a mini-debrief on every deal that goes into either closed/won or closed/lost stage

Move deal

Before you can move ██████████ to Closed Lost... you will need to update these properties

Closed lost reason

Search

Budget

Timeline

Main contact no longer at company

We didn't have enough relevant experience

We were too slow

Went with another Agency

Move deal

Before you can move Calyx Software, Inc. to Closed Lost... you will need to update these properties

Closed lost reason

Nick S was assigned a rushed on exploratory call in the middle of required team training and Nick didn't make time for detailed follow up besides sharing out agency overview deck + booking link for next call to discuss further.

Opp was competitive and never heard back from the prospect - despite video message from Myriah to reschedule even :*(

Lesson learned. Never host explore calls without 15 minutes of prep and follow up available (and always send a detailed follow-up or at least a good excuse for more time before you do).

See less

> Previously completed properties

Save

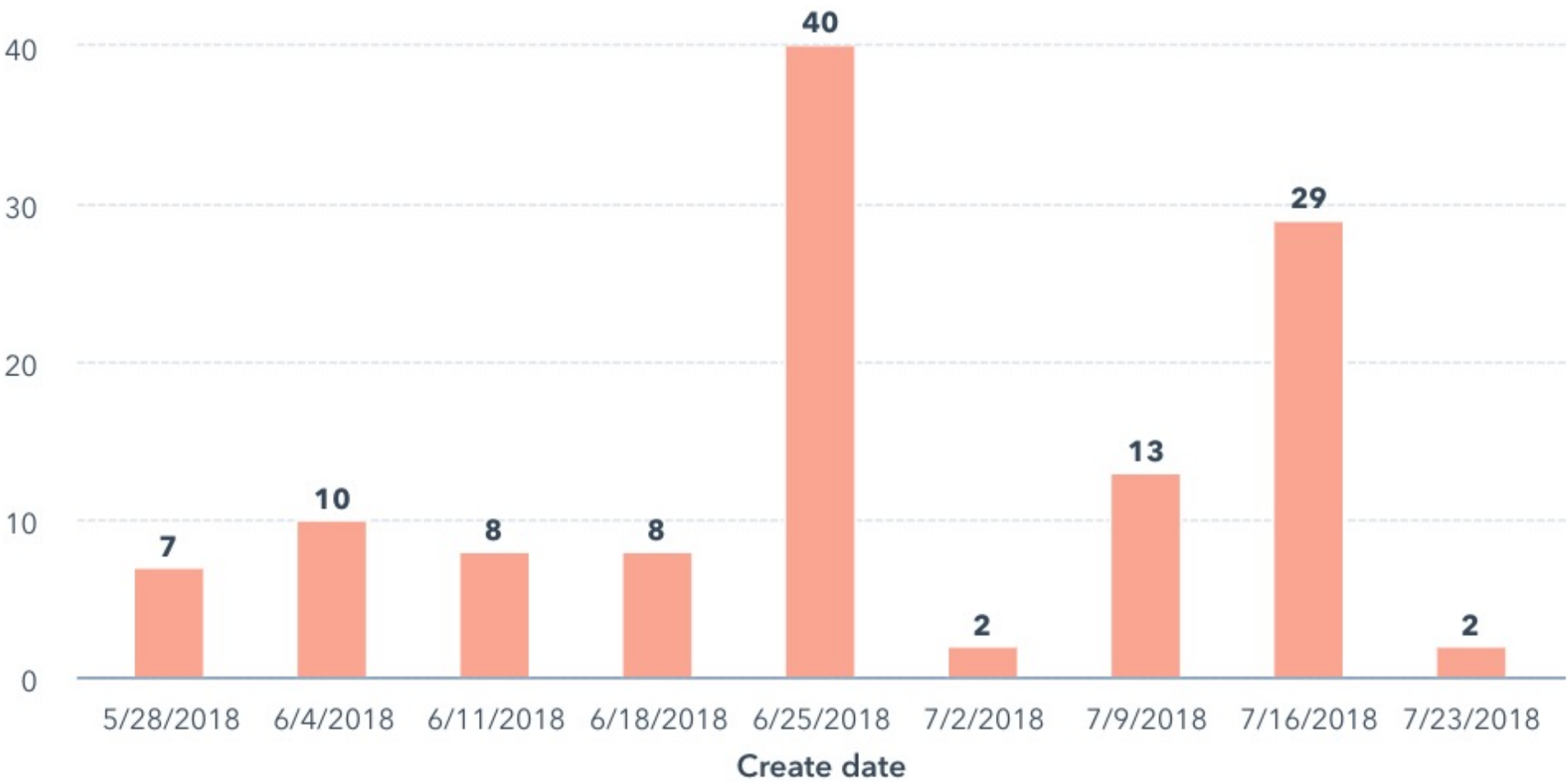
Cancel

MAINTAIN RESPONSIVENESS AND QUALITY

Deals Created ⓘ

Date range: In the last 60 days | Frequency: Weekly

● Count of Deals



Nick's Active Deals ⓘ

Date range: This year so far | Owners: Nick Salvatoriello

DEAL STAGE

COUNT OF DE...

Closed Lost...

11

Closed Won!

10

Stalled

5

Exploratory Completed

4

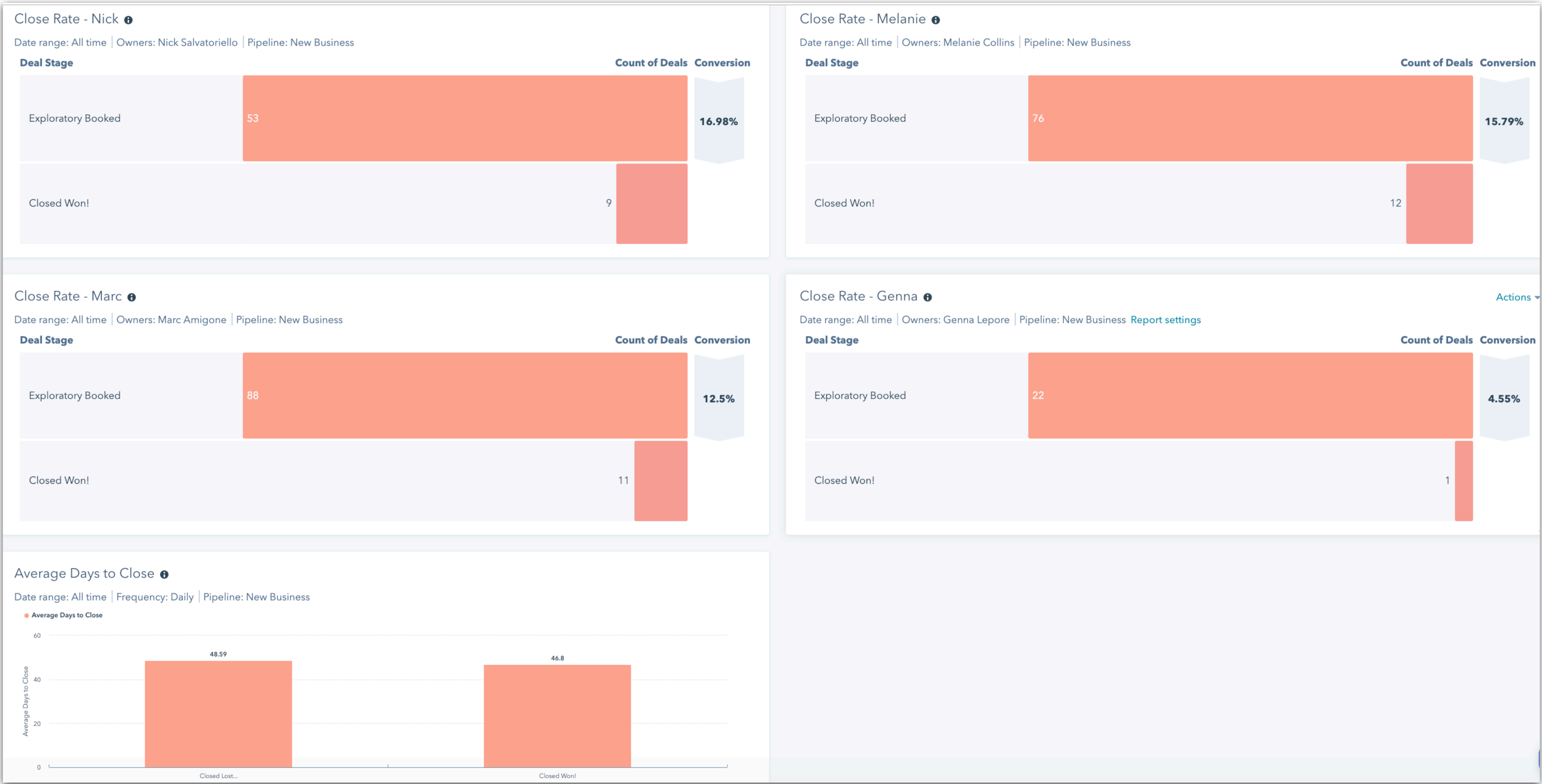
Total

42

< Prev 1 2 3 Next >

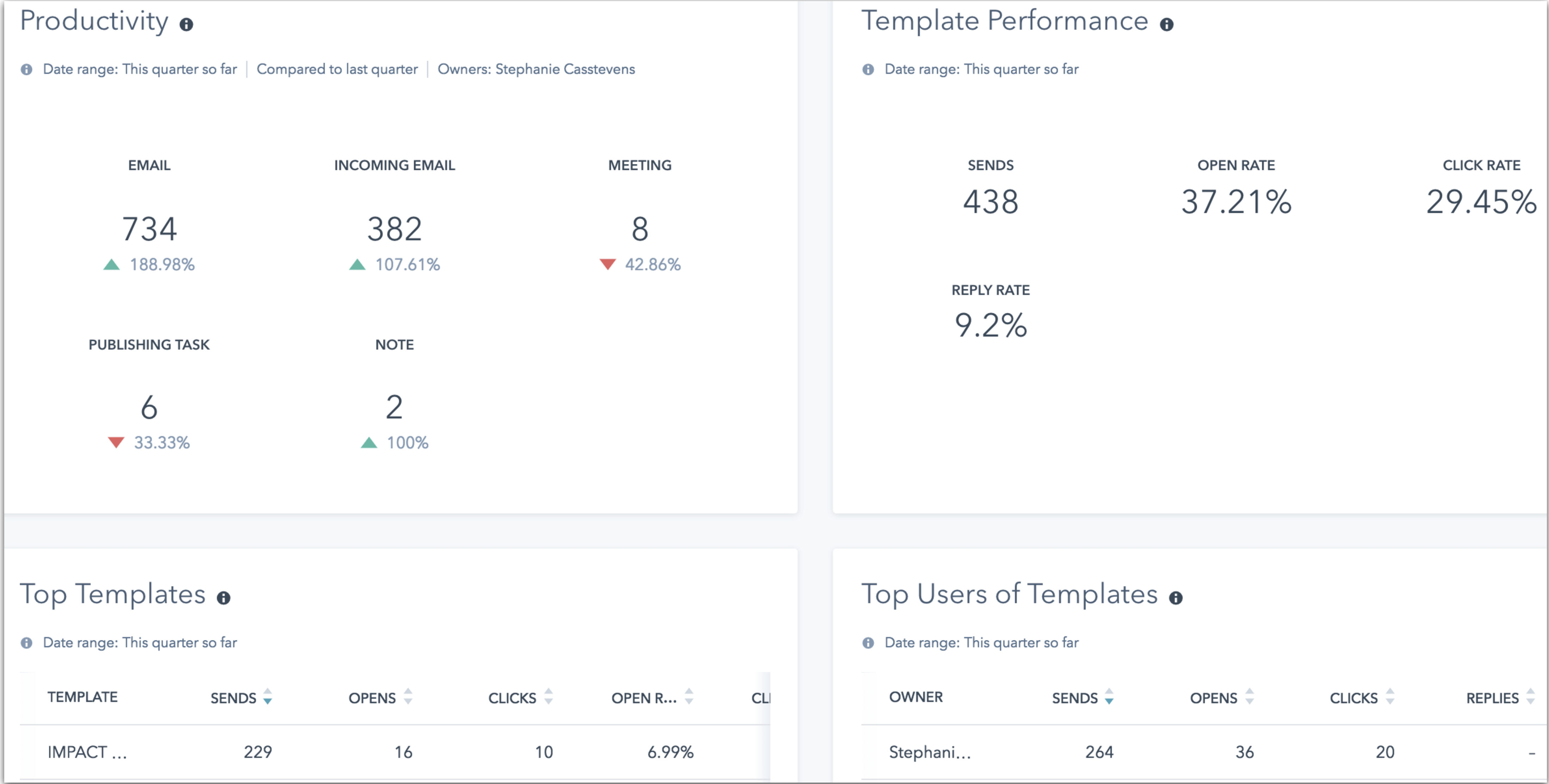
We learned that we could handle 10-15 active opportunities at once.
Anything more and our responsiveness and/or quality of response dropped.

SPOTTING TEAM-WIDE BENCHMARKS TO WORK ON:



We attained an average 18-20% **close/won rate** on all deals we got assigned to do exploratory calls with and ~30-day **average days to closed-won**.

ADOPTION OF SALES HUB FEATURES WAS INCONSISTENT



HERE COMES 2018....

**THINGS TO KEEP IN MIND
FOR YEAR 2 OF GROWTH:**

GREAT SUCCESS = GREATER RESPONSIBILITY

Increasing team size, talent, and specialization allows us to expand the business, but also brings new challenges.....

Tom's Highest Priorities - January 22, 2018

- Finalize and implement 2018 **Revenue Tracker** - **Shandia**
- Finalize 2018 scorecard and how to quickly get data for each metric - **Shandia**
- Finalize **new deal stages** within HubSpot for the agency, education and sponsorship pipelines. - **Shandia**
- Update / Simplify Master Services **Agreement template** by February 14th
- Implement optimized connect call process (doc started by Melanie) - **Shandia with Melanie**
- Upload Q1 2018 **Objectives** into 7geese (Liz is on it)
- Create 1st draft of slide deck for new version of the sales presentation
- Work with Brie to put together plan to get THINK Creative MRR to \$80k (from \$50 - \$60k) once they come on
- Develop revised **comp plan** for CSM role
- Transition Nick / Melanie / **New Salesperson** into taking education calls
- Rebuild / relanguage TSL Speaker and consulting Agreements - **Shandia**
- Optimize the Audit & 90-Day Plan Agreement
- Finalizing **Client Qualifiers** document to account for audit and new services

OUR PLAYBOOK FOR INBOUND SUCCESS

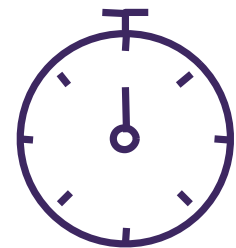
WITH HUBSPOT SALES HUB



CENTRALIZE INFO
TRACKING



STANDARDIZE PROCESSES



INCREASE EFFICIENCY



EXTRACT INSIGHTS



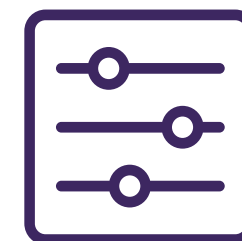
CLOSING DEALS FASTER



FOCUSING ON CUSTOMER
SUCCESS



EXPANDING OUR INBOUND
SALES TOOLSET



SUSTAINING TEAM SUCCESS AS
WE GROW

CREATING A TRIP WIRE / KICK-START OFFER



OUR NEW OFFERING: MINI AUDIT + 90 DAY PLAN

2-WEEK MARKETING AUDIT AND
RECOMMENDED MARKETING
STRATEGY FOR NEXT 90 DAYS



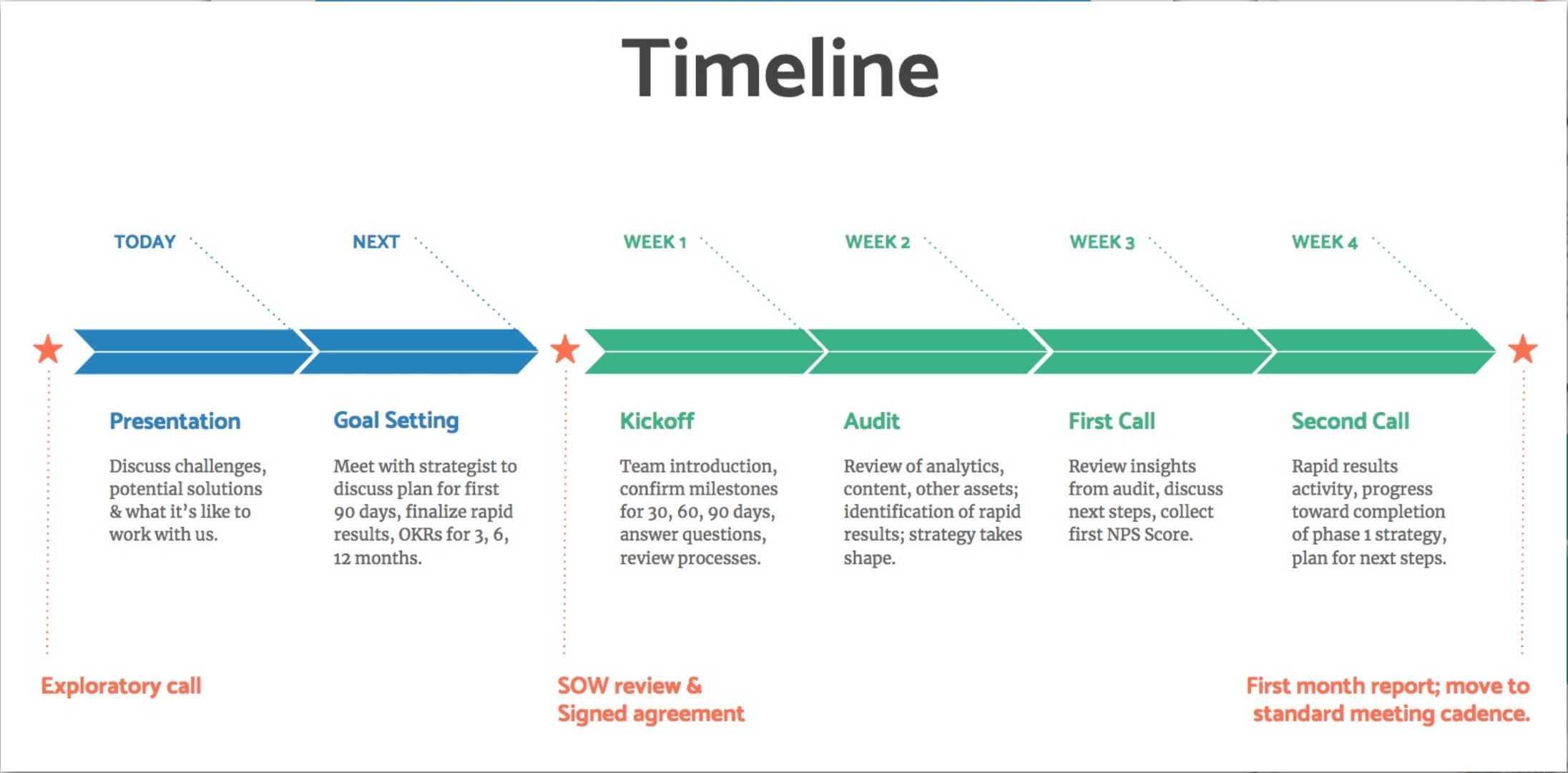
IMPRESS IN 2018 WITH IMPACT'S
INBOUND MARKETING
STRATEGY
TEMPLATE & EXAMPLE

[More Info](#)

Nick

nsal@impactbnd.com

GET IT NOW



OUR PLAYBOOK FOR INBOUND SUCCESS

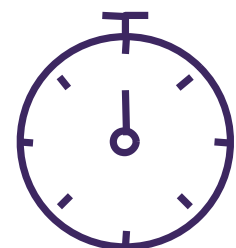
WITH HUBSPOT SALES HUB



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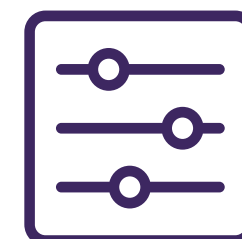
CLOSING DEALS FASTER



**FOCUSING ON CUSTOMER
SUCCESS**



EXPANDING OUR INBOUND
SALES TOOLSET



SUSTAINING TEAM SUCCESS AS
WE GROW

**FOCUSING ON
CUSTOMER
SUCCESS**



FOCUSING ON POST SALE / CUSTOMER SUCCESS MANAGEMENT

TRANSITIONING FROM 'HUNTER' TO 'FARMER'
AS RELATIONSHIPS GROW AND EXPAND

✓ ONBOARDING / ENGAGEMENT

Internal hand-offs

Joining Project kick-offs

Quarterly Business Reviews

✓ CONTINUATION / RENEWAL

Ensuring timely conversations are had with customers

Discounts/pricing are available

Adjusting expectations based on lessons learned from previous work together

✓ RETENTION / ACCOUNTABILITY

Owning the agreement.

Owning the executive relationship.

Running point if/when either party seeks to change direction.

✓ UPGRADE / EXPANSION

Helping Product/Service team with timing, packaging, strategy

Presenting scope to client and closing

HUBSPOT HAS PUBLISHED LOTS OF GREAT INFORMATION ABOUT THEIR EXPERIENCE



How to Evolve Your Customer Success Strategy to Fuel Your Company's Growth

Alison Elworthy, VP of Customer Success at HubSpot



Learn more: [Customer Success - The Third Growth Engine of Business](#)

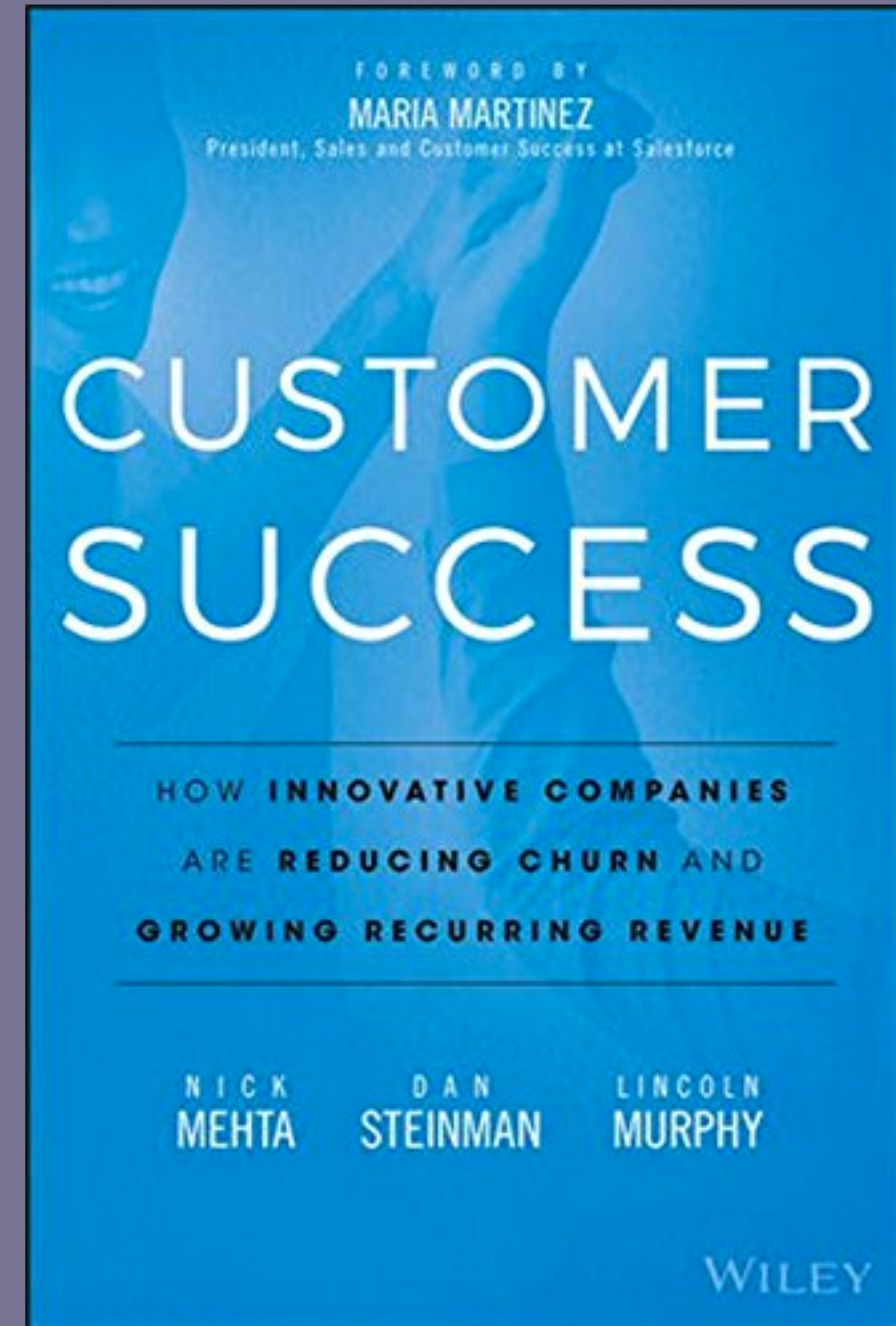
KEY RESOURCE

DEEP SPECIFICS FOR THIS FAST
DEVELOPING BUSINESS DISCIPLINE:

Why you want it for your team:

Customer success begins long before they become a customer (like, during the marketing and sales process).

Learn how the most successful companies are increasing retention and overall lifetime value of the deals they close.



OUR PLAYBOOK FOR INBOUND SUCCESS

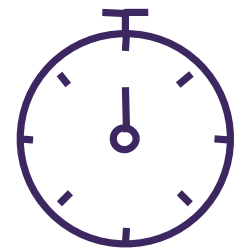
WITH HUBSPOT SALES HUB



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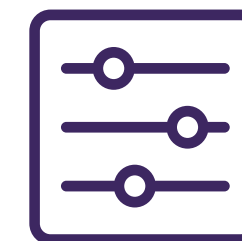
CLOSING DEALS FASTER



FOCUSING ON CUSTOMER
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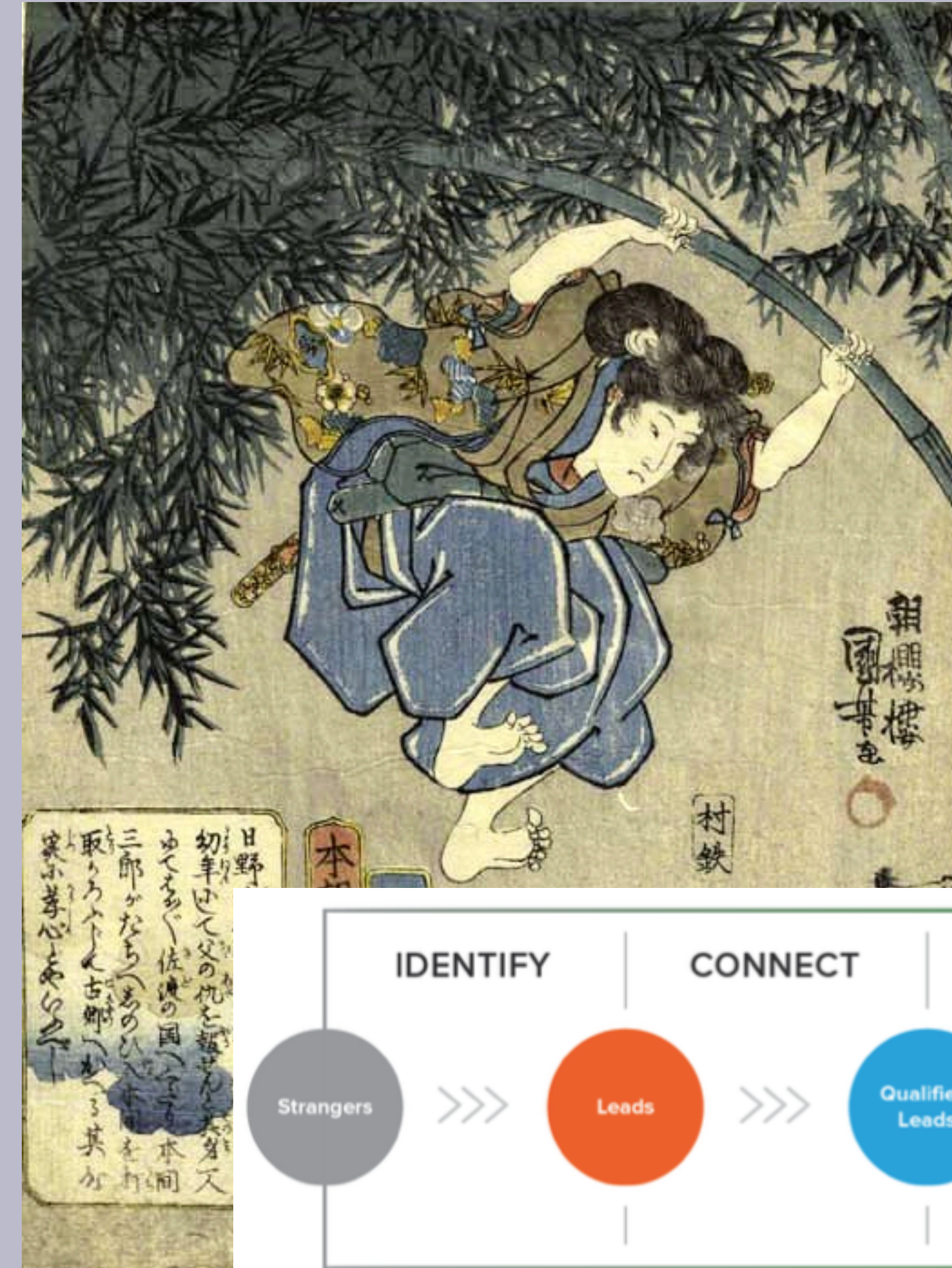


**EXPANDING OUR INBOUND
SALES TOOLSET**



SUSTAINING TEAM SUCCESS AS
WE GROW

EXPANDING THE INBOUND SALES ‘NINJA ARSENAL’

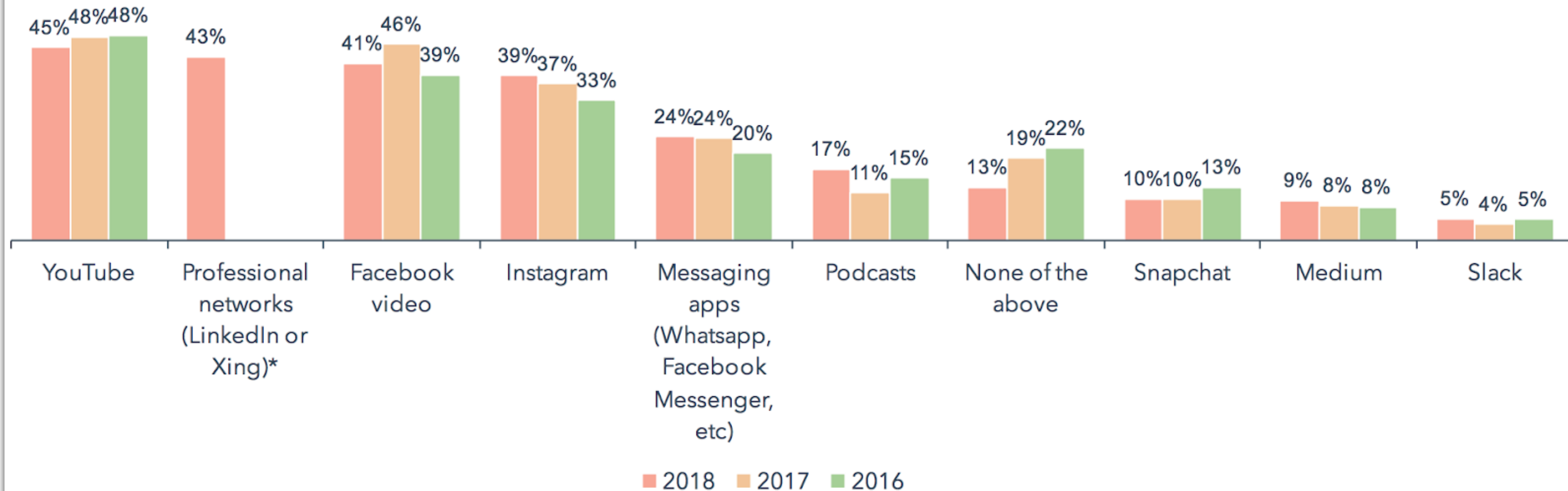


Source: [Wikipedia](#), HubSpot

NEW SALES TOOLS TO BE FORGED...

Marketing teams have invested in video, Instagram, and messaging

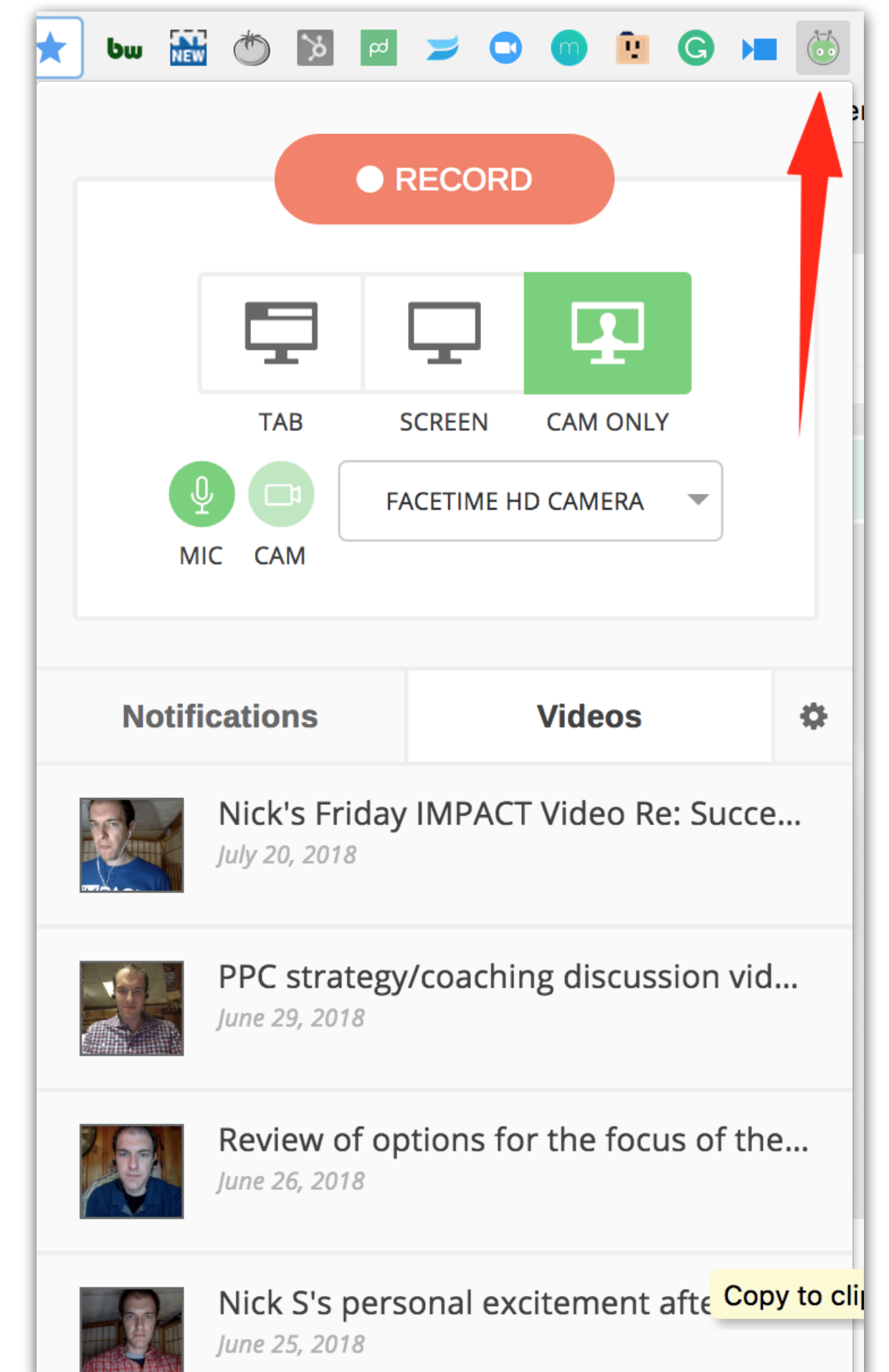
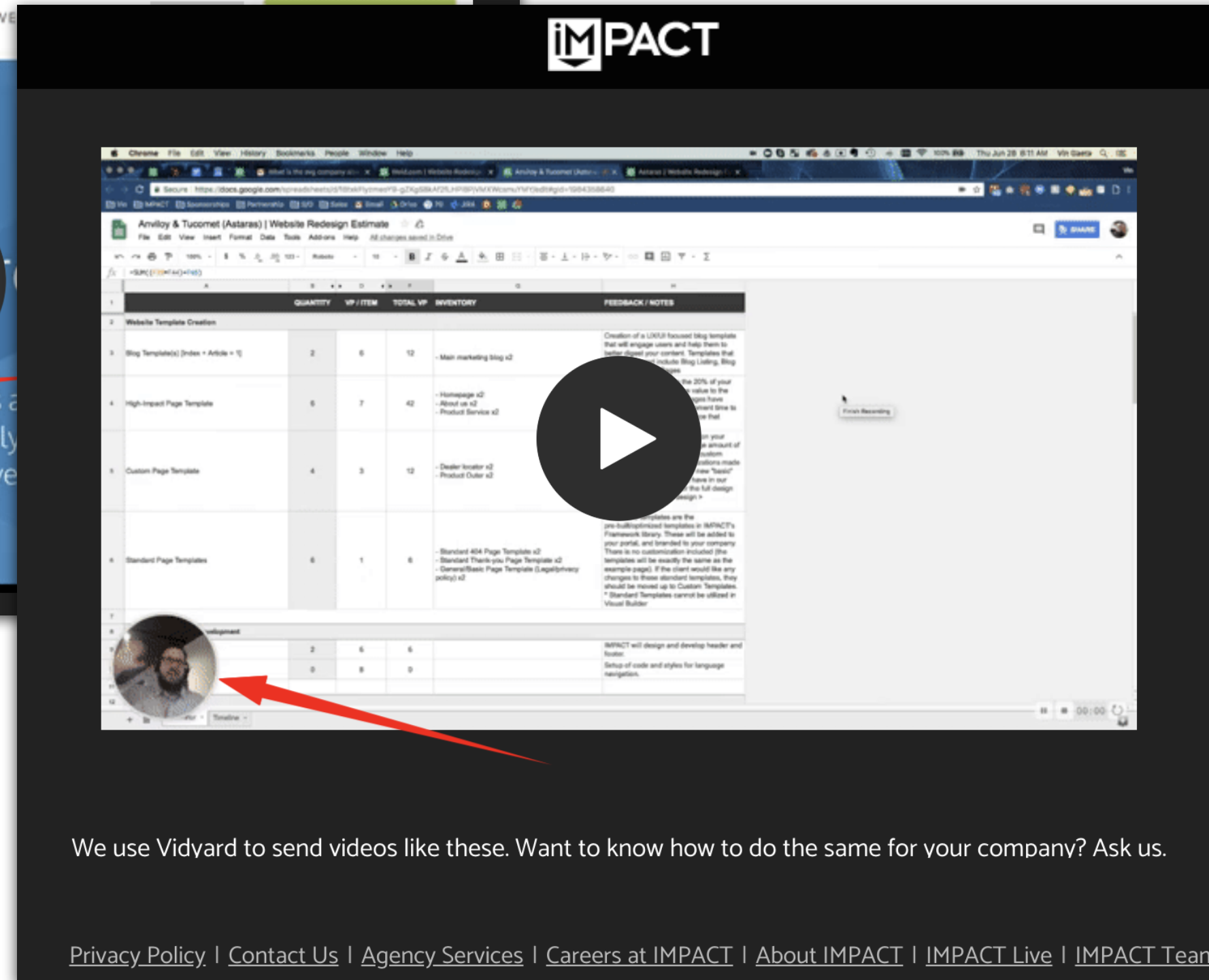
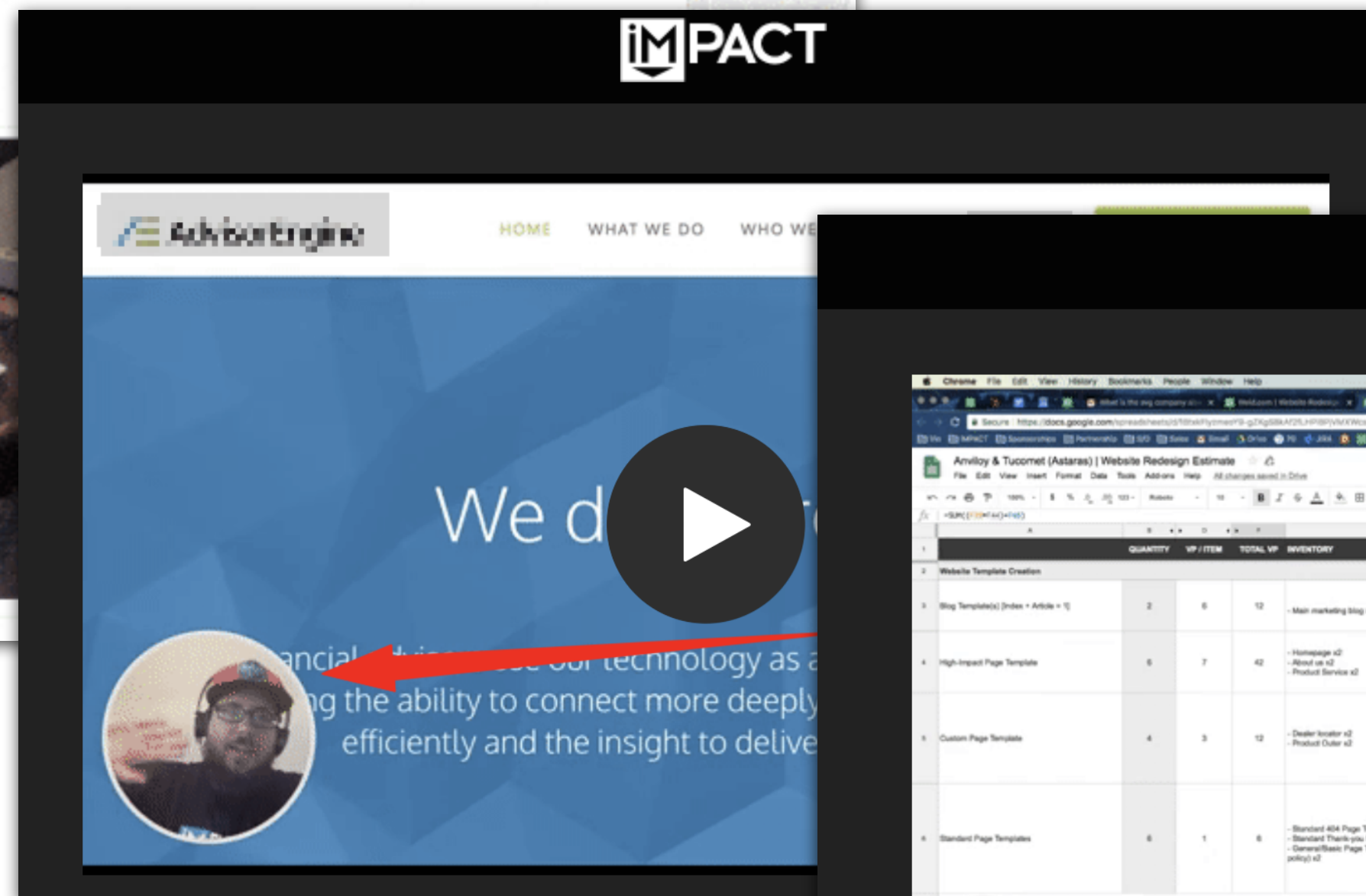
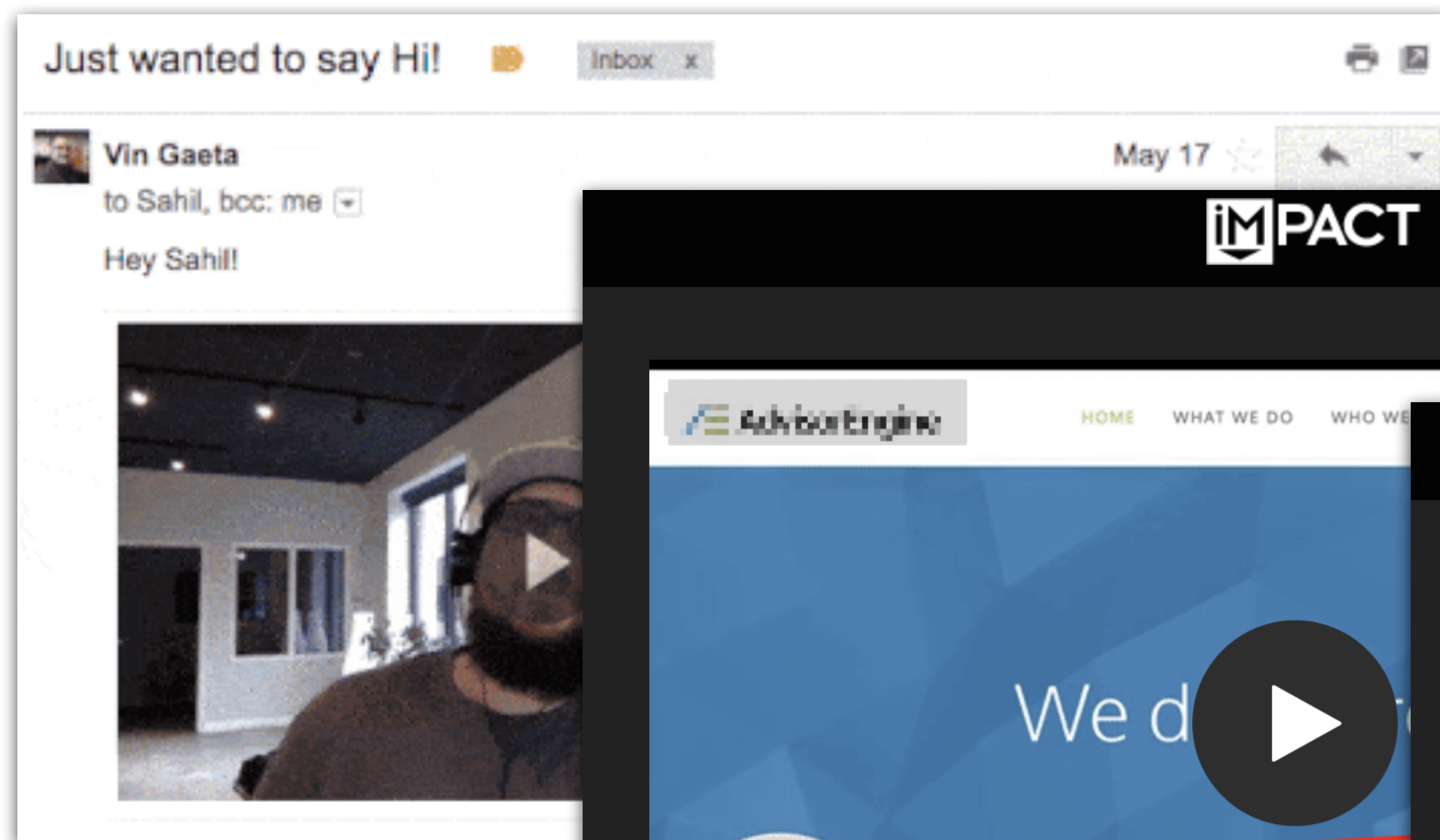
What content distribution channels do you plan to add to your marketing efforts in the next 12 months?



*New option in 2018


VIDEO IN THE SALES PROCESS:

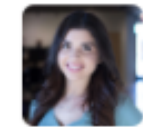
MORE EFFICIENT, EFFECTIVE, AND MORE HUMAN COMMUNICATION TACTICS



RESOURCE: 4 step-by-step scenarios that IMPACT used to deploy video

LEAD MANAGER/CONNECTION SPECIALIST OWNING LIVE CHAT

 Ok. Let me get you connected!



Myriah Anderson 10:31 AM

joined conversation from Playbook [Agency Microsite - Master Routing](#) and Goal [Leadbot Qualified](#)



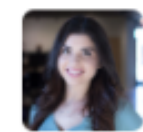
IMPACT 10:32 AM

marked as CQL - ⚡⚡⚡



IMPACT 10:32 AM

I'll send you a meeting invite. What's your email address?



Myriah Anderson 10:32 AM

Hi there!

I'm happy to answer any questions you have :)

Read



Site Visitor 10:33 AM

great! I am really looking for overall budget information which I will r
would like to go with your agency to do the redesign and reboot of

OPEN ^



Steve ~~XXXXXXXXXX~~ 7:12 AM

Good...PPC is secondary to SEO/blog....i want to change our site to be configurators..something very different for our industry



Myriah Anderson 7:13 AM

Absolutely- I agree that it's really something different for your industry. I'll have to connect with Jason Rose, I'd love to see conversions on the configurators so far.



Steve ~~XXXXXXXXXX~~ 7:14 AM

We have to optimize, etc....but they are pretty good



Myriah Anderson 7:14 AM

That's good to hear!



Steve ~~XXXXXXXXXX~~ 7:15 AM

BTW, thanks for everything....I thought your work was excellent



Myriah Anderson 7:15 AM

Thank you! That means a lot. I really enjoyed working with you all :)

PODCASTING

Post Details

VideoPostShares

Stephanie Cassteyens

Nick Sal

zoom

IMPACT Branding & Design: The IMPACT Show Episode 54: Content Length, Marketing Skills for the Future, and Creating a Crisis Plan...

Nick and Steph are back LIVE for the IMPACT Show to wrap up your week! We'll be discussing the age old question of optimal content length, why you need a crisis plan, and a whole lot more at 11:00AM ET!

44:07 · Uploaded on 07/13/2018 · View Permalink

Performance for Your Post

Peak Live Viewers16

Minutes Viewed647

Video Views272

10-Second Views152

Video Average Watch Time1:14

Audience Retention

Audience and Engagement

See our example: impactbnd.com/show

OUR PLAYBOOK FOR INBOUND SUCCESS

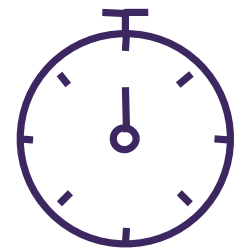
WITH HUBSPOT SALES HUB



CENTRALIZE INFO
TRACKING



STANDARDIZE PROCESSES



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EXTRACT INSIGHTS



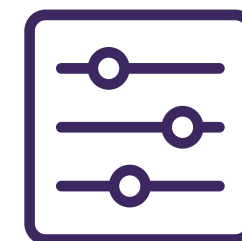
CLOSING DEALS FASTER



FOCUSING ON CUSTOMER
SUCCESS

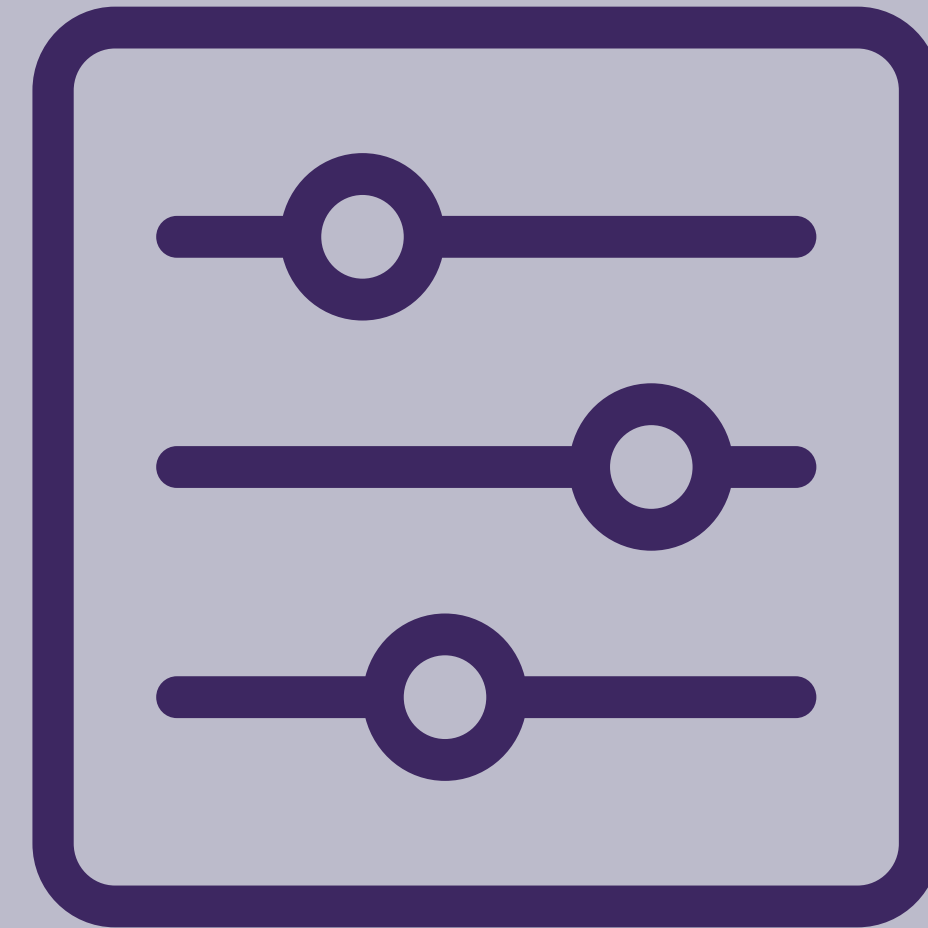


EXPANDING OUR INBOUND
SALES TOOLSET



**SUSTAINING TEAM SUCCESS
AS WE GROW**

EPILOGUE: SUSTAINING SUCCESS AS THE TEAM GROWS



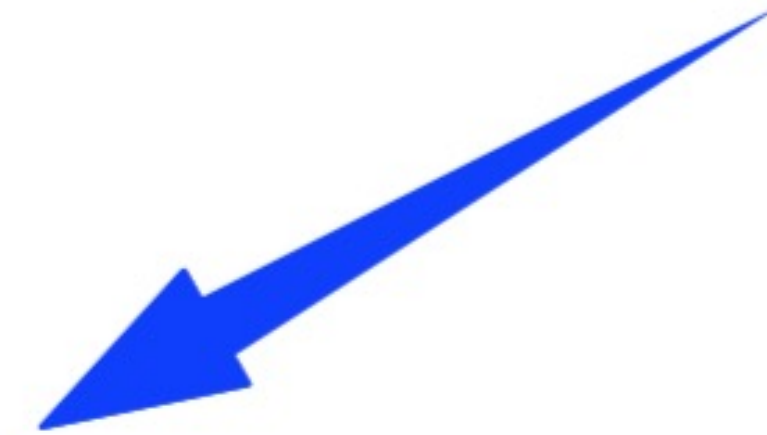
FOCUSING ON “THE URGENT” PUTS PROCESS AND TRACKING AT RISK...

Sustained Growth & Success - 60% Complete

- **Grow Revenue - 63% (OFF TRACK)**

Hit the monthly revenue targets for each revenue channel

- Apr: \$544,771 (DONE)
- May: \$590,980 (88% - MISSED)
- June: \$387,194 (OFF TRACK)
- Qtr: \$1,522,945 (OFF TRACK)



- **Measure & Improve Sales & Success Performance - 34% OFF TRACK**

Develop more sophisticated, real-time dashboards to track leads/conversations booked to scheduled, Audit to Continuation conversion rates, HubSpot Sold MRR, and individual performance

- **Improve Sales & Success Operations - 50% ON TRACK**



Complete Implementation of the Customer Success Manager role, development of Sales Operations Position, development of Client Success Specialist Position, finalize and launch the Marketing & Sales SLA

- **Develop IMPACT's Strategic Partner Network - 100% DONE**

Create a mutually beneficial, legal Partnership Agreement, develop onboarding program for Partners

- **Fulfill & Expand IMPACT's Sponsorship Program - 47% ON-TRACK**

Ensure delivery on promise of initial Sponsors, sell additional sponsorship and media, Finalize podcast sponsorship program, setup IM Live 2019 Sponsors for Success

MAINTAINING QUARTERLY OBJECTIVES + KEY RESULTS (OKR'S)

This is the responsibility of the sales leader, in consultation with his direct team and peers on IMPACT's leadership team.

IMPACT's Q1 Objectives

Sustained Growth & Success

- Develop best fit matrix / Criteria for moving stages in updated process (with audit #2) - Launch by mid Jan
- Update the process & presentation deck to show offering updates (and audit etc)
- Update to the website to reflect offering updates (services offerings), get our top ranking for Inbound Marketing Agency back
- Revenue targets/goals (agency, education)
- Improve revenue and deal tracking (with all new things added)
- MSA is updated and quick to sign (Feb 14 <3)
- Sell 2 webinars

Q2 2018 | Sales Objectives & Key Results (OKRs)

OO: "Sustainable Revenue Growth"

- **Revenue Targets (provided THINK onboards in April)**
 - April: \$XXX,XXX
 - May: \$XXX,XXX
 - June: \$XXX,XXX
- **Performance**
 - \$XX,XXX sold of consulting / training / workshops
 - CSM Objective (once rolled out): % portfolio revenue increase
 - # of audits sold / audit to MRR sold
 - X new major clients (or audits) by EOQ (% of revenue increase / mo. / qtr.)
 - Conversion rate of BOFUs from X to X (# of audits sold > Audits to MRR conversion)
 - HubSpot sold MRR goal
- **Operations**
 - Client Success Manager beta launched by 4/15, full launch by 6/1
 - Updated SOWs for each service offering
 - Create Client Success Specialist role (onboarding, job description, metrics)
 - Create Sales Operations Specialist role (onboarding, job description, metrics)
 - Project plan for video content in sales

PEOPLE TOOLS: BECAME IMPORTANT TO HELP SCALE

People Tools

- Salary Tiers
- Job Descriptions
- Skill Definitions and Recommended Training
- Quarterly Reviews
- Core Value Definition Clarity
- Individual Development Plan

This is a demo, not a training. Will go fast, I have been working on.

IMPACT Individual Development Plan

Team member: **NAME**

Date created: **DATE**

Your Vision:

	Short-term (1-2 years)	Long-term (3-5 years)
Professional Goals: Future positions, tiers, career path		
Personal Goals:		
Financial Goals:		

Top 5 Strengths (Personally and Professionally):	5 Opportunities for Growth:
1. 2. 3. 4. 5.	1. 2. 3. 4. 5.

Quarterly Individual OKRs (3-5)

ARE YOU A NEW LEADER OF INBOUND SALES NINJAS?

GET TO KNOW TOM DISCIPPIO

SALES • LEADERSHIP

Managing a Sales Team: 7 Lessons from a First-Time Sales Leader

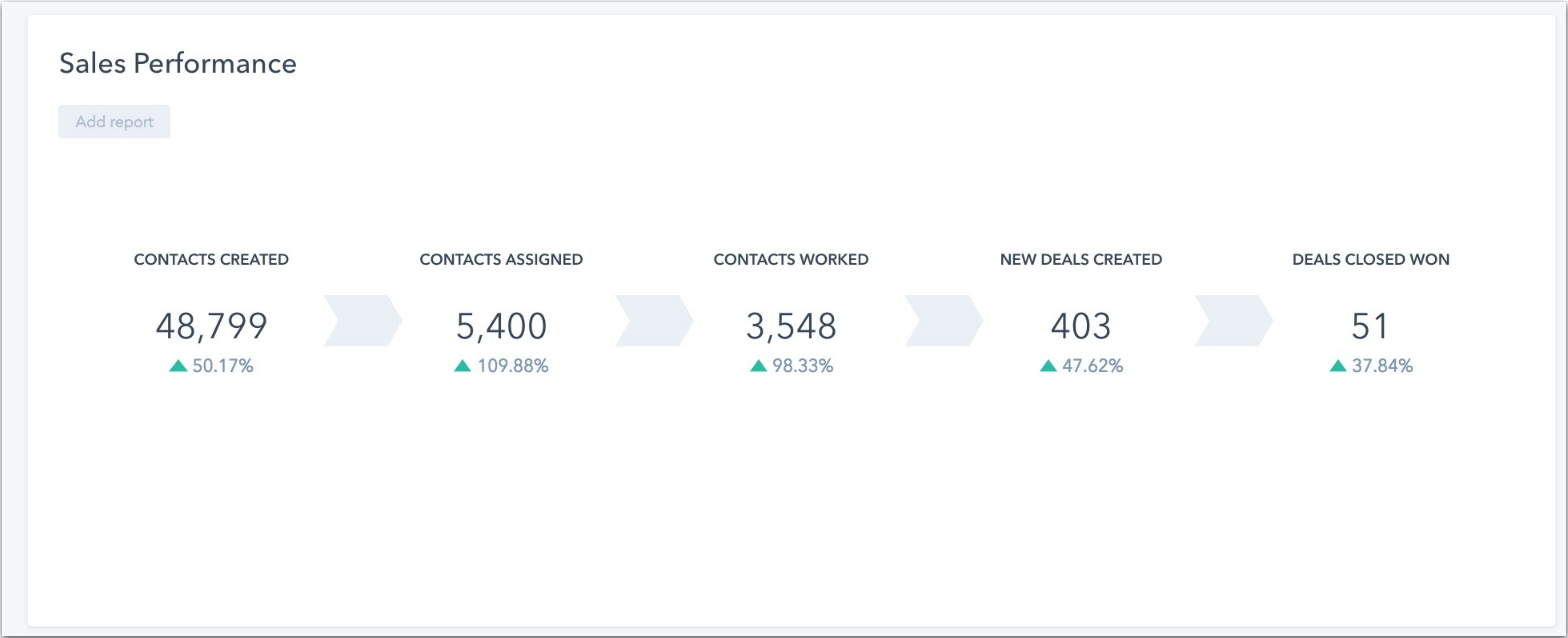


By: [Tom DiScipio](#) January 25th, 2018




I wasn't always in Sales. I graduated college with a degree in Graphic Design and Presentation and minored in Art. My first real job out of college was working as a production associate at a local sign shop, assisting with digital design and installation of signage. Fortunately for me, the next step in my career was joining Bob in the early days of IMPACT, continuing the execution of creative work. As we grew

THE INVESTMENT IS WORTH IT, YOU'LL SEE!



WANT TO LEARN MORE ABOUT HOW IMPACT DOES INBOUND SALES (AND HOW YOU CAN TOO?)

LET'S CHAT LATER
OR REQUEST HELP VIA OUR WEBSITE



Schedule Time to Talk

We'd Love to Hear from You

How can we help?

What is your biggest marketing challenge?*

What are your marketing goals? What's standing in your way?

First Name*

First Name

Last Name*

Last Name

Email ([Privacy Policy](#))*

Email

Phone*

Phone

Company*

Company

Website*

Website


What best describes your industry?*

- Industry -

How many employees work there?*

- Number of Employees -

Can I help you determine if we're the right agency partner?



NEED A FREE CRM THAT'S BUILT TO SCALE?

HUBSPOT'S IS FREE TO TRY:

IMPACTBND.COM/GET-HUBSPOT



GET THE DECK

impactbnd.com/ninja

GET TO KNOW



Visit our website: impactbnd.com

LET'S CHAT

Let's connect after the event or online



QUESTIONS?

**WHAT'S YOUR
EXPERIENCE?**

BE BOLD. ASK AWAY...