

THINGS EVERY HUBSPOT ADMIN NEEDS TO KNOW

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Agenda

- 01** Intro (you are here)
- 02** Implementing HubSpot
- 03** Optimizing HubSpot
- 04** Troubleshooting HubSpot
- 05** AMA and next steps



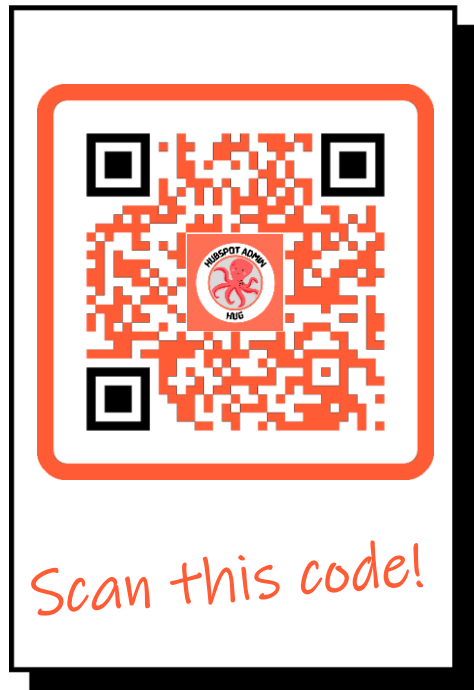
A Quick Note on Scope

Being a good admin requires a lot of skills beyond just HubSpot knowledge:

- Systems thinking
- Documentation
- Goal setting
- Strategy
- Logic
- Curiosity
- Etc...

For this presentation, we'll focus solely on the HubSpot features and tools that will help you implement, optimize, and troubleshoot your HubSpot account. But if you want to learn these other skills...

Join the HubSpot Admins User Group!



Weekly webinars on useful skills and HubSpot hacks!

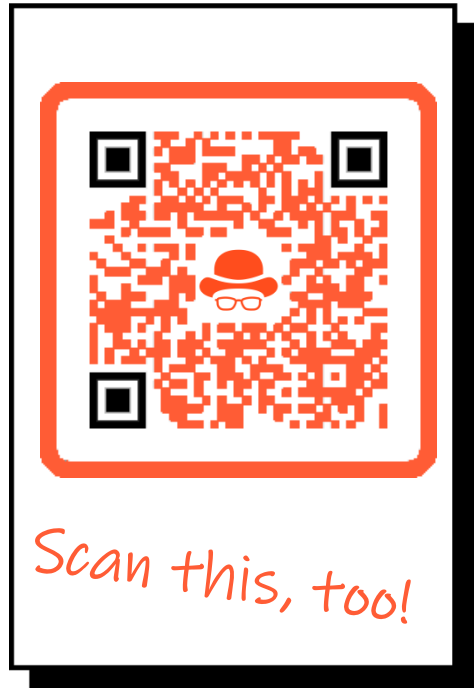
See upcoming events here:

<https://events.hubspot.com/hubspot-admins/>





(Or just scan the QR code!)

We have an in-person meetup at the Sprocketeer Lounge today at 4:00!

Follow #HubSpotTipsAndTricks



Daily HubSpot feature updates posted to LinkedIn, Twitter, Instagram, and Facebook!

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IMPLEMENTING HUBSPOT



Implementing HubSpot

1

Basic

- Properties
- Imports
- Users

2

Intermediate

- Views
- Records
- Data Sync

3

Advanced

- Objects
- Associations
- Sandboxes

Implementing HubSpot

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Properties Cheat Sheet!



This PDF is THE BEST resource on HubSpot's default properties that's ever been created (probably).

You should be able to access this from the INBOUND mobile app, but here's a link just in case:

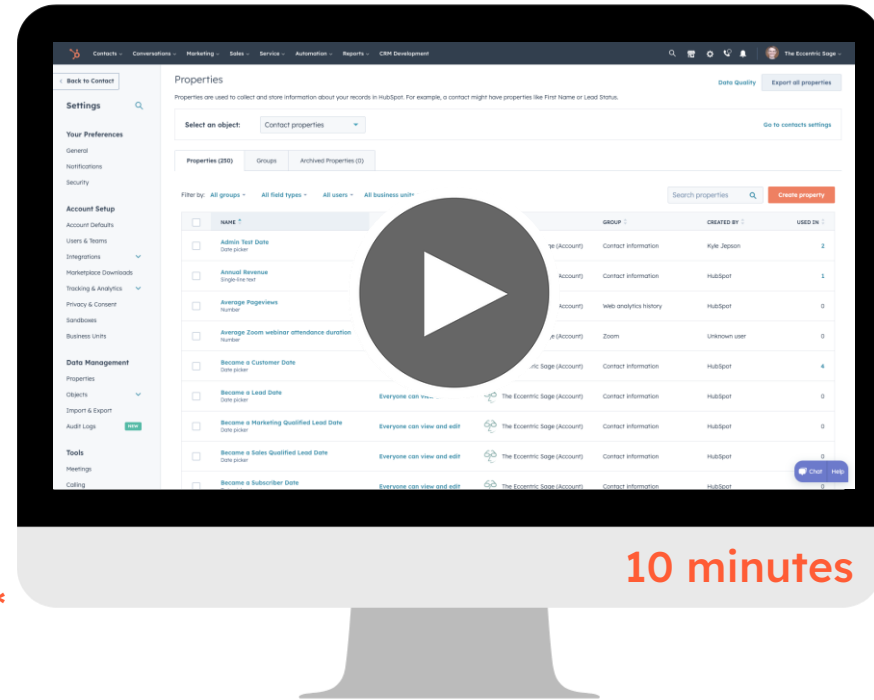
bit.ly/hubspotpropertiescheatsheet

Basic Implementation

Properties

Things you should know about properties:

- Field type
- Rules (text, date, or number only)
- Calculations*
- Field-level permissions**
- COMING SOON: Conditional Logic*



*Professional subscription required

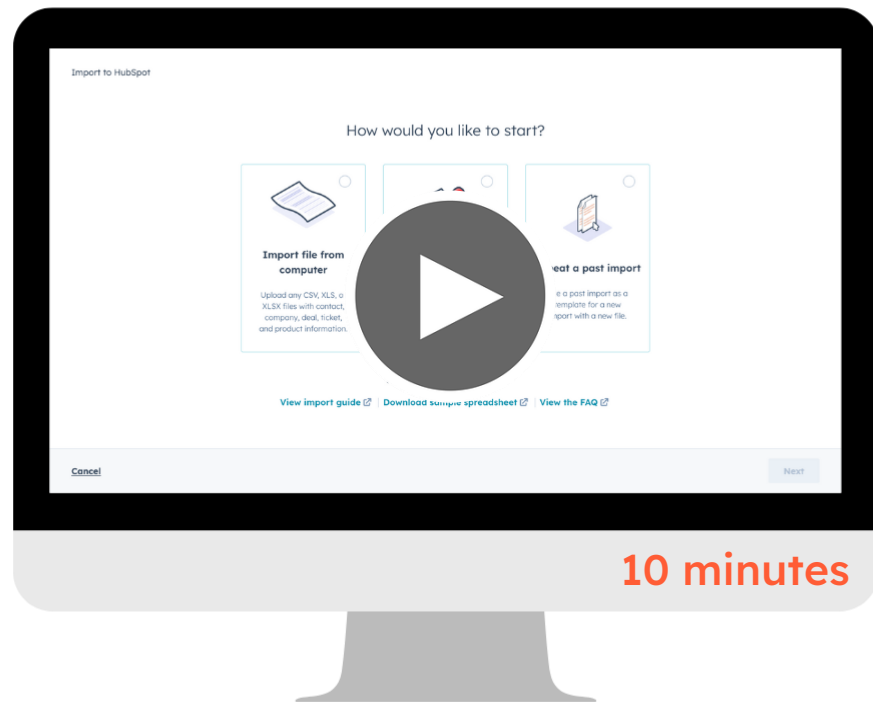
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Basic Implementation

Imports

HubSpot's importing tool has a lot of powerful features built into it:

- Data validation
- Create properties on the fly
- Unique IDs
- Association in imports
- Post-import results
- Repeat an import

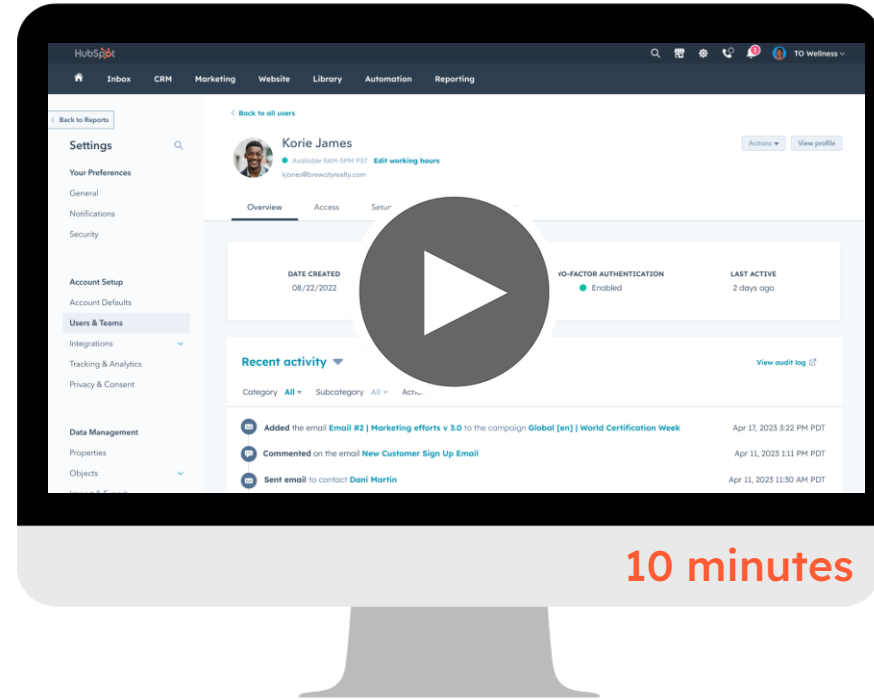


Basic Implementation

Users

Things you should know about users:

- Users
- Seats
- Teams
- Presets*
- Permission sets**



*Professional subscription required

**Enterprise subscription required

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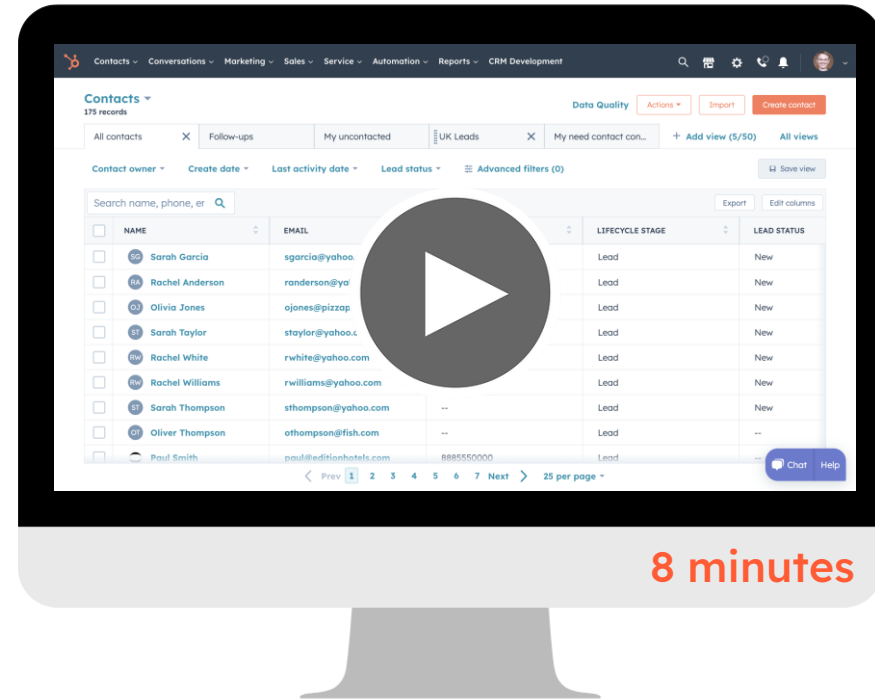
- Objects
- Associations
- Sandboxes

Intermediate Implementation

Views

Things you should know about views:

- Filters (and useful properties)
- Preview pane
- Inline editing
- Emojis and Tags*
- Board customization* (by pipeline**)



*Sales Hub Starter

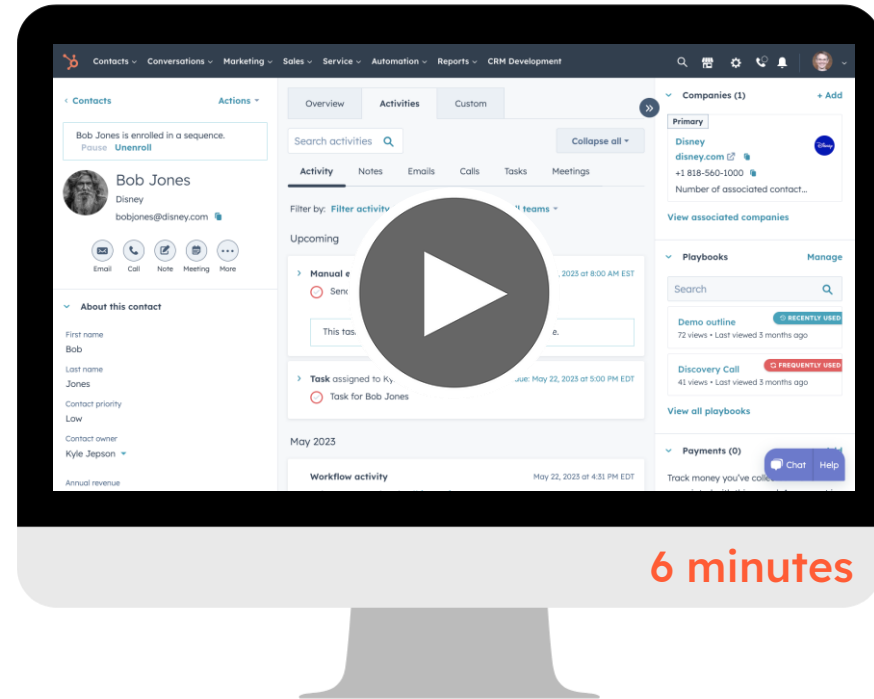
**Sales Hub Professional

Intermediate Implementation

Records

Things you should know about records:

- Sidebars*
- Center column**
- Card customization**
- Record creation form*



*Functionality varies by subscription

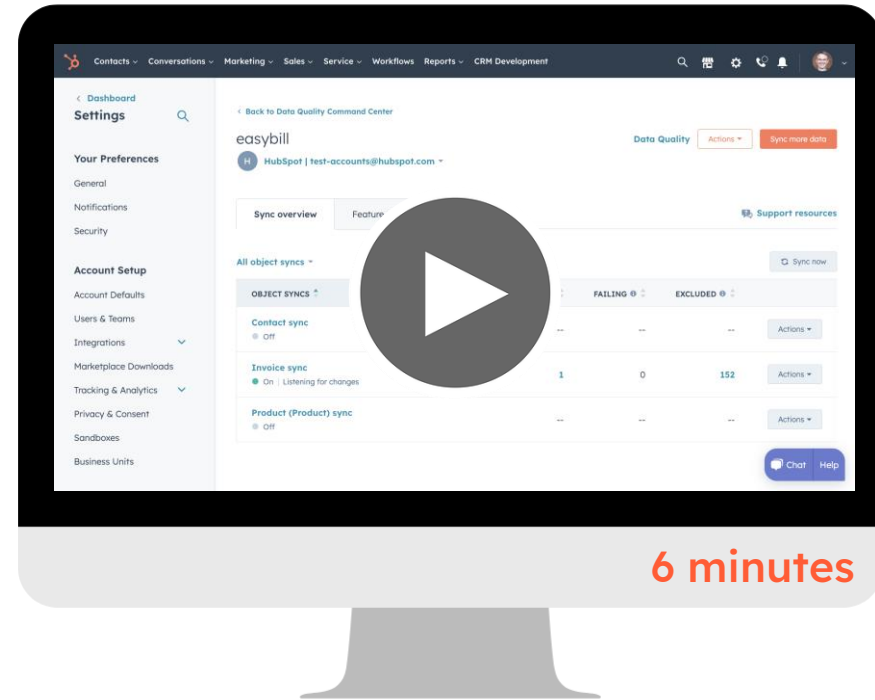
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Intermediate Implementation

Data Sync

Things you should know about Data Sync integrations:

- Setup
- Fix Formatting Issues*



*Operations Hub Starter (Professional for automation)

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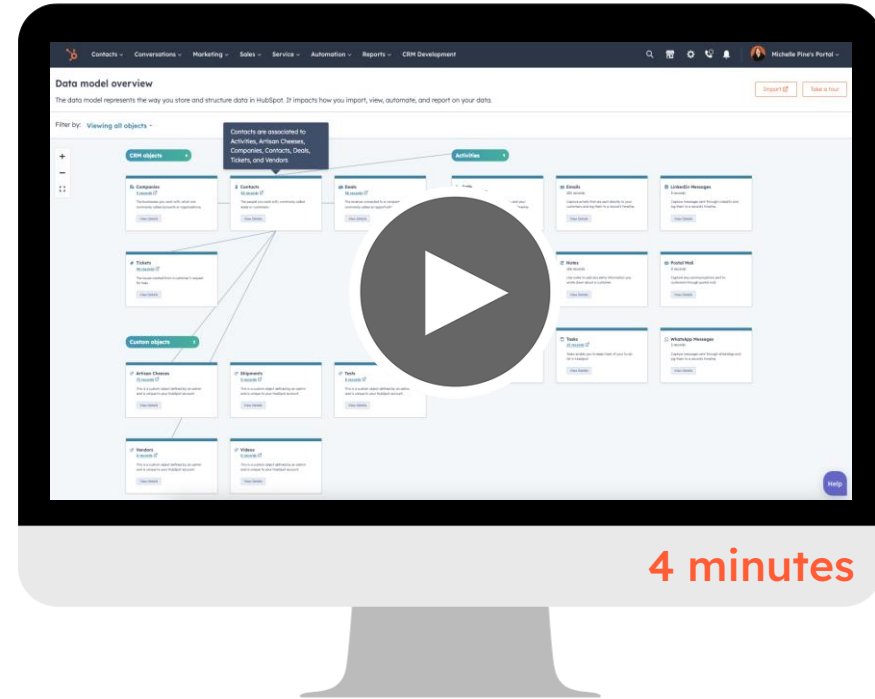
- Objects
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Advanced Implementation

Objects

Things you should know about objects:

- Data model overview
- Custom objects*



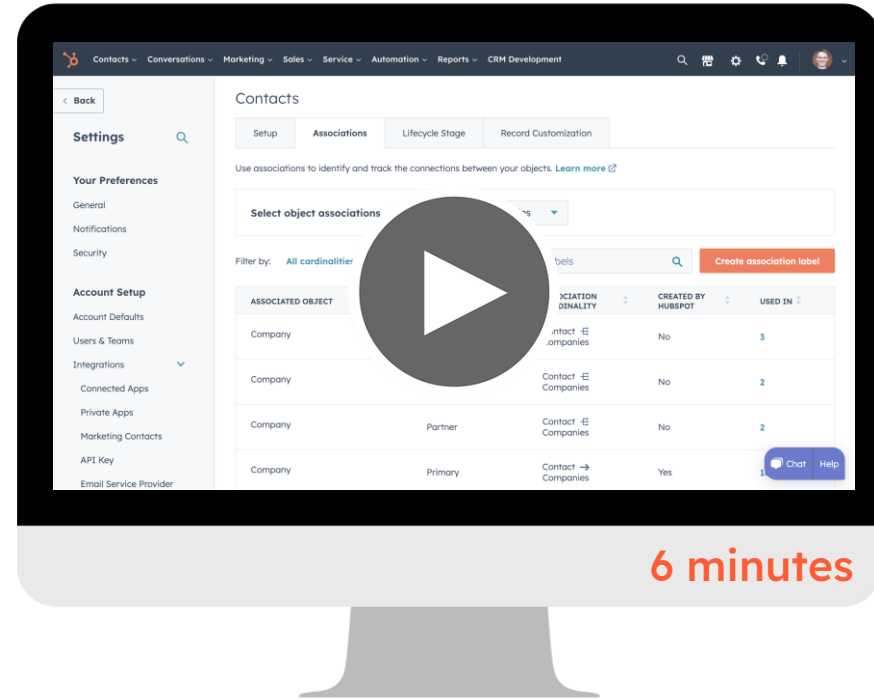
*Enterprise subscription required

Advanced Implementation

Associations

Things you should know about associations:

- Customize cards*
- Custom labels**
- In workflows** and reports
- COMING SOON: Same-object associations!



*Starter subscription required

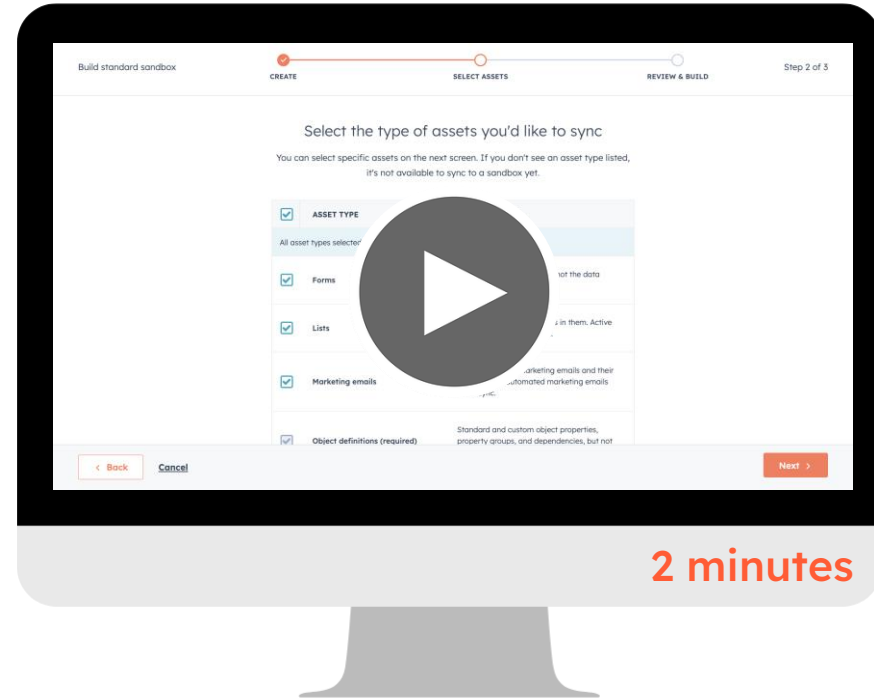
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Advanced Implementation

Sandboxes*

Things you should know about sandboxes:

- They exist



*Enterprise subscription required

Let's Shuffle!



Source: Pexels



OPTIMIZING HUBSPOT



Optimizing HubSpot

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- Reports
- Workflows

2

Intermediate

- Marketing
- Sales
- Service

3

Advanced

- Operations
- CMS

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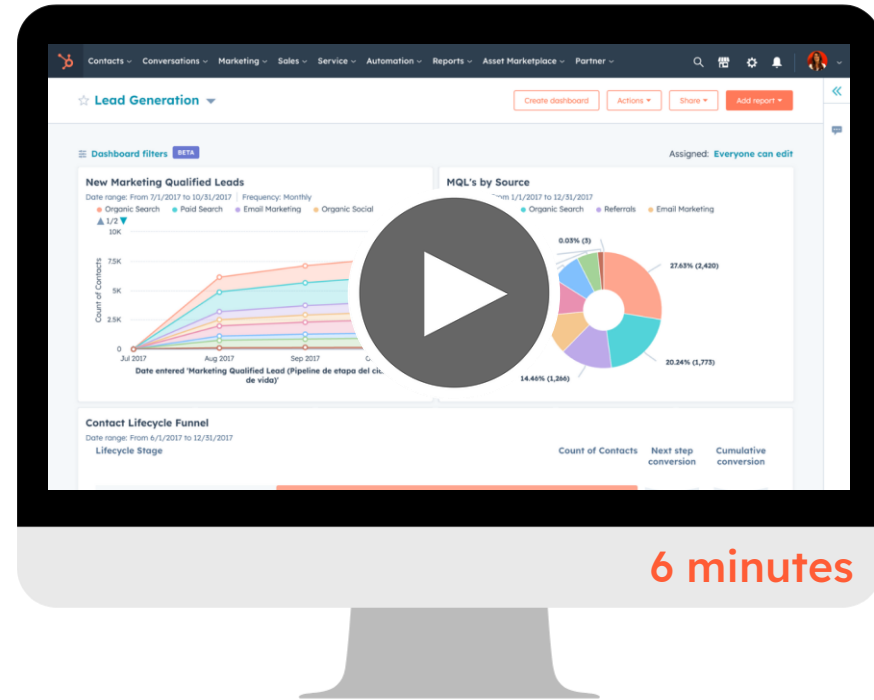
- Operations
- CMS

Basic Optimization

Reports

Things you should know about reports:

- Standard reports and dashboards
- Custom reports*
- Customizing dashboards



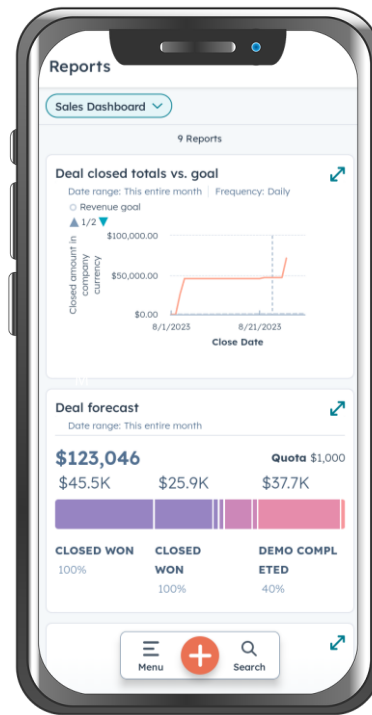
*Professional subscription required

Basic Optimization

Reports

Things you should know about reports:

- You can also access your dashboards in the mobile app!

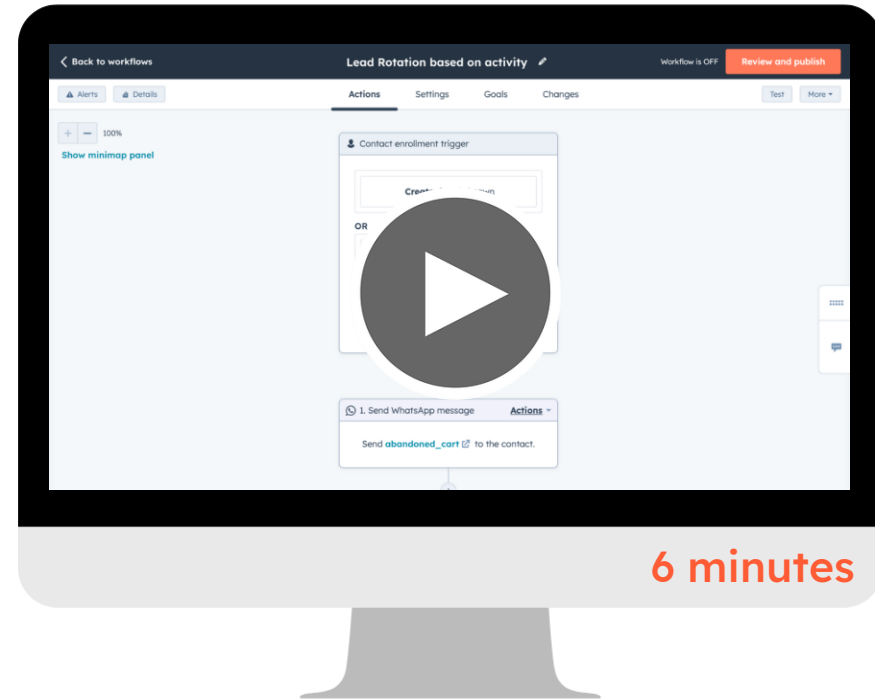


Basic Optimization

Workflows*

Things you should know about workflows:

- Organizing
- Actions
- Data panel



*Professional subscription required

Optimizing HubSpot

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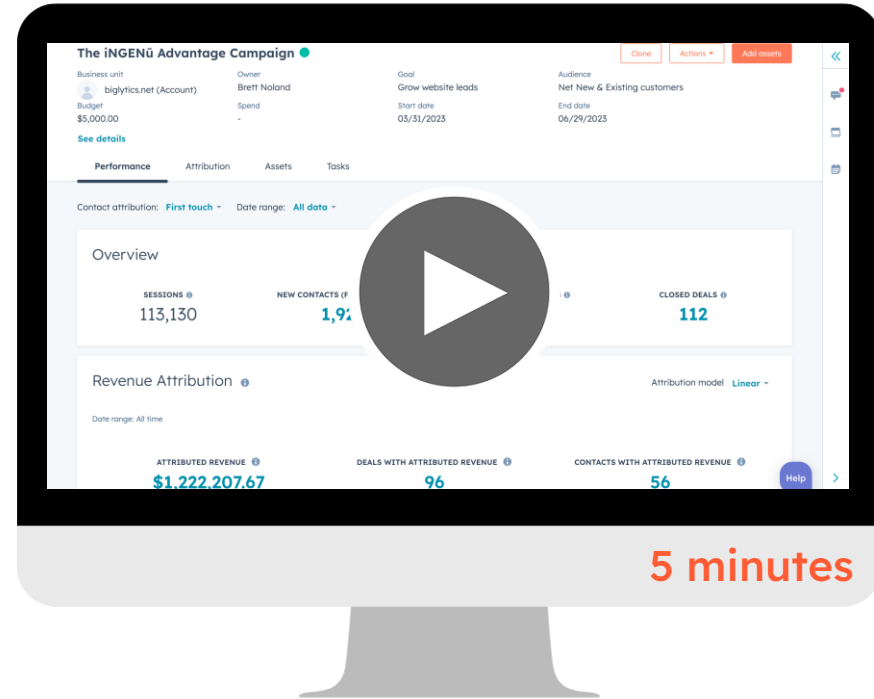
- Operations
- CMS

Intermediate Optimization

Marketing Hub

Things you should know about Marketing Hub:

- Content assistant
- Collaboration sidebar
- Campaigns*
- Approvals**



*Professional subscription required

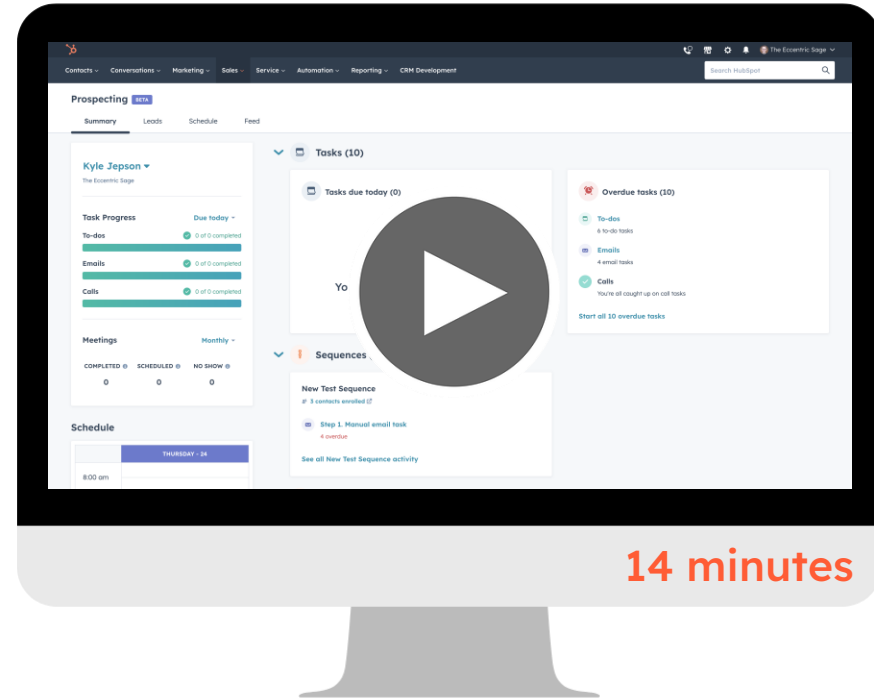
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Intermediate Optimization

Sales Hub

Things you should know about Sales Hub:

- Content assistant
- Forecasting*
- Prospecting*
- Handoffs*



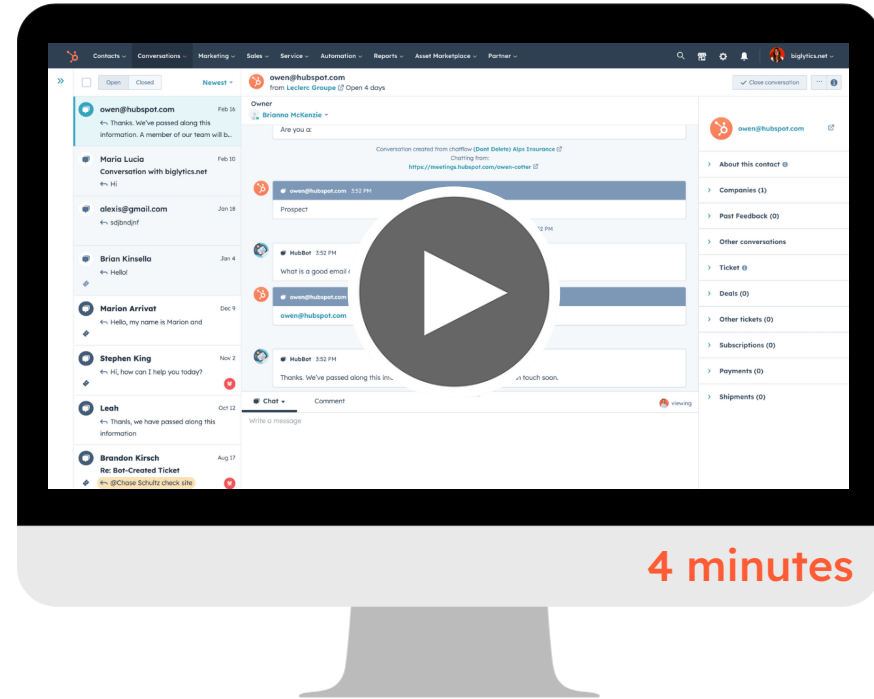
*Professional seat required

Intermediate Optimization

Service Hub

Things you should know about Service Hub:

- Content assistant
- Customer portal*
- Capacity limits**



*Professional subscription required

**Enterprise seat required

Optimizing HubSpot

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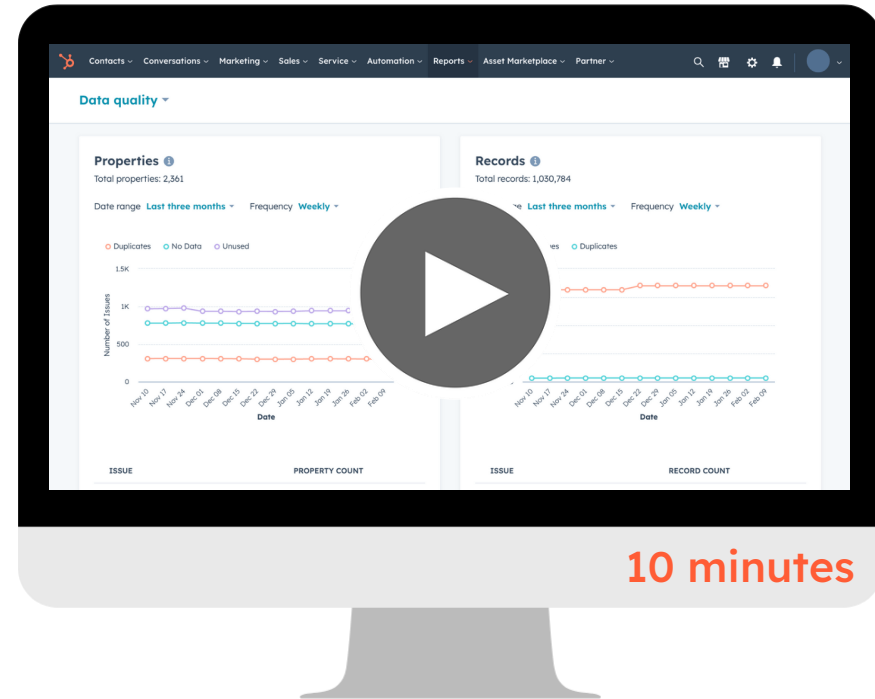
- Operations
- CMS

Advanced Optimization

Operations Hub

Things you should know about
Operations Hub:

- Data quality command center*
- Workflow upgrades*
- Datasets**
- Snowflake data share**



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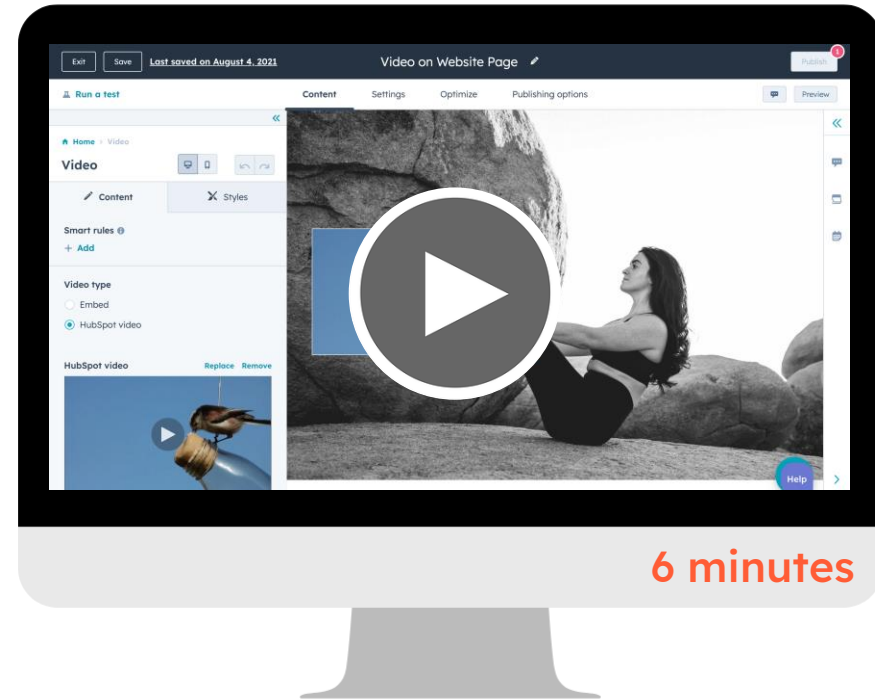
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Advanced Optimization

CMS Hub

Things you should know about CMS Hub:

- Content assistant
- Templates
- HubDB*
- Adaptive testing**



*CMS Professional or Marketing Enterprise

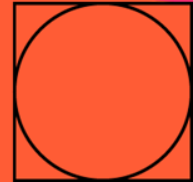
**CMS/Marketing Enterprise

Let's Shuffle!



Source: Pexels

TROUBLESHOOTING HUBSPOT



Troubleshooting HubSpot

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Basic

- Histories
- Logs
- Security

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- Impersonate

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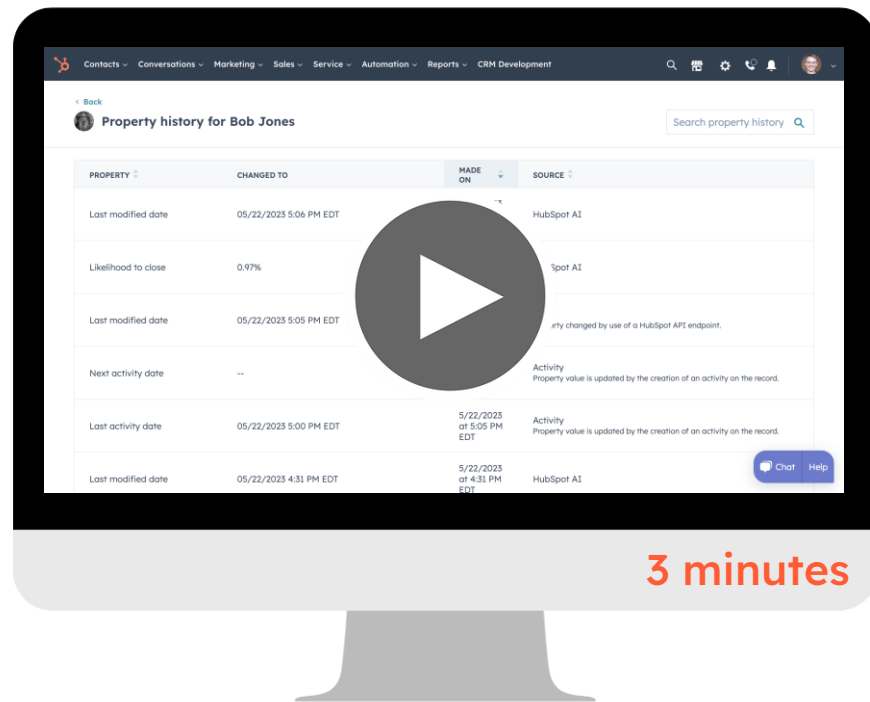
- Impersonate

Basic Troubleshooting

Histories

Things you should know about histories:

- Property history
- Association history
- Merge IDs property
- Export contact data

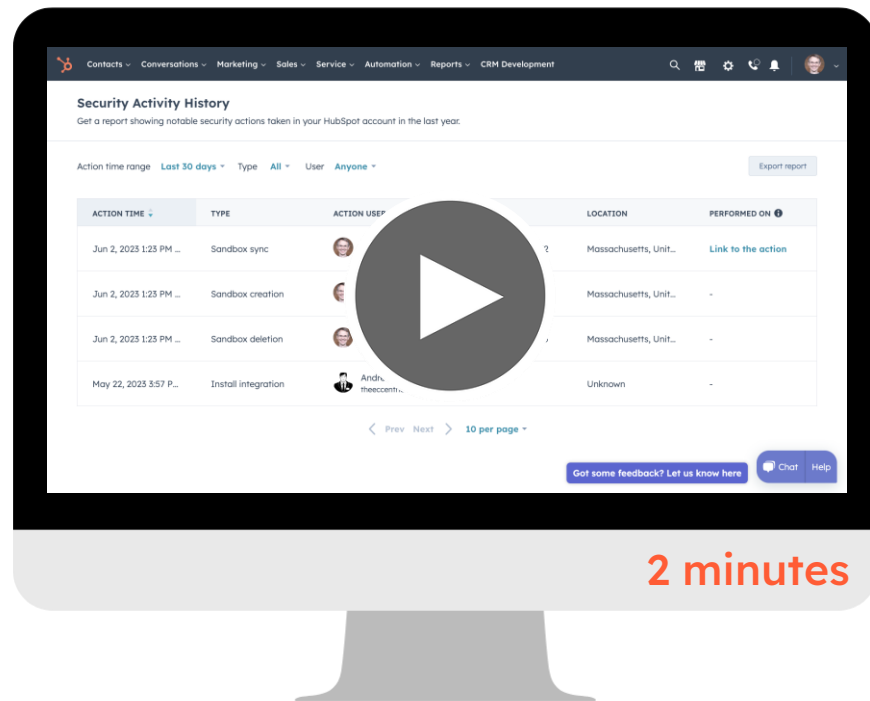


Basic Troubleshooting

Logs

Things you should know about logs:

- Login history
- HubSpot employee access history
- Security activity history
- Content activity history*
- Centralized audit log**



*CMS Enterprise Only

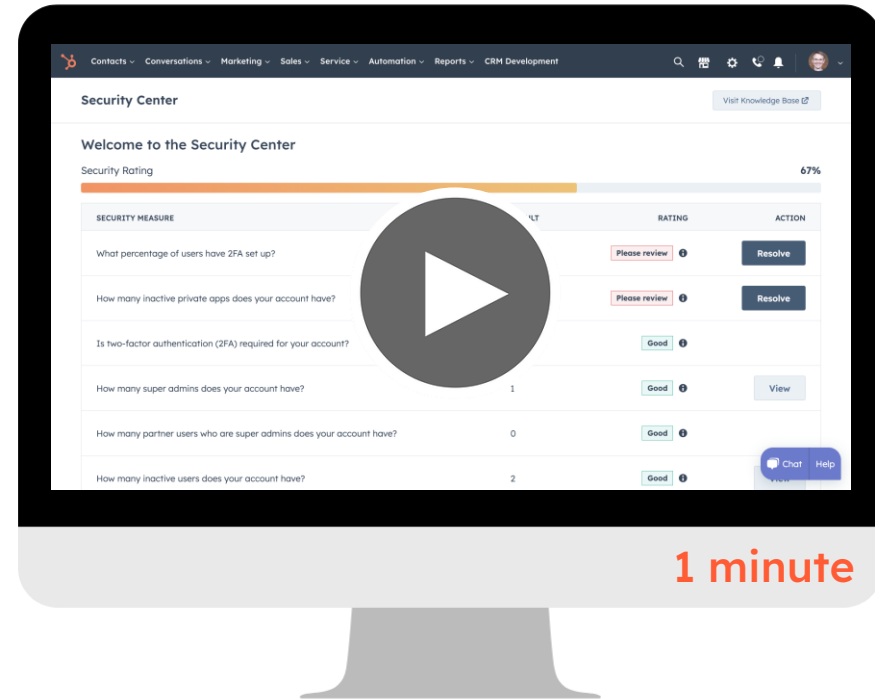
**All Enterprise Subscriptions

Basic Troubleshooting

Security Center

Things you should know about the Security Center:

- Rating
- Measures
- Actions



Troubleshooting HubSpot

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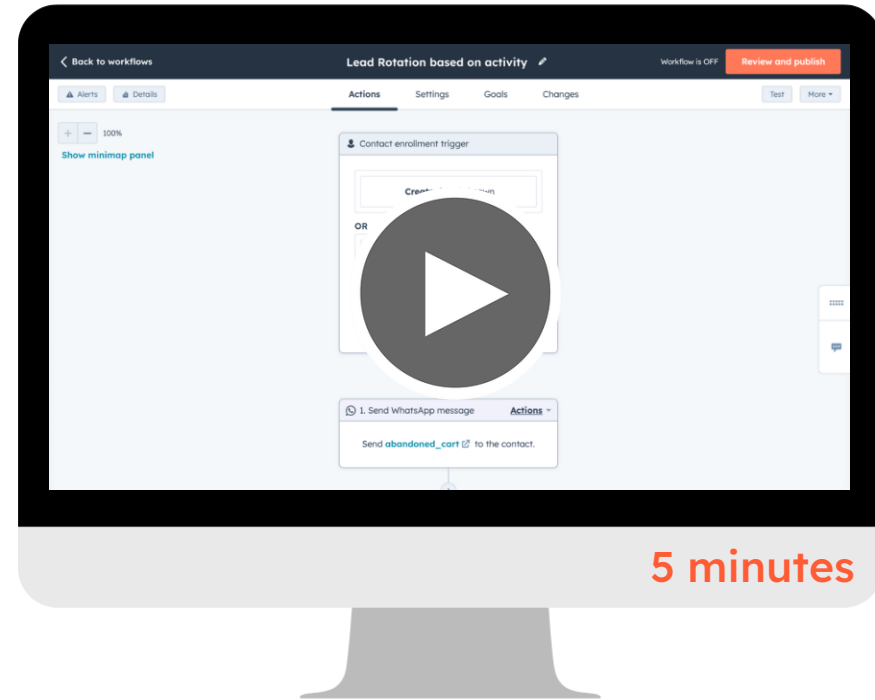
- Impersonate

Intermediate Troubleshooting

Workflows*

Things you should know about troubleshooting workflows:

- “Needs review” tab
- Issues detail panel
- Action logs
- Enrollment testing
- Re-enrollment



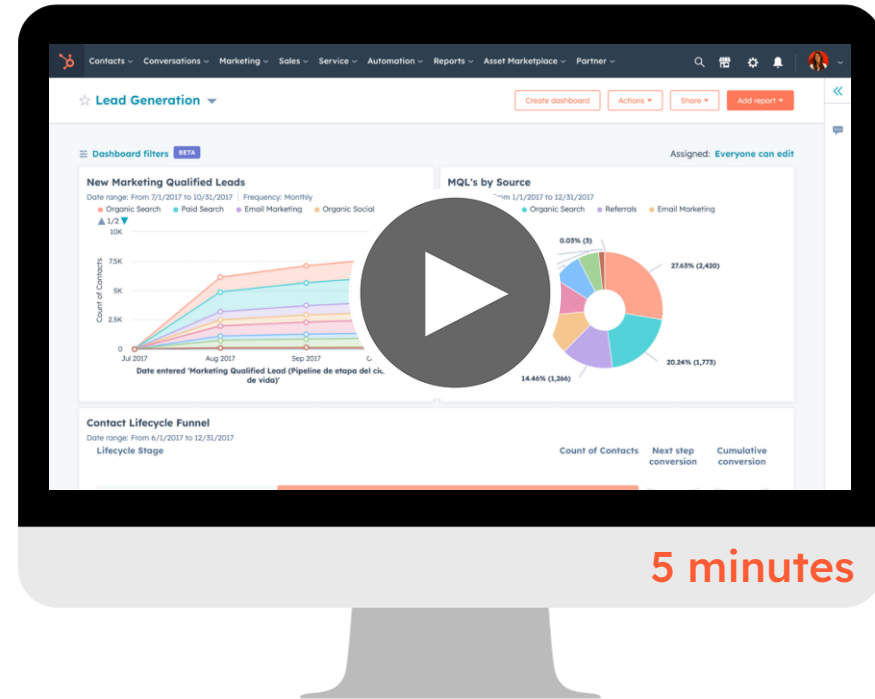
*Professional subscription required

Intermediate Troubleshooting

Reports

Things you should know about troubleshooting reports:

- Filters
- Refresh rates



Troubleshooting HubSpot

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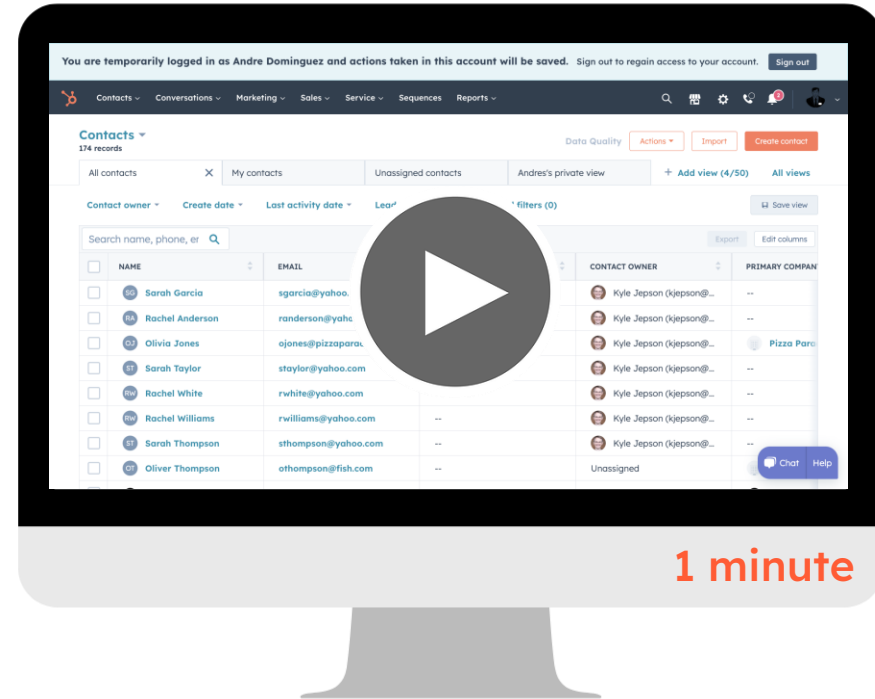
- Impersonate

Advanced Troubleshooting

User Impersonation*

Things you should know about user impersonation:

- Only available to super admins
- You can't impersonate another admin user
- You can't change user permissions while impersonating another user
- Sessions limited to 30 minutes.



*Enterprise subscription required



AMA AND NEXT STEPS



Download This Deck!








While I'm up here answering questions, feel free to download a PDF version of this presentation:

bit.ly/kylejepson2023



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THANK YOU

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