

## Sample Training Session Agendas

Below are sample options for your HubSpot Training Session. We will customize each session based on your implementation and as time permits. We encourage you to login to Hubspot & follow along as well as ask questions as they may arise.

### Getting your profile and preferences set up

- Setting up your profile & settings

### Sales Hub - Minimum of (1) 1-hour session

- Connecting your Email
- Connecting Calling
- Connecting your Calendar
- An overview of Contacts, Companies, and Deal records
- How to find and manage your pipeline
- How to create and manage a deal from the beginning to closed won/lost
- Creating Goals in the Forecast tool
- Using Tasks
- Creating Coaching Playlists
- Uploading and sending Documents
- Using scheduling pages
- Viewing Sales Analytics
- Creating Sequences (*Professional*)
- Playbooks (*Professional*)
- Forecasting (*Professional*)

### Marketing Hub - Minimum of (1) 1-hour session

- An overview of Contacts and Companies
- Connecting your Ad Accounts
- Creating and managing lists
- Creating and managing emails
- Creating and managing landing pages
- Connecting your Social Media Accounts and posting (*Professional*)

- Creating website pages and blog pages
- Using the SEO tool (*Professional*)
- Setting up and managing campaigns (*Professional*)
- An overview of File Manager
- Creating and managing CTAs
- Creating and managing forms
- Creating and managing workflows
- Predictive lead scoring (*Enterprise*)
- Adaptive testing (*Enterprise*)
- Multi-touch revenue attribution (*Enterprise*)
- Customer journey analytics (*Enterprise*)

### **Service Hub - Minimum of (1) 1-hour session**

- Setting up and managing your service pipeline
- Creating customer ticket properties
- How to create and manage a ticket from the beginning to close
- Managing your connected inbox
- Feedback Surveys (*Professional*)
- Knowledge Base (*Professional*)
- Customer Portal (*Professional*)

### **General CMS Hub**

- An overview of CMS hub
- Creating and managing a webpage
- HubDB overview

### **General Ops Hub**

- An overview of functionality and integration options
- Using workflows

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## **Marketing Admin Training Agenda**

### **Minimum of (2) 1-hour sessions**

- An overview of Contact and Company records

- An overview of the File Manager
  - Creating, managing, and embedding forms
  - Creating property logic in forms
  - How to review a property's history
  - Managing marketing contact status
  - Lists versus Saved views
  - Contact and Company de-duplication and the Merge IDs property ● Creating contact health lists: Missing email, Missing FN/LN, etc.
  - Creating a suppression list for workflows and marketing emails
  - Creating and managing Campaigns
  - Workflow Best Practices
    - Naming conventions
    - Reviewing and solving workflow issues
    - Setting Goals
    - Reviewing the Change log ●
  - Creating Marketing Dashboards
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## **Sales Admin Training Agenda**

### **Minimum of (2) 1-hour sessions**

- Reviewing user creation, seats, team, presets and permission sets
- An overview of Contacts, Companies, and Deal records
- How to import and export records into HubSpot
- How to create new pipelines and update deal stages for existing pipelines
- How to create new custom deal, contact, or company properties
- Customizing deal records
- Customizing deal board and card view
- How to create deal tags
- How to create automation for a pipeline
- Creating Goals and Forecasting
- Using Sales Analytics to build Sales Dashboards
- Managing and replacing Documents
- Creating Snippets and Templates
- Setting up Sequences