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HubSpot Academy
Training Kit For Managers

HubSpot Sales Training Kit

A training kit for sales managers to train their teams on
HubSpot CRM & HubSpot Sales Software.

Welcome to Sales Training Boot Camp! This training kit is for sales managers to administer the HubSpot Sales Software Certification course to their sales team. The certification course features five classes that cover contacts, email templates, email extension, calling feature, and deals.

Have your team watch the classes ahead of time, or watch them together. Each class is 10 to 20 minutes of video time. Each section below will have a Watch, Discuss, and Activity section.

HubSpot Sales Software Certification
Table of Contents:

Prove Your Knowledge!

We're here to help:

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Step 1: Pass the Certification Exam
Step 2: Complete the Practicum

Contacts Class

1. Watch: Introduction to Contacts, Filters, and Views *(18 minutes)*

- Why focusing on contacts is vital to a modern sales process
- How to use custom views to focus on the most important contacts
- An example of a custom view for following up with contacts
- A walkthrough of organizing contacts in HubSpot CRM

2. Discuss: What actionable information about the contact do we need to support our sales process? What data is being collected and how can it be used to inform your outreach? Is there additional information that we need?

3. **Activity:** Have each sales rep create a custom contact view that's actionable and informative. Consider working together to create a default contact view that each rep can modify to fit their own various needs.

4. **Notes:** Fill in any customizations you'd like to make to this session to align with your sales team and/or process:

Email Templates Class

*Note for free CRM teams: You are limited to 5 templates per user. Consider upgrading to HubSpot Sales Pro.

1. Watch: Introduction to Email Templates *(20 minutes)*

- Why email templates are an essential tool for modern sales reps
- Best practices for converting emails into templates
- An example of a template that spurs contacts into action
- A walkthrough of creating an email template in HubSpot Sales

2. Discuss: Which email templates do we use for each buyer stage, and why? How do templates differ between territories? How are we using personalization to customize them for our prospect? How do they support the inbound sales methodology?

3. **Activity:** Fill out the worksheet titled "Email Template for Buyer Stage by Territory" with the templates to be used for each buyer stage and territory. Have each sales rep make a copy of the View-Only Google Doc, fill in the appropriate email template name (hyperlinked to the template), and save as a reference sheet. Optional: Create this reference sheet ahead of time to use as an example or to send a sales rep who can't complete this training program.

4. **Worksheets:** Email Template for Buyer Stage by Territory Worksheet

5. **Notes:** Fill in any customizations you'd like to make to this session to align with your sales team and/or process:

Email Extension Class

1. Watch: Introduction to Email Extension *(10 minutes)*

- The importance of context in sales
- How the HubSpot Sales email extension give your reps the context they need
- An example of using the email extension to add context to an email
- Walkthroughs demonstrating the email extension in Gmail and Outlook

2. Discuss: The email extension was built to save sales reps time. How does it keep reps from having to manually enter data into the CRM?

3. **Activity:** Install the email extension. Directions here Have each sales rep add themselves as contacts and send each other emails using the email extension. View the data that is being tracked, including opens and clicks.

4. **Worksheets:** No worksheets for this class

5. **Notes:** Fill in any customizations you'd like to make to this session to align with your sales team and/or process:

Calling Feature Class

*Note for free CRM users: You are limited to 15 minutes of call-recording feature, so consider skipping this activity for this class or upgrading to HubSpot Sales Pro.

1. Watch: Introduction to Calling Feature *(10 minutes)*

- Why calling at the right time is so important
- How the calling feature in HubSpot Sales can help your reps call at the best time
- An example of using HubSpot Sales Calling to get a contact on the phone
- A walkthrough of making calls from inside HubSpot CRM

2. Discuss: How can we use the calling feature to learn from each other's calls? Would a weekly or monthly Call-Recap meeting to listen to recorded calls (both good and bad calls) help us refine our prospecting skills?

3. **Activity:** Do a roleplay session in pairs, where each rep pretends to be a prospect for the other rep. Regardless of which buyer stage the 'prospect' is in, they should aim to either disqualify them or qualify them for the next buyer stage. Playback the recordings and discuss what went well, or not so well. This will be the first edition of your Call Recap meeting.

4. **Notes:** Fill in any customizations you'd like to make to this session to align with your sales team and/or process:

Deals Class

1. Watch: Introduction to Deals *(10 minutes)*

- Why tracking sales is important to sales success
- How your reps can use deals inside HubSpot CRM to track and prioritize sales
- An example of using deals to set end-of-month priorities
- A walkthrough of creating and organizing deals inside HubSpot CRM

2. Discuss: Why is it so important to have deal stages defined by an action that the prospect takes? What custom deal stages do we track?

3. **Activity:** Fill out the worksheet titled "Action by Deal Stage Worksheet" with actions a prospect must complete to reach the next deal stage. Have each sales rep make a copy of the View-Only Google Doc, fill in the appropriate actions and deal stages and save as a reference sheet. Optional: Create this reference sheet ahead of time to use as an example or to send a sales rep who can't complete this training program.

4. **Worksheets:** Action by Deal Stage Worksheet

5. **Notes:** Fill in any customizations you'd like to make to this session to align with your sales team and/or process:

Following this class, your team should be prepared to take the HubSpot Sales Software Certification exam. Good luck!

Click here to see who passed their certification in your HubSpot portal.

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Worksheet for Email Templates Class

Email Templates Class

Directions: Enter the email template to be used for each buyer stage, in each territory. Territories can be split up geographically, by buyer persona, by industry, etc. Need ideas for email templates? Read this post.

	Territory 1	Territory 2	Territory 3	Territory 4
Buyer Stage 1				
Buyer Stage 2				
Buyer Stage 3				
Buyer Stage 4				

Worksheet for Deals Class

Email Templates Class

Directions: Fill in the action a prospect must take to reach the next deal stage. Try to use clear and explicit actions that all prospects must take. Consider customizing deal stages to fit the buying process for your company's product or service.

Action		Deal Stage
	▶	
	▶	
	▶	
	▶	

Example Actions:

- Appointment time/date confirmed with prospect..
- Prospect defined quantifiable goal, plans, challenges, and timeline.

Example Stages:

- Appointment Set
- Qualified to Buy