



[Exclusive Guide]

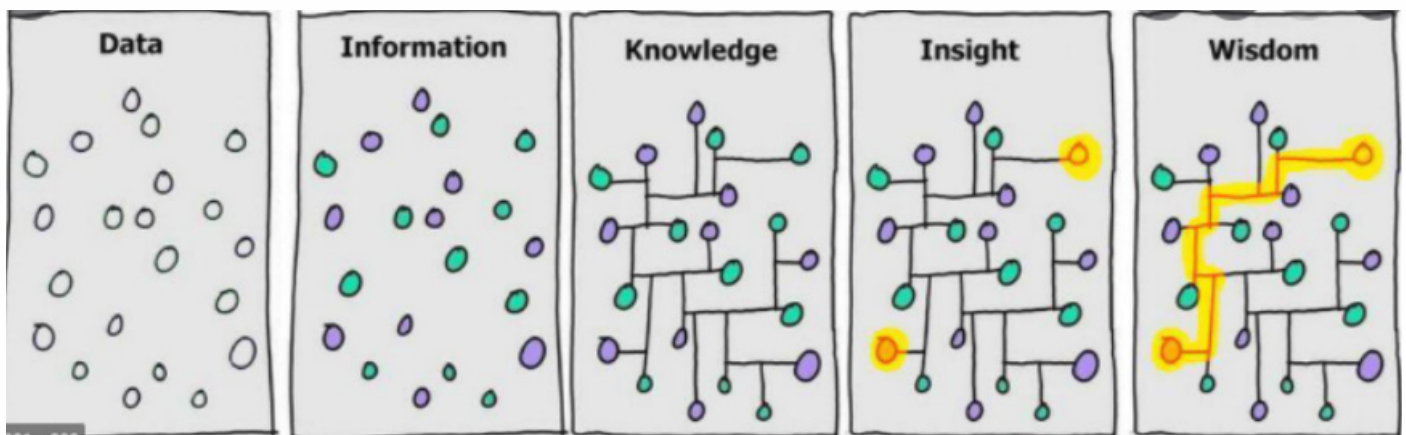
The Benefits of Using Your HubSpot CRM to Power Your Marketing

This guide explores and explains how to harness the power of your data and turn your CRM into a revenue-generating growth machine.

CRM is the cost of entry into a modern market: try running a business without one. However, a CRM is more than just a digital filing cabinet. It's a way to access, understand, and monetize a goldmine already at your fingertips: customer data.

The Data Gold Rush

Data on its own is useless. For data to be practical, it needs to be collected, stored, and harnessed so that it becomes valuable with minimal maintenance.



Having all the names of anybody who has shown interest in your business over the last eighteen months can be helpful for exhaling.

But how about knowing who was just browsing, who is ready to buy, who is prepared to purchase, and who checked two or three other boxes critical for making a sale?

By better understanding your data and working smart, you can ensure the right messaging gets to the right people at the right time without labor-intensive or prospect-annoying processes. Targeting has also become more sophisticated, meaning that ads are now less interruptive and more informative—so refined that we now take for granted the quality of the ads served in our Instagram feeds and YouTube videos.

The old ways don't work anymore

Contemporary digital marketing has changed dramatically since its inception 20 years ago. GDPR, privacy, savvy prospects, and even giant corporations like Apple redefining data mining have all had a profound impact.

Sound familiar?

Buying data lists

Mass email sends with misspelled names

Cold calls without consent

Spam SMS messages from random numbers

You probably even still see some of them. And we're not talking about the occasional 'Hi {first name}' greeting mistake every marketer dreads sending. We're talking about the data-scraping, privacy-invading, industry-shaming practices that gave us all a bad name.

Any company relying on these practices today would seem ancient by comparison. However, the uncomfortable truth is that many businesses still market like this. We bet you've even had one this week.

But why?

Malicious intent? Avarice? Lack of caring?

In most cases, it's none of the above. It's the opposite. Many companies are so excited to get their message out there that they forget the blend of science and craft that creates excellent marketing. They forget they sit on a goldmine of prospect data offering powerful insights into behavior, preferences, and desire.

Say hello to the Customer Relationship Management (CRM) system.

A CRM is a system that holds customer data. It can be as simple as a spreadsheet or as powerful as a constantly evolving AI single source of truth. When used correctly, a CRM can drive more revenue and delight prospects at every stage of the buying journey.



Why You Need to Leverage Your CRM for Experience-Driven Marketing

CRM is no longer just a sales tool.

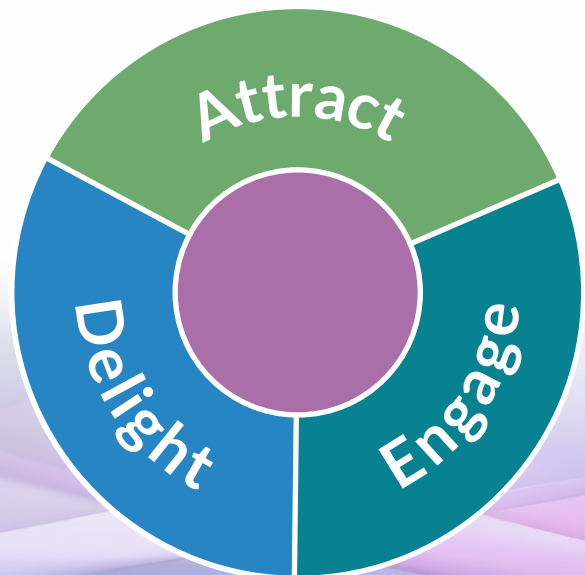
It's the heart of scaling businesses.



The marketers who get ahead today are hyper-focused on the customer experience. Experience-driven marketing puts your customers at the center of everything that you do.

It's a significant reason why HubSpot has adopted the flywheel. When focused on the customer experience, marketing attracts and feeds into sales. Sales engage and feed into service. Service delights and feeds back into marketing. All of this is only possible when the customer is at the center, managed by a CRM.

Leveraging your CRM is the secret to experience-driven marketing. Experience-driven marketing isn't just a buzzword—it's the secret to your company's success. According to Forrester research, companies that said they were [focused on experience grew 40% faster](#) and increased customer lifetime value by more than 60% versus those who weren't.



Very few marketers have all of their tools and tactics tightly integrated into a CRM -- which often leads to disjointed customer experiences, siloed data, and an inability to know what's working.

This is why we're investing so much effort in tightly integrating HubSpot's Marketing Hub with the CRM—to give your team a unified view of the customer experience, which allows you to create truly personalized experiences across all channels and to help you properly measure your success as a marketer.

A CRM Helps You Personalize Your Marketing Offers

Rooting your marketing in a CRM also lets you create personalized experiences across every channel. Personalization continues to be the holy grail for delivering a great experience. In this hyper-competitive environment, it's harder than ever to win attention -- and we all know that the more you personalize, the greater your chances are of being noticed.

What does real personalization look like? Real personalization is when the content on your site changes, recommending content that your visitor still needs to read. It is also when that visitor has shown interest in one topic, so you show them an offer related to that topic. It is when you have CTAs for customers and different ones for prospects. It is also when the chatbot on your site remembers not only their name but also who their sales rep is. All of this is possible through CRM-driven marketing.

The three paths to CRM success:

SEGMENT

ensure prospects hear a message suited to their needs

CONTEXTUALIZE

explain in clear terms why it's useful

PERSONALISE

make them feel valued and loved

Segment

The average consumer is bombarded by promotional messaging and sees between 500 and 1,000 advertisements daily.

Think about the last time you were relaxing and browsing on your phone, doing some online shopping, checking in on social media, or reading the news. How many irrelevant ads did you see?

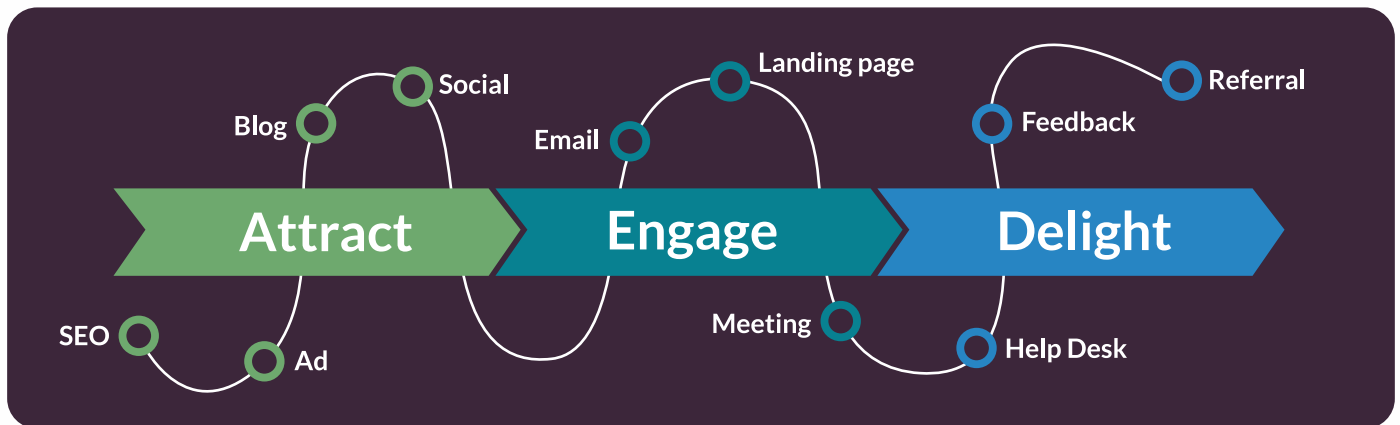
“Today only - 50% of all organic aloe vera & chili peanut butter cups!”

“Door, doors, doors! Get your doors from Acme doors!! Big doors, small prices!”
“Crypto, something or other.”

We bet you’ve closed down at least one web page this week because the advertising ruined your online experience. But there’s a more significant danger for marketers lurking in the internet shadows than angry prospects. Something much scarier... Apathy!

When your consumer doesn’t feel like your messaging directly relates to their life at that moment, they’ll tune out. This is why a CRM is vital to modern marketing. If you don’t understand your customers, you can’t give them the content they need when they need it in a way that works for them.

But the good news is that you already have the answer to the problem in your marketing arsenal—the data in your CRM. From that data, you can isolate specific groups of customers by wants, needs, and readiness to buy.



Use HubSpot lists to segment your database

Lists are a great way to isolate segments of your database by any data point you hold. It can be contacted by (who they are), company (where they work), or activity (what they’re doing) focused, and they can even constantly update to suit changing data fields in real-time.

In minutes, you can build a list of all contacts in the third month of their current contract. Would they benefit from a useful upsell to complement their existing package?

How about sending a discount code to every prospect who has visited your pricing web page more than once in the last 30 days?

Obviously, the same messaging will only work for one of those two groups. But with a bit of thought, each will get messaging they’re likely to welcome because it solves a specific problem they have.

Create manually-tracked custom behavioral events

Manually-tracked custom behavioral events enable you to define and track events unique to your business. Custom behavioral events can be tied to contact properties, which you can then use across HubSpot's tools. Manually tracked events use the [analytics API](#) and require a developer to set up.

This tool in HubSpot Marketing Hub Enterprise allows you to track more advanced analytics on your website or from external third-party apps to gain richer context about the entire customer journey.

[Learn how this tool works in this article>>](#)

Contextualize

Every buyer for every product must pass through the three key buying stages: Awareness, Consideration, and Decision.

But depending on your product or service, these stages often vary. A thirsty person on a hot day will travel from Awareness to Decision about buying a cold drink faster than a Project Manager looking at new forecasting software for a global SaaS business. One is made in minutes; the other could be months.

Although the journey may change, one fundamental remains consistent throughout: consumers need content specific to their buying stage before they can make a decision.

Think about it - before a Project Manager becomes aware that your forecasting software even exists, they first need to either experience or recognize that they have a problem: the pain caused by poor planning tools. Then, with a problem to solve, they will look for a solution - which could be several options ranging from integrating a new tool right through outsourcing the entire problem.

Build Campaign triggers that are linked to the Buyer's Journey using HubSpot

Consider the content below that was created for buyers at each stage of the journey. Triggering emails and messages for the prospect that are linked to where they find themselves in the buyer's journey will ensure that the content is relevant to their needs. Put yourself in the buyer's shoes and ask yourself what they need at each stage of their journey to purchase.

AWARENESS:

BLOG: Why Project Managers never have enough hours in the day.

CONSIDERATION:

GUIDE: 10 ways to become a more effective Project Manager.

DECISION:

CASE STUDY - why company X chose our technology to solve their forecasting problem.

By labeling prospects in your CRM depending on their customer journey, you can ensure they see suitable messaging for their journey. Just like you're unlikely to propose marriage on a first date, you don't want to bombard a prospect with technical data when they've only just discovered they have a problem. Keep sending well-timed, valuable pieces of information like a small trail of breadcrumbs that draw the buyer in rather than forcing your product on them too soon.

By segmenting your audience, you can ensure they receive relevant, contextually relevant sales messaging to nurture prospects and improve conversion rates.

Use HubSpot Smart Content to Contextualize your messaging at scale

HubSpot Smart content allows you to create different content based on rules. Your emails, landing pages, and CTAs can display differently depending on what is known about a prospect or contact.

For example, rather than manually sending context-specific content to prospects, you can adapt your HubSpot pages to react to their needs instead. You can use the data in your CRM to show Awareness, Consideration, or Decision-related content depending on their needs. This allows you to tailor content to the stage of the buyers' journey.

By understanding which prospects need to see your messaging, you reduce admin, boost conversion rates, and drive more revenue with less effort.

Personalize

You can use HubSpot to personalize sales messaging on any standard or custom properties (the various data points you collect on contacts). However, effective personalization doesn't just mean greeting somebody through email by name. Although it may have been disruptive fifteen years ago, the modern consumer is both tech—and data-savvy. Modern personalization means sending relevant messaging promptly using the correct language, tone, and subject matter.

Imagine this: receiving an email greeting you by name. Nice, but you've already had four others doing the same that morning alone. You can spot an automated email by now.

But what about four weeks before your company-wide HR software renewal is up for review? Do you receive a timely message specific to your HR management problem?

The power of personalisation can be shown by the following example: You've started a small business in the last six months, and you receive a persuasive message from an invoice management software vendor about the perils of not completing your tax returns in time.

You want your prospects to feel a sense of serendipity. Ultimately, we know it was effective CRM management because you created a HubSpot workflow to message either HR managers one month before their next renewal date or small business owners who've set up shop in the last year. However, prospects will feel connected with your brand because the message is aimed at meeting their needs at the right time.

Where contextualizing ends and personalization starts can be a grey area, so it's probably easier to think of it like this:

SEGMENTATION - to whom do we want to speak?

CONTEXTUALIZATION - what are we going to say?

PERSONALIZATION - how are we going to say it?

Contextualization ensures you don't torpedo a conversion too much, too soon. Still, personalization ensures the prospect feels you're speaking directly to them when they're most likely to want to hear your message.

Contextual communications should be personal without being so intense that they come across as overbearing. Clients want personalized information that feels helpful and offers value when needed.

Use custom properties to gather company-specific information on your leads

HubSpot comes ready-packed with various data points you can collect on each prospect. Ranging from name and address right through to how many emails they've opened, HubSpot can help you build a better understanding of both groups and individuals.

But because HubSpot has to cater to everything from SaaS consultancies to animal feed suppliers, they're limited in the universal properties that they build. Not every customer will need the average weight of a Nebraskan dairy herd, right?

But with custom properties, you can build bespoke data points specific to your needs.

Your CRM is your growth engine

As long as your CRM data is clean and easy to access, you'll be able to drive more sales and delight more customers.

Segmenting your audience means you can narrow down exactly which groups of prospects you want to target to ensure you get the right message.

Contextualizing your messaging by matching it to a specific point in your prospect's journey allows you to boost funnel conversions at every stage.

Personalizing your messaging means treating your prospects as real people so they trust and respect your brand. So, show your prospects that they matter by understanding their pain points and providing helpful information and solutions to their problems when needed.

The CRM triggers that can power hyper-personalized communications

Your CRM is packed with valuable demographic data that you can use to personalize your communication. However, using activity and engagement data to send out timely messaging could be the difference between a personal email and hyper-personalized messaging.

Triggers for timely communication

- Use page tracking to provide individual recommendations
 - By knowing which pages a contact has visited, you can offer specific recommendations to contacts tailored to their needs. Think of this like remarketing for emails.
- Use deal stages to trigger customized bots on pages to help drive sales
 - Use deal stages to trigger a bot to appear to prospects in a specific deal stage. Having a bot tailored to the stages of the buyer's journey allows you to answer questions that buyers need at the right time.
- Use known dates to trigger personal messaging
 - Send out birthday or anniversary emails or even emails about a customer's renewal date. These timely messages will help you engage with prospects and customers using your gathered information.
- Use workflows to delay actions until a contact responds/performs an action
 - In workflows, you can delay actions until a contact has completed an action, like visiting a web page or completing a form. The advantage of this is that you can wait till a buyer is engaged with you before you send them an email. This will allow you to align with buyers in real-time.

Send the right message to the right people at the right time to turn your entire CRM into a marketing machine.

Leveraging HubSpot CRM as the central hub for your marketing operations provides a powerful, integrated approach to driving business growth. By unifying customer data, automating workflows, and personalizing engagement, you can enhance the efficiency and impact of your marketing efforts. HubSpot's seamless integration of marketing, sales, and customer service ensures that teams collaborate more effectively, resulting in a more cohesive customer experience. By harnessing the full potential of HubSpot CRM, businesses can not only improve lead generation and conversion rates but also foster stronger, longer-lasting customer relationships, ultimately driving sustainable growth.

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