



The Ultimate Guide to HubSpot for B2B Sales Teams





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Every day, small to medium-sized B2B businesses face serious challenges impacting their growth and sustainability.

These challenges include:

- Limited human resources
- Fierce market competition
- Global supply chain disruptions
- Evolving digital economy

That last challenge may be the most pressing. While technology has revolutionized the sales process by automating tasks, centralizing data, improving communication, and streamlining sales operations, some small to medium-sized B2B businesses have lagged in adopting these tools and strategies.

The value of deploying digital sales tools is evident. [McKinsey](#) recently reported that two-thirds of the B2B companies with the fastest sales growth rates can offer their clients account-level intelligence with their tech stack. They're also more likely to have access to specialized analytics that provide deal-level insights and uncover potential issues related to a customer's business and industry.

In another recent [study about Artificial Intelligence \(AI\)](#), [McKinsey reported](#) that companies using advanced sales technology increase their market share by at least 10% annually. Sales tech enables them to deliver hyper-personalized sales for individual decision-makers based on their needs, profiles, behaviors, and interactions.

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Today's B2B Sales Teams

Today's successful B2B sales teams are no longer made up of independent contractors or sales distributors who own a book of business. Today's sales teams consist of full-time employees, who can clearly communicate their employer's value proposition, mission, values, and purpose.

But they're much more than employees. They're highly trained sales professionals utterly committed to a brand. Today's successful B2B sales teams are:

- Customer-focused
- Data-driven
- Adept at omnichannel sales strategies
- Tech-savvy

Digitalization, data-driven insights, and a strong focus on the brand and customer characterize today's B2B sales model. The salesperson's role has changed. It's now more consultative and relationship-focused. They use digital technology to meet clients' diverse needs in a rapidly changing environment. These tools are a critical driver of success, now and in the future.

Implementing new technology requires financial investment and changes in operational processes. For smaller B2B sales teams, it can be challenging to know where to start. But as the saying goes, "With challenges come opportunities." If you're a sales team leader or business owner wondering where to start building your sales tech stack, we recommend HubSpot.





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Introducing HubSpot

HubSpot can be a game changer for your B2B sales department. Some users report that the sales automation tools within HubSpot increased their revenues by 37% within the first year.

HubSpot's 2023 ROI Report states that Sales Hub customers experience:

- 105% increase in their deal close rate
- 41% higher deals closed per sales rep
- 26% reduction in their sales cycle
- 55% increase in closed deals

HubSpot provides a full range of software tools and services. These include inbound marketing, sales, customer service, and CRM. The tools support every aspect of your company's digital sales, marketing, and customer relationship management efforts.

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Here are some critical components within HubSpot:

- **CRM (Customer Relationship Management)**
- **Marketing Hub**
 - » Marketing automation
 - » Content management system (CMS)
 - » SEO and content strategy
 - » Social media management
 - » Marketing analytics
- **Sales Hub**
 - » Sales automation
 - » Email tracking and sequences
 - » Pipeline management
 - » Sales analytics
- **Service Hub**
 - » Customer service tools
 - » Customer feedback and surveys
 - » Customer analytics

HubSpot's tools work together cohesively, allowing your team to build, manage, and scale your inbound marketing, sales, and customer service efforts from a single platform. Let's dive a little deeper into the Sales Hub.



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Sales Enablement Through HubSpot

HubSpot's Sales Hub is a powerful sales enablement tool. Sales enablement provides sales teams with strategic resources, tools, information, and support. It aligns marketing, sales, and other relevant departments to ensure a cohesive and efficient approach to selling. The goal is to engage with prospects and customers more effectively throughout the sales cycle. Sales enablement empowers sales professionals to increase productivity, drive revenue, and enhance customer buying experience.

Sales enablement content equips your sales professionals with the right resources, knowledge, and support to engage with potential customers, close deals, and achieve sales targets. HubSpot reports that **79%** of B2B sales professionals who use sales enablement content say it's essential to make a sale. Salespeople who use it in their role are **58%** more likely to outperform those who don't.

HubSpot's comprehensive suite of tools and features collectively serves as effective sales enablement solutions. These solutions empower sales teams, streamline processes, and enhance customer engagement throughout the sales cycle. HubSpot's sales enablement solutions are user-friendly, scalable, and adaptable to the needs of businesses of all sizes. By providing a unified platform for customer relationship management, marketing, and sales, HubSpot facilitates a seamless and integrated approach to sales enablement.

But HubSpot is much more than just a sales content builder. It's an all-in-one platform that provides a comprehensive solution, from lead management and prospecting to sales tracking and analytics. Let's look at some of HubSpot's key sales enablement features.





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HubSpot's Key Features

Here's how your team can leverage HubSpot's Sales Hub to streamline workflows, optimize performance, and drive revenue for your brand.

Set Up Your Sales Pipeline

In HubSpot, a [deal](#) represents a sale your sales team is pursuing. It's tracked in the tool through pipeline stages until a sale is made or lost. Deals are connected to a contact; all activities are recorded in your CRM. Each deal includes an estimated value, close date, and stage in the sales pipeline. In essence, when you track deals, you're following your buyer's sales journey.

Setting up a sales pipeline can help you visualize the sales process from beginning to end. You can identify deal stages to categorize and track the progress of ongoing deals. HubSpot assigns each stage a probability for the likelihood of closing a deal.

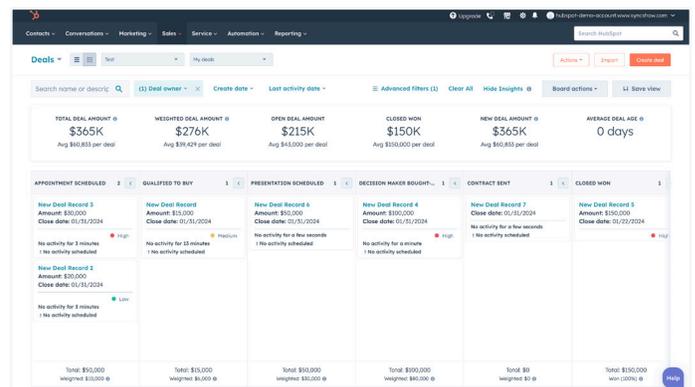
There are seven deal stages and probabilities in a default HubSpot sales pipeline, although everything can be customized to meet your team's needs. The out-of-the-box stages and probabilities are:

- Appointment scheduled (20%)
- Qualified to buy (40%)
- Presentation scheduled (60%)
- Decision maker bought-in (80%)
- Contract sent (90%)
- Closed won (100% Won)
- Closed lost (0% Lost)

The probabilities associated with each stage are calculated based on historical data and the likelihood of successfully moving a deal from one stage to the next. The process involves analyzing past sales performance to determine conversion rates between different sales funnel stages. The goal is to estimate the likelihood of closing deals at each stage, enabling more effective sales forecasting and planning.

Tracking deals through HubSpot allows you to represent the sales pipeline and current status of all deals clearly and visually. It also helps you identify bottlenecks and make informed resource allocation and prioritization decisions. The system measures the performance of individual sales reps, teams, and the overall sales process through KPIs like conversion rates, win/loss ratios, and average deal size.

Because the software tracks deals in real-time, it can also create accurate sales forecasts. This comprehensive view of the entire deal lifecycle empowers sales leaders to make data-driven strategic decisions and align sales activities with overarching sales goals and objectives. This ensures that individual deals contribute to the larger strategic vision of the business.





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HubSpot's Key Features

Develop Automated Email Sequences

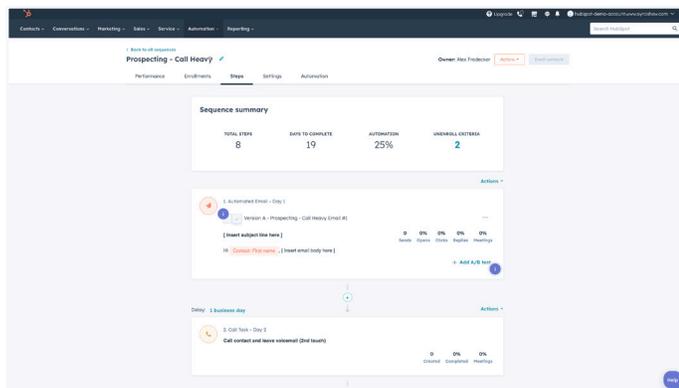
HubSpot's 2024 State of Sales Report found that **40%** of the sales professionals surveyed said email is their most effective sales channel. Additionally, 25% said their best-quality leads come from email marketing.

Email allows your team to interact with prospects and customers directly. It provides a personalized opportunity to build relationships, nurture leads, and close deals. Yet, it can be very cumbersome to manage without the right tools. Your sales reps might be sending dozens of sales emails every day. Using HubSpot's [sequences tool](#) will automate the process, saving them hours.

With the sequences tool, your team can send a timed series of targeted emails to nurture prospects. You can also create tasks to remind your team to follow up with their leads. Once leads move to a new deal stage, HubSpot automatically unenrolls them from the sequence.

Here are some more key features of the sequences tool:

- **Automated workflows:** Initiate workflows based on lead behavior, form submissions, or predefined triggers. Create personalized paths within workflows based on lead characteristics. You can combine email nurturing with other automated actions. These actions may include updating lead scores or creating tasks for sales reps.
- **Smart sending:** Optimize email delivery times based on the recipient's historical engagement patterns. Prevent recipients from receiving too many emails in a short period, minimizing the risk of unsubscribes.
- **Lead scoring and segmentation:** Design sequences specifically for leads in different score ranges or segments.
- **Performance analytics:** Detailed analytics and reporting on the performance of email sequences, including open rates, click-through rates, and conversion tracking.
- **A/B testing:** Experiment with different subject lines and content or send times to refine and improve email sequences over time.



HubSpot offers personalized, timely, and data-driven lead nurturing strategies. The tools empower your sales team to build meaningful connections with leads. The automation helps your team move each lead through the sales funnel efficiently. HubSpot enables sales teams to streamline communication, engage leads at the right time, and nurture prospects through personalized customer touchpoints.



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HubSpot's Key Features

Create Sales Templates

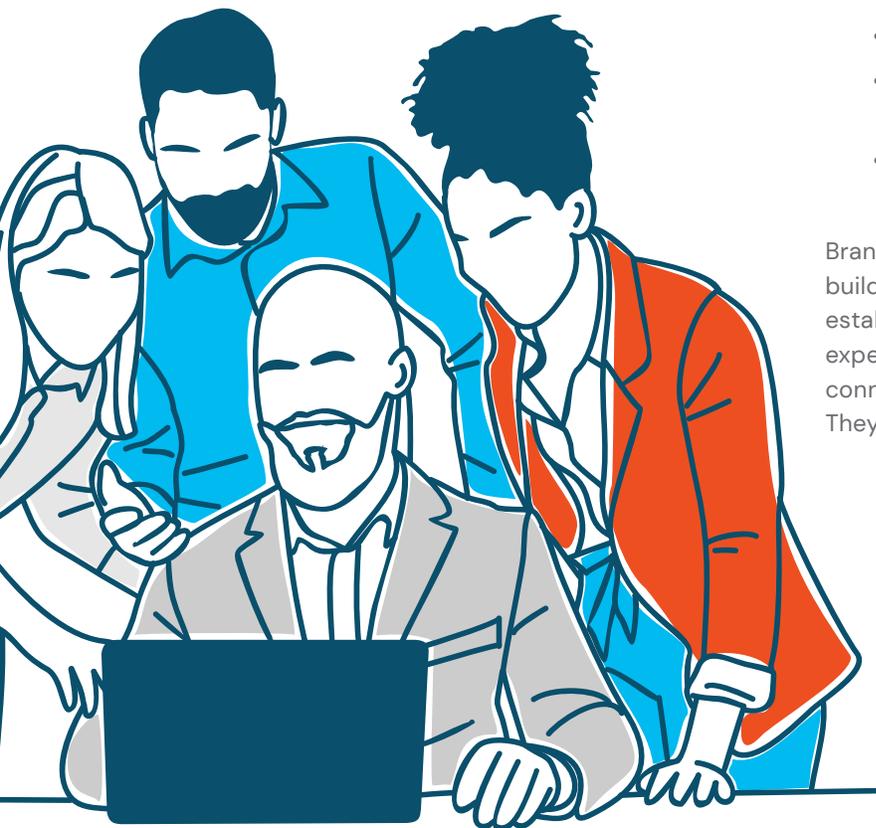
Sales automation is an excellent investment for creating efficiencies and streamlining workflows. However, people still buy from people, even in the B2B sector. So, you'll only fully realize your return on that investment with consistent and impactful messaging and branding. That is where HubSpot's [sales templates](#) are critical to success.

Your sales team can use these branded email templates in their email sequences or one-to-one emails. Each template can be personalized with dynamic content based on recipient characteristics. The system allows you to save and reuse your templates to maintain consistency in messaging across your team and departments.

You can create templates for every stage of the sales pipeline. HubSpot can provide messaging, or you can use your own. Here are some examples of templates you can create and save in Sales Hub:

- **First touch:** Share a helpful resource to start a conversation
- **Inbound lead from content:** Reach out to a new lead after they download content from your website
- **Follow-up:** Follow up after a product demo, meeting, or previous email conversation
- **Meeting request:** Schedule a demo, consultation, or discovery call
- **Product/service offerings:** Share information about a new product launch or service
- **Referral request:** Ask satisfied clients for referrals
- **Re-engagement:** Reach out to prospects who haven't responded to previous communications
- **Thank you:** Send a thank-you email after a successful sale

Branded and consistent messaging is crucial for building a memorable brand identity. It also helps establish customer trust and create a cohesive customer experience. Sales templates can help your sales reps connect meaningfully with your target audience. They can also help nurture leads and drive conversions.





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HubSpot's Key Features

Build a Library of Content

With HubSpot's documents tool, you can build a content library for your entire team to access. The library lets you [upload](#) documents for sales, like proposals and contracts. It also helps you organize and share presentations and more. You can share the documents within your team and departments. You can also share sell sheets and other documents with prospects and customers. HubSpot creates a sharable link or embeds a document in an email to share with the contact. You can also include documents in email sequences. You'll have tracking for every shared document, so you'll know when a contact views the document.

HubSpot includes the language from your data [privacy and consent settings](#) on every shared document. You can also include a prompt for the viewer's consent to your one-to-one communication subscription type.





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HubSpot's Key Features

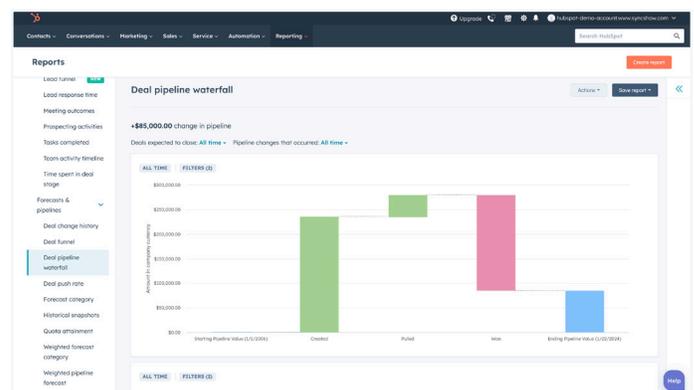
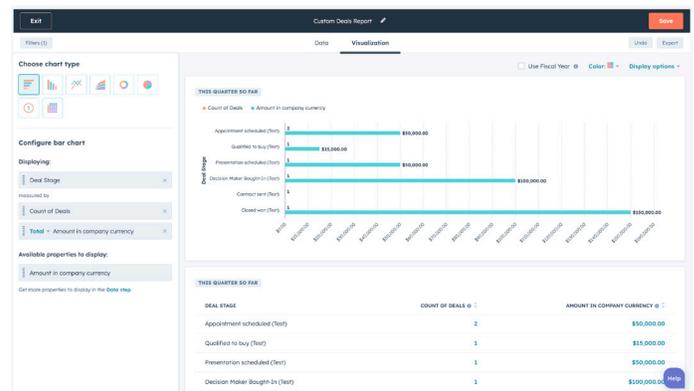
Leverage Data and Analytics

HubSpot offers robust dashboards and reporting capabilities on critical sales and business metrics. The sales analytics tool helps you better understand how your individual sales reps and your team perform.

The sales reports available include:

- **Coaching insights**
 - » Call outcomes
 - » Completed activities
 - » Deals created
 - » Lead funnel
 - » Lead response time
 - » Meeting outcomes
 - » Prospecting activities
 - » Team activity timeline
 - » Time spent in deal stage
- **Deal forecasts and pipelines**
 - » Deal change history
 - » Deal funnel
 - » Deal pipeline waterfall
- **Sales outcomes**
 - » Average deal size
 - » Deal loss reasons
 - » Deal revenue by source
 - » Deal velocity
 - » Deals won & lost

Once you've chosen the reports you want to use, you can organize them into one view using a [dashboard](#). You can build dashboards for different reporting purposes and share dashboards with others as needed. When you share dashboards, you can edit permissions and visibility per user.



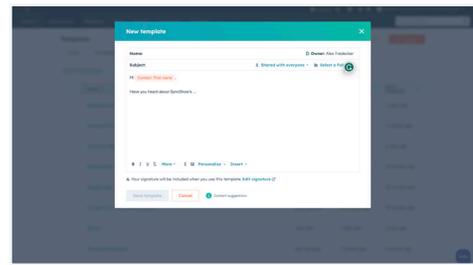
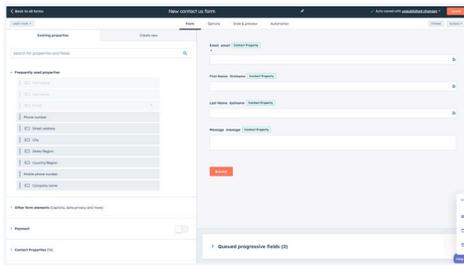


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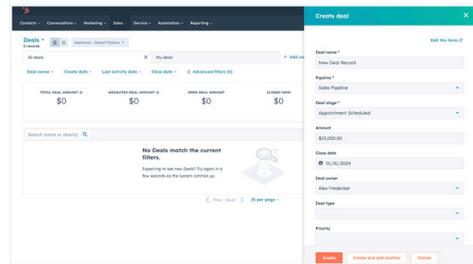
Sample Sales Journey Using HubSpot

To highlight the HubSpot features we've been discussing, let's review a sample deal record for a B2B sales team.



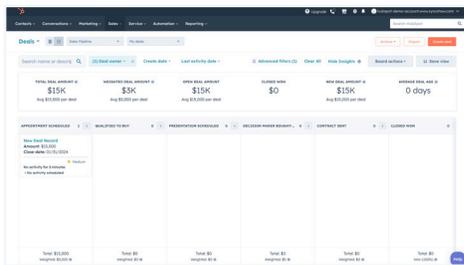
When new leads submit a form on your website, they receive a welcome email and are automatically added to your CRM.

Your sales rep enrolls the customer in an initial contact email sequence. The customer begins to receive personalized emails with product information and a request for a meeting.



When the customer clicks a link on an email and books a meeting, HubSpot unenrolls them in the initial contact sequence and sends them a follow-up meeting email using a template.

At the meeting, the customer asks for a proposal. Your sales rep sets up a new deal record. After the meeting, they send a templated thank you email and a proposal.



This is just the beginning of the customer journey. Every touchpoint is recorded in the deal record and available for review on the dashboard. Analytics for each deal are available through the reporting function.

The deal is visible on a dashboard. Leadership can see how much is in the pipeline for each sales rep.



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SyncShow's HubSpot Onboarding and Training

HubSpot should be a sales leader's best friend. However, HubSpot's robust and varied software suite can be overwhelming. Ensuring you and your team are well-trained on the platform is essential. 76% of users report increased efficiency and 66% report better sales and marketing team alignment after training on HubSpot. If you invest in HubSpot, you must train your team to use it properly. Your ROI will depend on it.

This is where SyncShow shines. We have the HubSpot Onboarding Accreditation to prove it. That means our team has the experience and skills to offer HubSpot audits and onboarding that will help you uncover the best pathway forward and set every team member up for success. Ensuring HubSpot aligns with both your sales and marketing teams' processes is critical. Your teams may need help with HubSpot (or any tool) when the way they do business doesn't align with how the software works. That leads to redundancies in workflow and miscommunication between teams. Our experts can help your teams come together and match their work to HubSpot instead of the other way around.

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of users report increased efficiency after HubSpot training

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report better sales and marketing team alignment after training on HubSpot





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SyncShow's HubSpot Onboarding and Training

Basic Training Track

SyncShow offers several onboarding/training tracks for HubSpot clients. The basic track is a four-hour onsite hands-on training built specifically for your company with an expert from our team. We'll start with the basics of account management and move forward from there. Other items we cover in this training include:

- Education and integration of HubSpot's specific terminology into your current marketing and sales processes
- Custom sales pipeline and deal creation to meet your team's needs
- Ensuring all team members understand how to use the system, including property (fields that store information) records, deals, and sales pipelines
- Review of team certifications

Customized Training Track

Our team can also provide training that meets your team wherever they are in HubSpot's vast array of capabilities, now and in the future. We can set up training for:

- Account customizations
- Salesforce data integration and property confirmation
- Custom property creation
- Custom reporting
- Custom workflow automation

Advanced Training Track

We also offer a two-hour virtual advanced training and check-in with a HubSpot expert that will include:

- Custom property management
- Advanced client communication automation
- Reporting, quoting, and forecasting

Many clients report that our hands-on, personalized approach provides accountability and allows for user interaction, making it more effective than some of the self-directed learning tools offered by HubSpot.

Keep in mind that training is an ongoing process. Our expert will schedule monthly meetings with your sales and marketing teams to spot-check, perform quality assurance, and modify HubSpot to meet ongoing needs. As your business grows and your needs change, we can ensure your team continues to optimize HubSpot efficiently. No matter which training track your company takes, it will be worth the time and effort. You'll see it in the elevated results of every sales and marketing campaign and tactic.



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The Last Word

Competition may be increasing, but budgets are not. Choosing HubSpot can significantly impact your sales and marketing results. Integrating HubSpot into your workflow allows your teams to centralize and personalize customer interactions, automate mundane tasks, and gain valuable insights for informed decision-making. The platform's comprehensive suite of tools streamlines processes and enhances collaboration, allowing your teams to focus on building meaningful relationships and closing deals. HubSpot helps your sales team to thrive in an often dynamic and chaotic business environment. It catalyzes growth and empowers adaptability, keeping you ahead of the curve.

[SyncShow ranks among the top 2% of HubSpot agency partners globally.](#) We want to equip you with some of the best software designed to help B2B businesses like yours attract more quality leads and close more sales. When you partner with us, you'll gain the HubSpot software expertise to fill your sales pipeline with better leads and drive sales and marketing efficiencies.

If you're struggling to stay ahead of the new B2B sales environment and the tech stack curve, [contact us today](#). Whether you have specific questions or don't know what to do next, we have answers.



HubSpot
Onboarding Accredited

SyncShow has earned HubSpot Onboarding Accreditation!

This exclusive designation means that our team has demonstrated extensive knowledge in onboarding clients to the Professional or Enterprise editions of HubSpot Marketing Hub and Sales Hub. We are specifically experienced in objectives-based onboarding methodology. When your team onboards with SyncShow, you'll set your team up for measurable sales and marketing success with better leads, increased efficiencies, impactful coaching, and actionable analytics.

