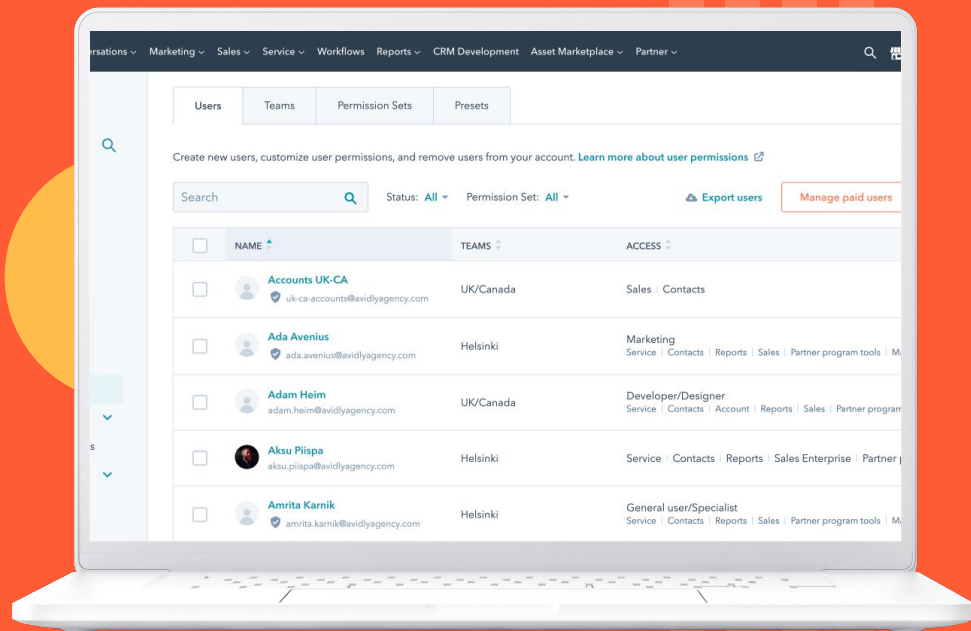Workshop

Efficiencies

HubSpot

Today's Agenda

- Users, Permissions & Teams

- Collaborating Tools

- Lead Scoring

- Lead Routing

- Q&A

HubSpot
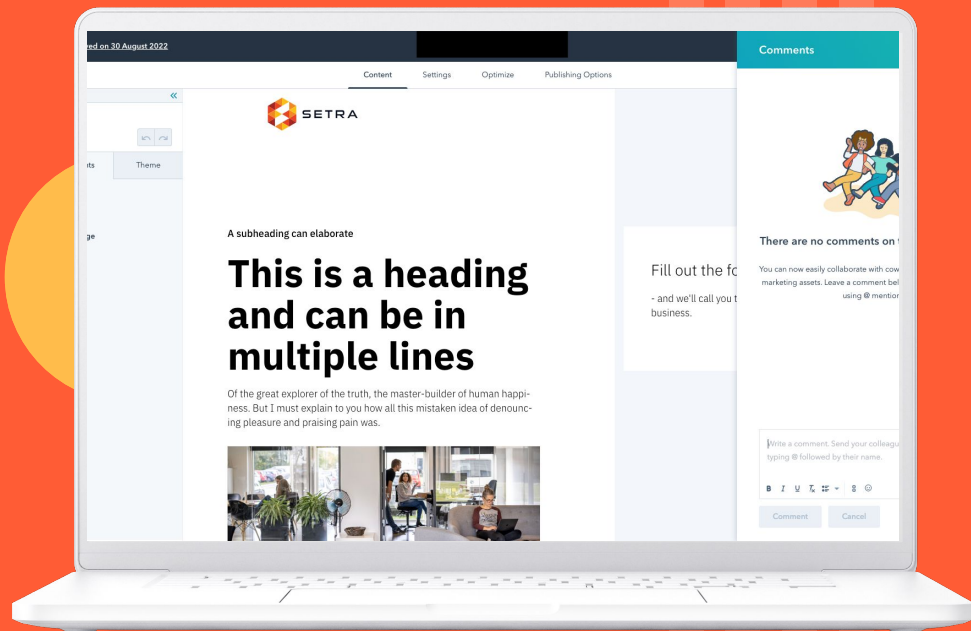
Users, Permissions & Teams

Users, Permissions & Teams

- **Users**

- **Permissions**
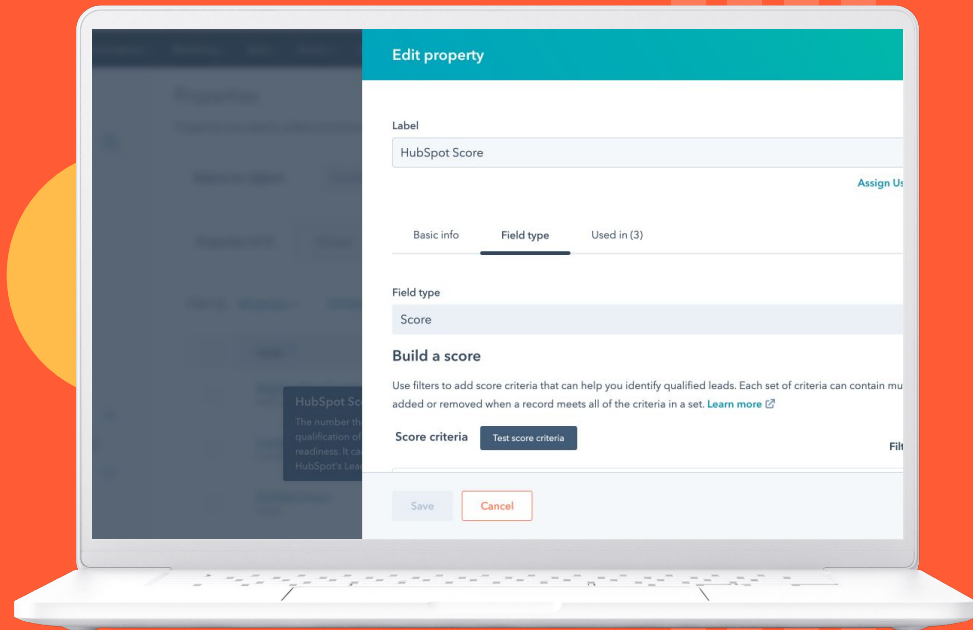
- **Teams**

HubSpot

Collaboration Tools

Collaborating Tools

- **Comment Mode**

- **Tasks**

- **Notes**

- **Integrated Marketing Calendar**

- **Conversations inbox**

HubSpot
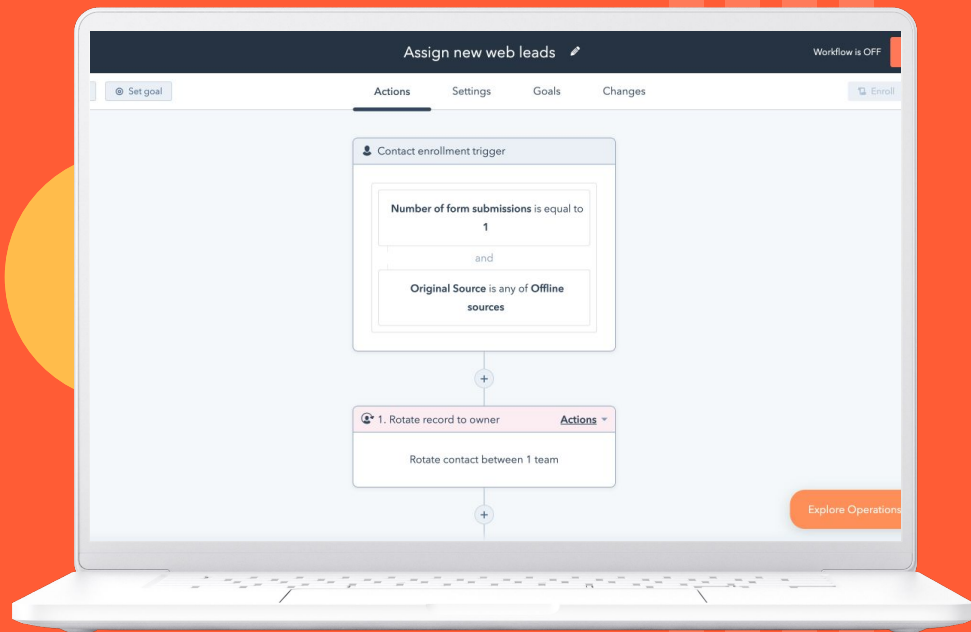
Lead Scoring

Lead Scoring

- **Implementing Lead Scoring**

- **Automate Lifecycle Stages**

- **Automate Handoff to Sales**

HubSpot

Lead Routing

Lead Routing

- **Assigning a new owner**

- **Rotating around teams**

HubSpot

Q&A

Upcoming Scale Like a Pro topics

January 11	Resolve to Grow in 2023
January 18	Campaigns
January 25	Ads
February 1	Landing Page Features & SEO

- Register for future Scale Like a Pro sessions:
  https://events.hubspot.com/scale-like-a-pro-series/

- Wednesdays at 11:00 AM EST

- Keep an eye out for more topics coming in February

Hubspot

Next Steps

- Keep an eye out for a follow-up email with a link to the recording and slides from today's event.

- Partner with your CS resource at HubSpot to execute on your strategy

- Connect on LinkedIn

- Share your feedback!

HubSpot

Resources

- Lesson: [Creating a Campaign in HubSpot](#) (HubSpot)
- Lesson: [Lead Scoring and Lead Routing with HubSpot](#) (HubSpot)
- Article: [HubSpot User Permissions Guide](#) (HubSpot)
- Article: [Create and Manage Teams](#) (HubSpot)
- Article: [Add Comments to your HubSpot Assets](#) (HubSpot)
- Article: [Create Tasks](#) (HubSpot)
- Article: [Plan your Campaigns with the Marketing Calendar](#) (HubSpot)
- Article: [Use Lifecycle Stages](#) (HubSpot)
- Article: [Set up Score Properties](#) (HubSpot)
- Blog: [Lead Scoring 101: How to Use Data to Calculate a Basic Lead Score](#) (HubSpot)
- Blog: [Why you need to Implement Lead Routing](#) (HubSpot)

HubSpot

Thank you