Producers Process for Hubspot Lists and Requirements

As a reminder, all lists and/or individual contacts that you want business development to call, require that they go into Hubspot AND that they have an e-mail associated with each contact, before business development makes any calls for you.

In addition, we now require any individual who wants to take advantage of this service, needs to be Hubspot Certified, so you understand why we purchased this expensive system. You'll also understand why the e-mail is a requirement. You've been sent out all of the information during your original training week(s). You can also search the online course – it's really awesome and simple to go through (in short-impactful modules).

Send Shawn your certification so that you can be approved to have calls made on your behalf.

REVIEW OF THE PROCESS:

1. Please qualify them, make sure that they are in your revenue threshold and a target market for you, then verify that each one has an e-mail address.
2. Upload them to HS once step one is completed – copy your manager on the qualified list.
3. Then, your script needs to be created and approved. Shawn will approve it. Send to her.
4. After 1-3 are completed, we can release business development to make your calls.

With that said, you are welcome to call any prospects on your own, outside of our business development processes.

The business development department has been instructed to call only on the lists in HS that have gone through the above steps.

- Please understand that we need to protect our people and internal processes within the Business Development Department, from being thrown out of their daily processes. They live in Hubspot… calls recorded, follow ups set and notes taken.
- In addition, you'll want all of your prospects to receive our inbound marketing material plus have them called. The only way this happens is if they are in HS correctly and they are qualified.

If you have any questions, feel free to contact Shawn.