HubSpot Training: Mastering Customer Relationship Management (Beginner)

Module 1 – Understanding the Logic of a Modern CRM

- The role of a CRM in an organization: objectives, benefits, and limitations
- Differences between CRM, marketing automation, and sales tools
- Overview of HubSpot (CRM, Marketing, Sales, Service) and common use cases
- Best practices: adoption, data quality, and follow-up discipline

Module 2 – Getting Started with the HubSpot Environment

- Interface discovery: navigation, menus, views, and search
- Essential settings: profile, company details, preferences, units
- User management: roles, access rights, and security principles
- Work organization: dashboards, shortcuts, and startup methodology

Module 3 – Structuring Your Customer Database

- Creating and managing contacts, companies, and associations
- Understanding properties: standard fields, custom fields, field types
- Data import and cleanup: formats, duplicates, and consistency rules
- Effective segmentation: filters, views, and lists for targeting

Module 4 – Centralizing Interactions and Customer Follow-Up

- Activity timeline: notes, emails, calls, meetings, and traceability
- Task creation and management: priorities, reminders, organization
- Managing interaction history: search, sorting, and key information
- Daily routine: a simple method to ensure nothing is missed

Module 5 – Capturing Leads Effectively

- Conversion principles: visitor → lead → contact journey
- Form creation: fields, validation, messages, and best practices
- Website integration: tracking, embedding, and data consistency
- Conversion pages: structure, calls to action, and compliance principles

Module 6 – Communicating with Your Contact Database

- Campaign preparation: objectives, audience, messaging, and scheduling
- Email creation: content, subject lines, personalization, segmentation

- Best practices: deliverability, consent, frequency, and quality
- Performance analysis: open rates, clicks, and optimization opportunities

Module 7 – Automating Simple Actions

- Understanding automation: triggers, conditions, and actions
- Basic automations: notifications, assignment, follow-up, reminders
- Structuring a simple journey: post-form or post-interaction automation
- Best practices: avoiding over-automation, testing, and monitoring

Module 8 – Organizing Support and Request Follow-Up

- Structuring customer request handling: tracking logic and priorities
- Centralizing exchanges: traceability and internal collaboration principles
- Organization methods: categories, statuses, and urgency levels
- Continuous improvement: standardizing responses and reducing delays

Module 9 – Measuring and Managing Performance

- Defining relevant KPIs: acquisition, conversion, follow-up, engagement
- Dashboards: reading, widgets, and essential indicators
- Interpreting results: trends, anomalies, and corrective actions
- Improvement planning: adjusting messages, segments, and processes