




The HubSpot Pro Customer Platform

Achieving Excellence: Best practices in establishing a simple recruitment process using HubSpot: Landing Pages, Quick Apply Forms, Automations, Managing Data & Basic Reports

Agenda

1. Introductions: Education Inbound & Community Members
 2. Quick recap of HubSpot Hubs & EnrollmentCRM.org
 3. What we heard during Intro calls about Pro Platform challenges/opportunities
 4. The Professional Platform Deep Dive: Establish a simple recruitment process
 - a. Landing Pages
 - b. Quick Apply Forms
 - c. Automations (Workflows)
 - d. Managing Data & Basic Reports
 5. Where can I get the most bang for my buck?
 6. Discussion, Q&A
 7. Next Steps
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HubSpot Products & Bundles

Everything is built upon the core HubSpot CRM and is enhanced with 5 “hubs”

1. Marketing Hub: Tools for outreach and engagement with families across multiple channels (social, web, blog, email, etc.)
2. Sales Hub: Tools to manage and engage with leads (application pipelines, call scripts, meeting links)
3. Service Hub: Tools for deeper engagement with families (surveys, knowledge base/FAQ, chat bot)
4. Content Hub (formerly CMS Hub): Tools to build your website on HubSpot and enhance your content
5. Operations Hub: Tools to ensure clean data and integration with other tools

Each Hub has 4 different tiers options:

1. Free
2. Starter
3. Professional
4. Enterprise

Bundles: a “Customer Platform” stack includes all hubs at the same level (example- Pro Customer Platform you get all 5 hubs at the Professional level) and includes a discount for the bundle.

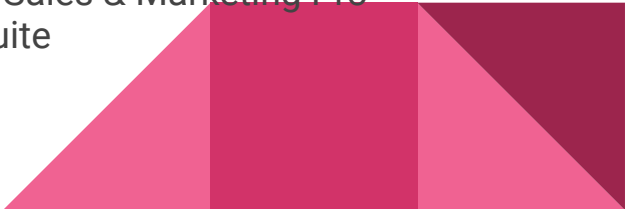


Listening to the Community

1. Quick Apply vs SchoolMint (or other) deep registration
2. Workflows/Automations
3. Texting
4. Lead Scoring (May 10)
5. Reporting (June 7)



The HubSpot **Pro** Customer Platform

1. Cost Range – \$720 - \$1,200 per month, based on contacts and users. Assuming 12k contacts and 5 users our networks would pay around \$20,000 per year.
 2. This is our recommended stack for most charter networks of at least three schools
 3. Major improvements from Starter
 - a. Workflows (internal and external automation)
 - b. Deal pipelines and automation (recommended to manage applications)
 - c. Leads object (recommended to manage Students as a separate object)
 - d. Social media (posting, scheduling, monitoring on Meta, LinkedIn, and Twitter)
 4. Enrollment CRM – this was all built on the Pro Customer Platform.
 5. Networks in the Community using all or some of the Pro Customer Platform:
 - a. The vast majority of networks are using some combination of Sales & Marketing Pro
 - b. Uplift, Vista, Summit & Fortune School are using the full Pro Suite
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What you can do with Pro hubs to help your recruitment strategy

Landing Pages

- Simple, straight forward builder
- Smart content
- Integrate meeting links, forms, and media
- Should have no navigation and one call-to-action
- Out of the box templates available in the HubSpot Template Marketplace (free and paid)



Marketplaces

 **App Marketplace**
Find apps to integrate with HubSpot

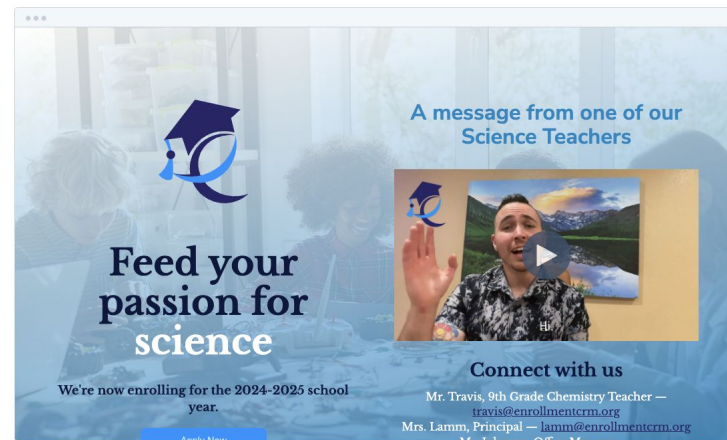
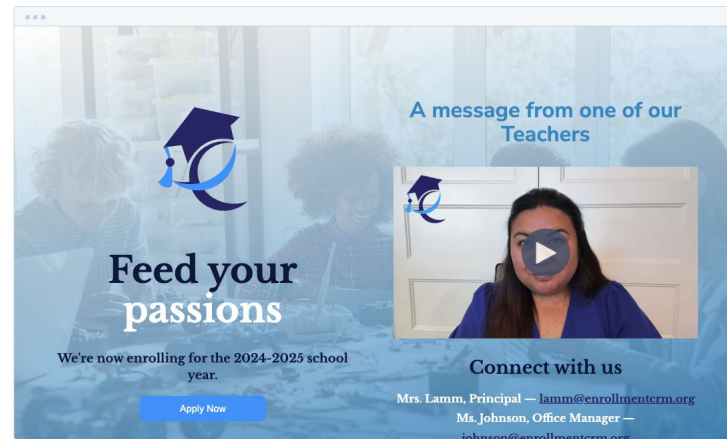
 **Template Marketplace**
Find website themes and modules

 **Solutions Directory**
Find your perfect service provider match

Manage

[Connected apps](#)

[Marketplace downloads](#)



What you can do with Pro hubs to help your recruitment strategy

Quick Apply Form

- Simple starting point for a family to show interest
- Limited form to start the application process
- Kickoff nurture to get them to fill out the full application
- High enrollment trigger (hot lead)

Fast track your Application for the 2024-2025 School Year!

Submit your application now!

Parent's/Guardian's First Name*	Parent's/Guardian's Last Name*	
<input type="text"/>	<input type="text"/>	
Relationship to student(s) Please Select		
<input type="text"/>		
Email*	Phone Number	
<input type="text"/>	<input type="text"/>	
Street address <input type="text"/>		
City	State/Region	Postal code
<input type="text"/>	<input type="text"/>	<input type="text"/>
Student First Name	Student Last Name	
<input type="text"/>	<input type="text"/>	
Student's Date of Birth	Student's Gender	
<input type="text"/>	Please Select	
Student's Current Grade	School of Interest	
Please Select	<input type="text"/>	

SUBMIT APPLICATION

What you can do with Pro hubs to help your recruitment strategy

Automations (Workflows)

- Lead nurturing workflows (including SMS)
 - Incorporating an existing app (ex. Sakari, Kixie) or HubSpot SMS
 - Send automated text messages
- Internal notifications
 - Alert your team about changes to a family's "status" as well as new leads
- Internal data management
 - Update statuses, properties, contact information without the manual intervention



Specific Example:

Family fills out quick apply which sets off cadence of emails and texts to families with additional information and opportunities.

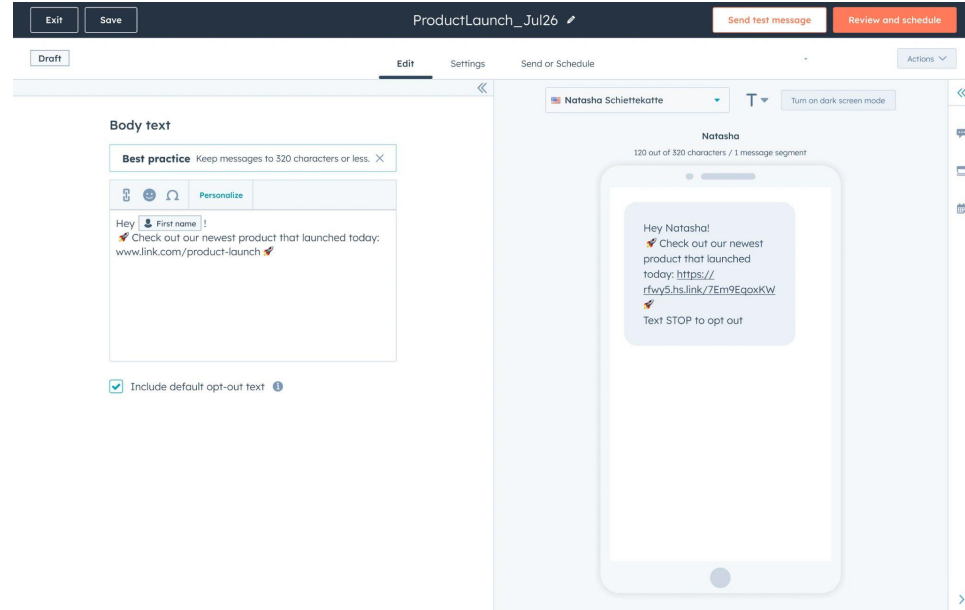
Push notification to team when a new lead comes in or when an existing lead completes an application.

Fix data without a human having to touch the data! Change .con to **.com**, fix all caps and other common typos.

What you can do with Pro hubs to help your recruitment strategy

Texting

- HubSpot SMS is an add on to any hub — need Marketing Pro+ in order to trigger SMS through automation
- \$75/month for 1,000 texts (160 characters), additional 1,000 for \$15/month
- Currently just one way texting, current beta for two- way texting
- Use cases: any nurture campaign, but perhaps even more important for lead up to FDOS
- HubSpot also integrates with other SMS platforms like Sales MSG, True Dialogue, Sakari, Kixie, etc



What you can do with Pro hubs to help your recruitment strategy

Managing Data

- Utilizing Operations Hub
 - Data clean up workflows (.con to .com, title case names, etc.)
 - Data quality command center to keep an eye on all your data
 - Management of duplicate data

Data Monitoring 📘

Total issues: 0

[Watch for more issues](#) ▾

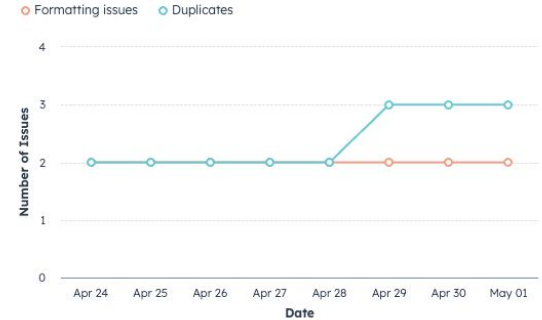
[View all monitored issues](#)

ISSUE TYPE	COUNT	MOST RECENT ISSUE	ACTIONS
New duplicate issues Auto enabled 🔗	0	Apr 28, 2024	View all

Records 📘

Total records: 493

Date range [Last 7 days](#) ▾ Frequency [Daily](#) ▾



ISSUE	AMOUNT	
Formatting issues	2	View all
	3	View all
	5	

What you can do with Pro hubs to help your recruitment strategy

Reporting

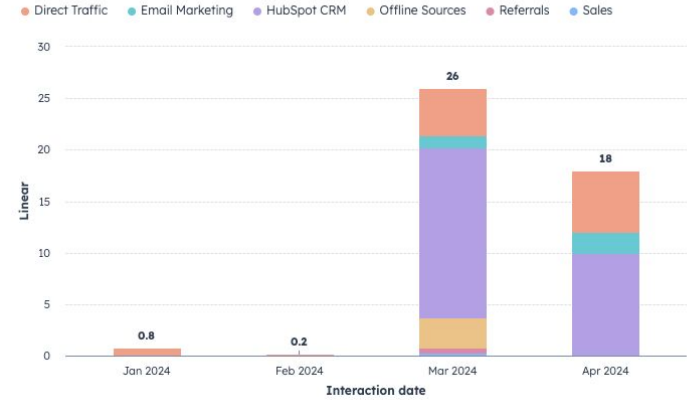
- Custom report builder
- Contact create attribution reporting

The screenshot shows a reporting tool interface with the following sections:

- Header:** "Back to create report", "Enter report name", "Sample reports", "Save report".
- Left Panel:** "1 data source" with a search bar and a list of filters including "Default measures", "Top properties", "Contacts filters", "Contacts properties", and "Fields".
- Configure Panel:** "Filters (0)", "Chart Settings", "X-axis", "Y-axis", "Break down by", "Compare by", and "Fields".
- Main Area:** A large empty space with a message: "Add one 'x' field or one 'y' field to display the report." Below this are "Unsummarized data" and "Summarized data" buttons, and a note: "Your summarized data will appear here."

Lead Generation by Source

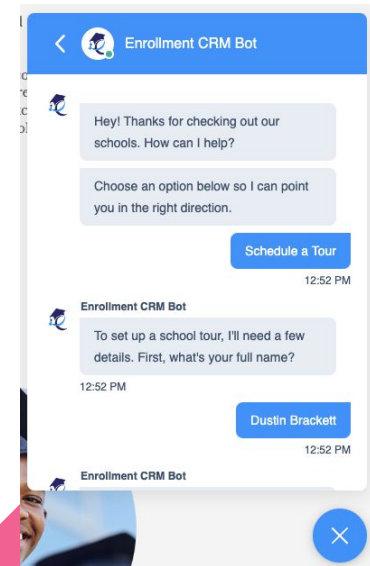
IN THE LAST 60 DAYS | MONTH



Scenarios for Professional Hubs

1. Many networks in CSGF will fall into this category
 - a. Best option for networks with more than 3 schools
2. Professional hubs allow you to automate workflows, create more comprehensive forms (quick apply) with automation, schedule tours and connect your social media so that your families get a more unified experience.
3. Better management of the guardian/student/application relationship and overall better application management

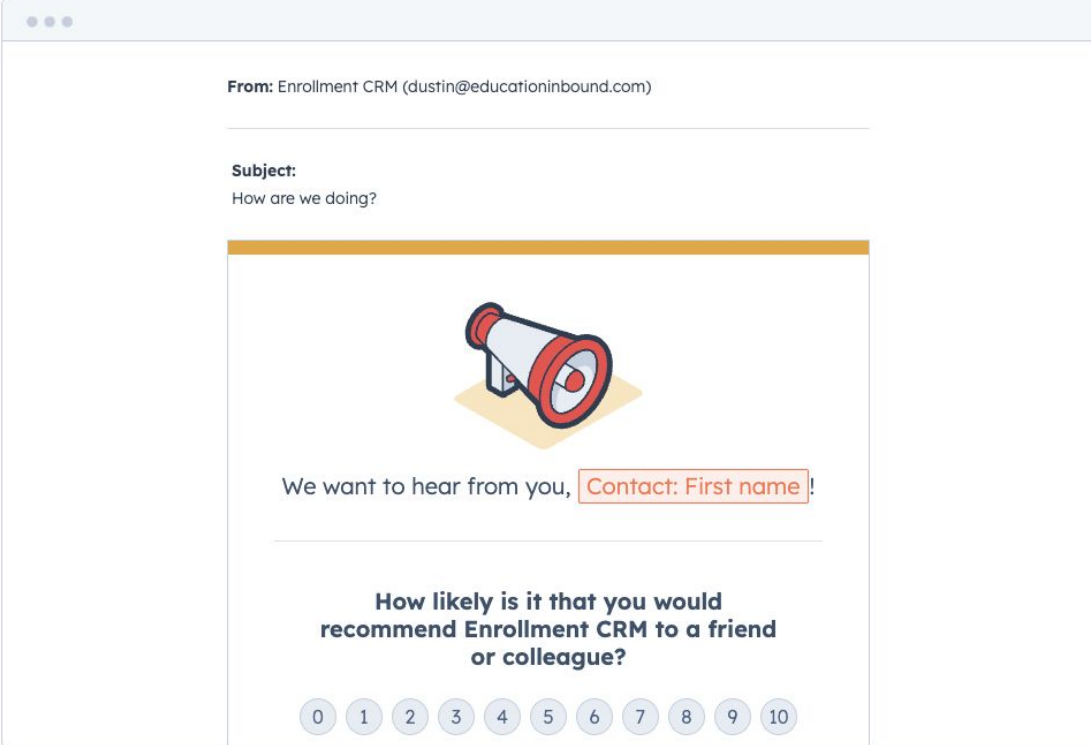
More robust for attracting, capturing and managing leads. Very good at engaging leads and existing families, leading to higher conversion rates



Scenarios for Professional Hubs (continued)

The Professional Hubs are where networks can also really begin to track and manage retention and persistence of existing families. By connecting specific “touchpoints” and NPS surveys (through Service Hub Pro) you can begin to hone in on the most at risk families.

- NPS can be shared via email, text, parent portal, etc



The image shows a screenshot of an email survey interface. At the top, it says "From: Enrollment CRM (dustin@educationinbound.com)". Below that, the subject is "Subject: How are we doing?". The main content area features a megaphone icon and the text "We want to hear from you, !". At the bottom, there is a question: "How likely is it that you would recommend Enrollment CRM to a friend or colleague?" followed by a horizontal row of 11 circular buttons numbered 0 through 10.

Most powerful levers to boost your recruitment efforts

1. Quick Apply - we have to make it as easy as possible for families to interact with us
2. Automate lead nurture campaigns to ensure that nothing is falling through the cracks
3. Utilize custom reporting (contact-create-attribution) reporting to help you understand which of your marketing activities are creating leads



Discussion, Q&A

What's Next

1. Join next week's webinar for a continuation of the Pro Suite deep dive.
2. Direct Advisement: Submit your specific help with your Professional hubs [here](#)! We're here to help take a little work off your plate.
3. Reach out to others in the Community who may have similar challenges
4. Additional Workshops: Look for a short survey on your top priorities for smaller, hyper focused workshops to tackle some of the common HubSpot challenges.
5. [Join the CSGF/COP Slack Channel!](#)



What's Next

Webinar Line Up:

1. The HubSpot Stack: What you get, what you need and what what are the trade-offs associated with these decisions in our charter-specific setting.
2. Achieving Excellence Using the Starter Customer Platform in the Charter sector
3. Achieving Excellence: Managing & Converting Leads in the Charter Sector
 - a. PART 1: Configuring your HubSpot Instance for the Public Charter School Sector; Establishing a simple recruitment process using HubSpot: Landing Pages, Quick Apply Forms, Automations, Managing Data & Basic Reports
 - b. PART 2: Using more complex workflows and personalization; Data Integrity & Data Management - keeping contacts and lists organized, removing non-active contacts
4. Advanced use of HubSpot using Pro or Enterprise Tools
5. Reporting & Communicating Data using HubSpot for Student Recruitment

