



The HubSpot Pro Customer Platform Part 2

*Using more complex workflows and personalization;
Data Integrity & Data Management - keeping contacts
and lists organized, removing non-active contacts*

Agenda

1. What we heard during Intro calls about Pro Platform challenges/opportunities
2. The Professional Platform Deep Dive: Establish a simple recruitment process
 - a. Complex workflows
 - b. Personalization / Smart Content
 - c. Data Integrity & Data Management
 - d. Managing the Parent/Guardian - Student - Application relationship
3. Where can I get the most bang for my buck?
4. Discussion, Q&A
5. Next Steps

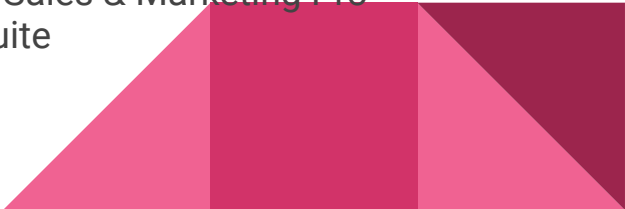


Listening to the Community

1. Quick Apply vs SchoolMint (or other) deep registration (May 3)
2. Workflows/Automations (May 3)
3. Texting (May 3)
4. Personalization
5. Lead Scoring
6. 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

Complex workflows

- Utilize apps in your workflows (ex. Send a text message, send a Handwrytten card)
- Trigger workflow enrollments on a schedule (recurring)
- Data quality automations

Enrollment triggers Cancel Save

Trigger based on a schedule Change trigger type

Enrollment Re-enrollment

Automatically trigger enrollment on a schedule (optional)

Schedule *
Daily

Time of day * ⓘ
🕒 8:00 AM MDT

And contacts meet the following filter criteria
Contacts will only be enrolled if they also meet the following criteria when the trigger runs.

Test contact Edit criteria

This workflow doesn't have any criteria

+ Add criteria

Connect an app Cancel

Search by app name or action 🔍

- > OCodeTools: Workflow Toolbox
- > 360NRS
- > AI Studio for Workflows
- > Aceevents
- > Accrete SMS (アクリート ショートメッセージ)
- > Airmet
- > Airtable Workflow Integration
Built by HubSpot
- > All in One SMS
- > Aloware Cloud Contact Center
- > Alyce

2. Send email
Send **Welcome!** ✓
0% click rate
Show details

Configuring
Configuring...

END 1

Capitalize contacts first and last names 🔍

Alerts Details Actions Settings and notifications Goals Changes

1. Format data Cancel Save

Edit action Contacts in action

Apply formatting rules to property values to keep your data in HubSpot useful and consistent. [Learn more](#) ✓
about how this action works.

Custom mode

Property to format *
First Name

Format * ⓘ
Capitalize first letter

Output type *
String

1. Format data
Format First name.
Show details

2. Copy property value
Copy outcome of 1. Format data to First name.
Show details

3. Format data
Format Last name.
Show details

4. Copy property value
Copy outcome of 3. Format data to Last name.
Show details

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

Personalization / Smart Content

- Use information about any contact to present a custom experience on landing pages
- Every module in HubSpot can use smart content
- Segment based on ad source, list membership, lifecycle stage, country, device type, referral source, language, or query parameter

Manage smart rules

Manage content for specific visitors specified by the rules below. If a visitor matches multiple rules, they will see the content in the rule that comes first.

Show different content based on **Contact list membership**

Rules

- Technology Interest
- Science Interest
- Engineering Interest
- Art Interest
- Math Interest

+ Add

A message from one of our Teachers

Connect with us

Mrs. Lamm, Principal — lamm@enrollmentcrm.org
Ms. Johnson, Office Manager — johnson@enrollmentcrm.org

A message from one of our Science Teachers

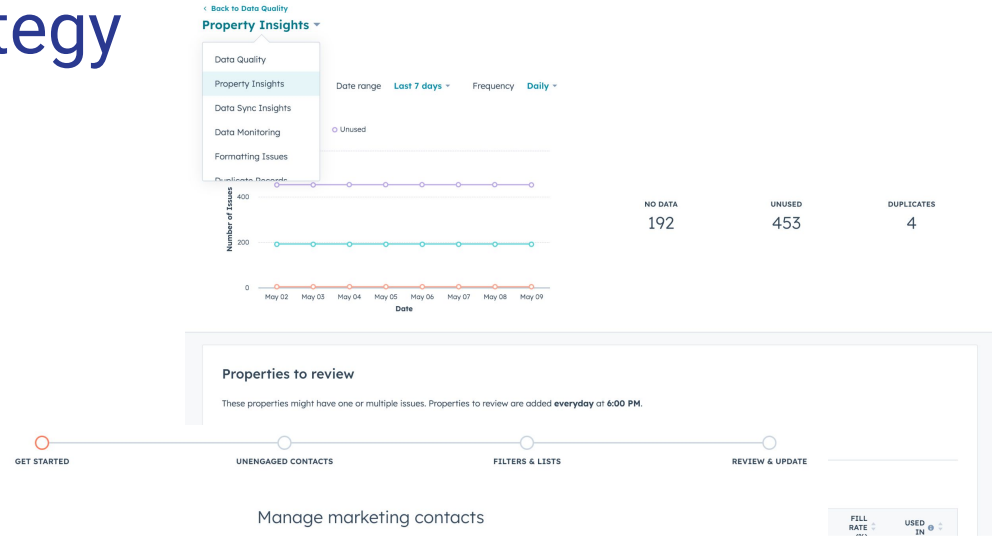
Connect with us

Mr. Travis, 9th Grade Chemistry Teacher — travis@enrollmentcrm.org
Mrs. Lamm, Principal — lamm@enrollmentcrm.org
Ms. Johnson, Office Manager — johnson@enrollmentcrm.org

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

Data Integrity & Data Management

- Monitoring all data in Data Quality Command Center
 - Review, monitor, and manage property insights, sync with other apps, data insights, formatting, and duplicates
- Manage marketing contacts
- Workflows to set marketing and non-marketing contacts



Make sure you only pay for the contacts you want to market to. Click 'Start' to begin setting contacts as non-marketing in your CRM.

You can set contacts as marketing at any time. When you set contacts as non-marketing, they'll stay as marketing contacts until their status is updated. The update takes places on the first of each month and on your renewal date.

You won't be able to send non-marketing contacts emails or target them with ads.

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

Managing the Parent/Guardian - Student - Application relationship

- Parents/Guardians as Contacts
- Students as Leads (Sales Pro tool)
 - Can manage Students separately through the Prospecting Workspace
- Applications as Deals
- All can be associated with each other and not limited on number of students or applications per student

The screenshot displays a CRM interface with three main sections:

- Contact Profile:** Shows details for Kobe Bryant (KB), including email (kobe@isthegoat.com), phone number (1234567890), and contact owner information.
- Activities:** A list of workflow activities for May 2024, such as "Kobe Bryant completed Capitalize contacts first and last names" on May 10, 2024.
- Leads:** A list of three leads: Capri Bryant (Hot), Gianna Bryant (Hot), and Natalia Bryant (Hot), each with a "Lead type: No lead type" and "Applied" status.
- Deals Pipeline:** A view of deals for "My deals" with a search bar and a table showing stages like "WAITING FOR DOCUMENTATION", "COMPLETED APPLICATION RECEIVED", "WAITLISTED", "ENROLLED", "JUNE EVENT ATTENDED", and "FAMILY ORIENTATION ATTENDED".

Most powerful levers to boost your recruitment efforts

1. Quick Apply - create multiple Leads (students) through a single form and associate to the parent/guardian
2. Manage your data and keep it clean
3. Utilize smart content to create a custom, more personalized experience for your families
4. Better manage the parent-student-application relationship by embracing Contacts, Leads, and Deals



Discussion, Q&A

What's Next

1. Join next week's webinar for advanced tools using Pro and Enterprise.
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

