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?
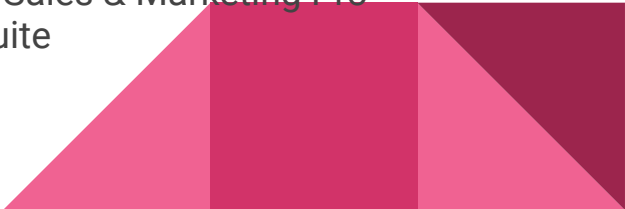4. Discussion, Q&A
5. Next Steps

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

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

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

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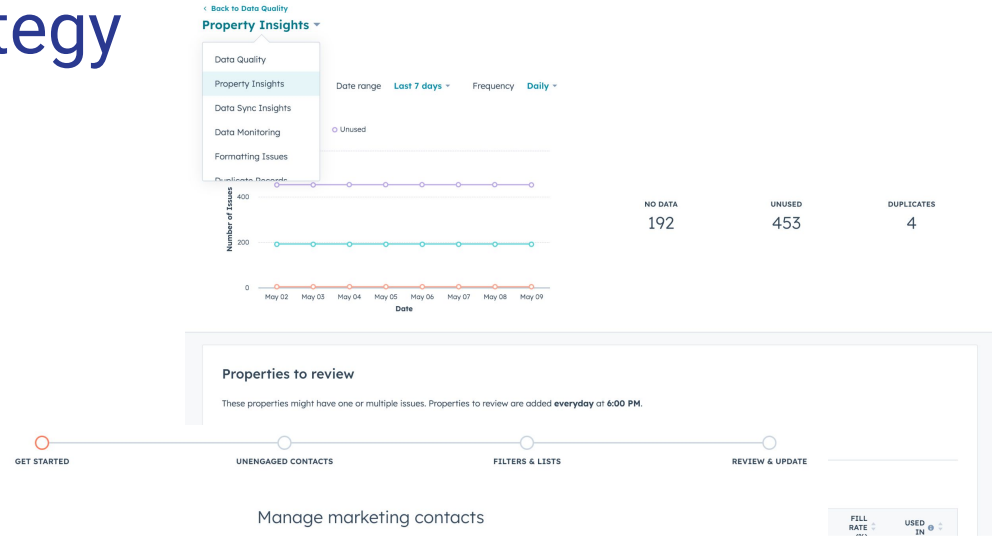
What you can do with Pro hubs to help your recruitment strategy

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

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