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The HubSpot Starter Customer Platform

April 26, 2024

Agenda

1. Introductions: Education Inbound & Community Members
2. Refresh on HubSpot bundles and EnrollmentCRM.org
3. The Starter Customer Platform
    a. What can you do with Starter Tools that will help your recruitment strategy?
        i. Landing pages, quick apply forms, etc
        ii. Examples
    b. What are the most relevant limitations with Starter?
4. Discussion, Q&A
5. Next Steps

Quick Review: HubSpot Options

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.

Quick Review: Enrollment CRM Example

- Last fall, we created a simple HubSpot instance for demonstration purposes within the CSGF community
- We assumed a standard family journey
  - Interest > scheduling touchpoints > lead nurturing > quick apply > enroll
- Our Enrollment CRM uses Pro, but certain aspects of this demo site can be built with Starter

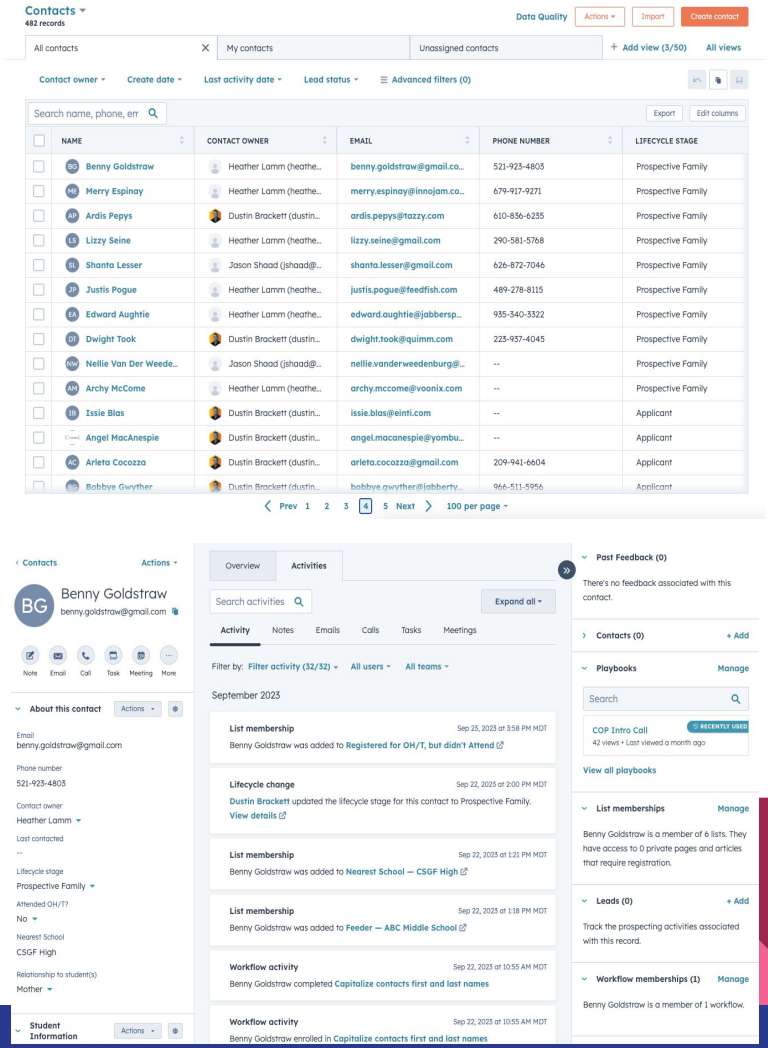
The HubSpot **Starter** Customer Platform

1. Cost Range — $20/month per user includes 1,000 contacts ($50/month for each additional 1,000 contacts) Networks can purchase this option for $180/year/user.
2. Major improvements from Free
    a. 10 reporting dashboards — report on leads, sources, engagement, etc.
    b. Remove HubSpot branding
    c. Increased email send limits (5x your marketing contacts, so 5,000 included)
    d. 500 shared minutes of calling from the CRM — use to call families, log and record calls
    e. Custom field mapping for integrations
3. Networks in the Community using all or some of the Starter Customer Platform:
    a. Alabama Aviation & AeroSpace is considering upgrading from Free
    b. Brilla is using Sales Starter and Public Prep is using Marketing Starter

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

CRM

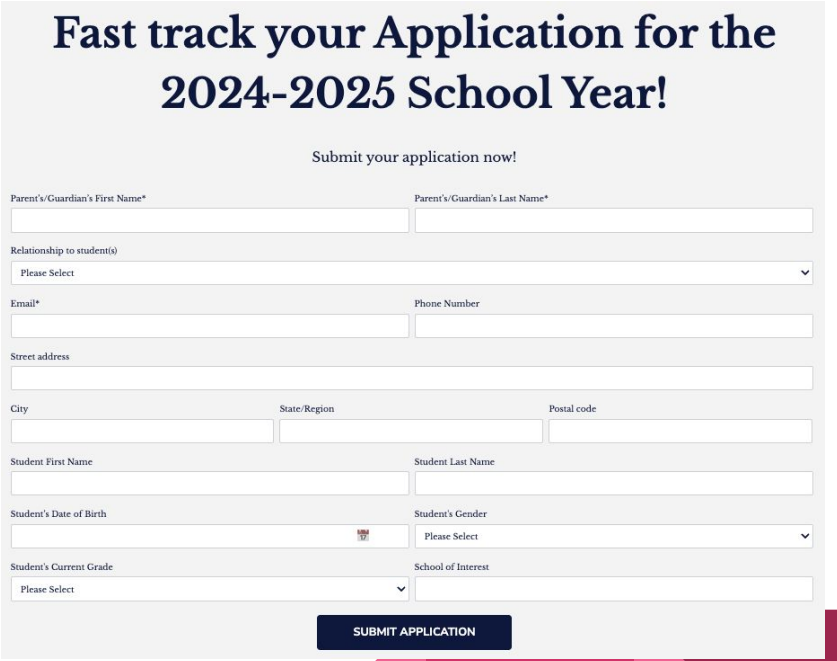
- A unified location to store, manage, and report on student and family data
- True lead management, getting away from Google Sheets/similar
- Manage activity with leads in order to make sure leads don't fall through the cracks
- Segment your leads into lists
- Custom properties & customization



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

Forms

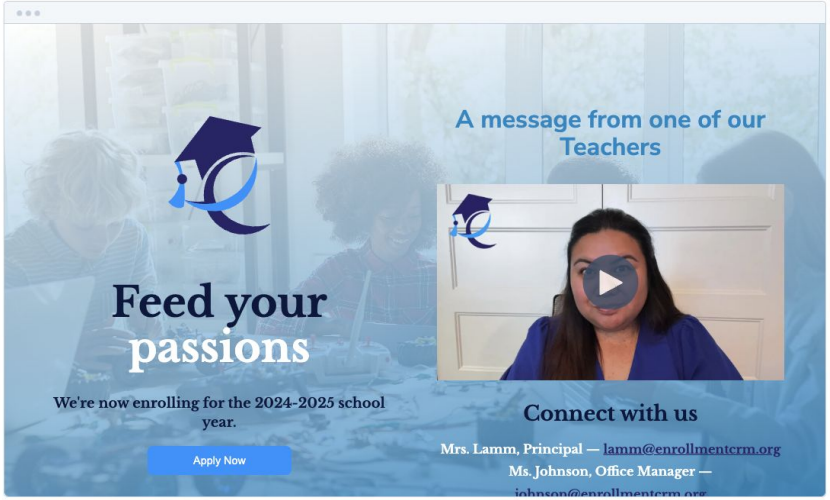
- Capture leads
- Create a Quick Apply Form
- Send notifications to your team for immediate outreach to leads
- Automatically update existing leads or create new leads



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

Landing pages

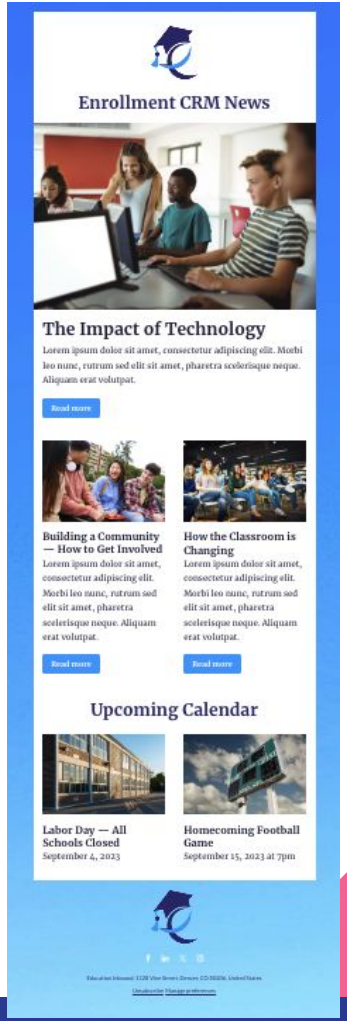
- Follow landing page best practices for lead generation
- Create landing pages for your advertising campaigns



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

Email

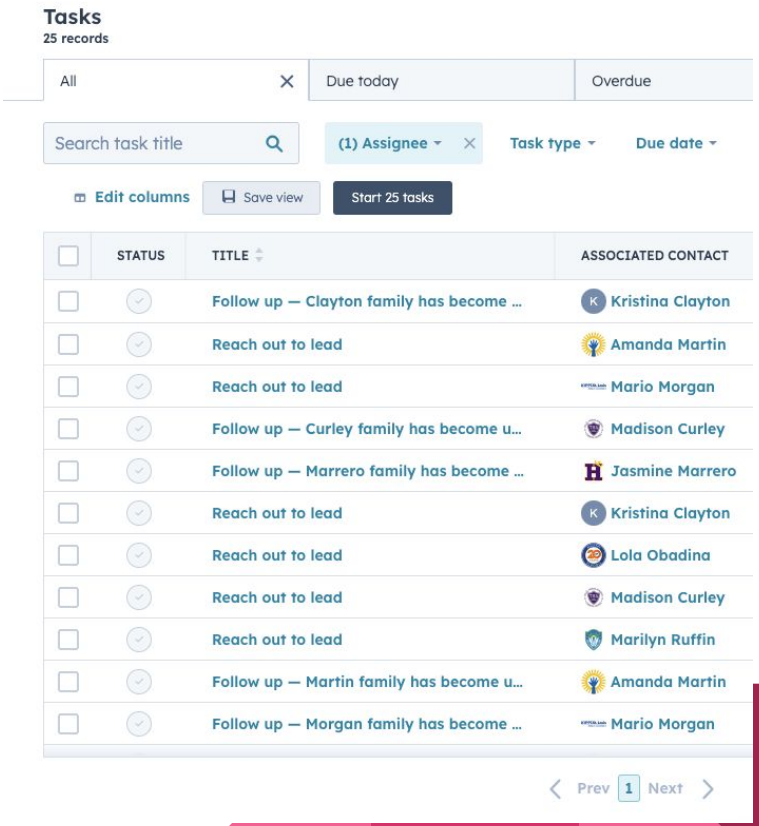
- WYSIWYG email drag-and-drop builder
- One-to-many marketing emails
- Starts at 2,000 email sends per month
- Stay in contact with your leads in the same platform while tracking activity



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

Tasks

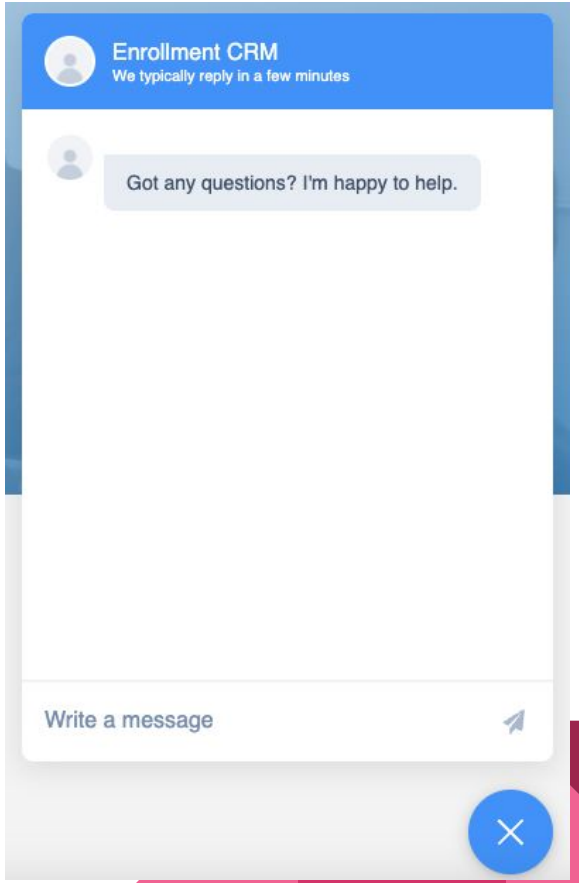
- Create follow up tasks for your team to reach out to leads
- Keep track of your outreach and engagement
- Assign leads to yourself or other people and track completion



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

Chatflows

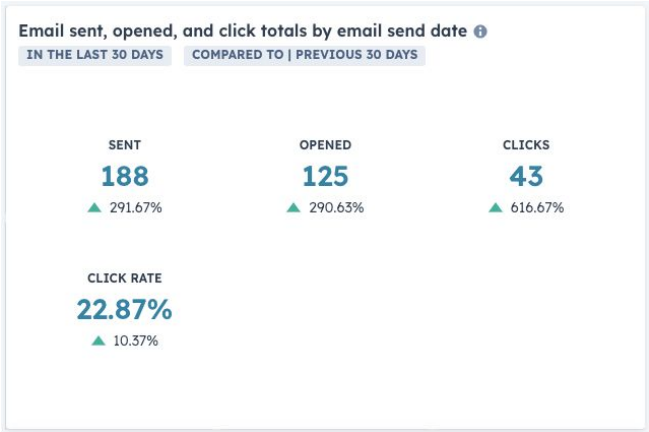
- Live chat and basic chatbots for your website
- Respond to live chat through Slack, the HubSpot mobile app, or online.
- Set availability times.

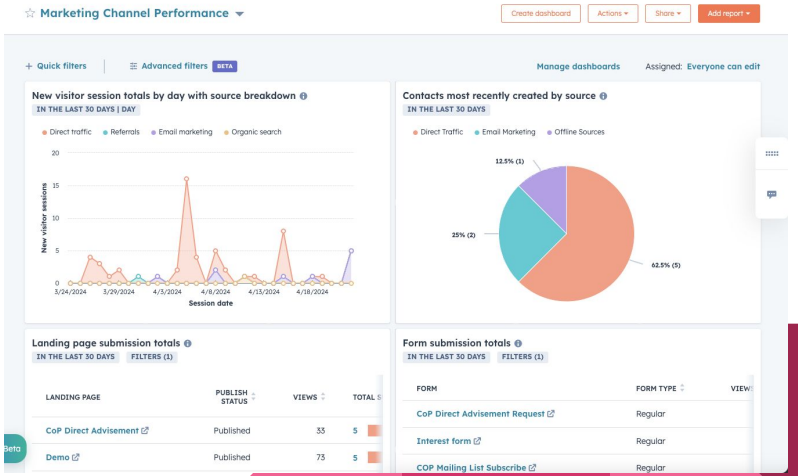


What you can do with Starter hubs to help your recruitment strategy

Reports

- Track and report on key metrics for your network
- Easily shareable with your team or managers
- Out of the box reports library

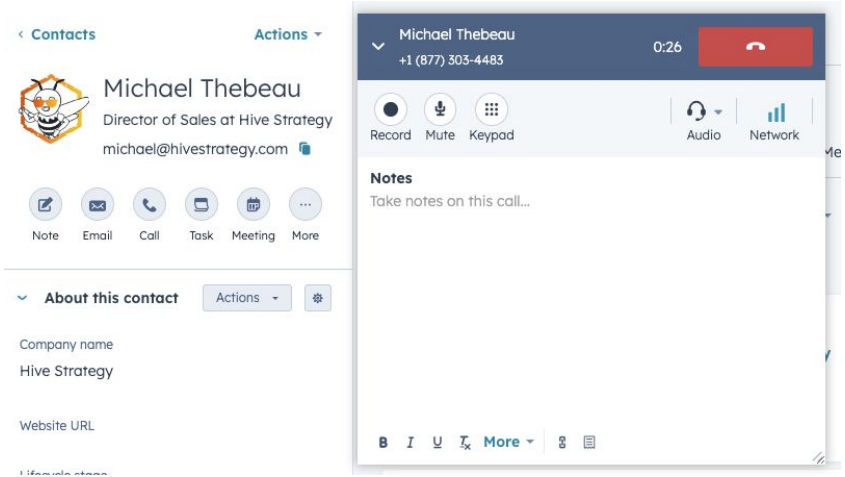




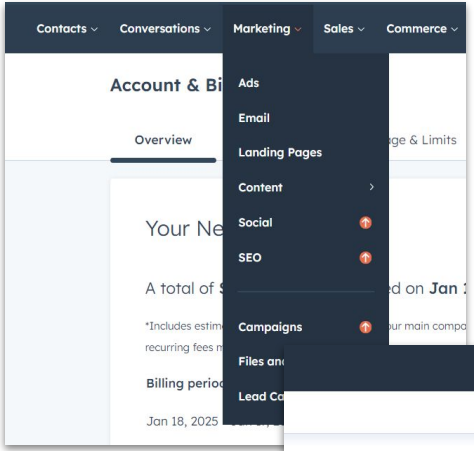
What you can do with Starter hubs to help your recruitment strategy

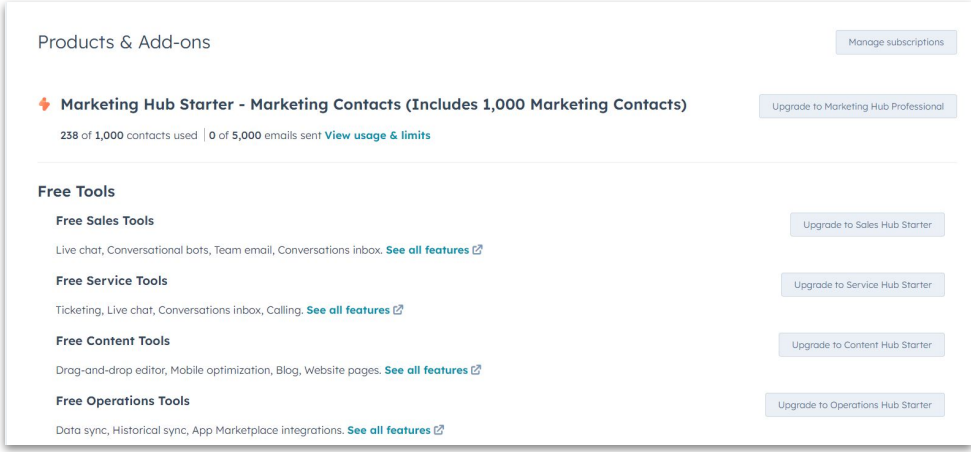
Calling from the CRM

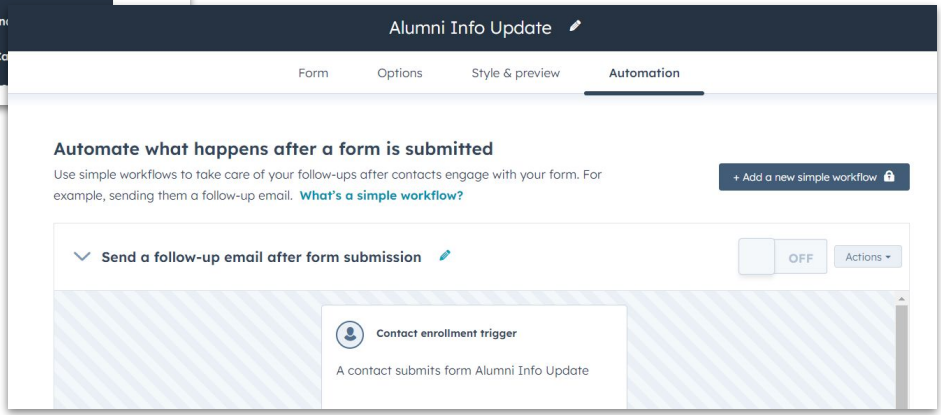
- Call, log, and record calls to families and have them accessible to your team right from the CRM
- Up to 500 shared minutes per month



Examples of Starter hubs



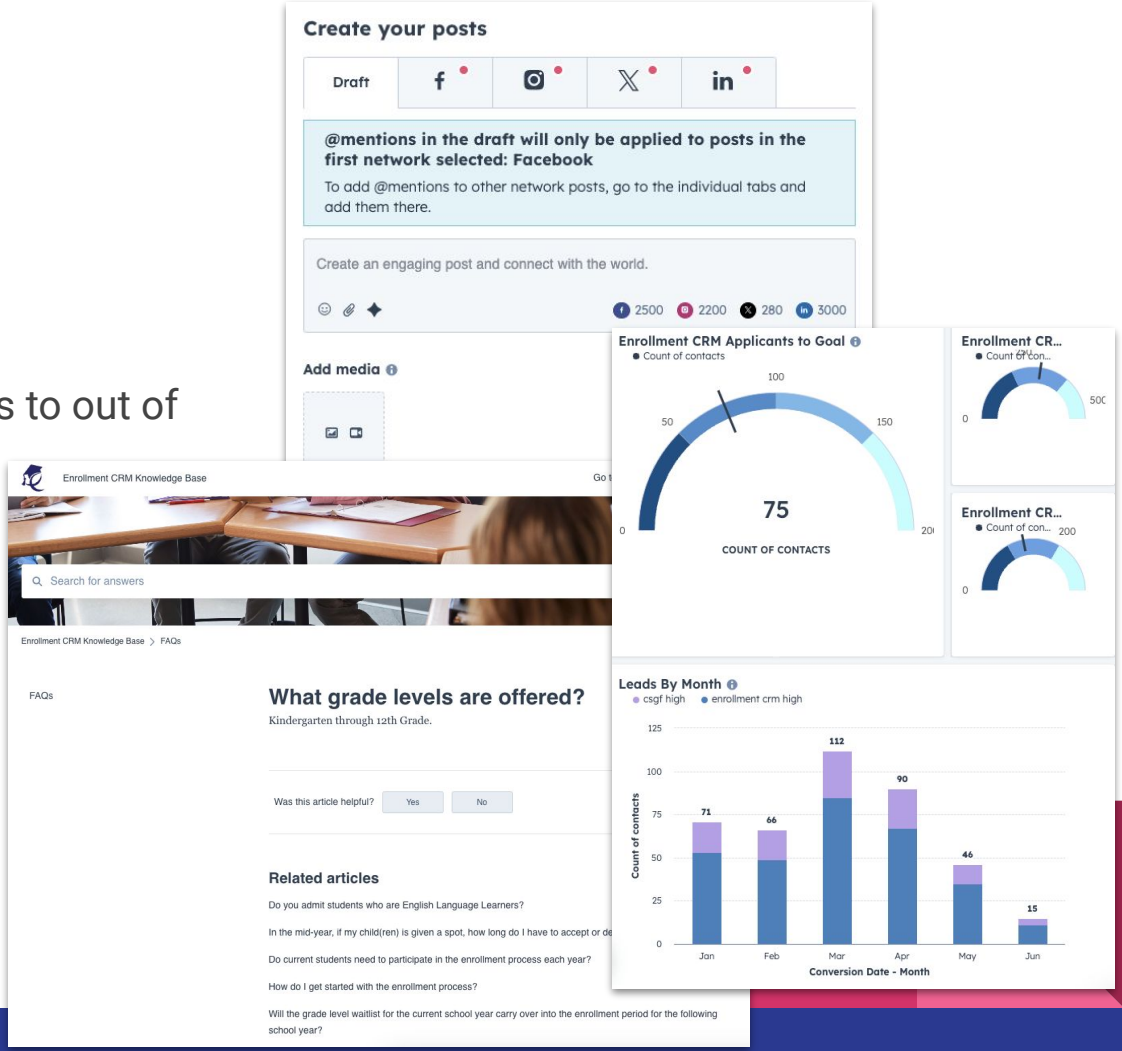




Limitations of Starter

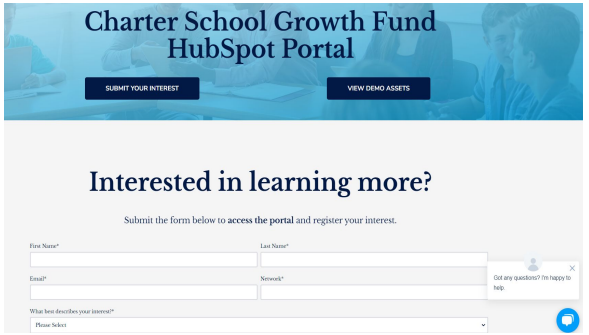
Tools not available in the Starter Suite:

- Social media integration
- Custom report builder (only access to out of the box reports)
- Marketing automation
- Automatic lead rotation
- Sequences
- Playbooks
- Lead scoring
- Knowledge base
- Feedback surveys
- AI tools
- Data quality automation



Scenarios for Starter Hubs

- A small network with only a couple of HubSpot admins (per seat pricing) and a small number of projected contacts (leads)
  - Likely 3 or fewer campuses.
- Create a couple of simple landing pages with a basic interest forms for lead capture
- Manage leads and lists, email leads and even make some calls to leads all within HubSpot



Sufficient for capturing and managing leads who find you organically or through WOM and for some basic marketing content.

What's Next

1. Schedule time with us if you think a Starter Platform might help your network
2. Reach out to others in the Community who may have additional experience
3. Direct Advisement: Submit your requests **here** for help! There are no dumb requests and we're here to help take a little work off your plate.
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

Additional Slides - for reference

Quick Vocab

Product Stack: the tools, technologies, and options available to you as you work to bring your recruitment & enrollment strategy to life. In this case, we're specifically talking about the HubSpot options, but your full product stack likely includes other solutions as well, such as SchoolMint.

Hub: the 5 different products within HubSpot that focus on different areas of an organization's work. These hubs are designed to align *customer service, marketing, operations, content management and sales* activities to create a unified customer experience

Customer Platform: HubSpot's new term for a bundle that includes all hubs

Suite: the old word for Customer Platform

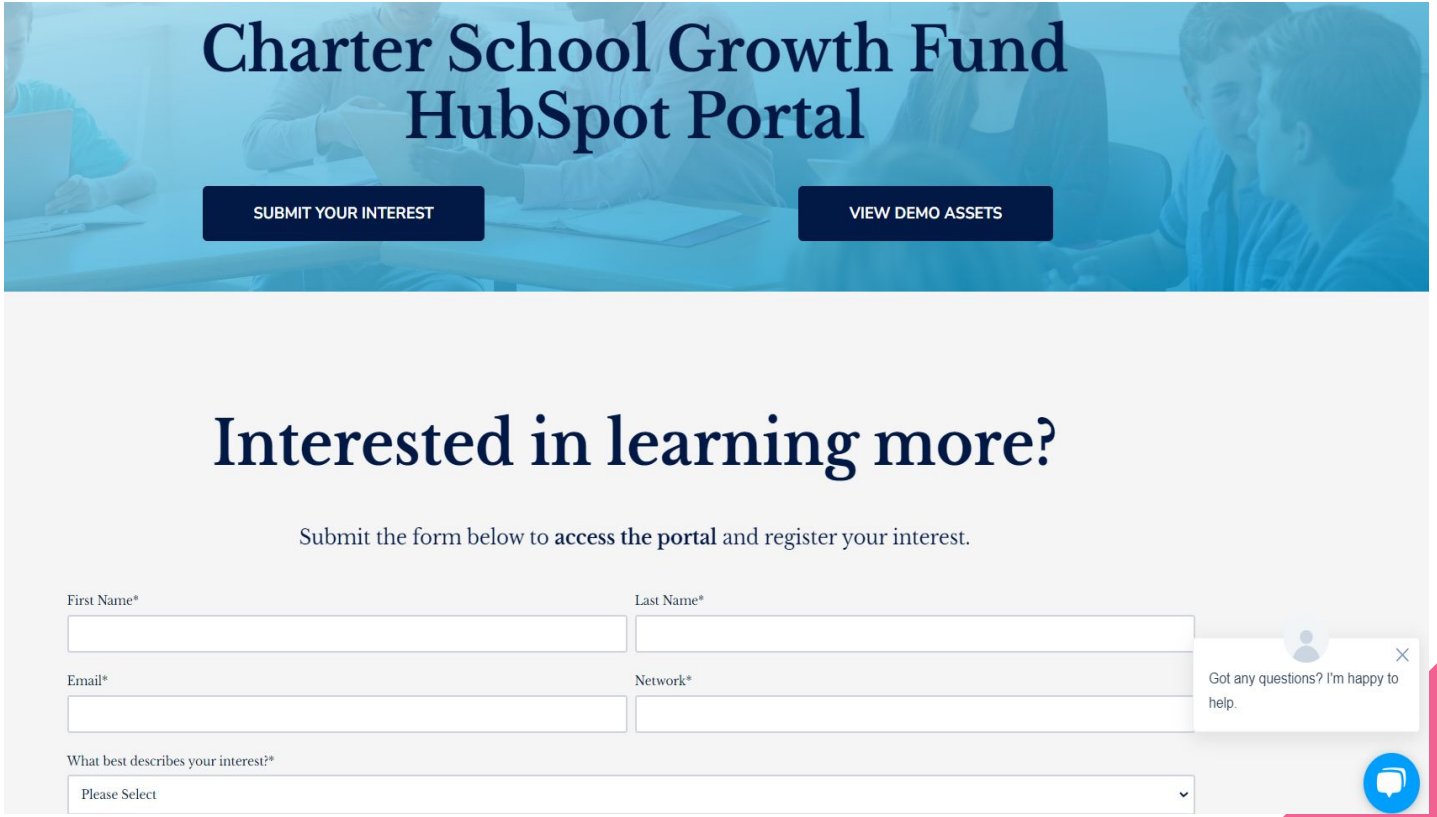
Tier: the different levels (and therefore pricing) that HubSpot offers customers based on size and need of the organization

Tools: the specific things you can do within a hub, for example in marketing you see a drop down menu of Ads, Email, Social, Landing Pages, etc.

Seats: the specific access someone has to view, edit and publish in HubSpot within your organization. This is new and we'll cover it below.

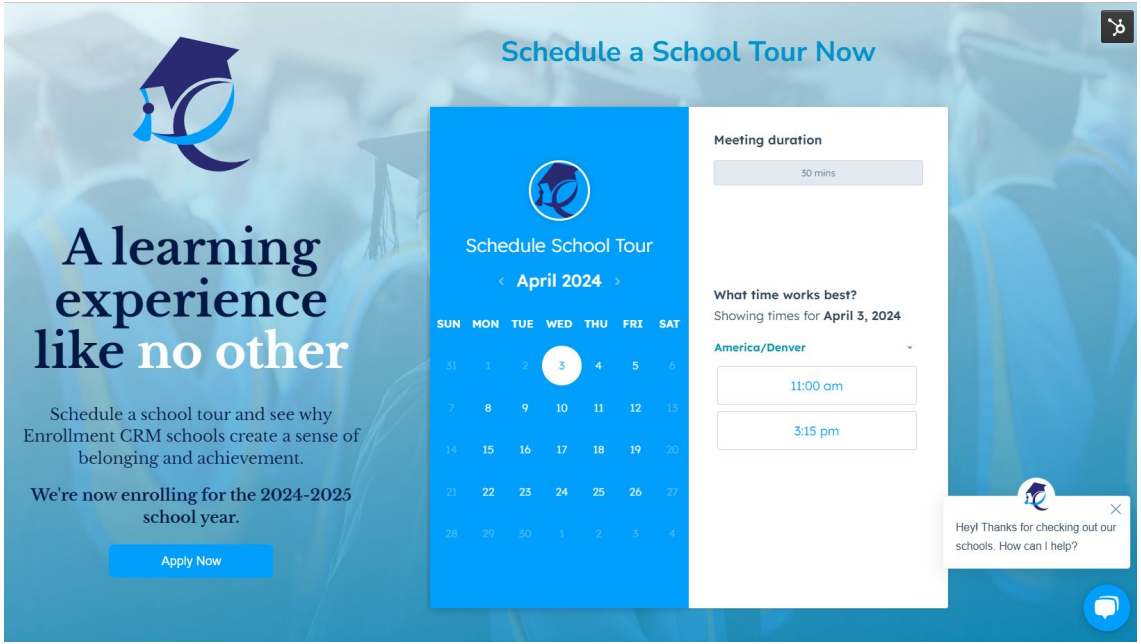
Integrations: the process of connecting the HubSpot platform with other software solutions to enable them to share data and functionality. Examples: social media, Calendly, Salesforce, etc.

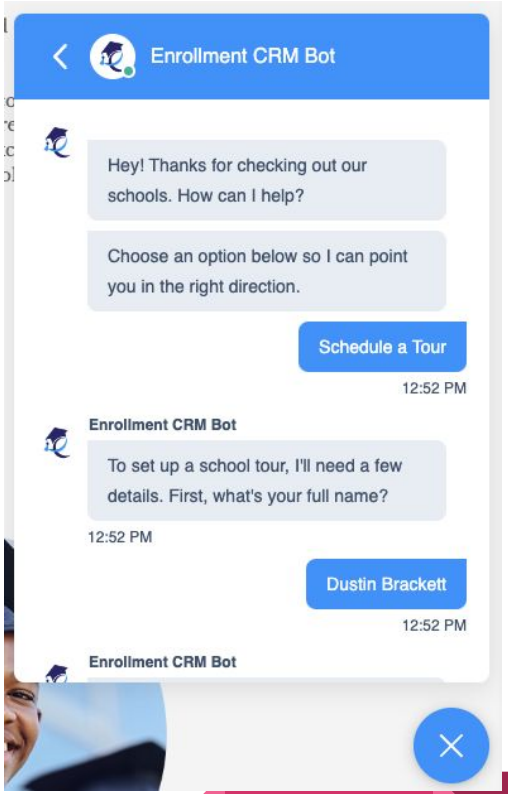
The start of a family journey: Interest



Capture and manage inbound leads

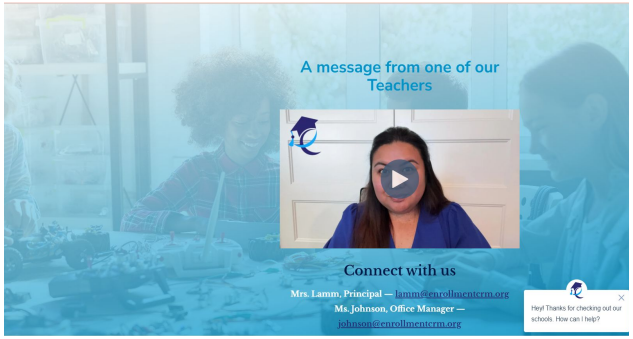
Easy tour scheduling





Capture, manage and engage inbound leads

Why us



STUDENT LIFE

Diverse and unique perspectives

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OUR STAFF

A team of collaborative, driven educators

Hey! Thanks for checking out our schools. How can I help?

npor

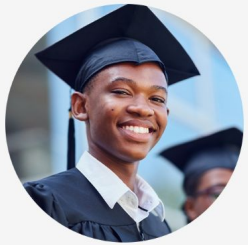
Engage and target leads with smart content

STEAM Curriculum

Our schools are focused on teaching our students the skills they need to succeed including science, technology, engineering, arts, and math.

A Culture of Growth

We support our students in growing into the young adults that they want to become.

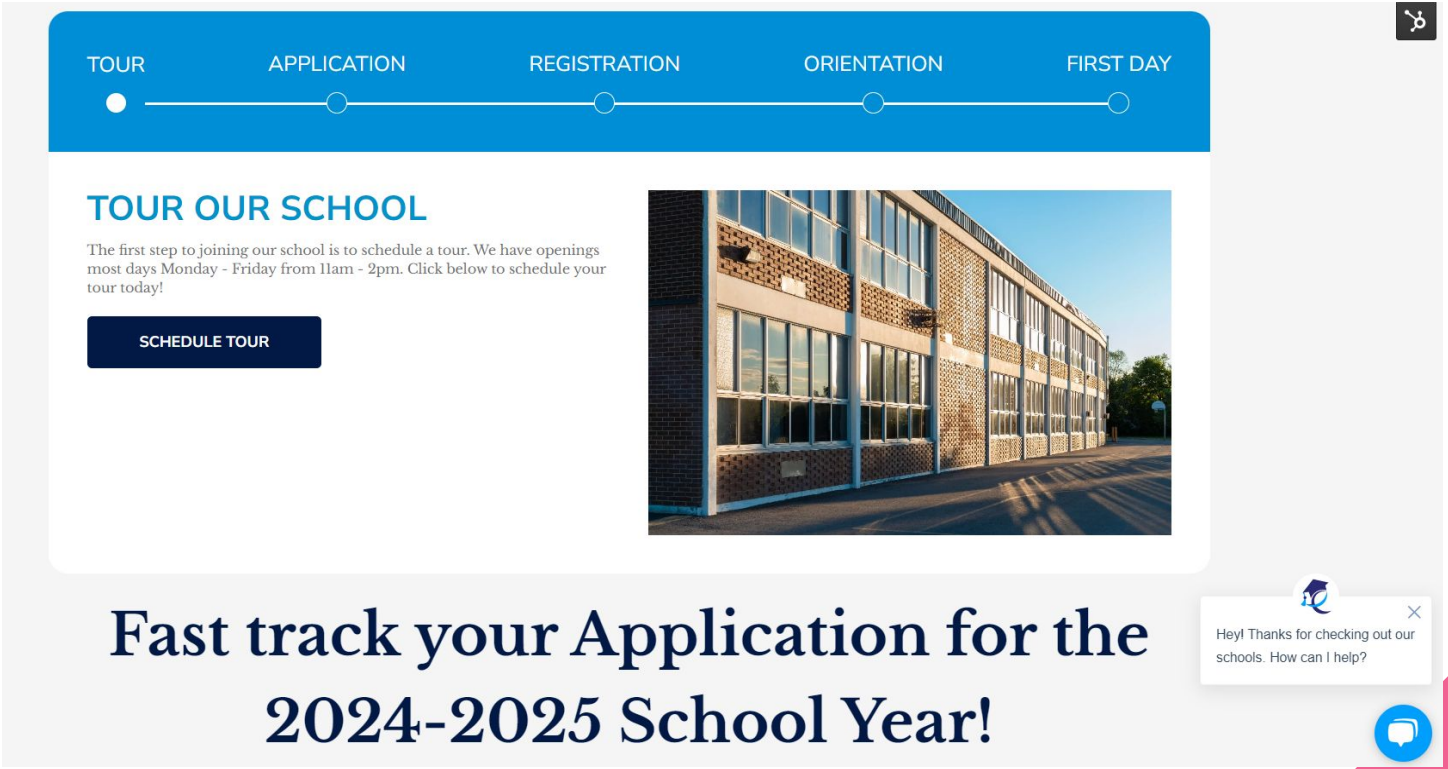


100% College Acceptance

100% of our students are accepted to college each year.

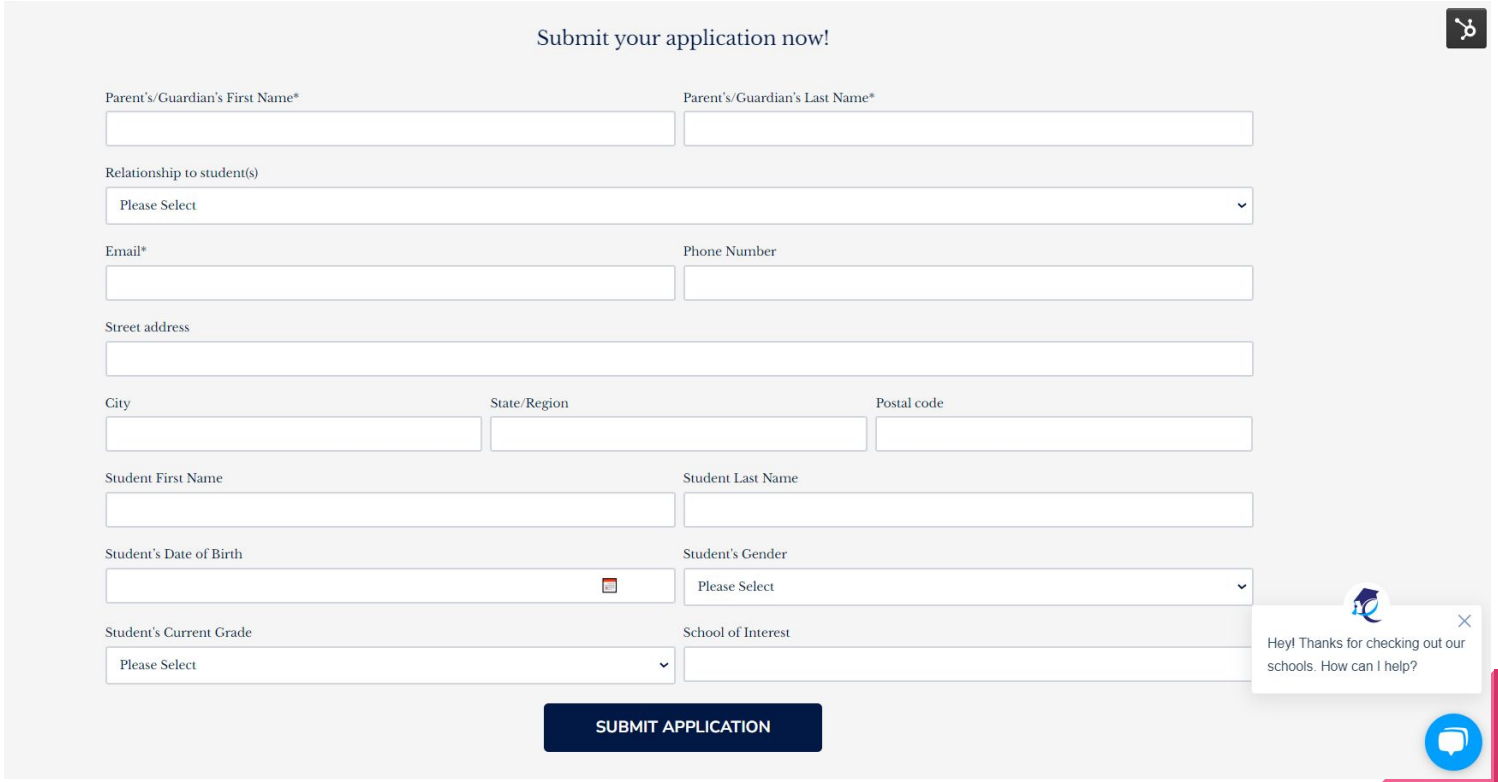
Hey! Thanks for checking out our schools. How can I help?

Quick Apply



Engage and convert leads into applications

Quick Apply



Lead conversion