



# 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

Contacts 482 records

Data Quality Actions Import Create contact

All contacts X My contacts Unassigned contacts + Add view (3/50) All views

Contact owner Create date Last activity date Lead status Advanced filters (0)

Search name, phone, email Export Edit columns

NAME	CONTACT OWNER	EMAIL	PHONE NUMBER	LIFECYCLE STAGE
Benny Goldstraw	Heather Lamm (heathe...	benny.goldstraw@gmail.co...	521-923-4803	Prospective Family
Merry Espinay	Heather Lamm (heathe...	merry.espinay@inojam.co...	679-917-9271	Prospective Family
Ardis Peyps	Dustin Brackett (dustin...	ardis.peyps@tazzy.com	610-836-6235	Prospective Family
Lizzy Seine	Heather Lamm (heathe...	lizzy.seine@gmail.com	290-581-5768	Prospective Family
Shanta Lesser	Jason Shaad (jshaad@...	shanta.less@gmail.com	626-872-7046	Prospective Family
Justis Pogue	Heather Lamm (heathe...	justis.pogue@feedfish.com	489-278-8115	Prospective Family
Edward Aughtie	Heather Lamm (heathe...	edward.aughtie@jobbersp...	935-340-3322	Prospective Family
Dwight Took	Dustin Brackett (dustin...	dwight.took@quimm.com	223-937-4045	Prospective Family
Nellie Van Der Weede...	Jason Shaad (jshaad@...	nellie.vanderweedenburg@...	--	Prospective Family
Archy McCome	Heather Lamm (heathe...	archy.mccome@voonix.com	--	Prospective Family
Issie Blas	Dustin Brackett (dustin...	issie.blas@eintl.com	--	Applicant
Angel MacAneaspie	Dustin Brackett (dustin...	angel.macanespie@yombu...	--	Applicant
Arieta Cocozza	Dustin Brackett (dustin...	arieta.cocozza@gmail.com	209-941-6604	Applicant
Bobbye Gwyther	Dustin Brackett (dustin...	bobbye.gwyther@labberry...	966-511-5956	Applicant

Prev 1 2 3 4 5 Next 100 per page

Contacts Actions

Benny Goldstraw  
benny.goldstraw@gmail.com

Activity Notes Emails Calls Tasks Meetings

Filter by: Filter activity (32/32) All users All teams

September 2023

**List membership** Sep 23, 2023 at 3:58 PM MDT  
Benny Goldstraw was added to Registered for OH/T, but didn't Attend

**Lifecycle change** Sep 22, 2023 at 2:00 PM MDT  
Dustin Brackett updated the lifecycle stage for this contact to Prospective Family. View details

**List membership** Sep 22, 2023 at 1:21 PM MDT  
Benny Goldstraw was added to Nearest School — CSGF High

**List membership** Sep 22, 2023 at 1:18 PM MDT  
Benny Goldstraw was added to Feeder — ABC Middle School

**Workflow activity** Sep 22, 2023 at 10:55 AM MDT  
Benny Goldstraw completed Capitalize contacts first and last names

**Workflow activity** Sep 22, 2023 at 10:55 AM MDT  
Benny Goldstraw enrolled in Capitalize contacts first and last names

**Past Feedback (0)**  
There's no feedback associated with this contact.

**Contacts (0)** + Add

**Playbooks** Manage  
Search  
COP Intro Call RECENTLY CREATED  
42 views - Last viewed a month ago  
View all playbooks

**List memberships** Manage  
Benny Goldstraw is a member of 6 lists. They have access to 0 private pages and articles that require registration.

**Leads (0)** + Add  
Track the prospecting activities associated with this record.

**Workflow memberships (1)** Manage  
Benny Goldstraw is a member of 1 workflow.

**About this contact** Actions

Email  
benny.goldstraw@gmail.com

Phone number  
521-923-4803

Contact owner  
Heather Lamm

Last contacted  
--

Lifecycle stage  
Prospective Family

Attended OH/?  
No

Nearest School  
CSGF High

Relationship to student(s)  
Mother

**Student Information** Actions

# 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

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

Submit your application now!

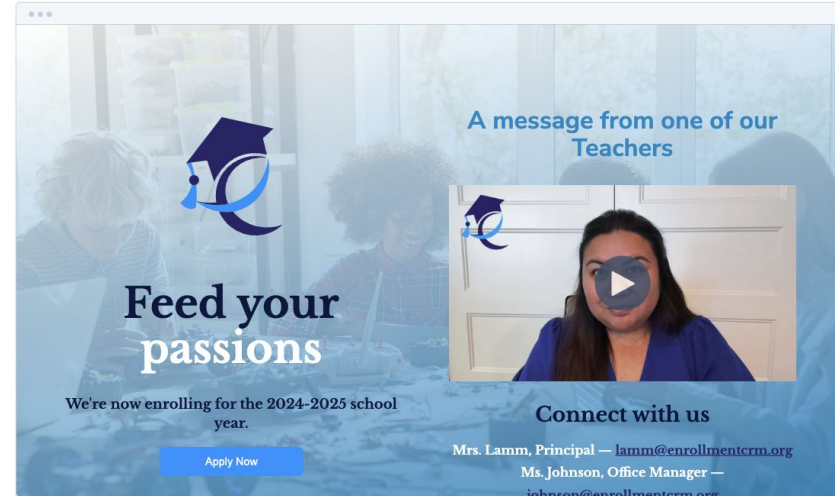
Parent's/Guardian's First Name*	Parent's/Guardian's Last Name*	
<input type="text"/>	<input type="text"/>	
Relationship to student(s) Please Select		
<input type="text"/>		
Email*	Phone Number	
<input type="text"/>	<input type="text"/>	
Street address <input type="text"/>		
City	State/Region	Postal code
<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 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

  
**Enrollment CRM News**




**The Impact of Technology**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi leo nunc, rutrum sed elit sit amet, pharetra scelerisque neque. Aliquam erat volutpat.

[Read more](#)



**Building a Community — How to Get Involved**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi leo nunc, rutrum sed elit sit amet, pharetra scelerisque neque. Aliquam erat volutpat.


[Read more](#)




**How the Classroom is Changing**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi leo nunc, rutrum sed elit sit amet, pharetra scelerisque neque. Aliquam erat volutpat.

[Read more](#)


**Upcoming Calendar**



**Labor Day — All Schools Closed**  
September 4, 2023



**Homecoming Football Game**  
September 15, 2023 at 7pm

  
f in x  
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[Privacy Policy](#) | [Terms of Service](#)

  
**Welcome to Enrollment CRM!**  
**We're so glad you're here.**

I hope you're incredibly excited about starting school!

I'll be your advisor for your entire first year. I'll help you select your classes and make sure that you have a happy and successful first-year experience. I'm looking forward to getting to know you over the next few months. I hope that you will see me as your main support and advocate for anything related to academic, campus life or in general.

In the meantime, if you have any questions, please don't hesitate to reach out.

**Enrollment Dates & Process**

- 1 Application Open**  
December 1, 2023 - February 20, 2024  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi leo nunc, rutrum sed elit sit amet, pharetra scelerisque neque. Aliquam erat volutpat.
- 2 Registration**  
March 1, 2024 - June 30, 2024  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi leo nunc, rutrum sed elit sit amet, pharetra scelerisque neque. Aliquam erat volutpat.
- 3 Orientation**  
July 5, 2024 - August 22, 2024  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi leo nunc, rutrum sed elit sit amet, pharetra scelerisque neque. Aliquam erat volutpat.
- 4 First Day of School**  
August 23, 2024  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi leo nunc, rutrum sed elit sit amet, pharetra scelerisque neque. Aliquam erat volutpat.

If you have any questions or concerns, please don't hesitate to reach out. We look forward to welcoming you to Enrollment CRM.

[Schedule a Call](#)

  
f in x  
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# 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

**Tasks**  
25 records

All  Due today  Overdue

Search task title  (1) Assignee  Task type  Due date

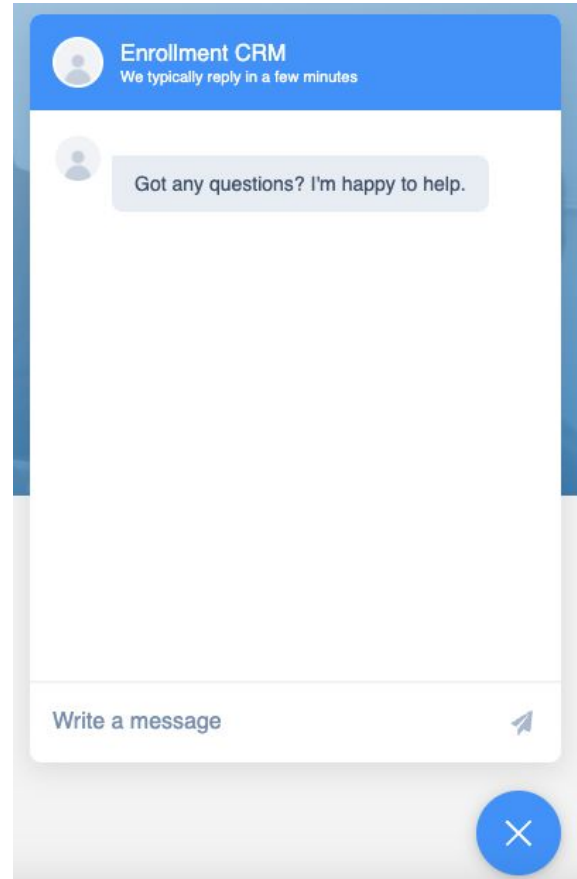
<input type="checkbox"/>	STATUS	TITLE	ASSOCIATED CONTACT
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Follow up — Clayton family has become ...	Kristina Clayton
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reach out to lead	Amanda Martin
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reach out to lead	Mario Morgan
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Follow up — Curley family has become u...	Madison Curley
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Follow up — Marrero family has become ...	Jasmine Marrero
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reach out to lead	Kristina Clayton
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reach out to lead	Lola Obadina
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reach out to lead	Madison Curley
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reach out to lead	Marilyn Ruffin
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Follow up — Martin family has become u...	Amanda Martin
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Follow up — Morgan family has become ...	Mario Morgan

< Prev 1 Next >

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

## Chatflows

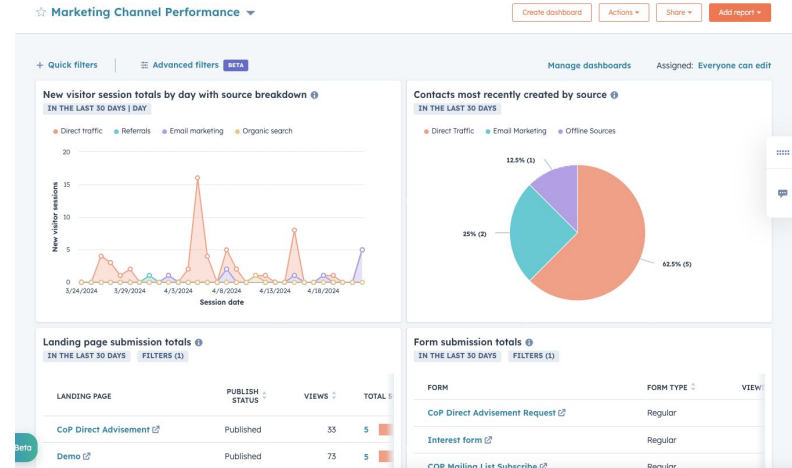
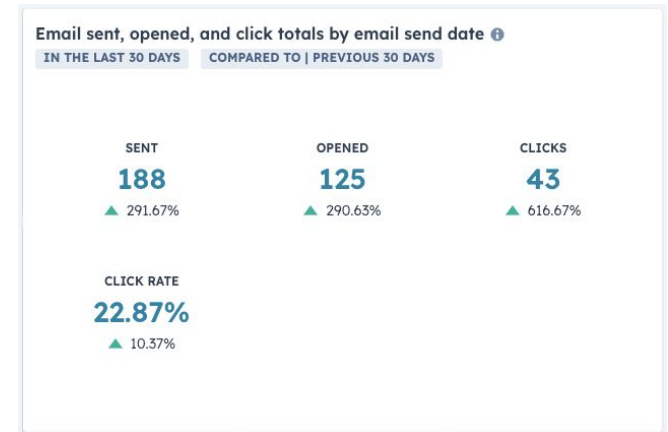
- Live chat and basic chatbots for your website
- Respond to live chat through Slack, the HubSpot mobile app, or online.
- Set availability times.



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

## Reports

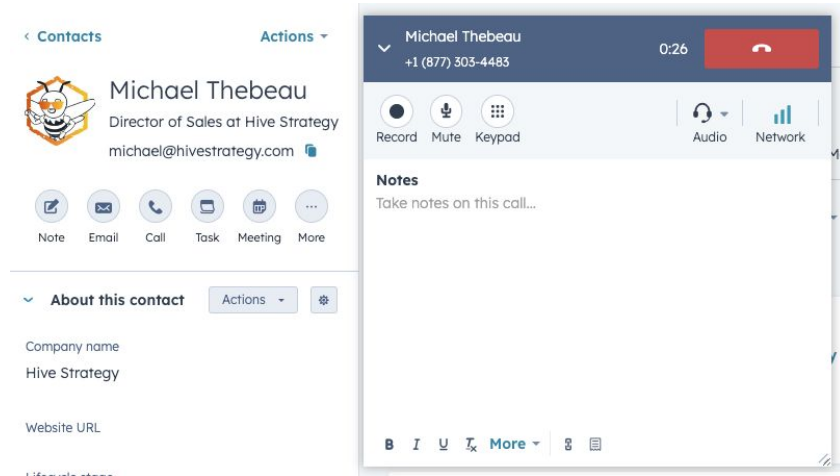
- Track and report on key metrics for your network
- Easily shareable with your team or managers
- Out of the box reports library



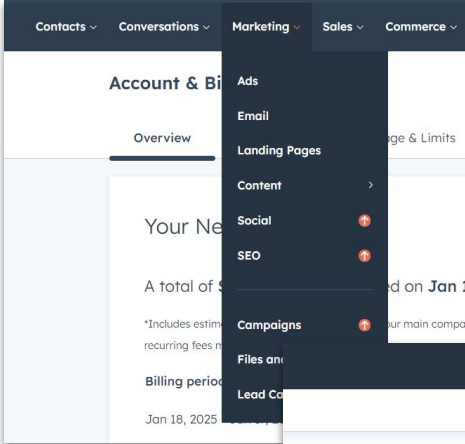
# What you can do with Starter hubs to help your recruitment strategy

## Calling from the CRM

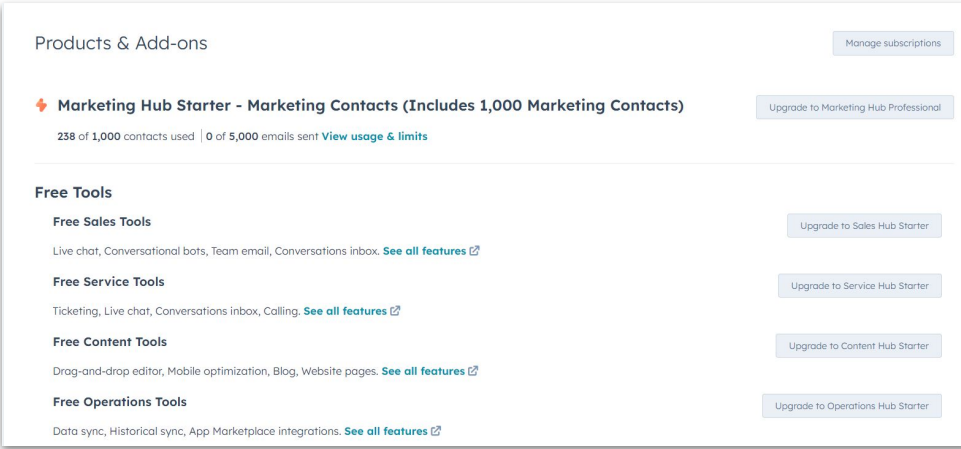
- Call, log, and record calls to families and have them accessible to your team right from the CRM
- Up to 500 shared minutes per month



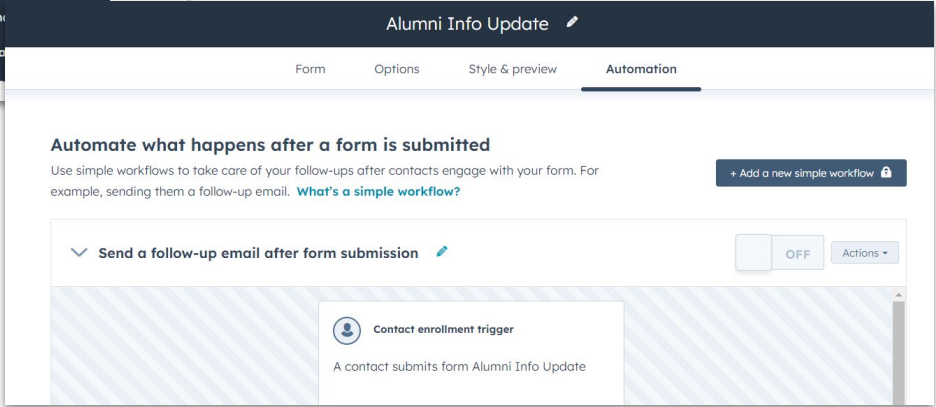
# Examples of Starter hubs



A screenshot of a HubSpot navigation menu. The menu is dark with white text and includes the following items: Contacts, Conversations, Marketing, Sales, and Commerce. A sub-menu is open under 'Marketing', listing: Account & Billing, Overview, Landing Pages, Content, Social, SEO, Campaigns, Files and Content, and Lead Capture. The 'Social' and 'SEO' items have red plus signs next to them.



A screenshot of the 'Products & Add-ons' page in HubSpot. The page title is 'Products & Add-ons' with a 'Manage subscriptions' button in the top right. The main content area features a card for 'Marketing Hub Starter - Marketing Contacts (Includes 1,000 Marketing Contacts)'. Below this card, there are sections for 'Free Tools' categorized into: 'Free Sales Tools', 'Free Service Tools', 'Free Content Tools', and 'Free Operations Tools'. Each category includes a list of features and a 'See all features' link. On the right side of the page, there are four 'Upgrade to...' buttons corresponding to the tool categories: 'Upgrade to Marketing Hub Professional', 'Upgrade to Sales Hub Starter', 'Upgrade to Service Hub Starter', and 'Upgrade to Content Hub Starter'.



A screenshot of a HubSpot automation workflow configuration page. The page title is 'Alumni Info Update' with an edit icon. The workflow is currently 'OFF'. The main heading is 'Automate what happens after a form is submitted'. Below this, there is a description: 'Use simple workflows to take care of your follow-ups after contacts engage with your form. For example, sending them a follow-up email. What's a simple workflow?'. A button '+ Add a new simple workflow' is visible. The workflow steps are shown in a list, with the first step being 'Send a follow-up email after form submission'. This step is triggered by 'Contact enrollment trigger' with the description 'A contact submits form Alumni Info Update'.



# 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

## Create your posts

Draft



@mentions in the draft will only be applied to posts in the first network selected: Facebook

To add @mentions to other network posts, go to the individual tabs and add them there.

Create an engaging post and connect with the world.



Facebook 2500 Instagram 2200 Twitter 280 LinkedIn 3000

## Add media



Enrollment CRM Knowledge Base

Go to

Search for answers

Enrollment CRM Knowledge Base > FAQs

### FAQs

#### What grade levels are offered?

Kindergarten through 12th Grade.

Was this article helpful?

#### Related articles

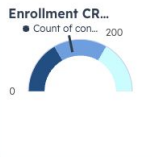
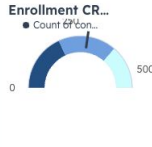
Do you admit students who are English Language Learners?

In the mid-year, if my child(ren) is given a spot, how long do I have to accept or decline?

Do current students need to participate in the enrollment process each year?

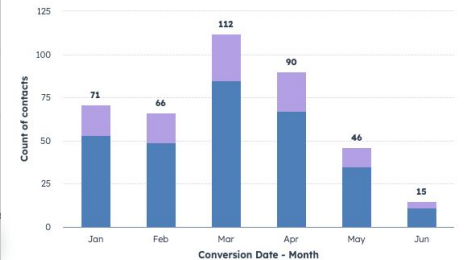
How do I get started with the enrollment process?

Will the grade level waitlist for the current school year carry over into the enrollment period for the following school year?



### Leads By Month

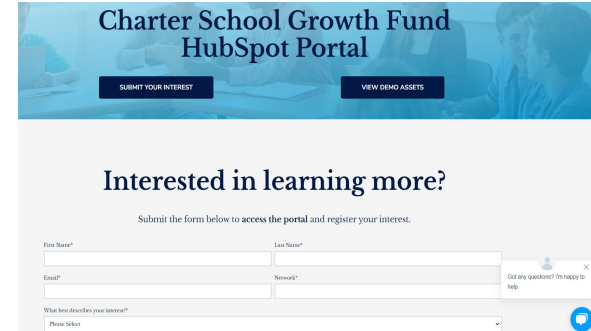
csqf high enrollment crm high



# 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.*



The screenshot shows a landing page for the "Charter School Growth Fund HubSpot Portal". At the top, there is a blue header with the text "Charter School Growth Fund HubSpot Portal" and two buttons: "SUBMIT YOUR INTEREST" and "VIEW DEMO ASSETS". Below the header, the main content area is white and features the heading "Interested in learning more?". Underneath the heading, it says "Submit the form below to access the portal and register your interest." The form includes fields for "First Name\*", "Last Name\*", "Email\*", and "Network\*", followed by a dropdown menu labeled "What best describes your interest?" with the instruction "Please Select". On the right side of the form, there is a small chat icon and a link that says "Get any questions? I'm happy to help."



# 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

## Charter School Growth Fund HubSpot Portal

SUBMIT YOUR INTEREST

VIEW DEMO ASSETS

*Capture  
and  
manage  
inbound  
leads*

## Interested in learning more?

Submit the form below to access the portal and register your interest.

First Name\*

Last Name\*

Email\*

Network\*

What best describes your interest?\*

Please Select ▼

Got any questions? I'm happy to help.



# Easy tour scheduling

**Schedule a School Tour Now**

**Schedule School Tour**

< April 2024 >

SUN	MON	TUE	WED	THU	FRI	SAT
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

**Meeting duration**

30 mins

**What time works best?**  
Showing times for April 3, 2024

America/Denver

11:00 am

3:15 pm

**Apply Now**

**Enrollment CRM Bot**

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

Choose an option below so I can point you in the right direction.

**Schedule a Tour**

12:52 PM

**Enrollment CRM Bot**

To set up a school tour, I'll need a few details. First, what's your full name?

12:52 PM

**Dustin Brackett**


12:52 PM

**Enrollment CRM Bot**

*Capture, manage and engage inbound leads*

# Why us

A message from one of our Teachers



Connect with us

Mrs. Lamm, Principal — [lamm@centralmencerm.org](mailto:lamm@centralmencerm.org)

Ms. Johnson, Office Manager — [johnson@centralmencerm.org](mailto:johnson@centralmencerm.org)

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

## STUDENT LIFE

### Diverse and unique perspectives


Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.



## OUR STAFF

### A team of collaborative, driven educators



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



ripor

Engage and target leads with smart content



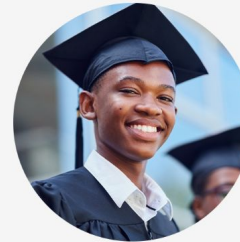
### STEAM Curriculum

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

TOUR

APPLICATION

REGISTRATION

ORIENTATION

FIRST DAY

## TOUR OUR SCHOOL

The first step to joining our school is to schedule a tour. We have openings most days Monday - Friday from 11am - 2pm. Click below to schedule your tour today!

SCHEDULE TOUR



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



*Engage and  
convert leads  
into  
applications*



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





# Quick Apply

Submit your application now!



Parent's/Guardian's First Name\*

Parent's/Guardian's Last Name\*

Relationship to student(s)

Email\*

Phone Number

Street address

City

State/Region

Postal code

Student First Name

Student Last Name

Student's Date of Birth

Student's Gender

Student's Current Grade

School of Interest

SUBMIT APPLICATION

*Lead  
conversion*



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

