




The HubSpot Stack

What you get, what you need, and what are the trade-offs associated with these decisions in our charter-specific setting?

Agenda

1. Introductions: Education Inbound & Community Members
 2. Why begin this COP with this topic?
 3. How HubSpot bundles its products
 4. EnrollmentCRM.org as our starting point
 5. The Starter Customer Platform
 6. The Pro Customer Platform
 7. The Enterprise Customer Platform
 8. Mix & Match - When it makes sense
 9. Discussion, Q&A
 10. Next Steps
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Meet the Education Inbound Team



Dustin Brackett
Co-Founder



Heather Lamm
Co-Founder



Moira Wiedenman
Consultant



Meet the CSGF Community of Practice: 37 Networks!

*Enter into the chat your favorite moment from spring break this year



The COP Participants and HubSpot Evolution

Please see [HERE](#) for the complete list of our 37 COP networks, their relative “tier” in their HubSpot Journey and their HubSpot product stack, if applicable:

Tier 0 - Not Yet on HubSpot

Alabama Aerospace & Aviation
Alliance College Ready
Caliber Schools
Coney Island Prep
Family Life Academy Charter
Gestalt Community Schools
One City Schools
PEACE Academy
Summit Public Schools
Tulsa Honor Academy

Tier 1 - New to HubSpot

Ascend Public Schools
DC Prep
DREAM Charter Schools
Fortune School of Education
Prospect Schools
Public Prep
Uplift Education

Tier 2 - 1-3 yrs on HubSpot

Amber Charter School
Achievement First
Brilla
KIPP NYC
KIPP Stl
Mastery Charter Schools
Rocketship

Tier 3 - 3+ yrs on HubSpot

DSST Public Schools
KIPP: Nashville
KIPP: Norcal
KTAF (KIPP NJ/Miami)
Vista College Prep

Why Begin Here?


Grounding in the **outcomes** we all want from recruitment & marketing systems:

1. Increase # of interested families/students (leads) and **capture** those leads in one place
2. Increase conversion rates of leads - into applications **and** into actual students on FDOS
3. Increase year-over-year persistence
4. Increase in efficiency and effectiveness of our teams

Critical question we were asked during many intro calls: What are the “competencies” a network must have in order to drive the above? What does “mastery” look like? How do we compare?

What we have found in our 8+ years of experience is that a network’s ability to drive outcomes with a system like HubSpot is **dependent on what tools are at our disposal**.

There are MANY other factors as well - experience on HubSpot, skills on your team, external conditions, and other systems. But we have to start at the product stack level in order to understand what’s even possible.



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.



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.



New Seat Pricing

1. HubSpot launched a new pricing model in March focused on “seats” for all hubs and tiers.
2. This only affects new HubSpot portals right now, but may impact renewals so its important to understand

 View-only Seat	 Core Seat	 Sales & Service Hub Seat
View HubSpot features <u>without</u> edit access	Edit access to purchased Hubs and connection to Smart CRM	Everything included in a Core Seat plus Sales and Service features
Best for business leaders	Best for marketers, admins, developers, and operations.	Best for sales and service reps and enablement

Enrollment CRM Example

What does this look like in practice?

- 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 example demonstrates the Pro Customer Platform and utilizes the CRM as well as all five hubs in some capacity.



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

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

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

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

Capture, manage and engage inbound leads

Why us

A message from one of our Teachers



Connect with us

Mrs. Lamm, Principal — lamm@centralmencerm.org

Ms. Johnson, Office Manager — 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



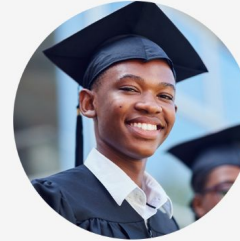
STEAM Curriculum

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?



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

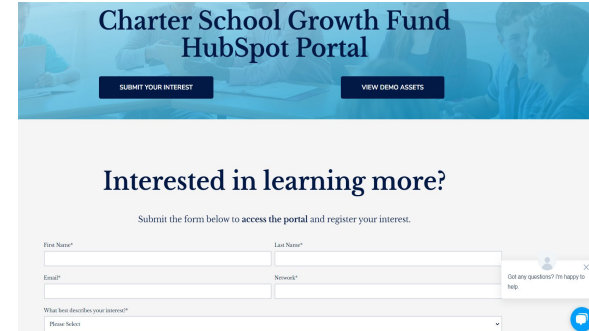
Scenarios for Starter Hubs

- A small network with only a couple of HubSpot admins 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

OR:

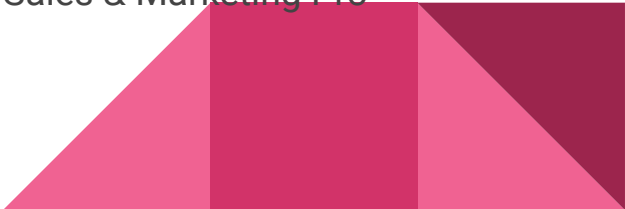
- A network on other Pro or Enterprise hubs that needs one specific tool (ex. Operations Hub Starter for additional field mappings for an integration)

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 this heading is a sub-heading: "Submit the form below to access the portal and register your interest." The form consists of several input fields: "First Name*", "Last Name*", "Email*", and "Network*". There is also 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 bubble icon and a link that says "Got any questions? I'm happy to help."

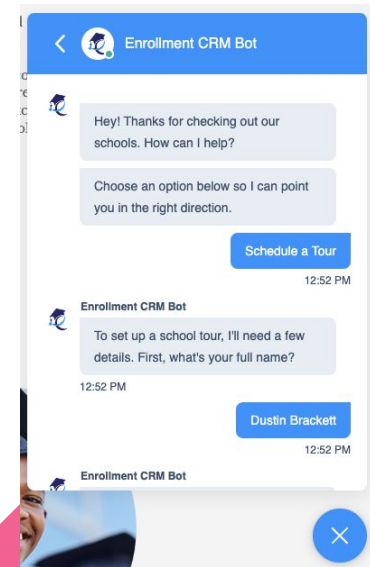
The HubSpot **Pro** Customer Platform

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 & Fortune School are using the full Pro Suite
- 

Scenarios for Professional Hubs

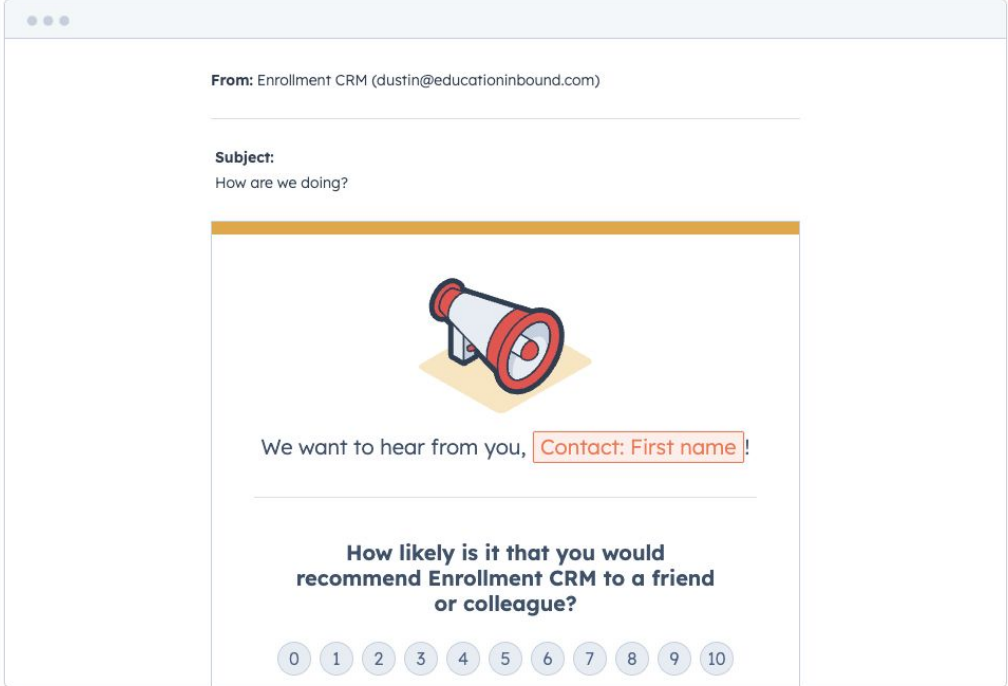
1. Many networks in CSGF will fall into this category
 - a. Best option for networks with more than 3 schools
2. Professional hubs allow you to automate workflows, create more comprehensive forms (quick apply) with automation, schedule tours and connect your social media so that your families get a more 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.



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 line 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?". Below the question is a horizontal row of 11 circular buttons labeled with numbers from 0 to 10, representing a Likert scale.

The HubSpot **Enterprise** Customer Platform

1. Cost Range — \$2,400 - \$4,000 per month, based on contacts and users. Assuming 20k contacts and 10 users our networks would pay around \$35,000 per year.
 2. Major improvements from Pro
 - a. Granular permissioning for your team
 - b. Content approvals before publishing
 - c. Attribution reporting (really understand which marketing activities are yielding applications)
 - d. Predictive lead scoring (using AI)
 - e. Custom objects (fully customizable, trackable, and reportable)
 - f. Membership portal (team or parent portal)
 3. Enrollment CRM — you can do everything that we built plus much more.
 4. Networks in the Community using all or some of the Enterprise Customer Platform:
 - a. Prospect, DSST, KTAF & KIPP: NYC are using one of the Enterprise hubs
 - b. None of our Networks are using the full Enterprise platform.
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Scenarios for Enterprise Hubs

1. Larger networks with many people/teams involved in HubSpot, and a large number of contacts (leads)
 - a. At some point it makes sense to upgrade to Enterprise for seats and contacts alone
2. Advanced permissioning or security needs
3. Custom app needs
4. Custom objects
5. Advanced website needs (memberships/internal website, multisite, etc.)
6. Most networks will not need an Enterprise hub

Is not necessary for greater lead conversion or management, but might be most cost efficient at scale AND can increase internal efficiency.

Back to all private apps
Google Sheets API Integration Edit app

App description... Last changed on April 5, 2024

Overview **Auth** Logs Webhooks

These credentials provide API access to your HubSpot account. Keep them safe and secure.

Access token pat-na1-f5996***** Show token Copy Rotate

Client secret ***** Show secret Copy

Scopes

crm.objects.contacts.read crm.schemas.companies.read crm.schemas.contacts.read crm.lists.read crm.objects.companies.read
crm.schemas.contacts.write crm.schemas.companies.write crm.objects.custom.read crm.schemas.custom.read crm.lists.write
crm.objects.companies.write crm.schemas.custom.write crm.objects.custom.write hubdb crm.objects.contacts.write


Mixing Hubs & Tiers

1. Most of you on HubSpot have wisely chosen to grow into HubSpot by starting with just Marketing Pro or Marketing & Sales Pro
 - a. This **can** be the most cost effective route, but not always
 - b. Makes sense when you are first launching and if you need only specific tools for one additional hub
 - c. Minimum recommended stack if you have at least 3 schools – **Marketing Pro & Sales Pro**
 - d. Ideal recommended stack if you have at least 3 schools – **Pro Customer Platform**
2. Select examples of mixing in various ways
 - a. DSST: Marketing Pro, CMS Enterprise, Operations Pro, Sales Pro
 - b. Prospect: Marketing Enterprise, Sales Pro
 - c. KIPP: NYC: Marketing Pro, Sales Enterprise
3. Let us help you review your stack!
 - a. Vista Prep
 - b. Fortune



Discussion, Q&A

Takeaways

1. Evaluate if you believe you are on the right hubs and the right tier based on what you've learned today
 2. Reach out to others in the Community who may have additional experience
 3. Ask Education Inbound for a quick evaluation of your hubs and tiers and for pricing on upgrade and downgrade options
 4. If you don't have HubSpot yet, think about the use cases described here and how they might apply to your network. And reach out to Education Inbound if you want to discuss in more depth!
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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



What's Next (continued)

- For networks NOT currently on HubSpot: We will reach out to gauge interest in two workshops that might be helpful:
 - Is a CRM & Marketing Automation Platform right for my network and if so, what are the best options?
 - Developing a powerful recruitment strategy using a CRM & Marketing Automation Tools: What it looks like.
- 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.
- Additional Workshops: Look for a short survey on your top priorities for smaller, hyper focused workshops to tackle some of the common HubSpot challenges.
- [Join the CSGF/COP Slack Channel!](#)