

Sales and Marketing Alignment Automation

Your organization will finish this project with a clear, working process for sales and marketing in HubSpot. This includes lifecycle stage transitions, marketing/sales handoffs, and automation to support each step of the process.

Our approach to achieving your outcome

Phase 1: Discovery

Week 1

- Discuss current process and future goals
- High level Marketing and Sales Hub review by Consultant
- Create current process map/flow

Phase 2: Configuration

Weeks 2-5

- Consultant reviews current process map
- Marketing and Sales will designate process builders
- Align usage gaps with identified priorities
- Create/Update Object data and conversion assets

Phase 3: Readiness & Deployment

Weeks 6-7

- Update process map(s)
- Build/Update automation to support new process
- Fill gaps to ensure easy hand offs between teams
- Confirm POC is comfortable with decided solutions

Phase 4: Close-out

Week 8

- Closing call
- Create/update final process documentation
- Discuss future automation opportunities
- Review final recommendations

Do you struggle with Sales and Marketing Alignment?

If the following apply, this consulting block is a great fit

Typical fit:

- Your marketing and sales teams need to be aligned in terms of lead handoff and qualification.
- A lot of the qualification and handoff process is manual, and you don't know which steps to automate.
- The data from Marketing isn't always used by Sales, and Sales doesn't have a great way to give feedback on leads to marketing.

Requirements for service delivery:

- Your company will have a clear, working business process for Sales and Marketing within HubSpot.
- You have buy-in from both Sales & Marketing, but need further guidance on implementing an iterative process.
- You have an existing lead flow (totally new processes won't gain as much from the consulting project).

What to expect from us

Your Inbound Consultant will provide guidance and recommendations to produce the service outcome.

In delivering the outcome we may provide:

- A project plan
- Planning templates
- Recordings of consulting calls
- One service-specific deliverable

What we expect from you

Your team will act on the guidance and recommendations of your Consultant, leveraging our Customer Support team for any "how to" questions.

Your team's stakeholders will be available to complete the service within 75 days.

You have sufficient resources to commit to at least 2 hours per week to execute on assigned tasks throughout the project.

Duration:
Up to 10 hours

USD: \$3,000
EUR: €2,800

GBP: £2,500
AUD: \$4,400

SGD: S\$4,200
JPY: ¥360,000

COP: 9,000,000
CAD: \$3,900