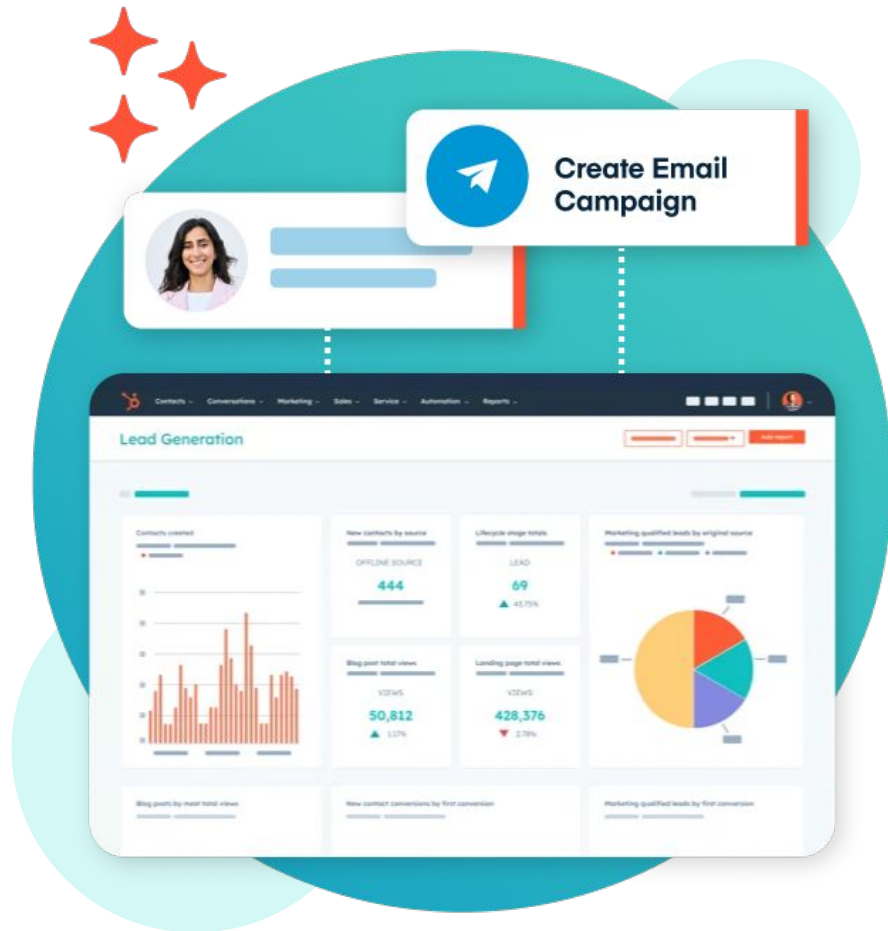


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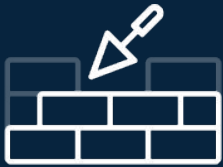
GETTING THE MOST OUT OF HUBSPOT





The **HubSmart Model** is **tbk's** 5-stage framework for scaling your business with **HubSpot**—smarter, faster, and with measurable impact.

There are 5 stages of HubSpot implementation that need to be put in place so you can get the most out of your CRM



STAGE ONE
Setup Smart



STAGE TWO
Track Smart



STAGE THREE
Automate Smart



STAGE FOUR
Attribute Smart



STAGE FIVE
Scale Smart

THE HUBSMART MODEL by **tbk**

STAGE 01: SETUP SMART



Focus: Foundational Configuration

Lay the groundwork with clean data, user access, branding, and essential tracking.

Ensure your CRM portal is correctly structured for long-term growth.

- User access & permissions
- Domain & email configuration
- CRM properties & lifecycle stages
- Contact and deal implementation
- Tracking setup (forms, pages, basic events)
- Enablement and change management

THE HUBSMART MODEL by **tbk**

STAGE 02: TRACK SMART



Focus: Visibility & Engagement Insights

Activate key tracking and reporting to understand what your contacts are doing and how they're engaging.

- Basic event tracking (emails, form submissions, page views)
- Form optimization
- Simple automations
- Lifecycle tracking
- Intro to dashboards, campaign metrics and custom views
- Simple marketing landing pages

THE HUBSMART MODEL by **tbk**

STAGE 03: AUTOMATE SMART



Focus: Sales, Marketing & Service Efficiency

Get all your key marketing, sales and service processes automated, with the right people notified and your contacts nurtured.

- Marketing workflows and social automations
- Meeting schedulers and notification systems
- Deal/ticket pipeline automations
- Lead scoring
- Advanced Sales tools: chat flows, tasks, playbooks, call tracking, knowledge base, automated feedback surveys
- Tracking URLs and UTM builder

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STAGE 04: ATTRIBUTE SMART



Focus: Performance & ROI Clarity

Gain visibility into what marketing and sales activities are driving revenue so you can focus on what works.

- Campaign attribution and reporting
- Sales lead scoring
- Deal forecasting
- Buyer journey analytics
- Marketing & sales alignment metrics
- Custom reporting (eg. team performance)
- Automated quote creation
- Intro to personas and customer journeys

THE HUBSMART MODEL by

STAGE 05: SCALE SMART



Focus: Optimization & Continuous Growth

Proactively use advanced tools, AI features, and strategic insights to elevate performance and scale efficiently.

- AI assistants (reporting, content, insights)
- Advanced workflows
- Full buyer journey tracking
- Team training & optimization cycles
- SLAs for service and support tickets
- A/B testing for emails, landing pages and CTAs
- Data quality automations and reporting



Thank you!

If you need anything,
We're here for you.

Contact:

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