CRM Implementation

Organise and Optimize your HubSpot set up, with ISO 9001 and 27001 accredited partner.
Let’s get your ducks in a row

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Welcome

If you’re looking for a Partner you can trust, you’re in the right place.

Plus Your Business (PYB) was established in 2013, when Martin Shervington was an advisor for Google.

Since 2016 Martin and his wife Elisa have been 100% HubSpot - delivering hundreds of HubSpot projects, and earning top accreditations in ‘Onboarding’, ‘CRM implementation’ & ‘Custom Integrations’.

Everything from data migrations from other platforms (e.g. Salesforce and Microsoft Dynamics) to integrations with third party software, inc. ERP systems.

Each and every HubSpot CRM implementation is unique, and follows 2 phases: Organise & Optimize. Hopefully this brochure will give you a good idea of the process.

The Process

ORGANISE

OPTIMIZE

Investigation

CRM: Structure/Process

Marketing, Sales & Service loops

Scale Up!
Organise

The first stage of CRM implementation.
CRM Set Up

Organisation is the tool for managing complex systems.

There are two components to getting a database ‘well organised’.

The first is ‘structure’ and the second is ‘process’, in that order.

Structure takes the form of properties, pipelines, workflows etc. whereas process tends to move data, inform & communicate, and generally create ‘a next step’.

When you get the data structure right, your processes are easy to build using HubSpot.
We rate PYB very highly here at Agentive (which is a JV between two large industrials (Sumitomo and bp). The team has covered a lot of ground with us, both in terms of professionalising our corporate start-up, but also in terms of coaching and developing our team to greater success. Spear-headed by Martin and Elisa, we have leaned heavily into the PYB team for expert assistance, coaching and leadership across the whole gamut of business activity. Martin and Elisa's team, brought a highly considered external perspective on a range of matters, not the least of which was how to leverage productivity by using HubSpot to bring execution discipline and process to improve our prospects as a start-up. Martin was able to bring a broad reach of experience to bear, and he really helped the team think more broadly about their roles, and how best to use the fantastic corporate support from our anchor investors, but also where to embrace approaches to ensure faster velocity. I think it is also worth pointing out that PYB brings heaps of experience and insight, which is generally valuable, but when deployed in conjunction with the HubSpot tool, are really impactful. I am really impressed with their service and look forward to working with them whenever the opportunity arises and Agentive grows.

Darren Meredith - CEO (Agentive)
CRM migrations are always scary but the PYB were everything you could ask for + more - knowledgeable, responsive and took the time to understand our business requirements. The ongoing support from both Martin and Elisa has been outstanding and I wouldn’t hesitate to recommend them to anyone looking for a migration partner.

Justin Powick - Head of Growth, Workforce

Migrations:

Where is your data housed?

Data migration is at the heart of our work. We’ll migrate your existing platform (Salesforce, Dynamics, Pipedrive, Copper etc), and any ‘rogue sales spreadsheets’ you may have floating about.

If you’ve haven’t been through this process before, then please be reassured…it’s going to be ok.

Each platform has its own language system, like companies/accounts or deals and opportunities. And we understand how to access & move data stored in each of these objects - a bit like a shelf unit stores words in books.
Integrations:
What data do you want to move where ‘when’?

With HubSpot at the core of your business processes, we can move data around effortlessly.

Using HubSpot workflows and ‘webhooks’ we can make HubSpot data (contacts, companies, deal properties etc) accessible to other data platforms; using HubSpot’s other APIs we can create bi-directional flows.

It all starts with a data model, then we move to the architecture before configuring the relevant systems.

Example: when a deal goes to ‘closed won’ in HubSpot, it moves the related data into your ordering system for your operational team to process.

This work is often complex but incredibly valuable - moving you from thinking and acting in data silos across the business.

“Best UK based HubSpot onboarding partner!”

Martin and Elisa and the team at Plus Your Business came highly recommended by HubSpot as an effective onboarding partner - they didn’t disappoint! From the outset they were focused on our requirements and their knowledge and the support and expertise they provided was exemplary throughout the process. They went ‘over and above’ to provide us with working solutions. We continue to employ their services and I have no hesitation in recommending Plus Your Business as a HubSpot implementation partner.

Greg Holt - Group Marketing Director
Already using HubSpot?

You’ll probably require ‘reconfiguration’?

We often work with existing HubSpot users. We’ll take your existing portal and reconfigure the data structure.

From there, we’ll consult with you and your team to build robust and effective processes.

This process will take between 4 and 12 weeks to complete - and will transform your experience of HubSpot.

PYB is a full service firm - able to handle data structure issues, integrations, workflows and more. Martin and Elisa came to our rescue when we realized we had launched our CRM with a problematic data structure. Their team helped us rebuild the plane while it was flying - extracting an unnecessary and problematic custom object - and providing the guidance we needed to make the most of HubSpot's built-in functionality and prepare our data appropriately. No simple feat, it was carried off expertly. Now we are tackling our service pipelines and ticketing gremlins. I have no doubt we will continue working with PYB in the future as we delve into marketing and sales items on our to do list.

Jessie Collins - Director of Technology Strategy, Really Great Reading

“Knowledgeable, Skilled, and Responsive”
A safe pair of hands
We’re delighted HubSpot has accredited us for the following…

**HubSpot Onboarding Accredited**

100+ Onboarding projects and successfully completed QA process by HubSpot. You’re in safe hands.

**HubSpot CRM Implementation Accredited**

Provision of CRM implementation is core to our business - and we’re accredited for migrations and technical projects.

**HubSpot Custom Integration Accredited**

Technical digital projects require skill and experience to deliver on time & on budget. We have a track record of both.
Optimize

The second stage of CRM implementation.
Optimization is about performance improvement.

Once your structure and processes are in place, we move to the next phase of CRM implementation - driving your results.

We know HubSpot. You know your business. Working with your team, we’ll apply over 100 tips, tools and techniques to ‘move the needle’ of your key metrics.

*Note: no rush to commit to this phase until Phase 1 is complete*

### The process:

**A. Baseline Assessment**
Once you’ve started fully using HubSpot, we’ll be able to assess your current levels of performance.

**B. Experimentation & Deployment of Tools/Techniques**
We’ll systematically install scientific approaches to everything from your email marketing, Adwords/LinkedIn management, through to sales team approaches and activities.

**C. ‘Scale up’ what works**
HubSpot will give us insight into exactly what is delivering results - from marketing to sales to service. This is where you’ll move ahead of the rest.
“Martin and Elisa have invested in fully understanding our business.”

Martin and Elisa have invested in fully understanding our business, its goals and aspirations and they make sure our digital efforts get the desired results. And they do this with energy, razer-sharp focus and brains! Many make agencies claim to ‘partnering’ their clients, but few really support through fair weather and foul. Martin and Elisa are a rare exception; thinking problems through and troubleshooting where needed. They are also very nice people to work with!

Alex Swann - Sales and Marketing Director, Cansford

Tools, Tips & Techniques

You’ll cover everything from analysis through to ‘design and implementation’ (if required) of...

- Website optimisation
- High converting landing pages
- SEO and Organic lead gen
- Adwords and LinkedIn campaign (targets and recommendations)
- Email marketing performance improvements
- Sales Team coaching
- Attribution, reports, and dashboards
- And much, much more

Utilising a scientific methodology, you’ll approach HubSpot in a totally fresh way - and in return deliver dramatic increases in overall business performance.
Working as a Team

Martin Shervington will work directly with your team.

Educating and supporting them through the process of optimization of HubSpot.

Marketing teams win the most - but sales and customer service benefit from a higher quality of experience for their prospects, clients or customers.

Martin and Elisa have been brilliant. They've held our hand every step of the way so we could onboard HubSpot and optimise its use for our growth marketing strategy. They have a consultative approach and always add a lot of value, not only making suggestions but helping us implement them too. They also now deliver our digital strategy. Testament to how good they have proved to be! Consultative approach, leaving no stone unturned to make sure you optimise the brilliance of HubSpot...

Sue Mutton - Marketing, SMS Plc

“ You need them on your team.”
Outstanding Results

Marketing teams are judged on their ability to drive quality leads.

And HubSpot gives you super-charged performance, but without support to ‘fine tune’… you’ll be left behind.

We’ll cover everything from revenue targeted campaigns for LinkedIn and Adwords, through to ensuring the sales team follow up in a timely and effective manner.

Think of this as a 3 month coaching program that will transform results for years to come.

“Dedicated, committed, and incredibly skilled in HubSpot”

PYB has done so much for the development of our Marketing and Sales hub in just a couple of months compared to YEARS of work with a different HubSpot partner! They have taken the time to get to know our organization, and work with us in a fantastic and friendly manner; always focusing on delivering results. They have used our time/hours wisely and effectively from the very beginning. I am very happy with their attention to detail, improvements, and development in regard to automation. Always available for last-minute inquiries. They know their way around this complicated web of CRM and will make sense of things. This is a team of professionals that are dedicated, committed, and incredibly skilled in HubSpot - not to mention positive attitudes that exude good energy and are easy to work with. I only have positive things to say and I highly recommend them to anyone that needs help escalating their business and HubSpot CRM. Their dog is cute too ;)

Susie Prestvik - Montel Marketing - HubSpot and External Events Manager, Montel Group
ISO Accreditation


Provision of consulting, training, onboarding and implementation support services for HubSpot Software to commercial clients worldwide.

Note: right now, we’re the ONLY HubSpot Partner with both of these ISO accreditations.
Prices for each phase (Organise & Optimize) are based on a day rate, usually delivered within 3 months - including migrations from e.g. Salesforce.

Increasing the intensity of delivery ensures you experience value from your HubSpot investment much quicker.

We’re not the cheapest. We’re the best.
Tailored Solution

Just like your CRM, your project will be tailored to your needs as a business. As you’d expect, this means the solution is not ‘off the peg’. Instead the experience will be a perfect fit to people’s roles and requirements.

You’ll find some indication of project duration below - delivered over 3 months.

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<thead>
<tr>
<th>Project scope (per month)</th>
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<tbody>
<tr>
<td>LIGHT</td>
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<td>MEDIUM</td>
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<tr>
<td>HEAVY</td>
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<td>15 days</td>
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Typical migration & CRM implementation project
Next Steps

Technology makes our lives easier.

It transforms the speed and ease of communication, giving us the opportunity to drive revenue growth in business.

We’ve already helped so many effectively implement HubSpot as their CRM - see here for more case studies and testimonials.

Together we’ll make organising and optimizing HubSpot an enjoyable human experience.

Ready for a call?
My number is +44 2921 680180 or email martin@plusyourbusiness.com