



HubSpot



**HUBSPOT
PLAYBOOK**

CRM
Lead Flow

**A PERFECT EBOOK FOR ANYONE LOOKING FOR A GUIDE TO GO
THROUGH THE HUBSPOT LEAD FLOW**

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**The
HubSpot
Playbook**

TO You, The Reader

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Building your mailing list is like digging for gold. Once you hit the right depth, money flows like a river. Well, this is the only topic we will be discussing in this ebook.

Since you have subscribed to my mailing list, you get an opportunity to use some of the premium tools online for free!

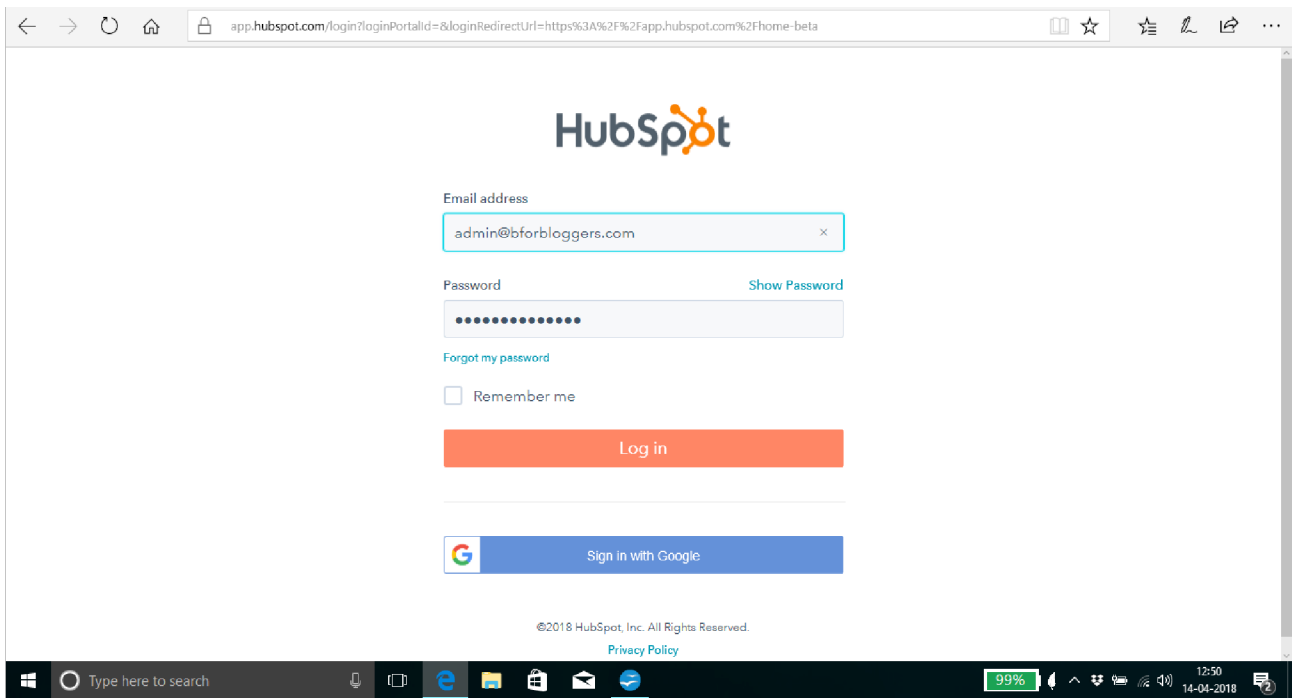
1. [HubSpot](#) – we will be using HubSpot to create our first CRM flow which is very very easy. You just need to have patience and a little bit of concentration. Everything will be set and we will go live in 15-20 minutes at max.
2. [Mailerlite](#) – With this Ebook you get a forever free account on Mailerlite Email marketing service. This account includes premium features such as Automation And Landing pages.
3. [LeadPages](#) – Although Email marketing Services give you a landing page builder, but these builders are highly annoying and make collecting leads even harder. Here's where Leadpages comes, Leadpages is the beginner friendly plugin I use and recommend to make highly interactive and convertible landing pages.

How To Make A CRM Flow In HubSpot

Building a CRM flow in HubSpot App is a little bit of a tough task for beginners. Follow up through this Step by Step procedure and don't do anything on your own. If you happen to get stuck somewhere, don't hesitate to contact me.

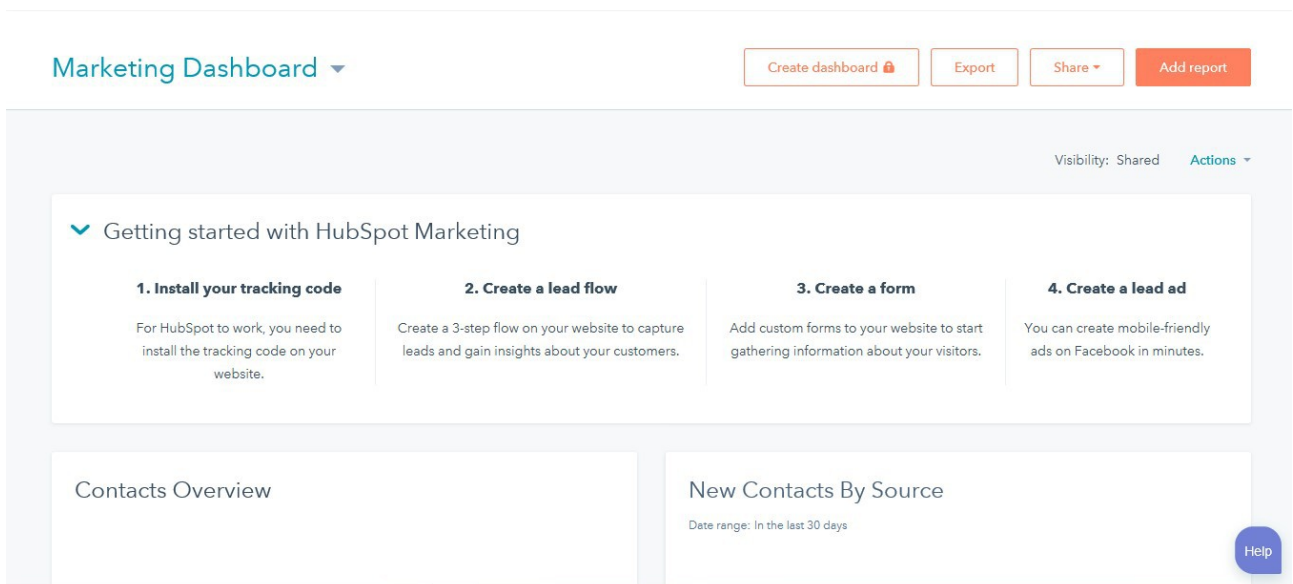
Step 1 : Signing Up At HubSpot

Head on to the [HubSpot signup page](#) and register for a free account. Use your primary email address as this email will be used by HubSpot to inform you about the updates on leads, offers etc.



The process is quite simple, you don't need any credit card to sign up and you get a forever free account on HubSpot within minutes. Once you are done signing up, head on to your HubSpot dashboard at app.hubspot.com

Step 2 : Install the tracking code



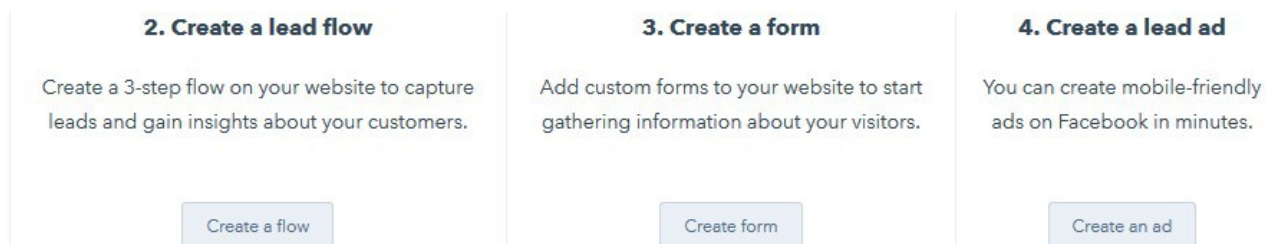
The hubSpot dashboard looks like this. The first step we have to climb is installing the hubspot tracking code on our WordPress blog. For doing this we can take the help of a plugin called header and footer scripts. Install header and footer scripts plugin on your blog and copy the hubspot tracking code from your hubspot dashboard. This code should be pasted and injected in the head section.

Once you are done with the code installation process, move on to the most exiting part, the flow making process.!!

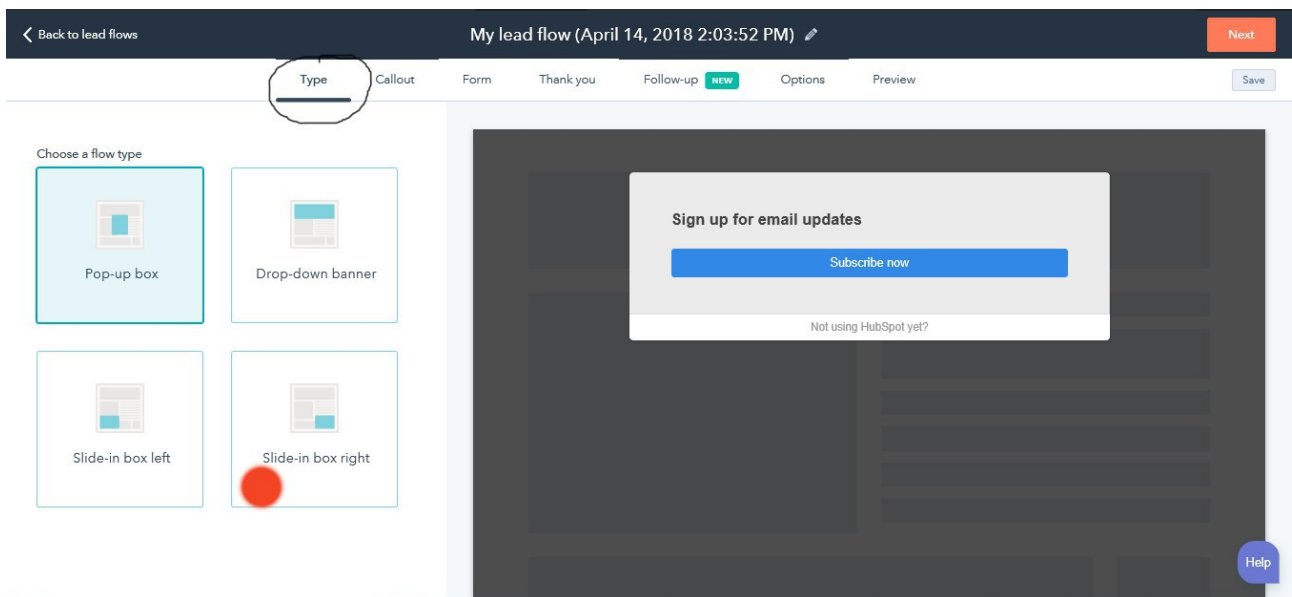
Step 3 : Lead Flow Creation

To create a lead form is a tough task, making it appealing and high converting is tougher.

There are three options available in front of you when you first land on your HubSpot marketing Dashboard.



We have two things to do. We can create a lead form, a pale, simple lead form or we can create a striking lead flow which converts like a pro. Go on and click on the 2. option that is “create a lead flow”. The next screen you will see is :-



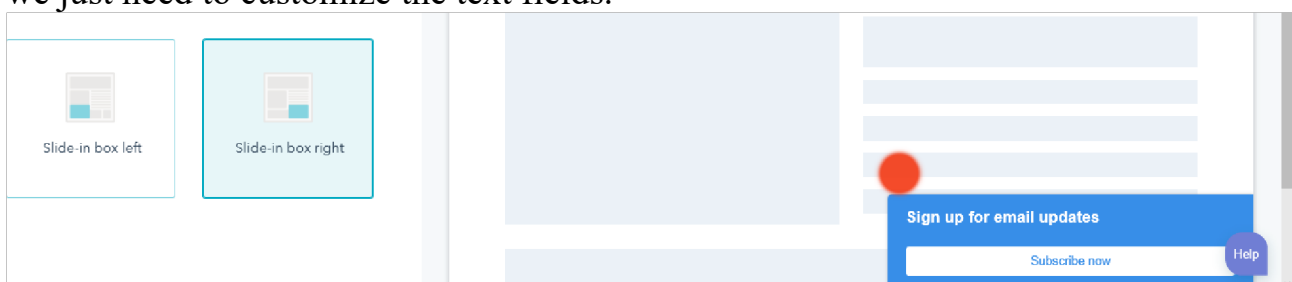
The lead flow generator. From here, we will curate the the prem made lead form. All the basic settings are preset so if you want to start capturing leads right from the moment, you can hit the publish button after selecting the slide-in box right option.

Follow the steps below to make a custom lead slide-in :-

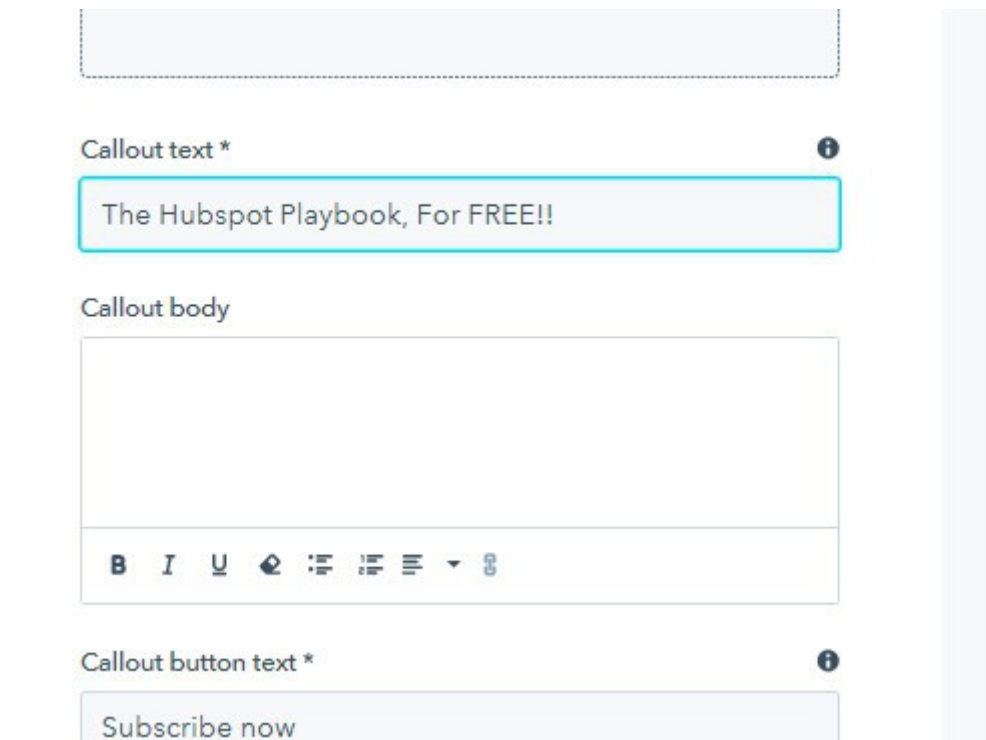
A. Head on to the type section and select the callout type. The callout is the first thing your users willsee when the lead flow is triggered.



Note that whatever you do, a preview will be showing all the time at the right corner of your screen. Now look at the imache below, the callout section is all set, we just need to customize the text fields.



As given in the image below, i have used this ebook as a lead magnet to drive more email subscribers.

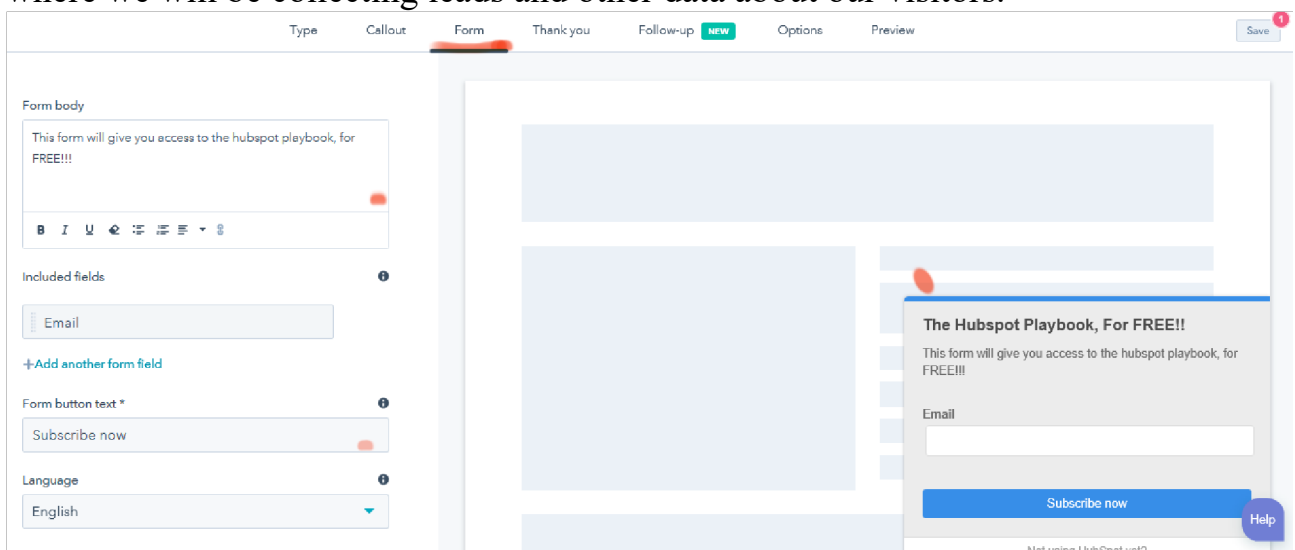


The image shows a configuration interface for a callout form. It includes a dashed box at the top representing the callout area. Below it, the 'Callout text *' field contains the text 'The Hubspot Playbook, For FREE!!'. The 'Callout body' field is empty, with a rich text editor toolbar below it. The 'Callout button text *' field contains the text 'Subscribe now'.

The callout text should be straight to the point and compelling. Make sure you are using a lead magnet. For ex. An ebook or a free service etc.

Leave the callout body empty to drive maximum results without giving a distraction. We are using the blank space action rule here.

Now move on to the second section that is form section type. This is the place from where we will be collecting leads and other data about our visitors.

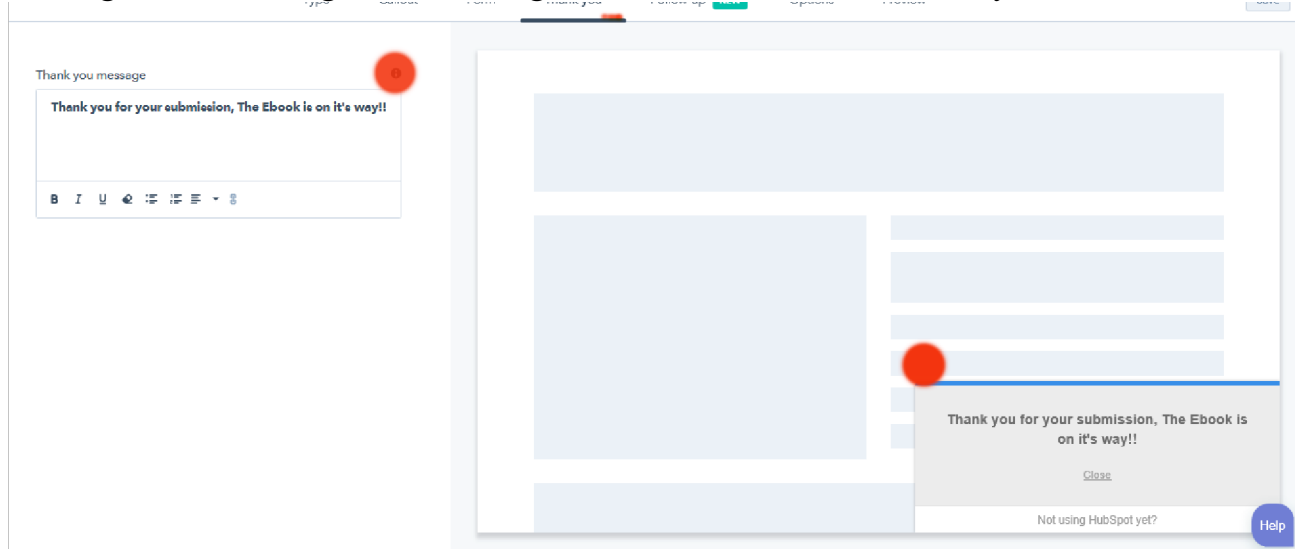


The image shows a configuration interface for a form. The 'Form' tab is selected. The 'Form body' field contains the text 'This form will give you access to the hubspot playbook, for FREE!!!'. The 'Included fields' section shows an 'Email' field. The 'Form button text *' field contains the text 'Subscribe now'. The 'Language' field is set to 'English'. A preview window on the right shows the form as it will appear to visitors, including the callout text, the email field, and the 'Subscribe now' button.

If you want to register your subscribers name you can add a name field by clicking on the add another form field button. As i said before, make sure you aren't using long text. A short and attractive statement is enough for the users to decide if they want the freebie or not.

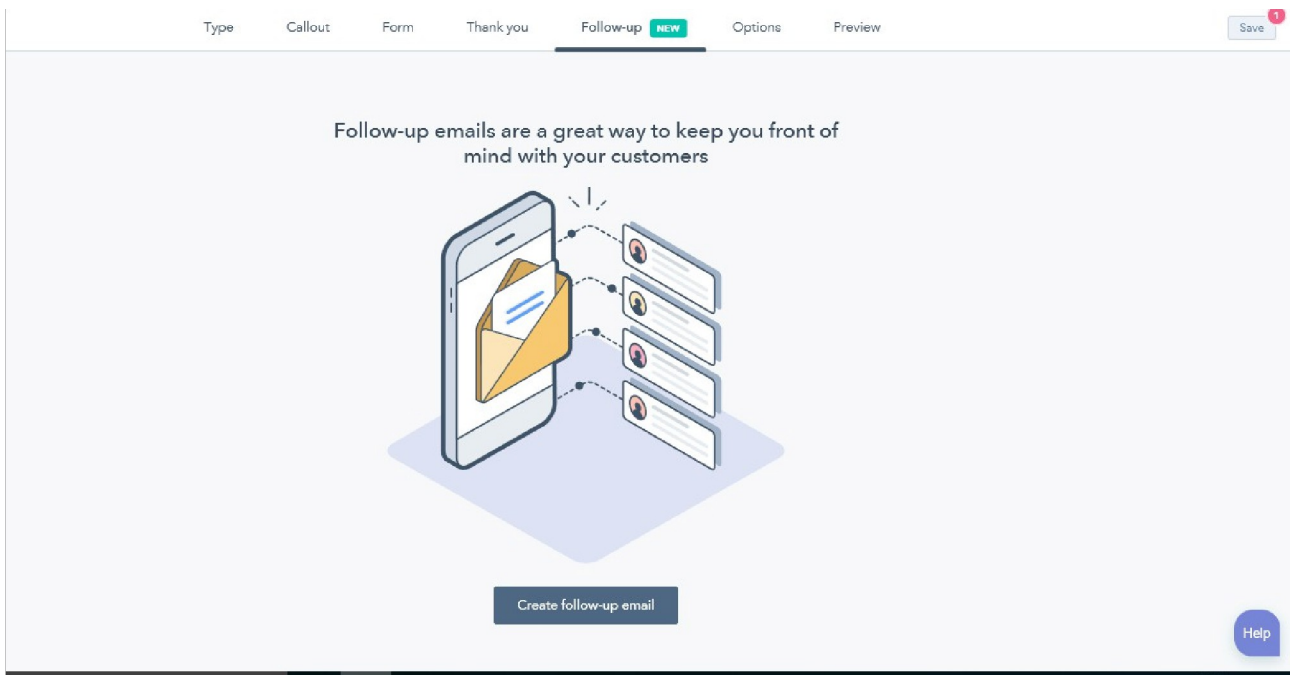
Just try to personalise the text as much as you can. Make them feel special and important and show them why they should definitely subscribe to your mailing list.

Once done with your form fields, move on the third stage which is the Thank You message. This message is shown right after the user subscribes to your list.

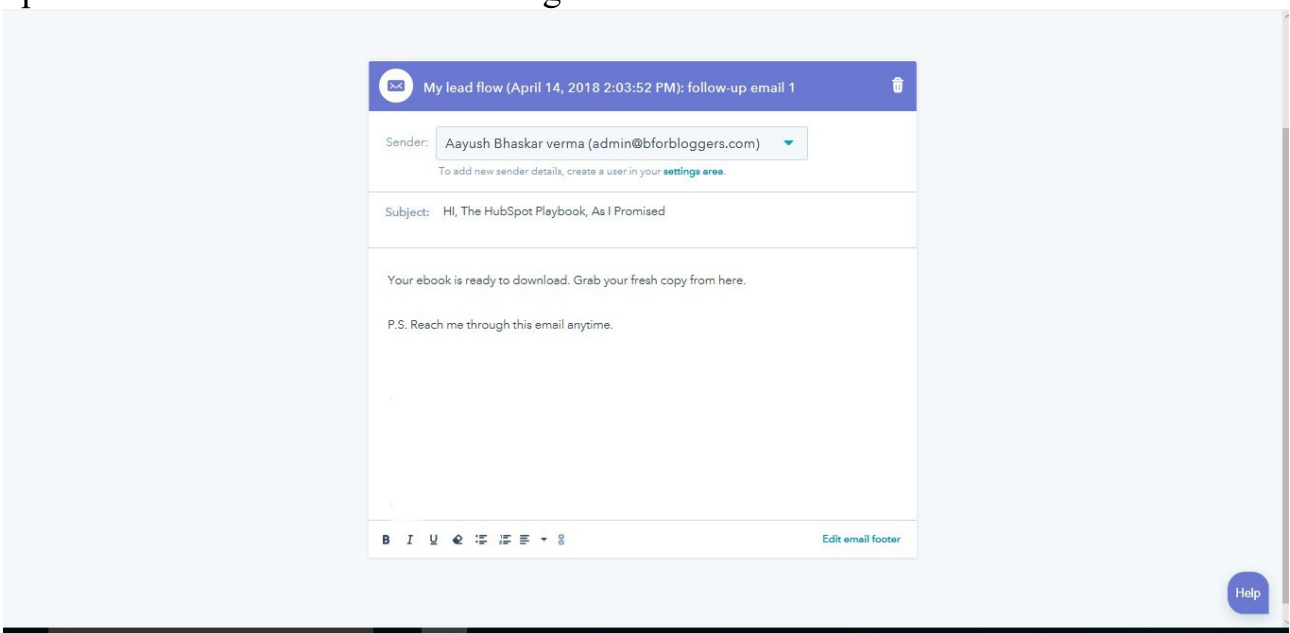


Inform the user that you got the information of the subscription and you are working on fulfilling your promise. I promised to send an ebook, that's why i should acknowledge the subscription and inform the user about the progress.

Now that your led flow has been created, you can straight go live from here by clicking the publish button present at the top right corner of your dashboard. However, we still have an option left that is creating a follow up email.



The follow up email should be personalized and must contain the access to the freebie you promised to your subscribers. Bear in mind that they can unsubscribe the list anytime so make sure you dont play with them. Click on the create follow up email button as shown in the image above.

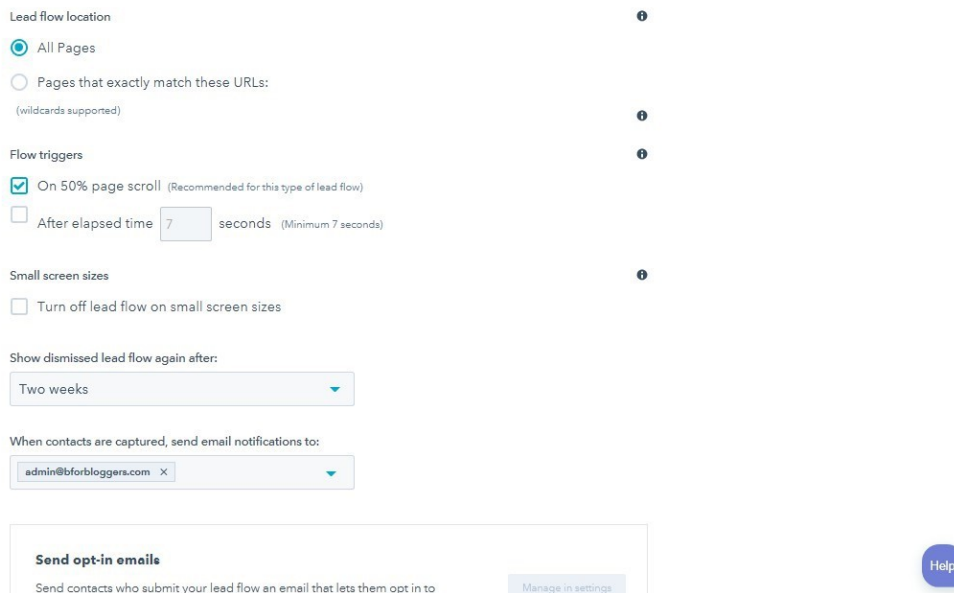


Make sure the email address you are using to send the follow up email is the one which is branded with your domain name.

Now once you are done with writing your follow up email, save the whole lead flow by clicking the save button present at the top right button.

That's it. Your lead flow is complete and we are ready to live. Just to make sure everything is correct, i need you to cross check the whole flow.

Once you are done cross checking, hit the publish button and Boom!!! Your lead flow is live on your site.



The screenshot shows the HubSpot Lead Flow configuration interface. It includes sections for 'Lead flow location' (with 'All Pages' selected), 'Flow triggers' (with 'On 50% page scroll' selected and a 7-second timer), 'Small screen sizes' (with 'Turn off lead flow on small screen sizes' unchecked), and 'Show dismissed lead flow again after' (set to 'Two weeks'). There is also a field for 'When contacts are captured, send email notifications to:' with 'admin@bforbloggers.com' entered. A 'Send opt-in emails' section is visible at the bottom, with a 'Manage in settings' button. A 'Help' button is located in the top right corner.

You can handle the settings of your campaign on how the lead form will be shown to your users. Since hubspot is smart enough, you can rest assured that you have the best settings available.

As soon as your blog will start getting visitors, you will be gaining more subscribers.

I hope this Ebook has helped you gain more subscribers and leads. Writing this ebook was a tough task and the only thing i will ask you to do is,

Share this ebook on facebook and twitter and if you are having any trouble with lead generation, you can reach me at aayush@bforbloggers.com or admin@bforbloggers.com You can follow me at :-

Twitter.com/BhaskarAayush
Facebook.com/bforbloggers

Author

My name is Aayush Bhaskar Verma and i am the founder of BforBloggers.com, a blog which shows you how to make a business out of your web property. I wrote this ebook sitting into my bedroom. You can think of me as a web geek making Dollars from his internet connection.

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