

Department	Use Case	What to Ask	What to Listen For	How HubSpot helps solve
Marketing	More efficient Marketing	How are you managing Marketing assets and how do you know their effectiveness?	Documentation and assets live in a variety of places. Trying to track product information in an ERP or various files is cumbersome to manage.	Leveraging Content Hub with Sales Hub enables users to track appropriate documentation to the deal and order level. HubSpot has open API's that can also connect to product management and ERP platforms.
		Tell me about your ideal prospect.	Cannot clearly define who the prospective customer is or what they need.	HubSpot will help you categorize your ideal prospect and report on how they are interacting with your business.
		What is the importance of existing customer sales vs. new customer sales?	Struggles communicating effectively with existing customers - especially when it comes to existing orders and other challenges.	Leverage customer interactions to build effective marketing and sales strategies around recurring revenue models. Tying HubSpot together with your ERP can also enhance customer experience and create longer, more meaningful engagements.
		How do you customers want to interact with your business?	Lots of different ways to engage - often by email. Listen for personalized experience asks such as a customer portal.	Because HubSpot has a unified data platform, you see the how customers are engaging with you, avoid unwelcome surprises, and enhance the customer experience.
		How do you differentiate messaging to different channels?	No good way to clearly message - often because data exists in various places.	HubSpot offers complete customer lifecycle engagement. See how end-users are finding you, engaging with distributors, and ensure you protect all of your product channels.
	Prove Marketing ROI	How do you determine what activities are the most efficient?	Goes on gut feeling or total leads registered. No real way to define value.	Lean into the unified data platform - it allows you to see the customer journey and identify what marketing initiatives are most important.
		How do you determine the total lifetime value of a customer?	Either cannot define or only do so through an extremely manual process.	Leverage cost of customer acquisition through accurate attribution. Combining this data with customer revenue creates a simple measurement to show what customers are bringing the most value.
		Where do you see the greatest opportunity for growth?	New product launches and/or new market segments.	Take advantage of practical AI to develop more content to get products to market faster. Do more with less and find out quickly what's actually driving results.
		What responsibilities does the Marketing team have for existing customer engagement?	No responsibility and/or lack of understanding on how they impact the existing customer journey	Considering selling to existing customers costs 7x less than new ones, you can leverage HubSpot's unified data platform to access and engage your existing customer base.
	Sales Team efficiency	Where does your sales team spend their time: field vs. office?	Mixed requirements of the field, contracted reps, inside sales teams, and customer service teams.	HubSpot app is dynamic, easy-to-use, and customizable. Your sales team will get more power at their fingertips whether they are in the field or in the office. Data is unified, so you have what you need when you need it.
		What is your average sales cycle and why do you usually lose?	Not sure how to track this because sales people aren't tracking activity.	HubSpot helps sales teams stay on top of their activities. From streamlined reporting to automatic reminders, you can customize the sales experience to close deals faster and identify opportunities for improvement.
		Where are areas you find duplicate entry or wasted time?	Transitioning data from the field. Emails and phone calls aren't captured anywhere centralized. Sales team members don't really leverage the system.	Get everyone on the same page while giving them tools to make their jobs easier. Integrate HubSpot with your email server and phone systems to track activities seamlessly. House all of the data your teams needs right at their fingertips, so they can close deals faster.
		What is your ideal sales cycle?	Not sure or cannot clearly define. No defined sales process.	Creating a standard sales flow within HubSpot keeps everyone on the same page and increases reliability of the data. Forecasting becomes more accurate and insights become readily available.
		How do you track sales team activity?	Only measured on sales OR lots of manual entry and administrative work.	Make their lives easier. Link to calendars, emails, phone systems and more.
	Gaining Insights from Existing Channels (Dealers, Distributors, etc.)	What industries do you find your company works best in?	Multiple industries. Lack of visibility into end-usage (for example, they sell through distribution but don't know who is actually purchasing the product).	Gain insights from how your end-user is engaging with your website. Leverage CMS if you want to dive into knowledge base or customer behaviors.
		What percentage of your business comes from new customers vs. existing customers?	Don't know or can't clearly define. Based on this answer, frame your statements to either focus on new customer acquisition or existing customer care and management.	Whether the strategy is ABM or Inbound, HubSpot has a host of tools to make your sales and marketing teams work together seamlessly. From there, delight your customer support teams by ensuring they have rich historical context to pull from ensuring your customers feel known.
		What is the most effective sales activity and how to do you know?	Cannot be defined or all anecdotal evidence. Processes to capture can also be extremely manual. Also listen for opportunities to tie together Marketing efforts with Sales results.	Bring your sales and marketing teams together by identifying what's working and creating effective sales enablement tools. HubSpot's customizable environment also means you can build processes directly into the CRM when you know what works best. Playbooks are another great way to bring everything together that your sales teams need to do in an easy-to-manage process.
		How do you get a clear picture of end-users and applications?	Lots of data or manual processes. Maybe they don't have a clear picture of the end user.	By inserting HubSpot as a hub for customer communication, you can capture data in one place.
		Where do you see the greatest opportunity for growth?	Need more insights to make better decisions. Launching new products.	Make decisions faster with unified sales and marketing strategies. Playbooks help train your sales team and give them tools for success.

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Product Management	Protecting Product Channels	Tell me about the channels you use to go to market.	Could be multi-channel or singular. Listen for how they might need better insights on behaviors and nurturing relationships.	Customer insights and behaviors can help monitor behaviors. Leveraging the flexibility of the HubSpot platform, you can develop Playbooks and forms that help you drive customized results.
		What are the different types of products/services you offer and how do you package them?	Challenges in quoting and manual processes.	Leverage quoting and customer engagement to streamline processes and get to market faster.
		How do you customers access technical specifications? Other documentation?	Requires emails or downloads.	Tie product and order documentation together leveraging Content Hub. You can even bring linked documents together in customer communication.
Sales, Inside Sales, or Customer Service	Streamlined Quoting	How are you quoting?	Inability to track quotes (they are all sent by email). Missed pricing opportunities and poor adherence to processes (or no processes at all).	For simple quoting requirements, HubSpot offers easy-to-use quoting functionality. For more complex needs, HubSpot integrates with a variety of mid-market tools that make quoting easier and more accurate.
		How are you ensuring quote to invoice accuracy?	Cumbersome processes (usually manual)	Leveraging quoting in HubSpot will ensure your team moves from quote to order quickly and efficiently.
		How important is it for your customer service teams to know inventory levels?	Very important - slow quoting and knowledge of availability loses deals.	HubSpot can integrate with a variety of ERP platforms both OOB from market apps or through custom API integration.
		What are the most common questions your customers are asking?	If they aren't clear then they aren't tracking it. Listen for things that an ERP should have such information around an order or getting a quote faster.	HubSpot has open API's which means integrations can be build as robust or as simple as needed to give your teams the information they need in the systems that they work in.
	Growing with Existing Customers		Customers want more visibility into their orders or want information faster. Maybe they aren't sure what makes their customers unhappy (an even worse situation).	Leverage integrations to create visibility within HubSpot and give customers answers that they want faster.
		Where are some of your current customer complaints?	Basing knowledge solely on revenue without context. Unable to define what makes a good customer.	Using data enrichment tools within HubSpot, you can create more context around the accounts and customers that are ideal prospects.
		Who are your best customers and why?		
Operations & Management	Organizational optimization	How are you tracking customer churn?	No tracking at all or very manual process.	Using work flows in HubSpot, identify when customers are no longer engaging/ordering. Create nurture campaigns to ensure your products and services are top-of-mind.
		What Accounting/ERP/operational system are you currently using?	See if they have one and if HubSpot has a preexisting integration. Also asking if they use a data visualization tool such as Power BI, Tableau, or DOMO can be useful.	HubSpot's open API's mean that you can connect or visualize data where you need it.
		In what areas do you lack visibility across the sales and operational organization?	Not knowing what sales teams are doing. Not getting accurate information around sales pipeline and quotes. Not getting insights on deals until they are ready to close. Overall, messy CRM data.	HubSpot captures everything in one place to help your sales team keep track of their activity AND help management plan with forecasting tools.
		How are you visualizing your sales pipeline against your production forecast?	Either they aren't doing this at all or it's a manual process. Possibly inaccurate.	Leverage sales forecasts in HubSpot to get a realistic view of potential sales from both new and existing customers. Either overlay that data with an integration or by leveraging visualization software such as Power BI.