MW Components

HubSpot Templates & Sequences

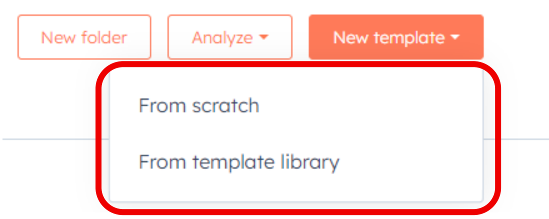
Paid Functions

For more information regarding **Templates**: https://knowledge.hubspot.com/templates/create-and-send-templates

☆ In order to create a sequence, you must first start by creating a template. Templates are used within sequences.

Creating a Template:

1. Along the bar on the left-hand side of the screen, there is a tab labelled **CRM**, please click on that and choose **Message Templates**.
2.
3. On the Templates page in the top right corner, you have two options:
   a. New Folder – this is used to group and organize your templates together if you would like
   b. New Template – this is used to create your actual templates
      i. From scratch – a blank template
      ii. From template library – you can use premade HubSpot templates. You can edit and personalize these templates.



4. Creating the template:
   a. Name – how we are internally labelling the template.
   b. Subject – the subject line of the email that the receiver will see
      i. On this line you can choose to make it private, share with everyone and add to a folder.
   c. Body – this is the actual body of the email you will use individually or within a sequence.
      i. **Personalization** – you can choose various HubSpot properties to ensure the email is personalized to the receiver, ie Contact: First Name will pull the contacts first name so the email reads “Hi Miriam, …”. You can use Contact, Company, Deal, Sender (Us) & Ticket properties.

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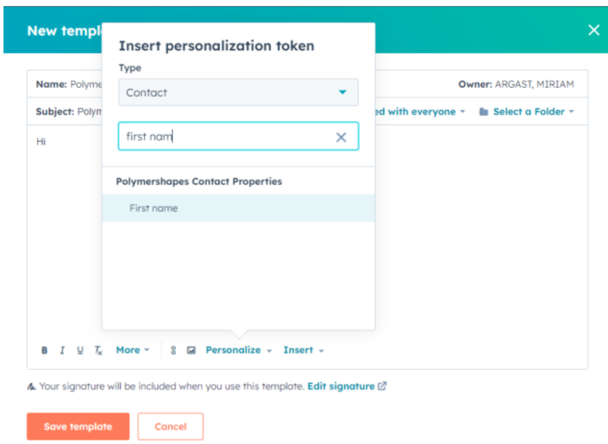
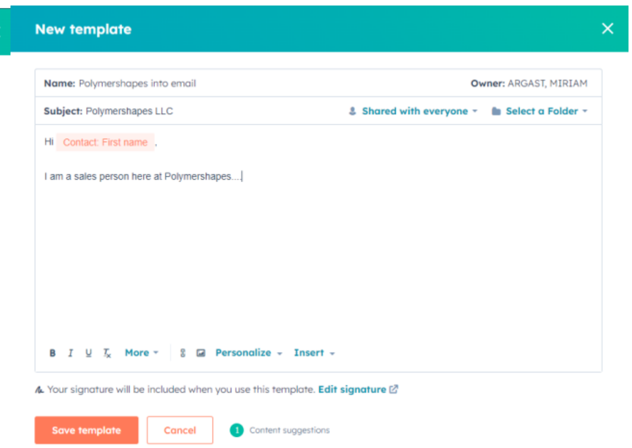


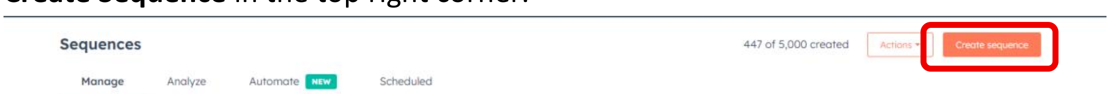


☆ If you have your signature in Hubspot it will be included when using the templates

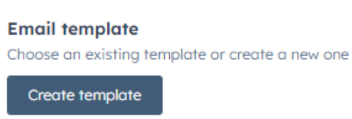
For more information regarding **Sequences**: https://knowledge.hubspot.com/sequences/create-and-edit-sequence

Creating a Sequence:

1. Along the bar on the left-hand side of the screen, there is a tab labelled **Sales,** then select and click **Sequences.**
2. To start a sequence click **Create Sequence** on the top right of the page
    a. You can choose to start from scratch or use a pre-made sequence and then click **Create Sequence** in the top right corner.

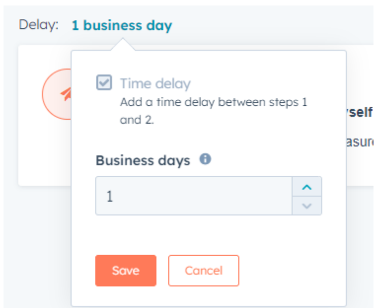


3. Creating the Sequence
    a. Name the sequence along the top of the page
    b. For Step 1
        i. Automated Email – this is where you utilize your premade template *Note, you can create a template from this page as well.



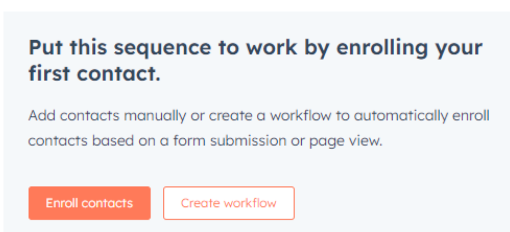
ii. Manual Email, Call & General task – these are all tasks that will be assigned to you during the sequence. *Note, until you complete these tasks the sequence will be paused.

iii. Once you add multiple steps you can set timing on your sequence to delay the next action or email.



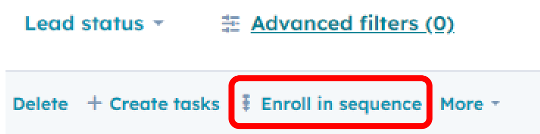
iv. Once your sequence is complete, click **Save** in the top right corner. You can choose to make it private to yourself, specific users and teams or available for the whole company.

4. Enrolling Contacts
    a. Middle of the next page

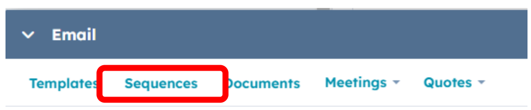


    b. Top right of the next page

c. Within the full contacts page *Note, you must select contacts before this option will appear.

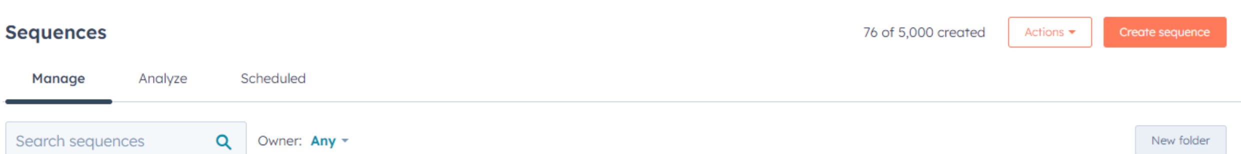


d. Within the individual contact page



Analyzing Sequence Performance:

1. Manage – Shows all sequences
2. Analyze – shows the performance of all your sequences
3. Scheduled – shows your active sequences



4. If you click on the name of your sequence it will pull up the performance of that sequence.