

FIND & FIX THE LEAKS:

POWER UP SALES WITH AI & AUTOMATION

Presented by Rick Kranz, Weidert Group
Appleton HubSpot User Group



FIXING THE LEAKS

SALES LEAKS

- + Lack of Sales Insights
- + Missed Opportunities
- + Too Much Admin Work
(Email, Research, Task Mgmt)
- + Too Much Follow Up
- + Disorganized Tools
- + Stalled Deals
- + Abandoned Deals
- + Complex Quoting



TYPES OF FIXES

- + Sales Automation
- + AI for Sales
- + Sales Process



HI, I'M

RICK
KRANZ



rkranz@weidert.com



Connect with me!



THE LEAK

LACK OF SALES INSIGHTS

Which Results in Missed Opportunities



THE FIX: AI

UNCOVER OPPORTUNITIES WITH NotebookLM



DIFFICULTY LEVEL

Easy Peasy



SET UP TIME

15 minutes

Meeting transcripts and summaries are great, but...

- + Zoom
- + Fireflies.ai
- + Otter.ai
- + Avoma
- + HubSpot
- + Rewatch
- + Fathom...

Transcript

Search

Rick Kranz 01:23
And I would have the same email address in both databases.

Brian 01:26
Same email address or no email address. In some cases, they have no email address.

Cody 01:30
Okay, so it's, yeah, I mean, we can set it up. We're just going to set up every single property. So, I mean, that just duplicates the amount of work from one normal database to four databases.

Brian 01:48
I do.

Cody 01:49
Hour and 30 minutes. It, you know, does it?

Frank 01:52
Yeah.

Rick Kranz 01:52
So how much time do we need?

Overview:

- The meeting addressed challenges in organizing **contact records** with multiple properties across different business units. Concerns included **unique farm information**, **email duplication**, and managing data efficiently for accurate marketing segmentation. Participants discussed solutions like **custom objects** and unique fields for each unit, as well as utilizing **address fields** to distinguish databases and workarounds for email addresses.
- Email duplication** and creating separate contact records for each subscription list were key points of discussion. Attendees explored ways to optimize marketing functionalities in HubSpot while considering possible limitations within the platform. Despite the complexity involved, plans were made to consult **subject matter experts**, **sales**, for further clarification and additional options. The focus was on ensuring all necessary data points are considered before implementing changes comprehensively.
- Participants shared concerns about the database structure's adaptability to diverse business needs. They recognized the importance of addressing challenges effectively across different businesses while maximizing the platform's capabilities. Collaboration and seeking input from **sales** were highlighted as essential to navigating the intricacies of structuring the database for long-term success. The aim was to incorporate a variety of perspectives to enhance the database's functionality and meet all needs efficiently.

THERE'S GOLD IN HERE



Call Transcripts &
Meeting Summaries

THE LEAK | Lack of Insights

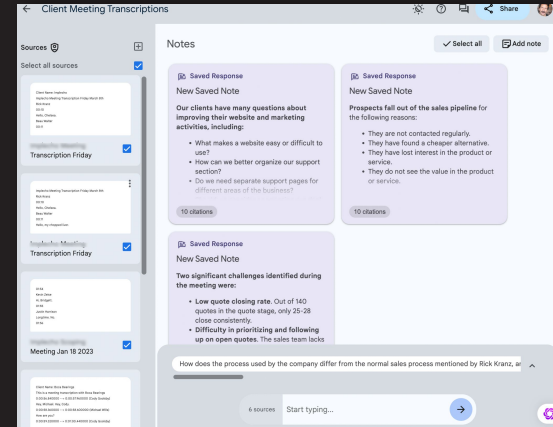
THE FIX | AI for Sales



NotebookLM

NotebookLM

by Google



- + Free & private
- + Add your call/meeting transcripts & summaries



NotebookLM

by Google

Now We Can **Engage AI to Uncover Insights**

- + What are some of the common problems our prospects have that we can solve for?
- + Which of our clients needs the most help right now?
- + Create a list of the most common questions our prospects have.



WE PROMPT

What are some of the common problems our prospects have that we can solve for?

AI RESPONDS

Here are some common problems we can solve:

- + Difficulty tracking key metrics:** We can set up custom reports in HubSpot to track key metrics such as CAC and lead conversion rate. We can also help you integrate HubSpot with other systems to get a complete view of your marketing and sales performance
- + Ineffective lead qualification processes:** We can work with you to develop a lead qualification process that ensures that only qualified leads are passed to sales. This can help to improve sales productivity and close rates
- + Inconsistent sales processes:** We can work with you to document and standardize your sales processes. This will help to ensure that all of your sales reps are following the same process, which can lead to improved results
- + Lack of visibility into the sales pipeline:** This can make it difficult to track progress and forecast revenue



WE PROMPT

Create a list of the most common questions our prospects have

AI RESPONDS

Our prospects have questions about improving their website, sales, and marketing:

- + What makes a website easy or difficult to use?
- + Would automating tasks help streamline our sales process?
- + How can we get more information from our leads into our crm?
- + Which contacts should we prioritize for follow up?



WE PROMPT

**Which of our clients
needs the most
help right now?**

AI RESPONDS

ABC Services seems to need the
most help right now.

They are experiencing multiple issues in their systems which are impacting efficiencies and lead management such as: inconsistent behavior in their forms and task creation, incomplete data capture, and difficulties with automating lead assignment based on company or contact owners. These issues are likely leading to a decline in the effectiveness of their sales processes.



WE PROMPT

Can you come up with a multi-step plan for helping our client ABC Services ?

AI RESPONDS

Establish the Pipeline and Prioritization Process

- Segment and Analyze the Pipeline: Segment the existing pipeline by contact and deal attributes, identifying opportunities for automation, prioritization, and nurturing
- Define Prioritization Criteria: Determine the key factors (e.g., project size, contact engagement) that should guide the sales team's focus
- Implement Automation for Lead Nurturing: Create automated sequences to follow up with leads who have received quotes but have not yet engaged or those who have shown interest but have not yet made a decision

Enhance the Follow-Up Process

- Establish a Cadence for Outreach: Define a clear schedule for following up with leads based on their status and engagement level
- Develop Personalized Follow-Up Emails: Create a library of personalized email templates that address specific customer needs and pain points
- Track and Measure Performance: Monitor follow-up activities to track engagement rates and identify areas for improvement

Integrate Systems and Automate Processes

- Explore API Integration: Investigate the possibility of integrating ABC Services' system with HubSpot to eliminate.



THE LEAK

TOO MUCH ADMIN WORK: EMAIL



THE FIX: AI

AI SALES ASSISTANT FOR EMAIL



DIFFICULTY LEVEL

Intermediate to
Advanced

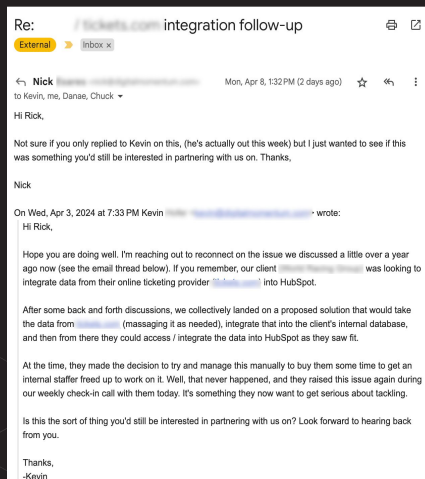


SET UP TIME

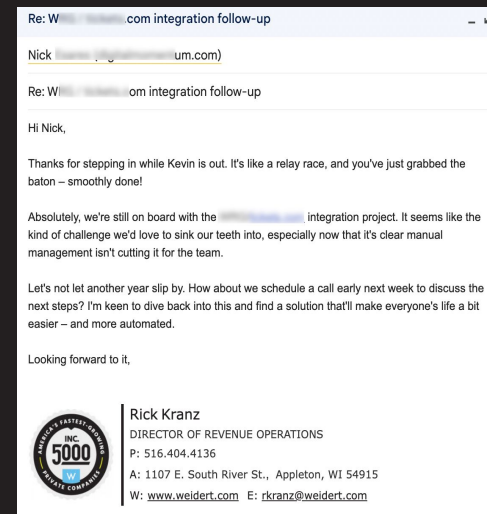
Hours to
Several Days



AI Sales Assistants For Email



INCOMING

*AI tool, such as Zapier Central*OUTGOING
DRAFT



AI Sales Assistant for Email

INBOUND EMAIL

Re: WI [redacted] tickets.com integration follow-up External Inbox x

to Kevin [redacted] <[redacted]@tickets.com>
Mon, Apr 8, 1:32 PM (4 days ago)

Hi Rick,

Not sure if you only replied to Kevin on this, (he's actually out this week) but I just wanted to see if this was something you'd still be interested in partnering with us on. Thanks,

Nick

On Wed, Apr 3, 2024 at 7:33 PM Kevin [redacted] <[redacted]@tickets.com> wrote:

Hi Rick,

Hope you are doing well. I'm reaching out to reconnect on the issue we discussed a little over a year ago now (see the email thread below). If you remember, our client ('[redacted]') was looking to integrate data from their online ticketing provider ([redacted]) into HubSpot.

After some back and forth discussions, we collectively landed on a proposed solution that would take the data from [redacted] (massaging it as needed), integrate that into the client's internal database, and then from there they could access / integrate the data into HubSpot as they saw fit.

At the time, they made the decision to try and manage this manually to buy them some time to get an internal staffer freed up to work on it. Well, that never happened, and they raised this issue again during our weekly check-in call with them today. It's something they now want to get serious about tackling.

Is this the sort of thing you'd still be interested in partnering with us on? Look forward to hearing back from you.

Thanks,
-Kevin



AI RESPONSE

Re: W [redacted] tickets.com integration follow-up

Nick [redacted] <[redacted]@tickets.com>

Re: W [redacted] tickets.com integration follow-up


Hi Nick,

Thanks for stepping in while Kevin is out. It's like a relay race, and you've just grabbed the baton – smoothly done!

Absolutely, we're still on board with the [redacted] integration project. It seems like the kind of challenge we'd love to sink our teeth into, especially now that it's clear manual management isn't cutting it for the team.

Let's not let another year slip by. How about we schedule a call early next week to discuss the next steps? I'm keen to dive back into this and find a solution that'll make everyone's life a bit easier – and more automated.


Looking forward to it,

 Rick Kranz
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A: 1107 E. South River St., Appleton, WI 54915
W: www.weidert.com E: rkranz@weidert.com

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AI PROMPT & AUTOMATION SETTINGS


 **Friendly Draft Responder** Test behavior On ⋮ ×

Instructions


Look at the incoming email determine if it needs to be answered. If it does draft an answer using a friendly tone and place it in my drafts.

When writing an email response never start with the phrase "I hope this email finds you well" or any phrase like that. Get right to the point but be friendly and even witty where appropriate.

Trigger
The trigger that will initiate this behavior Edit trigger

 **New Email**

Actions
The actions this behavior will have access to + Add action

 **Create Draft Reply**

Zapier Central



THE LEAK

STALLED DEALS = WASTED TIME

Sales reps waste approximately **27%** of their time due to not having collected all the necessary data from their prospects



THE FIX: AUTOMATION

AUTOMATED CRM CHECKLISTS

Customized by Deal Stage



CRM Automated Checklists

PIPELINE STAGES

STAGE 1



Appointment
Scheduled

STAGE 2



Qualified
To Buy

STAGE 3



Presentation
Scheduled

STAGE 4



Decision Maker
Bought In

STAGE 5



Contract
Sent



Automated CRM Checklists

STAGE 1

STAGE 2

STAGE 3

STAGE 4

STAGE 5

< Deals Actions ▾

Smith & Smith

Amount: \$30,000

Close Date: 04/19/2024

Stage: Appointment Scheduled ▾

Pipeline: Demo Sales Pipeline

Note Email Call Task Meeting More

Pre Appointment Checklist Actions ▾ ⓘ

Deal type
New Business ▾

Deal probability
20%

Close date
04/19/2024

Demo Data

Priority

Deal Description

HubSpot Sales Hub



Automated CRM Checklists

STAGE 1

STAGE 2

STAGE 3

STAGE 4

STAGE 5

< Deals Actions ▾

Smith & Smith

Amount: \$30,000

Close Date: 04/19/2024

Stage: Appointment Scheduled ▾

Pipeline: Demo Sales Pipeline

Note Email Call Task Meeting More

Pre Appointment Checklist Actions ▾

Deal type
New Business ▾

Deal probability
20%

Close date
04/19/2024

Demo Data

Priority

Deal Description

< Deals Actions ▾

Smith & Smith

Amount: \$30,000

Close Date: 04/19/2024

Stage: Qualified To Buy ▾

Pipeline: Demo Sales Pipeline

Note Email Call Task Meeting More

Post Meeting Details Actions ▾

Services

RFQ Received

Locations

NDA Signed

Delivery/Installation Status

Value Added

< Deals Actions ▾

Smith & Smith

Amount: \$30,000

Close Date: 04/19/2024

Stage: Presentation Scheduled ▾

Pipeline: Demo Sales Pipeline

Note Email Call Task Meeting More

Presentation Scheduled Preparation Actions ▾

Top Priorities

Needed Solution

Top Goals

Main Pain Point

Number of Members

Current Generator(s)

< Deals Actions ▾

Smith & Smith

Amount: \$30,000

Close Date: 04/19/2024

Stage: Decision Maker Bought-In ▾

Pipeline: Demo Sales Pipeline

Note Email Call Task Meeting More

Decision Maker Checklist Actions ▾

Quote Type

Demo Account Created

Supported Locations

Jira Link

Finance Contact

< Deals Actions ▾

Smith & Smith

Amount: \$30,000

Close Date: 04/19/2024

Stage: Contract Sent ▾

Pipeline: Demo Sales Pipeline

Note Email Call Task Meeting More

Finalize Contract Details Actions ▾

Onboarding Project Created

IT Contact

Delivery Restrictions

Deal probability
90%

Deal Tags
--

Amount
\$30,000.00

HubSpot Sales Hub



THE LEAK

CUMBERSOME QUOTING PROCESS

Eats Up Too Much of a Salesperson's Time



THE FIX: PROCESS

STREAMLINE, INTEGRATE, AUTOMATE

for a Frictionless Quoting Process



Streamline Quoting Process

STAGE 1

STAGE 2

STAGE 3

STAGE 4

STAGE 5

< Deals Actions

Baker, Kaufman and Brewer - Q2 Order

Amount: \$10,142

Close Date: 09/12/2021

Stage: Appointment Scheduled

Pipeline: Demo Sales Pipeline

Note Email Call Task Meeting More

Pre Appointment Checklist Actions

Deal type
New Business

Deal probability
20%

Close date
09/12/2021

Demo Data
true

HubSpot Sales Hub

At each stage we are forcing collection of the information necessary to create a quote



Streamline Quoting Process

Streamline Quoting Process

With One Click Generate:

- + NDA
- + Quote
- + Collect Signatures

Can also generate Invoice and collect payments where appropriate

Quote Number: IRE-1

Quote Number: IRE-1

Quote Number: IRE-1

Quote Number: IRE-1

Green Bay, Wisconsin 54204
Phone: 920-336-7382

Quote

Quote To:

Matthew Popham
Weidert Group
901 South Lane Street
Appleton, WI 54915
United States
Phone: 945-270-4652
Email: mpopham@weidert.com

Date: 02/01/2024
Expires: 05/01/2024
Sales Person: Cindy Goodley
cgoodley@weidert.com
Phone: +13422229283
Lead Time: 2-4 weeks
Payment Terms: Net 60
Delivery: FOB
FOB Info:

LINE	PATTERN/DESCRIPTION	QUANTITY	UNIT PRICE	NET PRICE
1		1	\$40,000.00	\$40,000.00
	Product Details: 4-6 weeks after receipt of purchase order and roll base, depending on ship load and available resources at that time. Should additional, unforeseen, or non-quoted work be required for reasons beyond the control of IB.			
2	Product Name Product Sub Name Here is the full description of the product itself.	6	\$10,000.00	\$60,000.00
3	The main product name Sub Product Name/Info Description below the product name...	1	\$5.00	\$5.00
4	New Line Item Subhead information Description	1	\$100.00	\$100.00
Total				\$100,105.00

Scope of Work
Adjustments to the actual quote

Signature
Before you sign this quote, an email must be sent to you to verify your identity. Find your profile below to request a verification email.

Matthew Popham
mpopham@weidert.com

Verify to sign

HubSpot Sales Hub





THE LEAK

ABANDONED DEALS

44% of sales reps give up after just one follow-up, and after four follow-ups, 94% of salespeople have given up



THE FIX: AUTOMATION

DEAL FOLLOW-UP: TRIAGE & AUTOMATION



Deal Follow Up: Triage & Automation

Deal Follow-Up

Triage & Automation

DEAL VIEWS

Deals ▾

High Priority X Medium Priority Low Priority

☰ ☼ Purchase Pipeline ▾ Deal owner ▾ Create Date ▾ Last Activity D... ▾ Close Date ▾ Clear All and more saved to grid view Advanced filters

Search name or description 🔍

<input type="checkbox"/>	DEAL NAME ▴ ▾	DEAL STAGE ▴ ▾	CLOSE DATE (EDT) ▴ ▾	DEAL OWNER ▴ ▾
<input type="checkbox"/>	PA P	Quote (Purchase Pipeline)	May 31, 2024 1:00 AM EDT	ji

HubSpot Sales Hub

**CONTACT VIEWS**

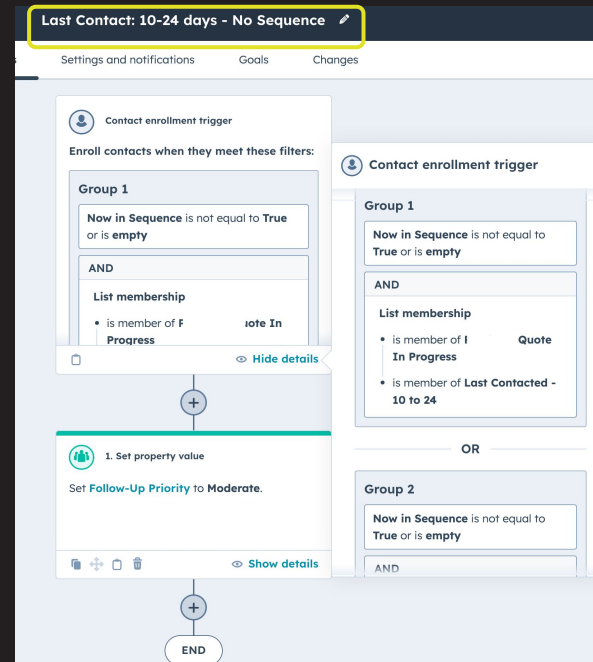
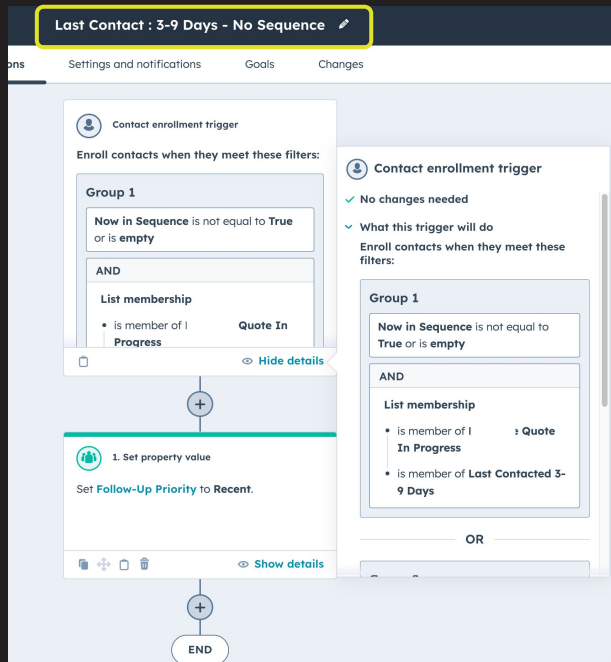
<div><div>High Priority (over 12k)</div><div>Medium Priority (6k - 12k)</div><div>Low Priority (<6k)</div></div>				
<div><div>Date ▾</div><div>Last Activity D... ▾</div><div>Lead Status ▾</div><div>Clear All</div><div>Advanced filters (2)</div></div>				
▴ ▾	EMAIL ▴ ▾	PHONE NUMBER ▴ ▾		LAST CONTACTED (EDT) ▴ ▾
	dking,	(352)	5922	Yesterday at 11:04 AM
	rblair,	(214)	3241	Apr 16, 2024 3:37 PM EDT

HubSpot Sales Hub



Deal Follow Up: Triage & Automation

WORKFLOW AUTOMATION



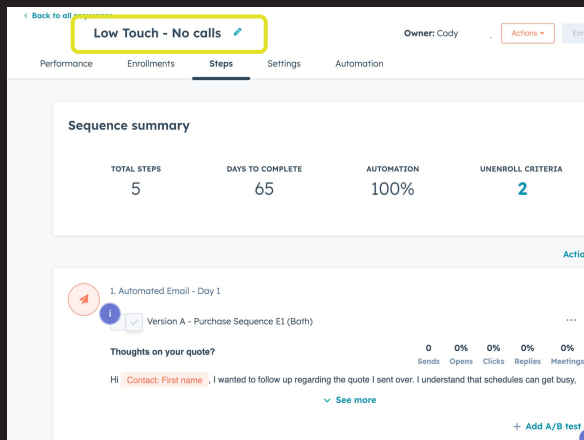
HubSpot Sales Hub



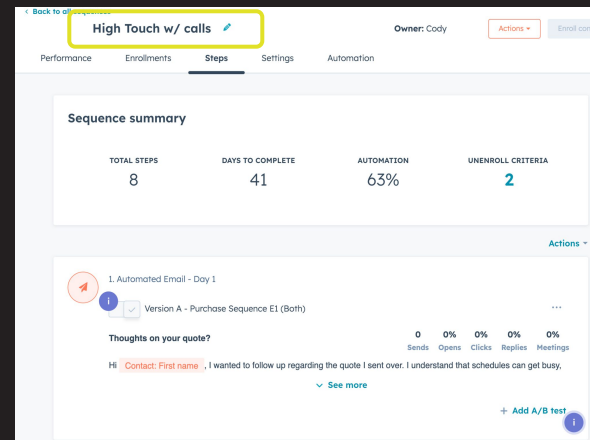
Deal Follow Up: Triage & Automation

SEQUENCE AUTOMATION

LOW TOUCH



HIGH TOUCH



HubSpot Sales Hub



THE LEAK

CUSTOMER RETENTION

48% of salespeople never make a single follow-up attempt after the initial contact with a customer



THE FIX: AUTOMATION

CRM SEQUENCES

Stay top-of-mind with customers;
Use automation to surface opportunities

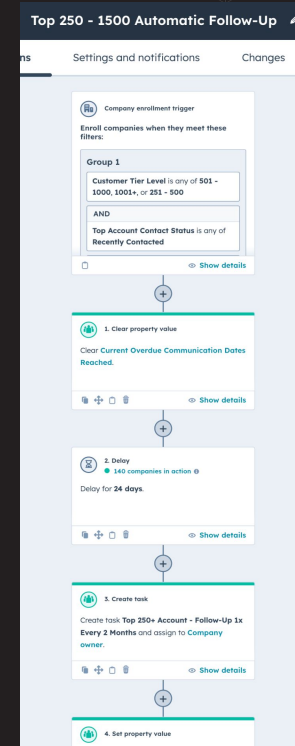
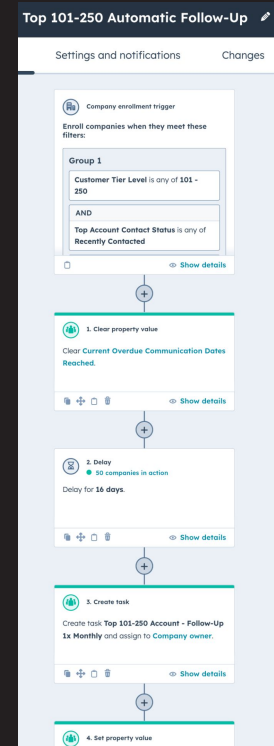
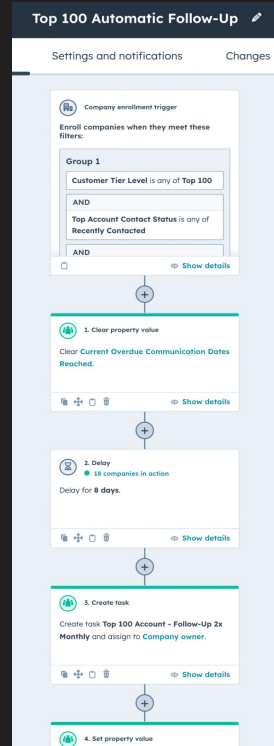


CRM Sequences

CRM Sequences

To Stay Top-of-Mind

- + Alerts Salesperson when to follow up
- + Tracks if they did and creates reminders if they did not
- + Then resets itself



WHERE DO I START?

STEPS TO TAKE

1. Identify your leaks
2. Prioritize the leaks
 - + Quantify impact (20/80)
3. Identify a good tool
 - + Existing first — do you have something that can do the fix already (i.e. CRM or Sales Automation)
4. Implement the fix
5. Change management
6. Evaluation / results
7. Iterate for continuous improvement

LEARN MORE

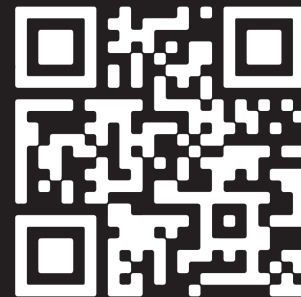
RESOURCES

1. [NotebookLM](#)
2. [Zapier Central](#)
3. [Weidert Group AI Resource Library](#)
4. [FAQ: How to Boost Marketing Productivity with HubSpot AI & More](#)



QUESTIONS?

LET'S CONNECT



Book a meeting with Rick