

## **Class 4: Introduction to Calling**

### **VIDEO 1: WHY SHOULD YOU USE HUBSPOT SALES TO MAKE YOUR CALLS?**

Hey, it's Kyle from HubSpot Academy. This class is about how you can use the calling feature inside HubSpot Sales to get people on the phone. Now, you might be thinking, "I have a phone--why should I use HubSpot Sales to make my calls?" Glad you asked, friend--let's dig into that a bit.

Why should you use HubSpot Sales to make your calls? I'll give you two reasons, one that's pretty basic, one that's more strategic.

Here's the basic one: if you make your calls using HubSpot Sales, then they'll be automatically registered in the CRM. They'll show up right on the contact's timeline so you can look back on them later, and they'll be reported so you can get credit for the work you've done. This means you'll be able to spend less time documenting stuff and more time selling, which is pretty sweet.

But let's talk strategy for a minute. A well-timed phone call is a powerful thing. Today's empowered buyers don't want to talk on the phone until they've already decided that you might be able to help them. But what if you could get them on the phone before they've made up their mind? If you could call them in the very moment they're weighing their options, you might be able to give them the information they're looking for, the missing piece of the puzzle that makes them choose you over the competition. A phone call like that is well worth your time, and your prospect's.

But here's the thing--if you just call people at random, you're probably going to catch them at a bad time and annoy them. And that can make them less willing to talk to you in the future. So calling someone at the right time can help you move a sale forward, but calling them at a bad time can really set you back.

So how do you nail the timing? The answer is to meet the buyer on their own terms. The truth is, buyers signal their interest in all kinds of ways, and most of the time it isn't by saying, "Oo! Oo! Call me!" In the next video, we'll talk about one silent signal that indicates your contacts might be waiting for your call, but first I'm going to let you in on a little secret: the key to success here is speed.

Check out these charts. These come from a study that was done on how response time affects sales success. In this case, they were looking at form submissions, but the same holds true for a variety of actions your prospects might take. If someone submits a form on your website, you'll be 10 times more likely to get them on the phone if you call within 5 minutes than if you call an hour later. Even more importantly, if you call within the first 5 minutes, you'll be 21 times more likely to qualify that contact as a lead than if you wait even just 30 minutes to call.

Now you might be wondering, "How in the blazes am I supposed to call that fast?" Hakuna matata. In the next video, we'll talk about how you can use HubSpot Sales Calling to do just that.

## VIDEO 2: HOW TO USE HUBSPOT SALES CALLING

If you're using the free version of HubSpot Sales, you're limited to 15 minutes of calling per month. If you're using HubSpot Sales Pro, that limit doesn't apply to you, but you should still make the time you spend on the phone as productive as possible.

How can you use HubSpot Sales Calling to optimize your phone calls? The short answer is to call your contacts at a time when they might actually want to talk to you. But if you don't have an appointment with them, this raises a different question: how do you know when to call your contacts in the first place?

Well, if you've been using HubSpot Sales to track your emails, you might have noticed some messages getting opened two, three, even four times. What's up with that?

That's your buyer hinting at their interest.

If you just get one notification for an email, that doesn't tell you a whole lot. Sure, the recipient opened it, but who knows if they spent any time reading it or actually liked what you wrote. However, if you get a second notification later on, that means they've come back for a second look. That's a good sign. And if you get a third notification--boy oh boy, that contact might really be into you! Call them.

Here's the deal--it's really easy to set a task to remind yourself to follow up with a person after a few days or a couple weeks, and that's a good practice to get into. But if you see multiple notifications coming from a single email you sent someone, don't wait for that follow-up date to come--call them right now!

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Remember, you'll be 10 times more likely to catch them and 21 times more likely to qualify them if you call within the first 5 minutes. The window of opportunity here is really narrow. Someone might really like your email while they're looking at it, but 10 minutes later they'll be stuck in some meeting about keeping the breakroom clean, and they will have forgotten all about you.

So try this: keep an eye on your email notifications. Watch for the emails that are getting opened multiple times. Set a magic number for yourself--probably three or four--and whenever an email has been opened that many times, call the person opening it. And call them fast. Preferably within the first 5 minutes.

How do you do that? Well, if you've got a phone number for a contact in the CRM, there'll be a call button on their notifications inside the activity stream. And the stream rolls notifications for a single email together, so you can see how many times it's been opened. Once it hits your magic number, click that call button lickety-split, and chances are, you will get them on the phone.

If you're using the email extension, there's also a call button inside the sidebar. So if somebody sends you an email that presents an opportunity for a larger conversation, click that button and off you'll go.

When you're making these calls, make sure you lead off in the right way. Context is everything. So if you're calling someone who just sent you an email, you can say, "Hey, I got your email." But if you're calling someone because you got an instant notification about them, you'll probably need a different approach. Just start the way you normally would if you were following up with them, and they'll probably say something like, "What great timing--I was just thinking about you!" Don't overthink this part. No need to explain why your timing's so good. Just dive right in and say something like, "That's great! I was hoping we could briefly discuss--" whatever it was your email was about.

Remember, if you call someone while they're re-reading your email, chance are you're going to get them on the phone and that they'll want to talk to you. Even if you don't use the notification trick, be sure to give HubSpot Sales Calling a try, just so you can see what it feel like not to have to manually log a call. The next video will walk through the details of how to do that.

## VIDEO 3: HUBSPOT SALES CALLING IN ACTION

Let's take a look at how you might use HubSpot Sales Calling to catch your contacts at a good time. For this example, we'll use the fictional sales rep we introduced in the class on custom views: Bob at Groundskeeper, Inc. Bob sells landscaping services to small property management companies.

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Because he works primarily with business owners, it's pretty common for his contacts to get busy and forget to respond to his emails. But he's found that if he can get them on the phone at a convenient time, he can usually find out pretty quickly whether they want to move forward with the sale.

Bob is sending an email to Andrea at First Management. Bob has had some promising conversations with Andrea over email, but he hasn't been able to get her to speak with her on the phone yet. So now he's writing an email proposing that they schedule a call. He writes up some details about what they would be discussing and how long he anticipates the call would take and sends it off. He also sets a task to remind himself to follow up with Andrea in a week if she doesn't get back to him before then.

Later that afternoon, Bob gets a notification stating that Andrea has opened his email. A few minutes pass, and he doesn't get a response from her, but he doesn't take immediate action. She might be checking her calendar for a time to meet, or she might be planning to get back to him later.

A few days later, Bob gets another notification stating that Andrea has opened his email. He waits, but still no response comes. A few hours later, he gets yet another notification. Bob has made it a practice to call a contact whenever he gets three or more notifications for a single email. He goes to his notification stream and clicks the call button next to his email to Andrea. He's taken straight to her contact record, and he places a call.

**Andrea:** Hi, this is Andrea.

**Bob:** Hi, Andrea. This is Bob over at Groundskeeper.

**Andrea:** Oh hi, Bob! I was just thinking about you!

**Bob:** That's great! I just wanted to circle back with you about setting up a time to discuss that tree trimming contract.

**Andrea:** Yes. I've been a little bit underwater lately, but I'm still definitely interested in discussing that with you. Could we set up a time for sometime next week?

**Bob:** That would be great! How's Thursday look for you?

**Andrea:** Thursday morning I'm in meetings all day, but I could do the afternoon.

**Bob:** Afternoon works for me--how's 2:30?

**Andrea:** 2:30 works great.

**Bob:** Excellent. This first call shouldn't take more than 20 minutes. I included some details in my last email, but I'll send you a calendar invite with a full agenda right away.

**Andrea:** Great! Thanks, Bob.

**Bob:** Thank you, Andrea--see you Thursday!

After ending the call, Bob adds a couple of notes about what was discussed and sends Andrea an invite for their upcoming meeting. He also edits the task he set previously with a new one that will remind him to send Andrea a reminder email the day before their meeting. Attaboy, Bob!

In the next video, we'll walk through the details of making a call using HubSpot Sales.

## **VIDEO 4: MAKING CALLS WITH HUBSPOT SALES**

You can call any contact inside your CRM by going to their contact record and clicking the Call tab. If you haven't registered a phone to call from, you'll be walked through the steps of adding a phone number. Once you've done that, you'll see two options for calling this person: "call from my browser" and "call from my phone."

If you select "call from my browser," you'll be able to talk to the person using your computer's microphone and speakers. If you select "call from my phone," HubSpot Sales will call your phone and then call out to your contact after you answer.

Regardless of which method you use, you'll be able to record the call by flipping this switch. Please note that some countries and US states require you to receive a person's permission before recording a call. HubSpot Sales knows which states require this and will automatically turn recording off when calling an area code from one of those states. However, because we can't be sure where your contact is actually located when you call them (especially since we live in a world of mobile devices) it's good to get consent where there's any uncertainty, or to consider making it a policy to always ask for consent.

Take notes as you talk with your contact, and your notes and the recording will be saved on the timeline when the call is over.

In addition to the contact record, there are two other areas where you can make calls to your contacts. One is in the sidebar inside the email extension. This enables you to call a contact while you're reading an email they've sent you. The other is in the activity stream that shows you all of your email notifications. This is found under the Sales Tools dropdown. Here, you'll be able to call anyone who has a phone number stored in the CRM while they're reading an email you've sent them. To visit your activity stream, [click here](#).