

Video 1: What is inbound?

Hi there! I'm Jorie with HubSpot Academy.

In today's world, there's a belief that in order to do business well, you have to be ruthless and cutthroat. That in order to be successful, you have to grow, even at the expense of your customers.

The sentiment is everywhere. It's in ads we see everyday, across pop culture, and even in the behavior of some of the world's biggest companies. But, the problem with that kind of thinking, especially in a world that's driven by word of mouth, is that it leads companies to make short term decisions that sacrifice long term relationships.

Another reason that logic is flawed is because buyers today have all the power. There's been a massive shift in the relationship between businesses and buyers. Now, the buyer is more empowered and has more information about your product, industry, and competition. And if you fail to meet their needs?

94% of consumers have discontinued communications with a company because of irrelevant promotions or messages. 74% of people are likely to switch brands if they find the purchasing process too difficult. 51% of customers will never do business with that company again after one negative experience. Those numbers are telling.

On the flip side, 93% of consumers said they are more likely to be repeat customers at companies with remarkable service. 77% of consumers shared positive experiences with their friends or on social media and review sites in the last year. So clearly, there's a better way to do business.

Inbound is a business philosophy based around helping people. The inbound approach means doing business in a human way and creating meaningful 1:1 relationships with strangers, prospects, or customers. Inbound means meeting people on their own terms and interacting with them using the sites, platforms, and networks they value most.

Inbound is a better way to market, a better way to sell, and a better way to help your customers. Because when good-for-the-customer means good-for-the-business, your company can grow better over the long term.

Inbound is about sharing your knowledge with the world. This, in turn, helps you build awareness and trust with your target audience. Boiled down, it's literally knowledge monetization that focuses on empowering your prospects and customers rather than forcing them to engage with you with interruptive experiences. You need to align with the way your buyers think, research, and purchase. It's about being a business that's helpful during each experience a person has with you. It's about meeting your consumers where they are.

Here's Brian Halligan, CEO and co-founder of HubSpot on what inbound means to him...

Brian Halligan: Inbound means to me, it's kind of a state of mind, you know? The old way you went to market was outbound. It was very interruption-oriented. It's sort of extracted value out of your prospects, and it wasn't fun for the prospect and it wasn't fun for the person who was going to market with the message.

Inbound's a new way to go to market. It's a new way to go to market that is a much more lovable way to go to market for the marketer and the marketee. Inbound really strives to help people go to market in a way that matches the way humans want to be sold and marketed to in 2018. Inbound, it's almost like a state of mind to me.

So, inbound is as much a mentality as it is a business strategy.

Being an inbound business means your building relationships and having conversations with, not at, your target audience. If you want to get value out of prospects and customers, you need to give them an experience that they value. To create this value, you need to provide the right information to right person at the right time, every single time, regardless of if they are interacting with your marketing, sales, or service teams.

It's about drawing people in -- that's why it's called inbound, after all.

Here's Brian Halligan again.

Brian Halligan: The other big change that's going on is I've felt like, at least when I was growing up in my career, the best product always won. What you sold was really important. I think more and more it's about how you sell it. When they say how you sell, it's about creating that, just that end-to-end delightful experience and business model that really matches the human behavior. You don't have to look far for that type of thing.

Look at the music industry, it's been totally turned upside down by Spotify. Spotify, it's a better model of buying it, and it learns from you and it changes over time, the service is better. Amazon, they've disrupted virtually everything, it's just a better way to buy. Yes, it's cheaper, but it's more convenient, the service is better, it's fantastic. Everything.

Look at Uber. It's a car that drives you around, taxis do the same thing. It's a better business model, a better go-to-market, a better service model. I think the companies that really do well today are the ones that leverage data to create a gorgeous end- to-end experience for that customer from marketing, when they find you, through to sales, when they become a customer, through to service, and then back to marketing.

Consumers' buying behaviors are going to continue to change and evolve. Your inbound tactics and tools will also change and evolve, but the inbound philosophy will still remain true. It's a philosophy about pulling people in by being helpful. By actually caring about what the problems of your potential buyers are and how you can help solve them. That's why inbound should extend to every aspect of your business.

Here's Dharmesh Shah, HubSpot's CTO and co-founder on this fundamental shift...

Dharmesh Shah: So, marketing sales and service have all been changing, and are continuing to change. And they're all changing in similar ways, but at different rates. So, marketing is changing earlier and faster than we saw over the last 10 years. So, a change in marketing, essentially was as people, we got tools that allowed us to block out marketing messages, to block out outbound.

And so, as a result of those tools, we didn't have to get inundated with marketing messages anymore. For sales, we got access to information. So, no longer did we have to rely on a sales rep to tell us things about pricing, or

customer reviews. We could just find that information on the internet. So, that's the kind of fundamental shift that started to happen. In the world of customer service, what's changed is now we have choices. So, back 10, 20 years ago, you could only choose between three providers. And so you had to deal with whatever service they gave you. And now, customers have a choice. So, that's radically changing how we approach customer service.

You've probably come across some of your favorite brands actively practicing inbound. It's that problem-solving blog post that shows on your Facebook feed. It's the product review that you found after doing a quick search in Google. The sales representative that you worked with you to help solve your problem at the appropriate time. Or that question you had about your subscription that got easily answered by a customer service representative on the company's website. The experiences that felt personalized. Experiences that felt relevant. Experiences that felt helpful.

If you fully embrace inbound, it will transform your business. You want to create experience that makes your prospects feel valued. Every individual is unique and they want to be treated that way. And when all of your vectors are aligned around an inbound approach, you can provide a holistic experience for anyone that interacts with your business no matter where they are in their buying journey.

It's time for you to support your prospect's buying process. It's time for you to join in and empower buyers and customers to make the right decisions for themselves.

Video 2: What is the inbound methodology?

How do you actually do inbound? Well, the best way to start is by understanding the inbound methodology.

First, here's Mark Kilens, VP of HubSpot Academy, on why the inbound methodology is so important.

Mark Kilens: The inbound methodology is going to help change your business, transform your business so it is more human. It is more helpful and it's going to teach you the things that everyone at your business needs to do to provide more value and build real relationships and trust with everyone you're trying to do business with.

Alignment is more important than ever these days. The inbound methodology is going to help you align your business so that everyone at the business understands your prospects and customers better, so they can deliver that real value and build real trust with the people you are here to serve.

And at the end of the day, the inbound methodology is going to help everyone at your business and all of your customers grow better. It's going to help you grow better by providing a framework.

So, what does this inbound methodology look like? It illustrates the three stages each of your marketing, sales, and services team will use to create and maintain relationships with people. These stages are attract, engage, and delight.

All of these phases apply to everyone in your company. You see, attracting isn't just the role of marketers. Engaging isn't just the role of sales. You can probably see where this is going. Delight isn't just the role of services! In order to create relationships that last and customers that stay, every customer facing team needs to

focus on how they can contextually attract, engage, and delight your prospects and customers and continue to build trust in your brand.

So let's see what the inbound methodology looks like in action. During the attract stage of the inbound methodology, an inbound business focuses on attracting prospects and customers through relevant and helpful content - immediately adding value during their buying journey.

Helpful content is contextual content, meaning that it relates directly to the question being asked, outcome being sought, or an aspirational goal. It should not only provide an opportunity to learn, but start to showcase that your level of insight and advice should be trusted. That shows why you're a thought leader. And to provide the easiest path to the desired solution, and expert-level insight into how to get there.

For a marketer, this could mean creating helpful content and experiences that demonstrate your knowledge. Sales reps, on the other hand, you need to make customers want to engage in conversation and see you as a resource, so you could attract prospects and customers by making yourself available for meetings, calls, or live chat in areas they're likely to have the most product questions. And services? Knowledge docs and chatbots make information easy to find for people who are looking for it.

Every business is an expert. Every role a knowledge broker. Attracting people is about using that expertise to create content and conversations that help people overcome their obstacles and reach their goals. To provide answers to questions, solutions for problems, and, perhaps, entertain along the way.

The engage stage begins the moment a person takes the desired action- to read that article, to book that meeting, to chat with that bot. It's about starting a relationship and becoming that trusted advisor.

In this stage, you begin to collect information about the individual you're working with. This could mean their personal information, if that's exchanged, or simply tracking the actions they choose to take moving forward. They may have landed on your website or started to interact through a preferred channel or app.

No matter how they are interacting with you, your focus is building trust. Answer questions. Provide solutions for the challenges your prospects and customers face and strategies to accomplish the goals they set. Maybe even to provide insight for the questions they didn't know they had. It's during the engage phase that you're able to start to build that one-to-one relationship and deliver solutions that solve problems with context, clarity, and creativity.

By focusing on what motivates your audience and having the expertise to solve for their needs, you become a resource. You sell your brand by solving for your prospects, rather than through telling them what sets you apart.

Of course, how you go about the engage stage will, again, depends on your role. For example, a marketer may use ad retargeting or blog posts to speak to different segments of their audience. A sales rep could use personalized follow up or having a series of phone conversations to determine the unique needs of a buyer. A services rep could focus on an inbound channel and use a support ticketing to organize and respond to each new inbound inquiry. The manner you build trust with your prospects and customers will depend on the unique needs of your business.

Finally, you arrive at the delight stage of the inbound methodology. Delight revolves around providing an outstanding experience every time a prospect or customer interacts with your company. To exceed their

expectations so much that they'll want to tell their friends and family about how you went the extra step to ensure they accomplished what they set out to do.

Delight is about more than just great customer service, although customer service will play a part. Anyone interacting with you has the potential to become the loudest voice across social media. You have the opportunity to ensure that you're actively creating advocates, rather than detractors of your brand.

To be an inbound business, you need to have a system in place to help delight those prospects or customers so that they become promoters and start to influence those strangers. Your promoters are what will help you have a continuous motion with the inbound methodology, after all. Think of it this way: at first, your marketing team is the loudest amplifier of your company, but hopefully soon, your customer base becomes even louder.

This means aligning your marketing, sales, and services teams around providing outstanding service in their content, conversations, and interactions. Make it as easy as humanly possible for people to find the answers they need. Ensure that you understand what motivates your prospects and customers. Find opportunities to provide additional insight or information.

Every prospect is a potential customer. As for any existing customers? Well, a customer isn't truly a customer until they've had the chance to leave you and chose not to.

Everyone at your company has the opportunity to delight someone. For marketers, this could mean creating a library of entertaining, but educational resources that can be recommended and evangelized to others.

Does this sound familiar? Maybe a little like the video you're watching? It should! The HubSpot Academy Learning Center is a great example of HubSpot marketing using educational content to delight its users.

For sale reps, this could mean using sales automation to remind yourself to check in with people post-sale to make sure they're getting everything they were looking for. For services reps, this could mean using feedback surveys help you improve over time and truly delight your customers.

So there you have it: attract, engage, and delight. The flywheel that can help you build relationships with anyone interacting with your company. It'll take some time and effort on your part. But the result? You achieve sustainable growth by paying attention to what makes your happiest customers tick.

Video 3: What are the fundamentals of an inbound business?

Before practicing inbound, it's important to understand the fundamentals of inbound strategy. Consumers don't want to be sold to, they want to be educated, and inbound tactics can deliver the kind of information your prospects and customers need to help them make smart, well-informed decisions and, ultimately, help them grow.

To do inbound, you need to be inbound. This means using a specific set of strategies along the way. You'll need to understand the following: the inbound principles, your company's purpose, how your business goals align, your buyer personas, and your buyer's journey. In addition, you'll need the correct toolbox, a growth platform, to ensure you can execute each one of your initiatives with excellence.

Let's start with the inbound principles. Think of the inbound principles as the guidelines for every interaction your teams have with prospects or customers. When implemented correctly, they can ensure you're being helpful, human, and holistic with your inbound strategy. The principles are as follows:

1. Standardize for consistency

Consistency in messaging and information is core to building trust. If a prospect or customer asks three different people at your company the same question, try to ensure they are getting the same answer all three times. This helps build confidence in your brand whenever a question or challenge arises.

2. Contextualize for relevance

A prospect or customer is in a continual conversation with your brand. Contextualizing means using the information from all previous interactions to provide the most relevant information as quickly as possible. This prevents repetitive conversations and time spent solving for problems or answering questions that are no longer an issue.

3. Optimize for clarity

Be conscious of the strengths and weaknesses of each communication channel. This can help you determine the best types of marketing, sales, and services interactions to deliver across each one.

4. Personalize for impact

Use the shared knowledge inside your contact database to tailor each conversation you have to the person you're having it with. Rather than canned responses or content, adapt your messaging to speak directly to the person you're interacting with.

5. Empathize for perspective

Inbound is about being human and that means having empathy and being adaptable. Acknowledge that your prospects and customers are people, with valid emotions. As a result, you want to ensure you're speaking to their emotional state at the same time that you are providing guidance and information.

Together, these can help shape the way your brand communicates. But oftentimes, it's not just about what your brand is actually saying. It's about the reasoning behind those words. That brings us to your company's purpose.

Inbound is all about making your company easy to find for the people who need your help. But before you can do that, you need to understand the job your company was founded to do.

According to the Harvard Business Review, "To inspire your staff to do good work for you, find a way to express the organization's impact on the lives of customers, clients, students, patients – whomever you're trying to serve. Make them feel it."

This is your company's purpose. It's not just your company's vision or mission, although those elements will definitely play a part in your strategy. Your purpose is why your company exists. It's about what you're doing for other people that's truly making a difference. Having a clearly identified purpose helps your marketing, sales, and services teams really step into the shoes of your prospects and customers and remain connected to the people they're serving, rather than just the numbers they're working to move.

Speaking of numbers, let's take a moment to talk about goals. What comes to mind when you hear the word "goal"? Maybe you think of the destination – the benefit of learning about the best ways to reach and align with

your prospects or customers. Maybe you think of the journey – how every interaction gradually builds momentum until you’ve built a relationship on a foundation of trust and transparency. Maybe you just think of the now – the checklist for today and what you want to accomplish over your morning coffee.

Now think about the marketing team, the sales team, and the services team within your organization: their checklists and their journeys to get there. If you’re not all ending in the same designation, that’s a lot of energy wasted when you could be working toward the same goals. Having a defined framework for aligning your teams and their goals can help ensure that everyone, from every executive to every individual contributor, is spending their time and effort working toward the same end.

That, of course, all falls apart, if you don’t have a unified sense of who you’re trying to attract, engage, and delight with your company. And that’s where buyer personas come in. Buyer personas are semi-fictional representations of an ideal customer, based on real data and some educated speculation about demographics, behaviors, motivations, and goals.

Personas are created through research, analysis, and taking a close look at who’s already buying from you. They can help you get into the mindset of your potential buyers and create the right content.

They’re the glue that holds every aspect of inbound (marketing, sales, and customer service) together.

That’s a really powerful thing if you can get your entire company talking about your ideal customers in the same way. This will help marketers know the best marketing channels to use and the right content to create to attract the right people. This can help a salesperson know the right questions to ask during a sales presentation. Or make sure you’re evolving your product to better service your customers.

That brings us to the buyer’s journey. Every interaction your persona has with your organization should be tailored to where they are in the buyer’s journey.

The buyer’s journey is the active research process someone goes through leading up to a purchase. Knowing the buyer’s journey for your persona will be key to creating the best content possible.

Instead of moving someone through the funnel, the buyer’s journey is tailored to your buyer and the stages. The three stages are the awareness stage, the consideration stage, and the decision stage that portray the experiences your potential customers go through.

Marketers can use the buyer’s journey to create different content at every stage. You’ll want to have content offers that answer your buyer personas problems, their needed solutions, and content on your product or service. You can also use the buyer’s journey to segment and better nurture your leads to help making the best purchasing decision.

For sales, you can use the buyer’s journey to better understand how to sell to your prospects and help guide them through the buyer’s journey. If you know someone’s at the awareness stage, you’ll have a very different conversation with someone that’s at the decision stage and has already recognized possible solutions to their problem.

And for services, think of your customers as having their own type of buyer's journey. When you're looking to upsell, resell, or cross sell, you don't want to send your customer back through an entire buyer's journey. Use this as a way to understand what your customer journey looks like.

Once you understand your buyer personas and their buying journey, it's time to start using tools that help you be inbound.

Your inbound growth platform should consist of different tools that you can align your entire organization. It's not just customer service that will be using email. And it's not just helpful to sales to have a CRM. And it's not just marketing that needs reporting and data.

The foundation that you'll need is a CRM. Remember, a CRM stands for customer relationship management. A lot of people think of a CRM being a sales tool. It is, but it isn't just relevant to sales.

Here's Brian Halligan, CEO and co-founder of HubSpot:

Brian Halligan: CRM's a confusing word. A lot of people think it's software for sales people, but it's customer relationship management. I think it's really a platform that you use to manage the entire customer journey, and that entire customer loop from marketing into sales, into service, from happy customers into prospects. How do you get that self-reinforcing loop cranking in your business? It's hard to do that if you've got one system for selling and one system for marketing and one system for service that don't talk to each other, that don't give context.

What makes a CRM so powerful is because it's a contacts database. A contacts database is central to every piece of your inbound business. You'll use it to keep track of all the different people who have a relationship with your business, to personalize every interaction you have with them, and to attract more contacts like them. Your contacts truly are the heart for every piece of your marketing, sales, and services strategy.

Contacts are not just names and email addresses inside of a database, but individuals who you're creating relationships with. A constant reminder of why inbound is and should always be customer-centric. A contact is anybody your company markets, sells, partners, engages with or employs. When involving both marketing, sales, and services in your contacts strategy and having them use the same contacts database, you're creating alignment and consistency with all parts of your inbound strategy that your contacts are interacting with. You'll also want to use different types of tools that best support the inbound methodology. Tools that will help you attract, engage, and delight.

But if buying behaviors continuously evolve, so will the tactics and tools that you'll use to reach them. That's why HubSpot's products are constantly evolving. It's to always solve for the way people want to buy.

Here's HubSpot's Senior VP of Product on how he thinks of inbound and technology:

Christopher O'Donnell: We've always stated that Inbound is fundamentally about being human and helpful. The technological landscape is adapting to exponentially increase company's helpfulness through artificial intelligence and machine learning. It's not something to fear but rather something to embrace as both a customer and as a business. As a customer you're able to surface the help and information you need faster and at your convenience and as a business you can automate the tedious details and have more meaningful conversations with your customers

how and when they want. All of this allows you to have more time to do the things you love. It's a win-win.

If you're going to do inbound, you need to get comfortable with change and be ready to adapt to the experience people are looking for when they're trying to make a purchase.

As consumers, we're now looking for convenience more than we ever have before. We're looking for the most enjoyable experience.

That's why you've seen so many changes in technology. Take chatbots for instance. HubSpot's co-founder, Dharmesh said chatbots are the most important technology over the last two decades. Here's Dharmesh on how this technology ties into this inbound philosophy....

Dharmesh Shah: Yeah, the reason chat bots are interesting is because of the technology they use, which is called conversational user interfaces. And the reason they're exciting, is if you think about ever since the dawn of software, for the most part, humans have been molding themselves to their software. It's like, oh, I have to learn how Photoshop works, or how this particular application works. And what conversational user interfaces allow us to do, is essentially talk to our software, whether it's through a messaging interface, or through a voice interface. So, for the first time now, software will adapt itself to how humans want to work with software, versus the other way around. And this is the first time as an industry, we actually have the technology to allow us to do that, where people can say, "I want to get my traffic data for the last week, or so." Or, "Tell me how many customers we signed up last month."

And instead of saying, "Oh, I go to click here, and click there," and trying to get that answer out of the software, you simply ask the software, like a normal human would. And now, software's getting increasingly intelligent. It has the ability to respond to those kinds of questions. Very exciting.

New tools and platforms have changed how organizations prospect and retain a customer. Today, your entire company needs to be part of delivering this great experience. Once a company puts Inbound ideas into practice, everyone in the company from your CEO to product development, to marketing and sales and services, every single person in the company will be aligned around this inbound philosophy, your company culture, and strategies required to deliver value to customers. All of those interactions need to match to the buyer's journey and what your buyer personas are looking for.

The inbound movement is just getting started. The move toward the future requires forward-thinking ideas to be embraced, experimentation to figure out which channels work best for your business, and an openness to try new technologies and tools to foster better relationships with your customers.

Video 1: What is a flywheel?

Hey, it's Kyle from HubSpot Academy. Let's talk about funnels. Chances are, you think of your business as some kind of a funnel, with a fairly large number of people knowing about your company, and a smaller number of people engaging with your company, and an even smaller number of people actually buying from you. Visualizing your business as a funnel is easy because anytime you look at a graph representing a conversion process, the chart itself is shaped like a funnel.

But there's one big failing in thinking of your business as a funnel. In the physical world, when you use a funnel, you pour some stuff into the top and wait for it to come out of the bottom, and then that's the end. All movement stops until you pour more stuff into the top. Furthermore, as you pour things into a funnel, the stuff at the bottom doesn't have much of an impact on the stuff at the top. As long as the things lower down continue to flow and get out of the way, the stuff going into the top of the funnel won't even notice they're there. But in the business world, the people coming out of the bottom of your company funnel can have a huge impact on the people going into the top of it. If your customers love your company and love your product, they'll tell their friends to come buy from you as well--which means the bottom of the funnel can feed the top of the funnel. In the physical world, that's impossible--it's hard to imagine how that could ever happen--but in the business world, that's just good business. Additionally, if the people who buy from you have a bad experience, if they're unhappy with the way you treated them, they'll tell their friends about that, too. Which means that the people coming out of the bottom of the funnel can prevent other people from entering the top of the funnel. Again, thinking of real funnels in the physical world, it's hard to imagine a circumstance in which the stuff that's already exited the bottom of the funnel could somehow go back up to the top and prevent other stuff from coming in. But this is an important fact about human nature that every business leader needs to understand. The attitude of people when they come out of the bottom of your funnel directly impacts the number of people who are willing to enter the top of the funnel.

With all of that as context, it shouldn't be a huge leap to realize that a funnel isn't the best metaphor for your company. A much better metaphor is the flywheel.

A flywheel is a machine that stores rotational energy. When you add energy to a flywheel, it starts to spin. If you add more energy to it, it spins faster. And unlike a funnel, where the only way to maintain a constant speed is to keep adding stuff to it, and flywheel will keep spinning unless some other force comes along and slows it down. From a business perspective, the rotation of the flywheel represents the growth of your business, and happy customers provide the energy that fuels that growth, either because they buy from you again or because they bring new customers to you by promoting your product to other people in their network. But if you produce unhappy customers, either by selling to people who are a bad fit for your offering or by overpromising and under-delivering, they'll work against your flywheel and slow your company's growth. Here's Alison Elworthy, VP of Customer Success at HubSpot, talking about what you can do to reduce the impact of unhappy customers on the speed of your flywheel:

Alison Elworthy: So, not every customer you have is going to have a fantastic experience, is going to stick around forever. You're always going to have customers that cancel in turn and leave you. But I think that's a great opportunity, not just to write that customer off, but make sure they have a positive experience on the way out. We talk about how your current customers are a great lever for future acquisition, those customers that leave you are also going to either refer or recommend your product to other people in the future. So it's really important even those people who may be

dissatisfied with a product or plan to cancel, leave on good terms. You want to break up and remain friends because those customers that do leave you will probably continue to refer your product and service in the future.

Even when you're working with unhappy customers, you need to do all you can to ensure they have as good of an experience as possible. Everything you do should be done with the goal of creating customers who will add positive energy to the flywheel and accelerate your company's growth. Here's HubSpot CEO Brian Halligan explaining this concept in more concrete terms:

Brian Halligan: When you're a startup and you don't have any darn customers, marketing matters a ton because you can't talk to any other customers if you're a potential customer. There's no word of mouth, there's no proof whether you're good or bad. As you're growing and you've got a lot of customers and you're scaling your company up, your customers are actually your best channel to market, it's not your marketing. Marketing is of course very important, but if you really want to grow, you ought to consider moving some of your money from sales and marketing into customer service, into your products, so you're delighting your customers, because those delighted customers that your business over the long haul, will grow, really grow on the backs of your successful customers. That's kind of where we're headed with HubSpot. Really pouring our R&D dollars, and pouring money into R&D, and pouring money and resources into customer service.

That's why the inbound methodology is a circle. It represents the flywheel that will drive your company's growth. By attracting customers who have a problem you can solve, by engaging with them on their own terms, and by delighting them at every stage of their buyer's journey, you'll create the momentum that will drive your company's growth. This is a huge advantage over the typical funnel viewpoint because it means that you aren't alone in helping your company grow--you have all of those faithful customers helping your company grow, too. And that's a much better way to grow.

Video 2: Combining funnels and flywheels

Let's talk about how funnels and flywheels fit together. Because funnels aren't going away. The flywheel represents your company as a whole, but you'll still have funnel-shaped charts and graphs representing the effectiveness of different processes within your company, and it's important to make sure those funnels are fueling your flywheel.

The most important of these funnels is your sales process. Your sales process defines the steps your sales team helps a qualified lead complete on their way to becoming a customer. If you look at a chart of your historical sales data, you'll probably find that a lot of people make it to the first step of your sales process, a slightly lower number of people make it to the second step, and so on until the final step, which the least number of people make it to.

This is a useful funnel-shaped chart. It can help you improve the steps of your sales process. For example, if there's an exceptionally big dropoff between step one and step two, it could be that your sales team is over eager in turning qualified leads into opportunities. It's a common problem for sales teams and leads to inflated sales forecasts and missed numbers. The solution to that problem is to either create stricter criteria for turning a lead into an opportunity or to reduce the amount of weight your sales forecast gives to the deals in that first stage.

A funnel chart for your sales process can help you optimize in other places, too. Any place you see an especially precipitous drop between two stages, you should do some analysis and find out what the problem is. There might be an inefficiency in the way your deal stages are structured, or perhaps your sales team needs more training on how to execute the stage before the dropoff. It's also helpful to look at charts like this for individual reps and see if there are coaching opportunities to help them improve their metrics in individual stages.

This is a good example of one way to use a funnel chart to improve a particular aspect of your business performance. Thinking of your business in terms of a flywheel shouldn't detract from any of this. In fact, by layering flywheel thinking on top of your funnel charts, you'll be able to find even more places where your processes can be improved. By realizing that, even though your sales process can easily be visualized as a funnel, it's actually one piece of a larger flywheel, you'll be able to put that funnel chart into the context of a larger one.

For example, after the sales rep moves a deal to Closed-Won, what happens? If you're in a service industry, there's probably a handoff from sales to services, and that in itself might be another process with more steps that can also be visualized as a funnel. But by combining it with your sales funnel, you'll be able to get a host of new insights. What's the conversion rate from Closed-Won to showing up at the kickoff call where the sales rep introduces the services rep? If it's not good, maybe that conversation should be woven into an earlier part of your sales process.

Here's another example. Regardless of what industry you're in, it's a good practice to ask happy customers to refer people from their network. What's the process that gets you from Closed-Won to Referral Given? What needs to happen in order for a customer to be happy enough with your product that they'll be comfortable putting your salesperson in touch with their friends? This isn't to say that your sales rep should be a ubiquitous presence post-sale--unless that's what your customer wants. More likely, there might be specific things your services team can do to make it easier for your sales team to get referrals later. And you might discover that there are things that your sales team needs to do before the sale to increase the likelihood that someone will promote the business post-sale. There may even be expectations that your marketing team can set before sales ever gets involved that will increase the customer's satisfaction after the sale, and increase the likelihood that they'll promote your business across their network.

By taking the individual funnels within your business and positioning them inside the larger flywheel, you'll unlock all kinds of opportunities for cross-team collaboration. You'll be able to optimize not just individual conversion rates but also the activities that happen long before an individual interaction that directly impact how well that interaction goes. With your entire company thinking about accelerating the flywheel as a whole rather than just improving their individual funnel metrics, you'll be able to make improvements that would have otherwise been impossible. And that's what it means to grow better.

Video 1: What are the inbound principles?

Hi, I'm Brian - the Conversational Strategy professor here at HubSpot.

Inbound has evolved over the past few years.

What started as a way to market better, has evolved into a way to grow your business, better.

As that evolution occurred, it's not enough to simply talk about why you should adopt the inbound methodology as the modus operandi of your business, or create tools and education around solving for the "what" - the practical set of resources that enable you to execute upon the theory.

You need the "how". A set of best practices, or guidelines, that connect the "Why" with the "What".

It's provided in a way that's both easily explained, and easily remembered.

A simple acronym, that can be applied to any inbound business, that helps guide you in how you connect the methodology with its execution. We call it S.C.O.P.E.

Pretty nifty, right?

Now remember - SCOPE is an acronym. Each letter represents one of the Inbound Principles - Standardize, contextualize, optimize, personalize, and empathize. They're designed to build upon each other, and enable you to execute what you've learned about the inbound methodology, with excellence.

You can apply SCOPE to every aspect of your inbound strategy, which of course is based upon the inbound methodology.

Methodology + principles = strategy

By using these sets of principles in your marketing, sales, and service you can add more value and build more trust with your prospects and customers. Using SCOPE when creating a blog post can help make sure you're creating content that's relevant to your audience. Using SCOPE when building out your sales process enables you to create timely, relevant content that can position you to be your prospect's needed and trustworthy advisor. Think of SCOPE as the instruction manual for executing your inbound strategy.

The "S" is for "standardize". You standardize for consistency. You want to make sure that you are always standardizing your information, so that there is never any confusion when it comes to the information about your business, products, and services. This doesn't mean that there is only one set of information for all situations. Instead it means that you have created variations of the information, that can be applied to the information, and is consistent whenever that information is required, for that situation.

Speaking of adapting to the situation - let's look at the "c". It stands for "Contextualize".

You want to make sure that you're taking the standardized information, and delivering it in a way that is contextually relevant. What do I mean by that?

When something is contextually relevant, it means that you are taking into account:

- What actions have happened prior to this point.
- What activities brought someone to this point.
- What type of question is being asked, and how has the prior actions and activities influenced the current situation.

In short - you take the standardized information, and you make sure that, by taking the context of the situation into account, you're delivering the right version of the information, at the right time.

Moving on, you have "O", which stands for Optimize. You want to make sure that, when delivering the standardized information in a way that is contextually relevant, that you are doing it in a way that is optimized for clarity.

Why is this important?

It's important because, as your business grows, you'll be interacting with people across multiple channels - its no longer just your website or blog. Today someone may interact with you across your website, email, phone, and social media. Each channel has specific strengths and weaknesses in how they enable you to deliver content.

They also have preferred amounts of content - in a live chat situation, whether on your website, via Facebook Messenger, or texting, people don't want to read long paragraphs of information.

They want short, concise delivery. At the same time, how people discover and consume content on your website has also evolved. Take that into account when looking at optimization. Is there a way to deliver the information via video, an infographic, or is a normal blog post just enough?

You want to leverage the strengths of a given channel, and mitigate its weaknesses.

Simply put - you want to deliver the right information, at the right time, and make sure that you're also delivering it the right way.

If you're anything like me, you probably like when a business that you've interacted with in the past remembers you, right?

That can be as simple as recognizing your phone number when you call them, or referencing a past conversation in the current one.

This is what the "p" in SCOPE stands for - personalize.

You want to personalize for impact.

By taking the time to set up your systems so that they can collect, store, and then make available the information that someone has already provided to you, you'll want to be able to create a more personal experience, and

reinforce the idea that you're developing a 1:1 relationship with the prospect or customer. How? Leveraging the information that you've collected in your CRM within your interactions allows you to do this.

Finally - we come to "e", which stands for "empathize". You empathize for perspective.

We all have feelings, and that's an important thing to recognize. By making sure that you try to be empathetic in your interactions, you're allowing yourself to see the situation from the perspective of your prospect or customer.

Often you have to deliver the emotionally correct response, before you can deliver the factually correct information. By ensuring that you're aware of the sentiment of an interaction, you'll be able to connect not only on a business level, but one that has a personal feel to it as well.

Video 2: The inbound methodology and principles

The inbound methodology is designed to be easily understood. Attract, Engage, Delight. You want to attract people to you. You want to engage with them. You want to make them happy. You want to delight them.

Question is - how do you do that? And to go a step further - how do you do that at scale?

The inbound methodology has a purpose - to empower you to build 1:1 relationships with prospects and customers, over time, and do it at scale.

If we left it there, we would be giving you the equivalent of a fortune cookie's fortune - it sounds really smart, but doesn't provide any insight into how to make it come true.

This is where the inbound principles come in. AED meets SCOPE. Attract, engage delight connects with standardize, contextualize, optimize, personalize and empathize.

But how? And why?

Let's tackle the "why" first.

Why do we have both the methodology and the principles?

The methodology can be looked at as the set of things you're wanting to accomplish - the words - attract, engage, delight - are all actions.

You want to attract people to you and your business.

You want people to engage with you and your business.

You want the experience people have with you and your business to delight them.

These three things are aspirational goals. They are things you can achieve.

So - to bring it back around - why do you have the methodology? To define your goals. By achieving the goals, you grow your business.

But how do you attract - How do you engage - how do you delight?

How does SCOPE come into play here?

Let's take a look. When you look at standardizing, it doesn't simply mean "have the information be the same". Instead, you should have clear, consistent content, messaging, and operating guidelines, that involve not only collecting information, but also creating the potential variations that may come into play.

During the ATTRACT stage, this means that the content you create includes consistent, relevant information, regardless of where it will be consumed.

It also means that you have created versions of that content that can be used on different channels, yet still deliver the same underlying information. You want to ensure that people cannot become confused, simply because of where, or when, they find information. If a question is asked, regardless of where, the answer should be fundamentally the same.

During the ENGAGE phase, when you're actively interacting with prospects and customers, standardizing takes on a different form.

When you're engaging with people, you want to make sure that the answers they are provided are the same, regardless of how whom, or whom is providing it.

Pricing models should be determined, with clear documentation in regards to what can cause it to change.

Features should be clearly documented, with short, medium, and long form versions available to your team.

Situations where your product or service can serve as a solution should be clearly defined, and what may limit or prevent success should be able to be delivered, and understood.

During the delight phase, standardization is similar in many ways to the ENGAGE phase - only at this stage you also need to make sure that policies and procedures are available, and easily understood. Documented solutions for potential problems are made available, and can be delivered across channels, but always deliver clear, consistent information.

So - How do you standardize?

Make a list of your products and services. For each item on the list, clearly define the features, options, pricing, and solutions related to that item. For each item on the list, document potential questions, and their subsequent answers, based on:

- Who - how might someone ask a question that begins with "who"? A Who question is looking for a person or team as part of the answer.
- What - how might someone ask a question beginning with "what"? How would you answer the question.
- Where - where questions can be geographic (relating to a location that can be found on a map), or non-geographic (locations that are relative to something else, like the location of a button on a product, or a setting in software).
- When - a "when" question has a time, or time period as part of the answer.

- Why - when someone asks a “why” question, they are looking for a reasoned explanation as part of the response.
- How - how questions are answered with an answer in the form of a descriptive manner - this may include a list of steps to complete an action, or ensure an outcome.
- Which - this is a choice question - normally it is asked when someone is trying to choose from a series of options. If the choice requires a series of follow up “qualifier” questions, make sure that you document what these questions would be.
- Yes/No - Should I, can I will I, and do I are all examples of questions that usually involve either a “yes” or “no” answer. Often they are followed with the answer to a “why” question, that supports the given yes or no answer.

If you’ve done these tasks, you’re well on your way to standardizing your information. This will enable you to deliver consistent, clear information and answers, when needed - regardless of whom on your team is delivering them.

You want to make sure that you’re taking the standardized information, and delivering it in a way that is contextually relevant”. What do I mean by that?

When something is contextually relevant, it means that you are taking into account:

- What actions have happened prior to this point.
- What activities brought someone to this point.
- What type of question is being asked, and how has the prior actions and activities influenced the current situation.

In short, you take the standardized information, and you make sure that, by taking the context of the situation into account, you’re delivering the right version of the information, at the right time.

In the attract stage, this may mean that how they found the content (via Google, or Facebook, for example) might alter the way in which information is provided. If they’ve visited your website in the past, then this may be taken into account in how they are greeted by a chatbot or live chat prompt.

If they are reading a blog post on a specific topic, you may offer additional resources or information, thereby moving them onto the engage phase. When in the engage phase, contextualization takes on a different meaning.

As a prospect or customer interacts with you and your business, you are collecting certain information, either directly, by asking for it, or indirectly, by tracking their activities and conversations.

If a prospect reaches out via live chat, or interacts with a chatbot on a certain page, you would want to make sure that this is taken into account when having a conversation. If they ask a question in a certain way, you can refer back to your standardized information, and deliver the correct answer, with the correct, contextual, details.

In the delight stage, use context to ensure that you are always moving the relationship forward.

If a customer was searching for the answer for a specific question, you would want to ensure that you have, at the very least, the ability to deliver a contextually relevant answer. This means that if they were, for example, searching for “how” to do something, that you had either a documented solution available to your team, or an

article in your knowledge base that was able to explain the steps it would take to complete the process in question.

You would also possibly have a chatbot in place, that lived on that page, and was able to answer questions related to the question at hand, and provide access to supporting documentation and media.

In short, you contextualize for relevance to the given situation.

Optimize for clarity. Each channel has specific strengths and weaknesses in how it enables you to deliver content.

When you optimize your content, your goal is to deliver the relevant content in the most efficient way possible, for the given channel.

Because people - prospects and customer alike - consume content on multiple channels, like email, websites, and social media, as well as via live chat, you want to ensure that you are leveraging the given strengths of a channel, while mitigating its weaknesses.

For example, you would never want to try and deliver a web page's amount of content via live chat, as it would simply be too much for the conversational interface. At the same time, if you were sending an email, you would probably want to have it be longer than a sentence or two.

Now, how does this connect with the methodology?

During the attract stage, you want to make sure that you're offering the most important information first.

Because prospects may discover you somewhere other than your website (like via social media), you want to ensure that you have channel-optimized versions of your content. A live-chat version may have link and images as part of the conversational narrative, linking to longer-form content that lives elsewhere, like on your website.

An email may have attachments that you normally would not be able to offer over, say, a phone call, because it's quite difficult to push paper through a phone.

During the engage stage, optimization becomes even more important. When engaging with a prospect or customer, you want to ensure that they are being given enough information to keep the conversation going, and that long pauses do not occur, as this can end the conversation, due to the other party losing interest.

During the delight stage, optimization becomes paramount in delivering the right information, in the right way, on the given channel it is requested.

For example, if you have a series of steps within a knowledge article, consider adding in a video walkthrough as well - both can be consumed across a variety of channels, and take into account that different people learn in different manners - optimize not only for delivery, but for retention ability as well.

When optimizing for clarity, you want to ensure that you are delivering the most important information first, while allowing for additional information to still be available, if needed.

Personalize for impact. The inbound methodology is designed to enable the development of 1:1 relationships, at scale. A huge part of creating these relationships is based around the idea of personal connection.

During the attract stage, personalization is usually limited to what you are able to know about someone based upon their actions - how they discovered you, what site referred them, and what actions they take once on your actual site.

You can use this information to ensure that you tailor what someone sees, and when they see it, based upon their prior actions and activities.

During the engage stage, personalization becomes the key to developing the 1:1 relationship. As you ask (and are asked) questions, the responses can be collected and reused later on. The ability to greet someone by name, and tailor the conversation based upon past interactions, regardless of whom, or what, those answers were originally collected by, allows you to concentrate on building impactful, meaningful relationships, and do so at scale.

In the delight stage, personalization continues to be important. Building off of the relational and experiential data you've collected to this point, you are able to deliver personal, contextual information, without having to constantly re-ask questions over and over, even though the person on the other side has already answered them.

You personalize for impact. Your goal is to leverage information you've already collected about someone, and leverage it to make them feel special, unique, and heard.

The e stands for empathize. You empathize for perspective.

What do I mean? We all have feelings, and that's an important thing to recognize. By making sure that you try to be empathetic in your interactions, you're allowing yourself to see the situation from the perspective of your prospect or customer. Often you have to deliver the emotionally correct response, before you can deliver the factually correct information. By ensuring that you're aware of the sentiment of an interaction, you'll be able to connect not only on a business level, but one that has a personal feel to it as well.

During the attract, engage, delight stages, empathy can be displayed in the tonality and phrasing of the content you create. If someone is more than likely dealing with a problem (personal or business - it doesn't really matter), you want to make sure that you're presenting you and your business as helpful and human. If someone is coming to you because of a celebration - match their level of excitement with your own. The emotional tone of your content is as important as the factual information it contains.

To recap:

Standardize for consistency

Consistency in message is core to effective growth. If a customer asks three different people at your company the same question, they'd better get the same answer all three times.

Contextualize for relevance

Use the information to craft relevant messages to fit the current situation. Adapt that standardized message to fit the current conversation.

Optimize for clarity

Be conscious of the strengths and weaknesses of each communication channel.

Personalize for impact

Use the shared knowledge inside your CRM to tailor each conversation you have to the person you're having it with.

Empathize for perspective

Give the emotionally right response before delivering the factually correct one.

The inbound methodology and the inbound principles are customer-centric by nature.

This means that attracting is not the responsibility of marketing alone, sales is not the only team involved in engagement, and members of the service team are not solely responsible for delight.

Instead, the teams must work together, using the inbound principles of standardize, contextualize, optimize, personalize and empathize as their guide, to attract, engage, and delight prospects, and convert them to customers.

Video 1: The importance of defining your company's purpose

Hey, it's Kyle from HubSpot Academy. Here's a question for you: Why was your company founded? Do you know the story? Maybe it was like Khan Academy, the web-based company that offers free online tutoring on a variety of school subjects. It didn't originally start out as a business. Sal Khan just wanted to help his cousins with their math homework, so he started making YouTube videos for them. It turns out Sal's cousins weren't the only ones who needed help with math, and when he realized how many people his videos were helping, he figured out a way to start a company that could make free education for anyone who needed it. Khan Academy courses have now been translated into dozens of languages and reach 100 million people every year, all because Sal Khan wanted to help his cousins with their math homework. That's a pretty common way for a company to start: The founder sees that they can solve a particular problem for a particular group of people and creates a company to do just that.

Another common founding story is where the founder is their own target customer. This was the case for Pleasant Rowland when she invented the American Girl doll. She wanted to buy a doll for her niece and was disappointed that her primary options were hyper-sexualized Barbie Dolls and shapeless Cabbage Patch dolls. So Pleasant thought back to her childhood and tried to remember all the things that made her excited to play with a doll, and then she founded a company that didn't just manufacture dolls but provided fantastic experiences both for the grownup who buys the doll and the child who plays with it. Each doll gets an identity and a backstory, complete with a book parents and children can enjoy together. Over the years, American Girl expanded from dolls and books sold through a printed catalog to an enormous ecosystem of dedicated retail stores, restaurants, and beauty parlors.

The success of Khan Academy and American Girl is directly attributable to the fact that both companies have remained true to the missions they were founded to achieve. But many companies lose sight of their missions once they reach a certain level of success. A classic example of this is the railroad industry in the United States. In their heyday, the railroads were so profitable that their leaders became some of the wealthiest people in the history of the world. But in the 1950s and '60s, the industry found itself in serious trouble as the new freeway system enabled cars and trucks to transport people and products, while at the same time the telephone made some trips unnecessary. In 1960, the Harvard Business Review proclaimed that the railroad industry was "failing because those behind it assumed they were in the railroad business rather than the transportation business. They were railroad oriented instead of transportation oriented, product oriented instead of customer oriented." In other words, these titans of industry didn't understand the purpose of their industry, and they paid the price for it.

So why was your company founded? What mission was it created to fulfill? It's an important thing to know, especially if you want to implement an inbound strategy. Inbound is all about making your company easy to find for the people who need your help. But before you can do that, you need to understand the job your company was founded to do.

Video 2: Identifying your company's purpose

Let's talk about how to identify your company's purpose. One thing to keep in mind is that there are two aspects of your company's purpose: The first is your company's purpose as it's understood internally, and for a lot of companies, there isn't much clarity on this point. Simon Sinek has built a career explaining this phenomenon, and

he's created a helpful framework called The Golden Circle. The outer ring of the circle represents what your company does--the product or service you offer, the industry you operate in, and so on. The middle ring is how your company does what it does, which includes the ways you differentiate yourself from all the other companies who have the same WHAT as you. At the center of the golden circle, you have your company's WHY--the reason for your HOW and WHY.

Most companies start from the outside and move inward. And that makes sense because the WHAT is extremely concrete while the WHY can be fairly abstract. However, if you can nail down your company's WHY--the reason it offers what it offers, the reason it operates how it offers--you'll be in a much better position to grow better. If your WHY is well defined, the HOW and WHAT will fall into place naturally.

Do you know your company's WHY? It's easy for the leaders of a company to fall into the trap of thinking that growth and profits are the WHY, but that's a dangerous road to go down. Don't get me wrong--your company has to make money if it wants to be able to sustain itself long term. But profitability should really be part of your HOW. You make money and reinvest it so that your company can continue to do WHAT it does, but that doesn't explain WHY your company is doing that.

So take some time to put some thought into your company's WHY. You can phrase it as a mission statement about what you hope to accomplish or as a vision of the ideal world you're trying to get to--whatever makes the most sense to you. But you need to get clarity on this point. As Simon writes in his book, *Start With Why*:

If the leader of the organization can't clearly articulate WHY the organization exists in terms beyond its products or services, then how does he expect the employees to know WHY to come to work?

The impact your company's WHY has on employee performance can be pretty significant. If everyone at your company is focused on fulfilling the same purpose, there's a good chance you'll succeed. But how do you get everyone aligned around a single purpose? The most effective way to do it is by fostering a culture that supports that purpose. A company's culture is the environment that defines and informs how employees act on behalf of customers and how the company hires, retains, and grows its people.

Here's Katie Burke, HubSpot's Chief People officer, talking about how we think about company culture:

Katie Burke: Company culture is really about defining what makes your company and your organization tick. So it's about your mission, it's about your values, and it's about the decisions that people make when no one else is watching. And so when I think about our culture at HubSpot, I think about really defining what is meaningful to us, what types of people succeed and thrive here, and the excellence that our customers can expect when it comes to our culture, our commitment to them, and how we make great decisions on their behalf every day.

So at far too many companies, human resources is honestly, a compliance tool. And the way that we think about people operations at HubSpot is that our employees are our customers. So when you're running your business day-to-day, really think about designing not just a great customer experience but also a great employee experience.

So the way I think about making our employee experience inbound is what do we actually know about you as a person? What do we know about you as a human? What do you care about? What drives you? What motivates you? And when you start designing people's experience as

employees around those details, all of a sudden you have an inbound experience that's significantly more remarkable and you have happier and more productive people who work on your team.

Your culture is part of the product that you offer and the service and promise you make to your customers. It's not something that you can set and then forget about. Inbound is about being human and that means having empathy and being adaptable. So rather than thinking about your employee experience as something you can avoid to wait and innovate on, think about it as fundamental promise, it's your promise to your customers, and to your business, and to your growth strategy.

Several years ago, Dharmesh Shah, HubSpot's CTO and co-founder, documented HubSpot's culture and published it to the world as the Culture Code. Here's Dharmesh explaining why he did that:

Dharmesh Shah: Culture's important. Well, you're going to have one, whether you write a culture code, whether you write your culture down, or not. So, our overall position is, better to have a culture you want and like, and that attracts the kinds of people you want working in the company. It's also important not just to have a culture, but to have it in written form, so you can communicate out to people. It's like, here are the kinds of people that will likely enjoy working here that we think will be a success.

So, all of the things that we know about building great product, and building great strong relationships, we can apply to culture and internal teams. And that's just as important, who you build it with, as is important as what you build, essentially.

The Culture Code has now been viewed millions of times, and it's become an important part of how we attract and vet new talent. It's also a standard we hold ourselves to internally to make sure we don't get off course.

So take time to think through your company culture. You might not be in a position to create your company's culture, and that's okay. Make suggestions, ask questions, and be sure to confirm that your company's culture aligns with you personally. You can always start by defining the culture for your individual team.

If you are in a position to define the culture for your entire company, start working at it. Define a culture that supports your company purpose and find ways to foster that culture throughout the company.

But there's another aspect to your company's purpose that you should consider in all of this as well, and that's your company's purpose as it's understood by your customers. This can be surprisingly different from the reason your company was founded.

Clay Christensen of Harvard Business School has written about this extensively in his book *Competing Against Luck*. One example he gives is V8, the vegetable-based drink. For years, Campbell's Soup Company marketed V8 in the same way most juice-makers market juices: as a way to slake your thirst on a hot day. But when they started researching the reasons people actually drank V8, they found a very different story. V8's most loyal customers weren't drinking it because they were thirsty; they were drinking it as an alternative to eating vegetables. They understood that vegetables are an important part of a healthy diet, but they also knew that peeling carrots and boiling spinach can be a lot of work. Drinking a bottle of V8 is easy. So Campbell's changed their strategy and started marketing V8 as an alternative to eating vegetables, and within a year, V8 sales

quadrupled. And that's the power of understanding your company's purpose from the point of view of your customers.

How do you get that understanding? There's a useful framework called Jobs to Be Done, or Jobs Theory. The idea of Jobs Theory is that people have jobs in their life that they need to get done, and they hire products to do those jobs. To understand the job that your customers are hiring your product to do, you're going to have to talk with a handful of your customers. Interview them, and ask them why they bought your product. Try to dig as far into the past as you can. You're trying to come up with a timeline of the thoughts and events that pushed them toward your product. Way, way back, before they ever talked to anyone at your company, maybe even before they had heard about your company, something happened to them that set them on the path of becoming your customer. You might be surprised how long the path is. It might be 18 to 36 months; it might be even longer than that, depending on how long they made do with no solution at all.

You can discover this path whether you're a brand new company with zero customers or an established enterprise who serves thousands of people every day. If your current list of customers is small, put a plan in place to interview your first few customers soon after they buy from you. If you have a large pool of customers, try to grab a random sample. Either way, when you interview your customers to find out about the job your product is doing for them, you want to get back to the very first thought that put them on the road to becoming your customer. To get there, you'll have to work backwards from the time the person bought your product. So ask them – why did they buy it? When they tell you why they bought it, ask them how long they thought about it before they made the decision. Ask what it was that made them finally go through with the sale. Maybe they think it was an impulse buy, but ask them what gave them the impulse. Had they thought about buying before and not done it? Were they making do with something else (or making do with nothing at all)? When did they realize they didn't have to make do anymore? What was the series of events that transpired from that first realization to the time they became your customer? Map that out for 10 or 12 of your customers and then try to come up with a story that describes them all equally well.

Once you have your story, ask yourself: Why are people going through this story? What job are they trying to get done? The answer will be their job to be done.

What does a job look like? You can use a statement called a job story to describe the job your customers are trying to accomplish. The format of a job story is as follows:

As a (who the person is),
when I am (the situation that person finds themselves in),
I want to (the motivation or action)
so that I can (the desired outcome).

Here's an example:

As a health-conscious adult,
when I am eating my vegetables,
I want to consume them in the form of a drink
so that I can get the benefits of eating my veggies without having to worry about peeling carrots, boiling cabbage, or flossing celery strings out of my teeth.

That's a good start to understanding why people buy V8, but we can go even deeper. In addition to the job story, there are other job dimensions that help you understand the ways a person might evaluate your offering as a way to get their job done.

These job dimensions include:

- Functional requirements – What's the minimum functionality required to get the job done? Since V8 customers are looking for the easiest possible way to get their veggies, Campbell's would be foolish to package the drink like their soups, which come in cans that require a can opener. The packaging of V8 should make drinking it as effortless as possible.
- Financial requirements – What are the monetary guardrails I need to stay in to make this financially feasible? Every category has its pricing limits. The great thing about jobs theory is that it can redefine what category your product is in. Campbell's doesn't have to pay attention to the going price for a bottle of apple juice; instead, they should be pricing V8 against fresh, canned, and frozen veggies.
- Personal identity – How does this product or service act as a symbol to represent what I believe about the world? You want your product to affirm your customer's identity and improve their self-esteem. What kinds of people are actually using V8 as an alternative to vegetables? Are they savvy business-types who are interested in increased efficiency and time savings, or are they subversive young adults who like to feel like they're hacking their way to health? If Campbell's wanted to focus its efforts on one of those two markets, they'd have to completely reimagine their brand and positioning.
- Social appearance – How will others view me while I use this product or service? If there's anything embarrassing about your product, you've got to provide a way for your customers to save face. V8 is packaged in the brightly colored sort of bottles you'd expect a fruit drink to come in. Just because you're drinking your veggies doesn't mean you have to look any less cool than your friends who are drinking red 40 and high fructose corn syrup.

So interview some of your most successful customers and figure out why they bought from you. Use the stories from five or ten customers to figure out the job story for people who buy your product, and then dig into the functional, financial, personal, and social aspects of using your product. Once you have that all figured out, compare your customers' job story to your company's purpose as it's understood internally.

How do the two match up? In many companies, they don't match up very well at all. If that's the case for your company, your best bet is to change the way you think and operate internally to match the way your most successful customers view you. If you really want to unlock your company's full potential, you need to align your entire organization around helping a particular kind of person overcome a particular challenge. And if there's broad agreement among your customers about the challenge you've helped them overcome, then that's probably the challenge you should focus on.

It's important to note that identifying your company's purpose is only the first step in the much larger challenge of rallying your company around that purpose. And this will be an ongoing challenge for as long as your company exists. For example, Campbell's did a great job leaning into positioning V8 as an alternative to veggies. They quadrupled sales in less than a year. But the results were only temporary. When the leading members of the team moved on from V8, the new leaders didn't have the same vision, and the brand is now just a shadow of its former glory. Clay Christensen observes:

Almost overnight, the organization seemed to reorient the business by product line, competing again against other juice and drink products with a bloated product line that creates confusion, not clarity. Without clarity in the purpose brand, customers must ask themselves, "What job does a V8 do?"

You don't ever want potential customers to look at your offering and wonder what it's for. Instead, when people have a particular problem, they should be able to recognize your product as a viable solution. And after they buy it, they should be so delighted by how well it did the job they hired it to do that they'll want to hire it every time that job comes up--and that they'll recommend your company to anyone else who has that same problem.

To offer that level of satisfaction, you need to get your entire company aligned around solving the customer's problem. If your company's purpose is reflected in your marketing collateral but isn't top of mind for your sales team, you won't benefit from understanding your purpose at all. Or if your sales team embraces your company's purpose and uses it as the foundation for all of their sales calls, but then your customer service team is unclear on what that purpose is, your customers are going to feel betrayed. Marketing, sales, and customer service all have to have a shared understanding of what your company's purpose is, and they have to have a unified strategy for fulfilling that purpose.

But your company's purpose goes beyond marketing, sales, and services. Your back-office employees also need to be focused on your company's purpose.

Consider this: How many times have you had to interact with a company's finance or accounting department? How often has it been a pleasant experience? Most companies don't put any thought into the customer experience provided by the accounting team, and so hidden fees, confusing bills, and poorly defined processes are the norm. Think about your own company. If a customer wants to dispute or reverse a charge, or if they have a question about the way you billed them, or if they want to cancel your service, is there a clear and painless way for them to do so? Chances are, your customers don't need to interact with your accounting team all that often, but when they do, those interactions can make or break their relationship with your company. And if a customer who has a bad billing experience decides to be especially vocal about it, that can cause you a lot of trouble down the road.

And what about your legal team--are they focused on helping your customers succeed? We live in an era where almost anything can be purchased online, and the buying process is usually smooth and easy--right up until the end, when the vender suddenly hits you with a book-length block of text that requires a law degree just to understand. It's practically a cliché at this point to joke about not reading the terms of service, and yet modern businesses still haven't found a way to humanize this aspect of their products.

What are your terms of service like? Do your customers truly understand what it is they're agreeing to? Just like you don't want your accounting team making any enemies, if there are any surprises tucked away in the fine print of your offering, you'll find it harder and harder to get customers in the future.

It's impossible to list out all of the ways each individual employee can delight or offend your customers, but if everyone is working together to fulfill your company's original purpose, you won't have to worry about that. Make sure every employee believes in your company's purpose and then trust them to find their own way to support it. This won't only create an excellent experience for your customers, but it will help your company grow better. Chances are, whatever space you're in, you have competitors. And if your product is really good, enterprising new companies will find ways to copy it. They might even find ways to make it cheaper or better or both. But your internal processes are yours, and nobody will ever be able to replicate them. So if you can foster a

culture of customer obsession within the ranks of your employees, you'll have a competitive advantage that no one will be able to take away from you. If accounting creates a delightful billing experience, and if legal transparently aligns your company's interests with your customers' interests, and if IT structures your systems in ways that help you serve your customers better, and if HR focuses on hiring and retaining people who are committed to helping your customers succeed, and if marketing, sales, and customer service are all unified in their efforts to attract, engage, and delight your customers--in short, if everyone from the highest executive on down is constantly on the lookout for ways they can better serve your customers, none of your competitors will ever be able to touch you. Your customers will love you, and they'll promote you across their networks, and ultimately their positive word of mouth will drown out whatever your competitors might try to say to promote themselves.

So figure out what your company's purpose is and rally your teams around it, and then you'll have a beacon to guide your inbound strategies and every other initiative you undertake.

Video 1: Why do you need to set business goals?

What comes to mind when you hear the word "goal"? Maybe you think about the destination – that endpoint that represents the culmination of all your efforts. Maybe you think about the journey – how every meeting, task, or project, every success, and every failure helps you build momentum over time and creates something you're really proud of. Or maybe you just think about the now – the checklist for today and what you want to accomplish over your morning coffee.

No matter what it is exactly, the success of every inbound business begins with goals.

Why?

Every business is going to face its own unique set of challenges. Whether you're starting up or scaling up, growth takes time and effort. And, sometimes? The difference between where you are and where you want to be can quickly feel insurmountable.

However, nobody got to the moon without a vision. Nobody launched a rocket ship without plan. That's where your business goals come in.

According to Astro Teller, a scientist and entrepreneur, "Great dreams aren't just visions, they're visions coupled to strategies for making them real." Astro Teller is the CEO of X, a research institute founded by Google, focused on the ways technology can continue to reshape our lives. Teams within the organization refer to X as a moonshot factory.

According to Teller, "We use the word "moonshots" to remind us to keep our visions big -- to keep dreaming. And we use the word "factory" to remind ourselves that we want to have concrete visions -- concrete plans to make them real." These goals, no matter how lofty, shape the actions of subsidiary's employees. And this has led to the development of technologies like Waymo, Google's driverless cars.

So it's not enough to have goals, even if they err on the side of realistic rather than aspirational. They need to be grounded in a plan. You need a strategy to get from point A to point B. And to cite a favorite James Cameron quote, "Hope is not a strategy."

So what do you do?

Think about your business. This could mean a team of one or one hundred. No matter the number, you have the opportunity to align everyone behind a set of shared goals. Of shared visions that everyone is working toward. To take that first step, together, down a targeted path to get you where you need to be. To hit your moonshot or to reach your peak.

Having a sense of shared business goals helps create a shared sense of accountability and a basis for transparency across teams. At the time, business goals can also inspire. In the words of Daniel Pink, author of *Drive*, "The single greatest motivator is making progress in one's work. The days that people make progress are the days they feel most motivated and engaged." People want to know how they're performing.

Without reflecting on how you and your teams performed against your goals, it can be hard to determine what areas need to be improved or areas where you can grow. You never want to stagnate, after all. If you don't push you or your team to innovate or push themselves, your business could quickly fall behind. Goals can help you establish a consistent standard for high performance and productivity.

Today, you and your team should always be learning, always be improving in order to grow or scale. Business goals, when properly set and clearly communicated, can help ensure there's alignment, transparency, and no effort wasted across teams. So whether you're looking to create the next new innovation or to just ensure that your business is executing with excellence, goals can help you get there. What new heights will you reach?

Video 2: How to set a goal that aligns with your company's purpose

When set correctly, goals can align everyone in your organization, from the C Suite to the individual contributor. So, how do you ensure you're setting the right type of goals?

Enter objectives and key results. Also known as OKRs, objectives and key results is a goal setting system that helps to ensure that the company focuses efforts on the same important issues throughout the organization. Think of OKR setting as a way to connect company, team, and personal goals, making sure all employees work together in one unified direction.

This system was pioneered by venture capitalist John Doerr and his mentor Andy Grove. It's pretty popular. Some early adopters include Intel and Google, but now include companies like Amazon, Dell, Facebook, Microsoft, and Netflix. Just to name a few. So you could say it's effective to help a business maintain its sense of purpose, align its teams effectively, and grow better.

So how does it work?

You start with your objectives. Objectives are statements that define the qualitative outcome of your goal. According to John Doerr, "By definition, objectives are significant, concrete, action oriented, and ideally aspirational. When properly designed and deployed, they're a vaccine against fuzzy thinking –and fuzzy execution." Objectives answer the question, where do you want to go? What are you trying to achieve? They convey your endpoint. Oftentimes, you can use your company's purpose as a means to inspire meaningful objectives, without encountering the pitfalls of your objectives becoming a series of checklists or todos.

Then, there's key results. Key results are how you benchmark and monitor how you get to the objective. According to John Doerr, "Effective KRs are specific and timebound, aggressive, yet realistic. Most of all, they are measurable and verifiable." These are one to three ways that explore how you're going to achieve your objective. Key results are numeric and are quantitatively scored or "graded" to determine whether or not those initiatives were successful.

Let's take a look at an example. Say you were trying to improve your business' customer satisfaction. An OKR you could set could look something like:

Objective: Improve customer satisfaction

KR 1: Increase customer retention from 70% to 85 by 2019

KR 2: Achieve a Net Promoter Score of 15 from our company customers by Q4

The objective speaks to an aspirational goal, to create a great customer experience, while the key results are measurable and you could verify whether or not those results were achieved. Did you notice another distinction? While an objective can be long lived, key results typically have a designated time period. Although you should set KRs that span about a quarter, this can also depend on the unique needs of your business.

Speaking of timing, let's talk grading. Key results can be graded using two different methods: setting numeric key results and binary key results. The first type is used to calculate completed percentage of an activity on a scale of 0 to 1.0 .

For example, let's say you were to set an objective to maximize sales effort for every region. Your key result is to have 100 new customers within the next 3 months.

If the team is able to sell to 70 new customers, then it can be said that it has achieved a 0.7, or 70% of its target. Remember, as OKRs should be aggressive, you should typically aim to hit in the 0.6 - 0.7 range, or 60-70% of your goal. If you're consistently hitting a range around 1.0, or 100% the your goals you're setting, that might indicate that you have the opportunity to set and hit higher goals. The logic here is to disrupt yourself before someone does. If you fail to innovate, you could very quickly go the route of Blockbuster when Netflix started to challenge the status quo with its rental and streaming services.

Then, there are binary key results, where ratings can be a simple 1 or 0. You either meet the KRs requirements or you don't.

For example, let's say you have an objective to increase brand awareness as a retailer. Your key result is to open another location over the course of the next quarter. If, after the quarter ends, you opened that location, your OKR would be marked with a yes, or a 1. If after the quarter is out, and you didn't open that location, it's a no and the OKR would be marked with a 0.

Using your data to grade OKRs means you're getting real time progress reports on your initiatives. This can help you understand if you're on track or if you need to adopt different tactics to accomplish what you set out to do.

You can align OKRs perfectly with your company purpose, mission, or vision to create a north star that everyone can look to as a guide. How? Using your company purpose as a guiding light, decision makers can create a set of one to five top priorities for your company for the year.

Why five? According to Verne Harnish, author of *Mastering the Rockefeller Habits*, "No organization or individual can focus on or accomplish more than five or six priorities in a given time period." After all, if everything is a priority, then nothing is a priority.

So you start at the top, key stakeholders setting the top five (or less) objectives and key results for the year. That's the top of your goal setting pyramid. But how does it trickle down to the individual contributor. Let's explore.

The next layer of management, whether that's VPs or department heads – again, depending on your business and its organization– take time to understand these top five priorities. Then, they identify one or a set of KRs they think they can move. They take these KRs and use them as the foundation of their own objectives for their departments. They then set the KRs they think will help them achieve that objective. And then the process repeats.

From there, individual teams determine take the KR's set by their VPs or department heads, etc., that they believe they can action and use them to create their own objectives. From there, they set KR's that will help them achieve these objectives.

This pyramid structure to goal setting can act as a foundation for cross team alignment because all goals roll up into each other. Your teams organically align because you're all using the same foundation to set your goals. This can help ensure that no time or effort between teams or individuals is wasted. And, if you've hired the right people? As Brian Halligan, CEO and Co-founder of HubSpot, "Give people hard problems to solve and get out of their way". You'd be surprised at the results.

OKRs are meant to fit the needs of companies at any stage of growth. To take it back to the words of John Doerr, "At smaller start-ups, where people absolutely need to be pulling in the same direction, OKRs are a survival tool...At medium size, rapidly scaling organizations, OKRs are a shared language for execution. They clarify expectations: What do we need to get done (and fast and who's working on it? They keep employees aligned, vertically and horizontally. At larger enterprises, OKRS are neon-lit road signs. They demolish silos and cultivate connections among far-flung contributors. By enabling frontline autonomy, they give rise to fresh solutions. And they keep even the most successful organizations stretching for more."

And what do OKRs have to do with running an inbound business?

In the inspirational words of Bono, "So you're passionate? How passionate? What actions does your passion lead you to do? If the heart doesn't find a perfect rhyme with the head, then your passion means nothing. The OKR framework cultivates the madness, the chemistry contained inside it. It gives us an environment for risk, for trust, where failing is not a fireable offense. And when you have that sort of structure and environment and the right people, magic is around the corner."

Magic is around the corner, indeed. So whether you're a team of one or a team of many, OKRs can help you grow better. That's not to say its a replacement for strong leadership or culture. You'll still need to cultivate those factors internally. Yet, when properly utilized, it can be a framework that helps inspire, empower, and align.

Video 3: How to prioritize short-term and long-term business goals

Goals can be tricky. Say you set up your business plan for the quarter. Maybe that inspires you to start to think about how your short to medium terms goal affects this year's goals. Then, maybe you think about your goal two to three years out. Before you know it, you're falling in love with your five, ten, and maybe even twenty-five-year plan.

That's not to say having goals and plans for the future is bad. The problem starts when businesses start to only focus on the future and lose sight of what they need to action and prioritize in the present. To ensure your business stands the test of time, think about the three horizon framework.

The three horizon framework is a way to conceptualize what your business wants to accomplish in the short-term, mid-term, and long-term.

According to Bill Sharpe, author of Three Horizons: Patterning of Hope, the framework "can represent these three relationship of the present to the future as three horizons which describe a pattern of change over time in our area of interest."

Think of horizon one as the initiatives you take to power present success. These are the goals and strategies you put in place to maintain and extend your core business. This is the time where you work on incrementally improving your business to keep your business and hitting its operating goals to keep the company moving forward.

Innovation is happening here, sure, but in this horizon you're focusing on sustaining your business, continuing to generate revenue, and optimizing the efficiency of your processes. Here, you're identifying your biggest assets and doubling down on them to ensure your business continues to be successful. Intuitively, the majority of your time and resources (around 70 percent) will be spent executing on the horizon one plays.

By contrast, the third horizon goals and objectives focus entirely on the future. Taking up about 10% of your team's efforts and resources, these plays are meant to create genuinely new business models. Horizon three initiatives support where you think your industry is headed and how you're innovating now to invest in the future and remain one step ahead. Having a horizon three helps you stay connected with your long term goals without sacrificing attention or connection with what needs to get done today.

Horizon two goals and strategies help bridge your first and third horizons.

Going back to the words of Bill Sharpe, these are the transformative plays that "are responding to the shortcomings of the first horizon and anticipating the possibilities of the third horizon." As the remaining 20% of your efforts, these midterm plays are meant to prevent any fault lines between your short term and long term strategies. Horizon two is where your business genuinely begins to transform and lean into emerging innovations in its industry, without completely losing sight of what made horizon one so successful.

Think of your horizons like a diversified investment portfolio. If one horizon starts to over perform or underperform, you do not want to reallocate resources from a different horizon. It's important that you keep the balance: 70/20/10 to ensure sustainable, long term growth. After all, if you have too many present plays, you could stagnate. If you just keep doing what makes you successful today, you'll be failing in the future because what got you here won't get you to where you want to go. However, if you invest too much in future plays, your present performance could suffer. There is no future for a business that no longer exists.

The three horizons framework as a means to visualize, allocate resources to, and conceptualize the priorities of your business. As a business, there will be points where you will need to make hard choices. Choosing to prioritize a particular goal or use a particular strategy above another doesn't always devalue the other option. Rather, having multiple options or sets of secondary priorities can help inform future decisions or directions you decide to take as a business.

Video 4: How HubSpot aligns its teams behind its goals

Once your organization or team is able to execute the OKR framework regularly you can take it one step further to align your organization's purpose, mission objectives and goals. Let's take a look at how HubSpot uses a yearly, one page plan to align its department around goals and objectives. Affectionately known as the MSPOT, the breakdown is as follows:

At the top of the page is the company mission: to help millions of companies grow better. This ensures that all the goals, objectives, and key results set align with the HubSpot's purpose.

Next, comes the serving section. This helps remind HubSpotters who they're serving with the company purpose. This section is currently broken into who HubSpot is serving externally, its customers and partners, and internally, its company and employees.

Next, we move into the strategy. On the left, there's the plays. These are the top five objectives HubSpot is trying to accomplish for the year. On the right, are the HubSpot targets. These are the key results that help measure the progress of the objectives. The official OKRs, baked into our strategy.

Finally, at the bottom are the omissions. These are plays that HubSpot acknowledges are important, but determines aren't going to be prioritized for the year.

This doesn't mean they will never be actioned, per se, only that HubSpot and its teams is going to focus its energy elsewhere for the time being.

After all, if you prioritize everything, you don't truly have priorities.

This MSPOT, representing the HubSpot mission, serving, plays, omissions, and targets, is set every year by the executive team. This is then passed to the heads of the HubSpot marketing, sales, and services departments, who build individual MSPOTs. This helps maintain alignment around our company wide OKRs while setting more role specific OKRs that teams and individuals can look to for direction.

These department specific MSPOTs and the steps each of the HubSpot teams are taking to make progress on their plays is reviewed and reinforced in meetings throughout the year.

Basing each goal on the company purpose, HubSpotters can easily humanize their metrics. Every HubSpotter can easily see that for every number they are trying to move, there is a real person they are working to educate and inspire. This helps maintain a shared sense of empathy as everyone – from the C Suite to the individual contributor– works to execute with excellence.

Video 1: Why are buyer personas an important part of your inbound strategy?

Hey, it's Kyle from HubSpot Academy. One of the most important things your company needs to do is create a concrete definition of who your ideal customer is. Not everyone is going to buy your product, nor should you want them to. Some people just aren't a good fit for your offering, and if you market and sell to them and get them to buy, they'll find out first hand just how bad of a fit they are, and their negative reviews and unsavory social media posts might scare away people who actually would be a good fit.

If you want your company to grow better, you need to have a deep understanding of your ideal customer. To get there, we recommend creating a buyer persona. A buyer persona is a semi-fictional representation of your ideal buyer based on data, interviews, and some educated guesses. Essentially, it's a definition of your ideal buyer presented in such a way that it sounds like it's talking about a specific person. So you aggregate information about a particular kind of person in your target market, find an avatar to represent that kind of person, and give them a name. Buyer personas are often named something memorable and alliterative, like Management Margaret or Skeptical Suzy. This makes it easier for your team to remember them and keep them in the front of their minds.

Personas have been around for a long time, and different people have different ideas of how they should be created and used. In many cases, personas are developed by marketing teams to guide their marketing efforts. They might be a collection of demographic information and personal preferences, with the purpose of helping the marketing team create content that will resonate emotionally with a particular category of people. All of that is good, but personas have the potential to be so much more than just a marketing tool. Your personas should have just as much value for your sales and services teams as they do for your marketers.

Think about it this way: If your marketing teams has a persona they're marketing to, while your sales team has an ideal company profile that they use to qualify their leads, and your services team has another set of criteria they use to measure customer satisfaction, your teams are going to be disjointed, and your customers will feel it. With marketing talking to your customers in one way, and sales rebooting the conversation when they take over, and then services having a completely different set of expectations about what your customers need and want, there's going to be a lot of frustration internally and externally. And the results will be inefficient teams and unhappy customers.

On the other hand, if you can create a single, unified persona that is robust enough to guide your marketing campaigns, your sales conversations, and your services activities, your customers will enjoy a seamless end-to-end experience, and your internal teams will enjoy the benefits of being well aligned with each other.

To give you an idea of what that can look like in real life, here's Brian Halligan, HubSpot's CEO, talking about the personas we used when HubSpot was in its earliest stages:

Brian Halligan: When we were first starting HubSpot, we had different personas that were interested in HubSpot. One we called Owner Ollie, and Owner Ollie, it was a five-person company. Ollie didn't have any time to do any marketing, and he was just trying to deliver his product, let's say, and it was often times a services business. Then we had another persona called Mary Marketer, and Mary Marketer was a marketer in a, it's called 50, hundred-person, marketing organization, small marketing team, but she marketed all day long.

Both of these personas wanted very different things. Owner Ollie really just wanted HubSpot to do the darn marketing for him. Owner Ollie, if you wanted anything, wanted the world's simplest product. He didn't care about any analytics in the product. He wanted just, he wanted to do it for him, he wanted us to do it for him. Mary wanted very different things. She was kind of power-user. She was growing more technical and sophisticated over time. She wanted analytics, she wanted great email marketing, great social marketing, great everything, and she wanted it all tied together with great support.

Before Brian gets to the punchline, let me point something out really quick. Even though these Owner Ollie and Mary Marketer are personas, Brian constantly refers to them like real-life people. He knows their wants and needs. He talks about Ollie as if he's a friend and knows his problems and what solutions might be best for him. That's the key to buyer personas. Getting into the mindset of your potential customers.

Alright, back to Brian.

Brian Halligan: We were trying to serve both, and at some point in time, boy, we were trying to build products for both of them. The requirements for both were very difficult to solve at the same time. The more we tried to solve for both, the less we served either. At some point we said, "We're going to solve for Mary, the future is Mary. It's a company between five and let's call it 500 employees, with a small marketing staff, growing business, sales staff, they want to be a big company someday, let's equip them with the tools and the knowledge they need to really grow a modern go-to-market model.

That fed into, by making that decision, our product organization could really focus there, our sales organization could focus there, our marketing messaging could really focus there.

HubSpot's decision to focus specifically on a single persona marked a turning point in the company's growth. And it'll work for you, too, if you put in the effort to get your persona really nailed down. So commit now to define your personas and rally your entire company around them.

Video 2: How to create a buyer persona

Let's talk through how to create a persona that's robust enough to unify marketing, sales, and customer service. First we'll talk about who should create your persona, then we'll talk about how to go about creating it, and we'll finish off by talking about ways your persona can be used by all of your teams.

So first off, who's in charge of creating your personas? This is a job that often falls to the marketing team, and while it's fine for marketing to head up this initiative, they shouldn't be alone in this effort. The creation of your buyer personas should include input from as many different perspectives within your company as possible. Your marketing team should look at their performance metrics to understand who is most responsive to your product and positioning. Your sales team should look at past sales data to see what kinds of people are most likely to buy from you, and they should also share anecdotal information about what kinds of people are easiest to work with during the sales process. Your customer service team should share their insights into what kinds of people make the happiest, most loyal customers. In addition to these customer-facing teams, your back-office teams might also have important contributions to make. Perhaps finance can give you insights into what sorts of people are

most or least likely to fulfill their financial promises to your company. Legal might be able to point out certain kinds of people who tend to run afoul of your terms of service. And so on.

The point is, you will need to appoint somebody to own the project of creating and maintaining your buyer personas, and someone in marketing might be a great fit for that responsibility. But if your personas are based solely on input from marketing, they will almost certainly be deficient. The more viewpoints you can include in the persona creation process, the better the final personas will be.

So how do you go about creating your personas? First, you need to define the information that should be included, and then you need to identify the best sources for that information, and then you need to roll up your sleeves and get to work.

When it comes to defining the information your personas should include, you should start with your company's purpose. If you have a concrete understanding of the problem your company is meant to solve, that will form the foundation of your buyer persona. Once you know the problem people want you to solve, you can start brainstorming the broad categories of people who have that problem. You can start by having your customer service team identify any commonalities among your most successful customers. What traits are highly correlated with success using your product? Maybe there's one particular kind of person who sees a lot of success with your product; maybe there are several kinds of people who see a moderate amount of success; maybe some kinds of people are practically guaranteed to be dissatisfied with your product. Defining these categories of people will give you a rough idea of how many personas you're going to create.

Once you know that, you don't have to look any further than the roles of the people on your customer-facing teams to figure out what information you should include in your personas. Have marketing, sales, and customer service list out the questions they need answered in order to serve each persona.

For example, marketing will need to know things like how a given persona phrases their problem when they type it into Google. Marketing will also want to know where each persona goes to get help with their problem and what channels of communication they prefer to be contacted through. Demographic information can also be extremely helpful to a marketing team, so that they can ensure the content they create uses the right tone, is translated into the appropriate languages, and includes imagery of people who resemble the persona as closely as possible.

All of this information might be extremely helpful for marketing, but none of it will help sales much at all. The questions a salesperson might ask for each persona will be things like how high of a priority is overcoming this problem? What kinds of goals is this problem preventing the persona from achieving? Is this persona typically the only person involved in the purchasing decision, or will they have to get buy-in from other people before they can buy? How long or short do they expect the sales process to be? Do they typically view your product's price as being high, low, or about average?

In addition to these questions, your services team might have a completely different set of questions. For example, what needs to happen in order for this persona to feel satisfied after purchasing your product? What aspects of your product do they find most confusing? What are their favorite features of your product? What kinds of things will make them happy enough that they'll recommend your product to others? What kinds of things will upset them enough that they'll recommend that people not buy your product?

As you can see, when you bring marketing, sales, and services together, the list of questions that can be asked about each persona can get pretty long. But that's okay. Just get them all out, write them all down, and that'll give you a recipe for creating a fantastic buyer persona.

Once you have all of those questions outlined, you'll need to identify the best way to answer each of those questions. You have three main options here: looking at historical data, performing customer interviews, and making educated guesses. Try to answer as many questions as possible using data you already have. For example, you can look at the marketing data for your most and least popular content pieces and see if you can find patterns in what is or is not resonating. You can also look at sales data for patterns in people who are most or least likely to buy. And you can look at data about existing customers and see if there are any patterns in people who remain loyal or buy multiple times versus those who buy once and then disappear.

Once you've filled in as much of the persona as you can based on your data, it's time to start interviewing customers. Even if you're able to fill in your entire persona using data, it's important to talk to actual customers to make sure your interpretation of the data matches the real experiences of individual people. For each of your personas, you'll want to interview about 15 people. Using the questions your teams came up with as your guide, ask them how they found your company, what made them decide to buy from you, what positive and negative experiences there were along the way, and how you can improve the overall experience you've provided them. Take good notes during these interviews--record the interviews if you can--and then look for common themes that show up from one customer to the next. The things you learn from these interviews will add a level of depth to your personas that you won't be able to uncover any other way.

When you're done analyzing data and interviews, you should review your personas with colleagues from marketing, sales, and services. Are there any questions that marketing, sales, and services came up with at the beginning of the process that haven't been answered by the data and interviews? If so, it's time to pull together the collective wisdom of your customer-facing teams and make some educated guesses. Seek for consensus as much as possible, but if there are disagreements, that's okay. The first version of your personas will be a starting point. From there, you can experiment to find ways to verify or refute different pieces of information and improve them over time.

And that brings us to the final piece of buyer personas: how you use them. Your personas should inform everything your customer-facing teams do. Marketing should use them to create and position the content they make. Sales should use them as a benchmark for qualifying and understanding individual contacts. And services should use them to guide the efforts to provide your customers with the best possible experience using your product. Make sure there are ways for marketing, sales, and service to all give feedback so your personas can be improved over time.

With all of that said, please understand that personas don't replace the need to find out information about individual people. As your sales and services teams seek to build relationships with individual customers, they should remember that there will always be differences between your personas and actual people. The persona should act as a launch pad for the relationship, but once you get to know a person a bit more, rely on the data you have on that person over the information in your persona.

It's important to keep in mind that the work of creating personas is never done. Even if you get your personas into an optimal state, people change as time goes by. A few years from now, when new communication channels have changed the way people learn about your product and new competitors have entered your market and your product has matured and your customer base has grown, your personas will need to be updated. If you're

constantly getting feedback from your teams, your existing personas should gradually change to match the changes in the people it represents. But it could be that an entirely new category of people are now interested in your product, and you'll need to create a brand new persona to represent them. But by using the steps we've already outlined, you'll be able to create that persona and stay ahead of the curve. And that's a big part of what it means to grow better.

Video 1: What is the buyer's journey?

Have you ever seen something in the window of a store that you really wanted, and then you immediately bought it?

Well, in most cases, that's not how purchases are made. Think about other items that you recently purchased for yourself, your family, or your business. What was your thought process? How did you decide on the product or service? Did it help fulfill your need?

Before making a purchase and becoming a customer, a person will first go through what's called the buyer's journey. It's labeled as a journey because each one of your prospective customers will be at different points in their journey towards a purchase. It's part of your inbound strategy because by understanding your buyer's journey, you can give those prospects the fuel they need to move towards making a purchase.

The buyer's journey is a fundamental part of an inbound strategy because it's a framework to help you empathize with your prospects. Your potential buyer is focused on either identifying their problem, understanding what options could alleviate their problem, or comparing their top choices when they are ready to make a purchase.

The buyer's journey is defined as the active research process someone goes through leading up to a making purchase. Knowing the buyer's journey for your persona will be key to creating the best marketing, sales, and service experience possible. It's a model to help keep the buyer's behavior, information needs, and problems central to anything your business does.

Every interaction your persona has with your business should be tailored to where they are in the buyer's journey. Using the buyer's journey will help you better attract, engage, and delight your prospects and customers by meeting them where they're at in their journey and providing the needed guidance and value that they're seeking. The internet has made it easier for you to attract, engage, and delight at the various stages of the buyer's journey using content.

You've gone through the buyer's journey before. It's the path you take when you have a problem to solve, then do your research on potential solutions, and then make your purchasing decision.

If you're making a larger purchase for your business, it will be a different buyer's journey than if you were buying a commodity.

Everyone goes through this process, whether you've purchased a house, selected a restaurant for dinner, or even picked up a candy bar at the convenience store.

Each business will have a unique buyer's journey, designed around their buyer's problems and needs. It's a recipe that can't necessarily be replicated from one business to another.

These are the three main stages of what every buyer goes through. The stages are the awareness stage, the consideration stage, and the decision stage, and they portray the experiences your potential customers go through.

Let's hear from Mark Kilens, VP of HubSpot Academy on how you should be thinking about the buyer's journey:

Mark Kilens: Sure. Okay. Content is education. Education is content. So what you need to do is you need to think about how to use your content as an educational tool throughout the buyer's journey.

As people start to become aware of a problem, that awareness stage, how are you going to teach them more about that problem so they actually understand it a little bit better and you build a little bit of trust and you start that relationship off with them? As they move into considering how to maybe solve the problem, what solutions they could use, what are you going to teach them about those solutions? Are you going to do it through video? Are you going to do it through text? A combination of both? How are you going to actually make them understand that a solution like yours is going to be the right one for them?

And then finally, as they go from considering to buying something to then actually saying, "Hey, look, I need this thing. I now need to decide on this product." How are you going to help them understand the right product and make sure that product is going to really, really deliver on the promise that you defined in the first two stages? That product is going to help them solve that problem and help them overcome whatever obstacle they're facing.

You may find that you need to add an additional stage to your buyer's journey and that your prospect spends more time in one stage rather than another. Regardless, it's a powerful tool that you can use to better standardize, contextualize, optimize, and personalize your prospects' experiences with your business and better empathize with them and get into their mindset.

Marketers can use the buyer's journey to create different content at every stage. It can help you can use it to refine what your content is about while creating content that is relevant to your prospect's place in the buyer's journey. You'll want to have content offers that answer their problems and needed solutions, and content about your product or service. You can also use the buyer's journey to segment and nurture your leads to make the best purchasing decision.

For salespeople, you can use the buyer's journey to better understand how to sell to your prospects and guide them through the buyer's journey. If you know someone's in the awareness stage, you'll have a different conversation with them than with someone who's in the decision stage and has already recognized possible solutions to their problem.

Here's Michelle Benfer, VP of Sales at HubSpot, on how sales continues to change:

Michelle Benfer: I think today's seller really needs to tap into their own authenticity. So you're connecting with somebody who is more educated, they've done more research. And you are really there to facilitate a conversation as to what are their needs, what are their challenges, what are their pains, what problem are they trying to solve? The product that you sell, or whatever you're representing, does it meet those needs? Does it help solve that challenge?

So the role of the seller today, they need to be authentic and connect with their buyer. But in addition, they really need to be curious, and really just have a zest for learning, and

understanding the buyer's scenario, their business, their challenges, and help facilitate this journey of buying in a way that we didn't see previously.

By using the buyer's journey, you can make sure you're adapting the way you sell.

And for services professionals, think of your customers as having their own type of buyer's journey. When you're looking to upsell, resell, or cross sell, you don't want to send your customer back through an entire buyer's journey. Use this as a way to understand what your customer journey looks like.

Your marketing, sales, and service teams, and really your entire business, needs to be aligned on the different stages of your buyer's journey.

Here's Meghan Anderson, VP of Marketing at HubSpot, on the importance for a business to have a collective understanding of the buyer's journey and buying process:

Meghan Anderson: One of the other major shifts that we've seen is I think that the shopping and buying process used to be a very linear thing. You consume a piece of content from the marketing team and then that content drops you into a lead nurturing flow, and then you get handed off to sales, then sales hopefully closes you, and then you get handed off to the customer-facing teams, and I don't think that for most companies that's how the customer experience goes anymore. I think that it is much more convoluted and much more complex and because of that, marketing, sales, and customer teams have to work together. You may have somebody who is a customer, who is consuming your marketing content. You may have somebody who is a customer who is thinking about buying something again from you, and so they're entering a whole new cycle. There is this undulating relationship that happens across all teams and what that means as a company is you really have to align your entire company to have a shared understanding of what's going on with the customer, what's been their experience to this point, so that at any given moment any one of those teams can pick up the relationship and not miss a beat for the customer. The future of business, I just don't think there are handoffs anymore. I think that it's much more of a team sport.

Video 2: How to create a buyer's journey

As is the case with everything inbound, it's important to understand your potential customers: how they think, the answers they seek, and the paths they tend to take to find solutions.

Because audiences can vary so widely based on industry and intent, understanding your buyer persona is the start of developing the buyer's journey. Only by understanding their unique process of becoming aware of their problem, considering solutions, and deciding on the right solution, will you be able to create a truly effective inbound strategy, packed with custom content that best supports their journey towards making a purchase.

Your buyer's journey can look very different depending on factors like your industry, business model, product, pricing, and audience. Some B2C customers, for example, spend very little time in the consideration stage compared to B2B customers that require far more nurturing, engagement, and relationship development before a purchase is made. It all depends on your business.

Regardless, every approach to creating a buyer's journey should be the same: First, understand your buyer persona, and second, develop each buyer's journey stage around your industry and persona's intent.

Let's start with the first stage, the awareness stage:

The awareness stage is when your prospect is experiencing and expressing symptoms of a problem or opportunity. They're doing educational research to more clearly understand, frame, and give a name to their problem.

The awareness stage does not mean that your prospect is now aware of your business. At this point, they are just aware that they have a problem. Maybe they're ready to fire their existing process or know that their existing process just isn't working yet.

If your prospect was to walk into a store and a sales clerk asked what help they're looking for, or, even better, if your prospect used a search engine, if they're in the awareness stage they'd be using terms like troubleshoot, issue, resolve, risks, upgrade, improve, optimize, or prevent.

Your buyer persona would describe this stage as "I AM A BUYER AWARE THAT I HAVE A PROBLEM". Let's do a brainstorm together. Fill these in as if you were your buyer persona to better understand your buyer at this stage.

- I need to improve _____.
- I need to prevent _____.
- I need to start _____.
- I need to stop _____.
- I need to optimize _____.
- I need to solve _____.
- I need to learn more about _____.

The terms that you insert are the phrases or keywords that your buyer persona might use to describe the awareness stage.

This allows your brand to establish itself as a reliable source of information to the buyer, and it allows your business to immediately follow up with information that will aid them in the second stage of the buyer's journey - the consideration stage.

The consideration stage is arguably the most critical point in the buyer's journey because this is where prospective customers start eliminating solutions that aren't a good fit.

In the consideration stage, your prospect has now clearly defined and given a name to their problem or opportunity. They're committed to researching and understanding all of the available approaches or methods to solving their defined problem or opportunity. This isn't the point that they're considering your business, though. They're considering the different solutions they have available to solve their problem.

Blogs are a great way to attract attention to your website, but they lack the personal engagement side of marketing and sales that helps businesses qualify prospects and nurture relationships. This kind of engagement is necessary, especially for people at this point of the buyer's journey.

Your prospect uses solution type terms in the consideration stage, like provider, service, supplier, tool, device, software, appliance, or solution.

In the consideration stage, your buyer would say, "I AM A BUYER CONSIDERING HOW TO SOLVE MY PROBLEM." So let's do another brainstorm together. Fill these in as if you were your buyer persona.

- What tools are available for _____?
- What are _____ industry solutions?
- What are my _____ options?
- What _____ options are there for _____ ?

You'll start to notice that the terms used here are solution keywords. You aren't inserting your company name in here, but you might be inserting terms that you'd use to describe the solutions that you provide.

This research will help your prospect decide on their solution and move into the decision stage.

The decision stage is where your prospect has now decided on their solution strategy, method, or approach. This is where they might be compiling a long list of all available vendors and products in their given solution strategy. At this point, they're researching to whittle down the long list to a short list and ultimately make a final purchase decision. They might decide on the one that best meets their needs, or they might go with the solution they find first.

They're using relevant terms like compare, versus, comparison, pros and cons, benchmarks, review, or test.

To get in the mindset of your buyer persona at this stage, you can use the following statements:

If they say, "I AM A BUYER DECIDING ON A SPECIFIC PRODUCT AND VENDOR," OR "I AM A BUYER TRYING TO MAKE A DECISION BETWEEN PRODUCTS AND VENDORS," how would you fill in these statements as if you were your buyer persona?

- I need prices for _____.
- I need _____ product specifics.
- I need proof that _____ works.
- I need evidence that _____.
- I need assurance that _____.

Also know that prospects, website visitors, or leads might interact with you for the first time in any of the different buyer's journey stages, but you need to be prepared for each and every stage.

By taking the time to empathize with your buyer and think about what information they need, you increase your chances of securing customers who are the right fit for your products or services. This will translate into a higher retention rate for your company as well as promoters of your business who will help your business grow better.

If the buyer's journey is a critical part of building out a content strategy that will work for your marketing, sales, and services, you might be asking yourself: What content is appropriate to offer in each stage of the buyer's journey?

It all comes down to what your content is about and how it's positioned. Is your content focused on the problem your buyer persona is experiencing? That would be an awareness stage piece of content. If your content is more about the solution to a problem, then it would be consideration stage content. As for the decision stage, that's when you begin to create content that answers questions about your product or service.

As you can see, you want to be creating content for all of the different stages of the buyer's journey. You can determine where your piece of content fits into the buyer's journey based on the topic, not the format.

If you don't have an intimate understanding of your buyers, conduct a few interviews with customers, prospects, and other salespeople at your company to get a sense of the buying journey. Here are some questions you should ask to put together the buyer's journey for your company.

During the awareness stage, buyers identify their challenge or an opportunity they want to pursue. They also decide whether or not the goal or challenge should be a priority. In order to fully understand the awareness stage for your buyer, ask yourself:

- How do buyers describe their goals or challenges?
- How do buyers educate themselves on these goals or challenges?
- What are the consequences of inaction by the buyer?
- Are there common misconceptions buyers have about addressing the goal or challenge?
- How do buyers decide whether the goal or challenge should be prioritized?

During the consideration stage, buyers have clearly defined the goal or challenge and have committed to addressing it. They evaluate the different approaches or methods available to pursue the goal or solve their challenge. Ask yourself:

- What categories of solutions do buyers investigate?
- How do buyers educate themselves on the various categories?
- How do buyers perceive the pros and cons of each category?
- How do buyers decide which category is right for them?

In the decision stage, buyers have already decided on a solution category. For example, they could write a pros/cons list of specific offerings and then decide on the one that best meets their needs. Questions you should ask yourself to define the decision stage are:

- What criteria do buyers use to evaluate the available offerings?
- When buyers investigate your company's offering, what do they like about it compared to alternatives? What concerns do they have with your offering?
- Who needs to be involved in the decision? For each person involved, how does their perspective on the decision differ?
- Do buyers have expectations around trying the offering before they purchase it?
- Outside of purchasing, do buyers need to make additional preparations, such as implementation plans or training strategies?

Develop a buyer's journey, and this process will have the greatest possible impact on your customer relationships - helping fuel your inbound strategy and helping your business grow better.