

YOUR GUIDE TO CHOOSING THE RIGHT HUBSPOT AGENCY PARTNER

The Characteristics that Matter
and How to Identify Them



Introduction

Anyone looking for a marketing agency will doubtlessly see the name “HubSpot” along the way. HubSpot is the most established marketing, sales and service platform available to businesses of all sizes, providing users with Customer Relationship Management (CRM) software that helps them run and grow their businesses. HubSpot also partners with marketing agencies, giving them and their clients access to the CRM software, plus an expansive library of educational materials from HubSpot Academy.

With HubSpot, companies can:

- Create websites and use a variety of webpage templates
- Create landing pages that help them obtain new contacts
- Compile, segment and manage robust contact lists
- Send marketing and sales emails using those contact lists
- Gather and analyze information to gain useful insights

SO, WHICH HUBSPOT PARTNER IS RIGHT FOR YOU?

There are many HubSpot agencies out there, all with different specialties and at different tiers of HubSpot partnership. If you’re inexperienced when it comes to marketing, it’s hard to know what your precise needs are, but you don’t need to be a HubSpot expert to find a truly qualified partner.

Use this guide to learn the basics of HubSpot and the role of HubSpot in an agency’s services, so you know what to look for.

Read on to get one step closer to finding your ideal marketing partner.

The goal of any small-to-medium-sized company should be to find a marketing agency that puts the tools HubSpot provides to the best use to sharpen and solidify its marketing and sales efforts.

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CHAPTER 1

HUBSPOT BACKGROUND

What is a HubSpot Agency Partner?

A HubSpot Agency Partner is a marketing agency that agrees to take on HubSpot's inbound methodology as part of its marketing philosophy, provide HubSpot services to its clients and use HubSpot's learning center to advance its expertise.

Agencies become HubSpot Agency Partners to supplement the skills and talent they bring to their clients with the additional capabilities and knowledge HubSpot offers. HubSpot serves as a platform on which agencies can center all the information and materials they use to provide their services. Centralizing most of the services of a full-service marketing agency makes it easier for that agency to:

- Manage the content, marketing emails and offers they create
- Ensure that all content is aligned and on-brand
- Gain useful insights through analytics

HubSpot partners don't go at it alone, either. They have access to guidance from HubSpot professionals, including special attention and guidance when they first start out with HubSpot. **This guidance means that a HubSpot partner agency will never have a problem it can't solve.**

HubSpot partner agencies also enjoy access to HubSpot Academy, an online library filled with lessons, courses and certification tracks on topics relevant to marketing, sales and service professionals. These materials not only educate professionals on tactics like writing compelling content for social media or designing a stellar website, but also demonstrate how to best use HubSpot for those activities.

HubSpot's platform allows agencies to keep their clients' marketing materials and communications on time and on target, helping to build strong relationships with prospects and customers.

Using an Agency Versus Going DIY

While some companies choose to undertake their HubSpot journey themselves, others come to recognize that HubSpot could be a much more powerful tool when combined with the expertise and experience of an agency.

The DIY approach is feasible, but HubSpot was made to adhere to a specific philosophy that emphasizes certain aspects of marketing. This means that there are certain tactics and marketing approaches your company could benefit from, but that you won't have help with if you take this HubSpot journey on your own.

Partnering with a marketing agency is the only way to fill in the gaps; a good agency will use HubSpot as part of a comprehensive approach to make sure you get all the services you need. You'll also reap the benefits of their marketing expertise and experience.

CHAPTER 2

HUBSPOT AGENCY PARTNERS

Tiered Agency Partners

When you search for a HubSpot Agency Partner, you will notice that agencies have been grouped by HubSpot into the following tiers: Un-tiered, Silver, Gold, Platinum or Diamond.

The agencies categorized from Silver to Diamond have qualified for HubSpot's Agency Partner Tiers Program.¹ This program ranks agencies that have demonstrated excellence in inbound marketing through HubSpot.

Tiers are also decided based upon criteria like:

- How many clients the agency has managed
- How well an agency retains clients
- The agency's engagement with the HubSpot software
- Actual inbound marketing success (partly tracked through reviews; more on that later)

Why Does the Tier Matter?

Once a marketing agency qualifies to be tiered, the tier they achieve unlocks certain additional tools and benefits they can use to create value for their clients. Agencies within the top two tiers (Platinum and Diamond) have access to the best that HubSpot can offer. Some benefits of the top two tiers of HubSpot partnership are:

- The option for agencies to request HubSpot Senior Marketers, Directors and VPs and the C-level Executive Team for events
- Access to HubSpot's Connect software so that agencies can master additional technologies to assist you on your marketing journey (more on tech partners in Chapter 3)
- Invitations to events where agencies can share new insights and learn from marketing masters
- Opportunities for agencies to write for HubSpot's blog and gain the kind of influence that filters through to clients

Ranking in HubSpot's Agency Partner Tiers Program unlocks new educational resources and tactical advantages for agencies that can add value for clients. The metrics that determine an agency's tier are important to clients looking for a HubSpot Agency Partner because they measure the success of the agency. **For this reason, it's best to look for a partner in the top two tiers of the program.**

Experience & Education

We'll get into the more specific details of the HubSpot certifications to look for in Chapter 6, but for now we'll focus on the ways you can know if a HubSpot Agency Partner has the experience and expertise you need.

HubSpot's Agency Directory is a great place to start.

It lists all HubSpot's Agency Partners and offers features like advanced search with filters so that you can browse agencies by industry, services, countries, languages and budget types, or simply search by name.

Within the directory, each agency partner has a page where you can view:

- A general description of their philosophy, experience and methods
- All the HubSpot certifications and awards their team possesses
- The marketing areas they serve and languages they support
- The budgets the agency works with
- The industries the agency's clients typically come from
- Reviews submitted by clients

Reviews

One important way to get a sense of how an agency performs with HubSpot is to examine their reviews. Reviews can provide some of the most important information in your search because they're not submitted by the agency itself. Only clients of an agency can review it, and they must provide a ranking from 0-5 stars and a blurb that describes the rating they have given.

Reviewers must sign in with LinkedIn so that their business relationship can be verified, and their names and companies are posted beneath their reviews with links to their profiles, so you can find out more about their business. **This ensures that all the reviews you're seeing are authentic.**

Here are some important considerations as you read reviews:

- What needs did this reviewer pose to their agency?
- Are they in a similar industry to my company?
- What do they specifically like and dislike about their agency?
- Do the strengths of the agency align with my expectations?
- Does this review align with the specialties and qualities the agency claims to have?

CHAPTER 3

HUBSPOT TECHNOLOGY STACK

HubSpot's Tech Partners

HubSpot's tech partners are software companies that have built an integration with HubSpot so that their programs can be used in the Connect.

HubSpot's Connect Program is for software providers who share both HubSpot's inbound philosophy and customer base. It's important for HubSpot to have tech partners because of the expansive set of tools that marketing activities require, and so that your new agency partner can use the tools and assets you may already have.

As you look for a HubSpot Agency Partner, you'll want to see what additional apps and web services the agency uses to complement their HubSpot services. Using a variety of tools demonstrates the kind of mastery you're looking for.

Integrated Tools to Look For

To give you some useful information about the kinds of tools that will help your HubSpot agency give you the best possible service, we'll highlight some tech partners that are especially important because of their relevance to the current marketing climate.



DRIFT: Drift is a marketing and sales software provider that both creates chat bots that can capture and qualify leads around the clock and help companies send intelligent email. Drift's technology is particularly important in this age of conversational marketing, when your company needs to have nimble, efficient communication with prospects and customers to build the online relationships you need to be successful.



DATABOX: Databox is a web service that pulls all performance data into one place so that it's easy to create reports and gain useful insights. Databox allows digital marketers to decide which metrics they want to view at a time and to use information from more than one analytics source at once to view marketing performance. The value add for the agency customer is knowing that their marketing agency keeps track of how the sites, materials and content they create is performing and can adapt quickly based upon the information they compile and view in Databox.



SIGSTR: Email signatures may seem small or insignificant, but they're actually one of the most visible marketing assets your company has. Your company is continually sending and receiving emails, so a program that allows you to use email signatures and banners to market your brand, products and services in an aesthetically pleasing, efficient way is crucial.

HubSpot Connect Ecosystem

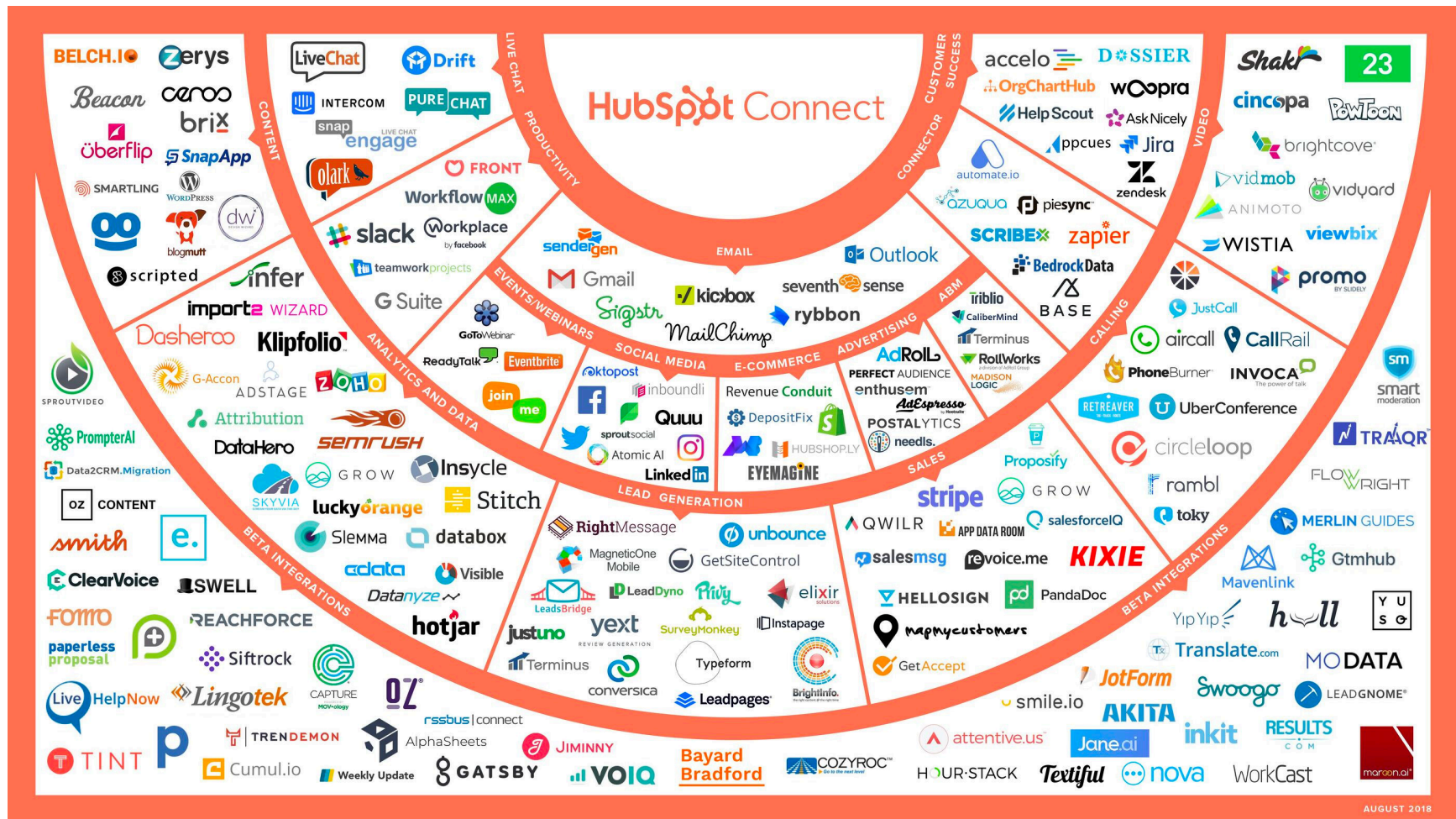


Fig. 1. The HubSpot Connect Ecosystem. 2019, Graphic. HubSpot, (accessed March 6, 2019)

CHAPTER 4

HUBSPOT AGENCY PROCESSES

Onboarding & Setup

Plenty of agencies use HubSpot and are HubSpot partners, but you need an agency that thinks of HubSpot as more than just another badge on their website. Your agency's HubSpot process is comprised of the onboarding and setup practices, strategy and tactics they use to meet your needs. Within each of these components are important steps that an agency should take to make sure that:

- Your business begins to use HubSpot in an informed and seamless fashion
- The agency has all the information they need to market your company according to your vision
- The agency deploys HubSpot's tools in the most effective way according to your goals and industry

We're going to take a deep dive on each component of agency processes (onboarding and setup, strategy and tactics) so that you know what questions to ask a potential marketing agency to get the most out of your HubSpot experience.

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Onboarding & Setup

Agencies that don't bring much to the table are hesitant to provide information about how they're using HubSpot to market your company. They think that if their only contribution is operating HubSpot for you, they shouldn't demonstrate how easily you might be able to do it for yourself.

But a great agency has an informative and communicative HubSpot onboarding process that keeps you in the loop and is neither vague nor unnecessarily detailed.

Onboarding is ongoing because it includes steps that take place during and after the other two HubSpot process components (strategy and tactics) are in place. An ideal HubSpot agency should have an onboarding timeline that moves through the activities outlined in the diagram below.

ACTIVITY	PURPOSE
Administrative setup	Establishing HubSpot users and tracking code, scheduling the onboarding meetings where information for higher-level activities will be obtained, and integrating with tech partner accounts your company may already have
Marketing setup	Outlining market segments and creating parameters and metrics for marketing reports that provide useful insights for adapting marketing tactics and messages
Campaign or bottom-of-the-funnel setup	Gating marketing content (which means creating forms that must be filled out for users to have access to assets like eBooks or webinars) and connecting marketing content in ways that increase conversion of prospects from browsers to true contacts
Second phase of marketing setup	Establishing the frequency and content of the reports your company will be receiving and then fine-tuning those reporting practices after initial testing to find the best way to inform you
Marketing training	Training your company's team to be comfortable with HubSpot and performing the activities that the company will take on as its own responsibility

Marketing Strategy

The second component of your agency's HubSpot process is strategy, which has less to do with HubSpot's software and more to do with the HubSpot inbound methodology and the agency's own unique philosophy on marketing.

HubSpot's inbound methodology is all about attracting prospects and customers, engaging them with helpful, human content and delighting them with a product or service that keeps them coming back and recommending your company to others. Your marketing agency should have a methodology that not only incorporates these ideas, but also adds value in a special way.

Included in your agency's philosophy should be a strategy for how the agency approaches a customer's situation and the information they collect to create and disseminate the quality content that, with the help of HubSpot, will grow your business. Developing this strategy requires research. An agency will seek your input to get the most information they can.

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Marketing Strategy

Even if you don't know the answers to your agency's marketing-specific questions, your company probably possesses data that can help the agency answer them. Every agency has a different approach to their strategy research, but there are a few key components that should never be left out.

COMPETITOR RESEARCH

A good agency knows that it's important to understand your company's competitive environment. **Part of thorough competitor research is looking at companies that, while not direct competitors, provide alternative or replacement products or services.** Typical components of competitor research include:

- The size and stage of growth of your company in relation to its competitors
- The segments of your target market
- A SWOT analysis that examines your strengths, weaknesses, opportunities and threats
- A close analysis of what you do to add values for prospects and customers
- An assessment of what your competitors are doing to attract, engage and delight prospects and customers

INDUSTRY RESEARCH

While it may be informed by competitor research, industry research takes a wider view. **This type of research looks for trends in the industry, as well as currently relevant economic, political, technological or social changes for your company or target market.**

TARGET MARKET RESEARCH

Sharpening your company's marketing operations involves knowing whom to market to. Your HubSpot agency might use sales data or set up your website to collect the kind of data that helps them construct a profile of your ideal customer based on an understanding of their needs and background that goes beyond the simple unifying fact that they buy from you. **This profile is called a buyer persona, and your marketing agency should create at least one with input from all their teams to ensure that their marketing efforts resonate with the right people.**

Tactical Execution

The third component of your marketing agency's HubSpot process is tactics. Tactics are the individual, specific marketing tasks your agency takes on to achieve your goals. It's hard to tell what tactics can be right for your company when you haven't really expanded your marketing operations on your own. This is an area where many companies find themselves putting trust in the expertise their agency has. While this may be the case, two good ways to make sure an agency uses the right tactics for you are to:

EXAMINE YOUR COMPETITORS' MARKETING

Look at their websites and see if you can peruse one of their marketing emails. Take note of what appears effective and what seems to fail to resonate.

FIND AN AGENCY THAT USES A WIDE RANGE OF TACTICS

While diversity in the tactics an agency uses doesn't guarantee they'll apply them in the perfect way for your company, the more tactics an agency can execute, the more likely their method is to include what your company needs.

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Inbound & Outbound Marketing

Though there are too many marketing tactics to mention, they tend to fall into certain categories, which can then be further grouped by the marketing methodology (inbound or outbound) they support. We'll provide a detailed discussion on inbound versus outbound marketing in Chapter 6, but for now we've provided brief descriptions so that you can tell which activities belong to which category.

INBOUND MARKETING is about attracting customers through informative content and having meaningful interactions with them through tactics like:

- Search engine optimization (SEO)
- Social media
- Content marketing

OUTBOUND MARKETING is about placing your brand in front of any and all consumers, regardless of their personal interest. It's a one-way form of communicating that uses promotional tactics like:

- Print advertising
- Tradeshows
- Public relations (PR)
- Email marketing

Some companies choose to use different agencies for each set of tactics, but moving all your marketing services under one roof is the only way to ensure all messages are synchronously on-brand.

CHAPTER 5

CERTIFIED HUBSPOT PROFESSIONALS

HubSpot-Certified Staff

HubSpot is more than a platform; it's a methodology that governs how an agency executes all its inbound marketing activities. Being able to use the platform and its tools isn't enough if a team doesn't understand the methodology that puts those tools to good use. That's why it's important for the staff of the marketing agency you choose to be HubSpot Inbound certified and why it adds to the value an agency can provide when its staff have additional certifications.

HubSpot's Inbound certification is obtained by going through a track of lessons that cover both HubSpot's inbound methodology that centers on attracting, engaging and delighting prospects and customers, and on HubSpot's inbound principles, which serve as the instructions for executing an inbound marketing strategy. These principles are crucial for every team member at your chosen marketing agency to use for guidance in their work.



The HubSpot Agency Directory allows you to see the certifications the agency has, but to find out about specific staff members, the best way is to look at the individuals who make up an agency's team. Most agencies will post their team members' individual certifications in their website bios, which many agencies have. You can also use LinkedIn, as HubSpot encourages newly-certified HubSpot Academy students to post their certifications there.

HubSpot Certifications

HubSpot Academy offers a variety of certification tracks that cover broad and detailed topics in marketing, sales and service. We've discussed how HubSpot's Inbound track and certification are a good universal starting point for marketing agency team members, but other HubSpot certifications are not equally relevant to all team members. Here are some certifications to look for based on an individual's job role or marketing agency team:



CONTENT MARKETERS: HubSpot Content Marketing, Delivering Client Success, Social Media, HubSpot Marketing Software, Inbound Marketing



DIGITAL MARKETERS: HubSpot Marketing Software, HubSpot Email Marketing



ACCOUNT MANAGERS: Inbound Marketing, Delivering Client Success, Client Management

While the individual experience and expertise of a professional can't be confined to a post-professional certification, it should always speak well for a marketing professional that they have spent the time to educate themselves on HubSpot's approach to a task or how to better use HubSpot to deliver excellent service to clients like you.

CHAPTER 6

HUBSPOT AGENCY METHODOLOGIES

Just Inbound?

HubSpot was founded upon the principle that an inbound methodology is the only truly successful form of marketing in the modern and ever-changing environment of business. HubSpot's ideology espouses that because people are tired of being advertised to, the best way to market is to abandon the self-promotional ways of advertising in favor of forming relationships with prospects and customers. HubSpot believes the best way to do this is by offering helpful, human content for customers to find as they research their needs and naturally discover information.

This is the reason that this style of marketing is known as inbound marketing; it uses information to draw prospects and customers towards your company, whereas outbound marketing creates messages and dispatches them indiscriminately to the wider world.

Many agencies have followed HubSpot's lead and abandoned outbound marketing altogether. They prefer the lower-cost inbound activities that include tactics like search engine optimization (SEO), social media and content marketing. While an agency that focuses solely on inbound marketing will likely offer a high quality of work on their inbound services because of their ability to specialize, it's important to be aware of what won't be included in your marketing services.

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Just Inbound?

Here, we've compiled some outbound services and tactics, as well as some important data from our 2019 B2B Marketing Mix Report on how B2B marketers still use and rely on them to generate leads:²

MARKETING AND DESIGN HELP FOR TRADESHOWS AND EVENTS:

46% of B2B marketers cite trade shows and events as their greatest source of qualified sales and marketing leads.

ONLINE DISPLAY AND PAY-PER-CLICK (PPC) ADVERTISING:

PPC is a tactic that can combine inbound and outbound marketing to advertise to your target audience even when they're not looking for answers that could lead them to your products and services. 19% of agencies said PPC is their top source of qualified leads.

PRINT ADVERTISEMENTS:

8% of marketers cited print advertisements as a top source of qualified leads in B2B sales and marketing in 2018. Any qualified lead who sees a print ad could turn into a satisfied customer who then passes on the good word about your company.

OUTBOUND EMAIL:

Email marketing is tricky because it can be outbound or inbound. The inbound emails sent to prospects and customers who've entered their emails and become contacts are invaluable, but outbound emails that get exposure for your brand are important too, especially in B2B. 33% of B2B marketers cited email marketing as their top source of qualified leads, and leaving out a component of email could mean missing out on chances for business.

Just Outbound?

Outbound marketing methods are more traditional, but newer isn't always better. The old idea of an advertising agency that creates print ads and paid media is disappearing, but some agencies still specialize in outbound marketing. As with choosing an inbound-only agency, specialization usually belies increased expertise. If an agency only provides outbound services, they're probably offering some of the highest quality in those services.

Here, we've used the same source as before to highlight some inbound marketing services, their use across B2B marketing agencies and their success in generating leads. Before you choose an out-bound-only agency, consider what your marketing experience might be like without the following:

INBOUND EMAIL:

As discussed, an invaluable part of marketing is the inbound email that follows up with prospects and customers after they submit a form on your website. Inbound emails are a quick and easy way to follow up on leads and remind prospects and customers about your company.

SEARCH ENGINE OPTIMIZATION (SEO):

28% of B2B marketers cited this as their top source of leads, with digital marketing in general also a top area of marketing spend for 57% of B2B marketers surveyed.

SOCIAL MEDIA:

25% of marketers cited this as a top source of their qualified leads. As digital marketing grows, tools like social media increase in importance. It's a low-cost way to boost your brand equity and be seen by prospects and companies.

BLOGGING AND CONTENT MARKETING:

66% of B2B marketers surveyed stated blogging and content marketing were among their most implemented marketing tactics in 2018. Blogs help build relationships with prospects and customers by offering helpful, human content that answers their questions without being overly promotional.

The services we've highlighted are important parts of a comprehensive marketing program. As you can see from the data we've provided, you need a mixture of both inbound and outbound methodologies to truly be successful. Combining both inbound and outbound marketing to market strategically across all channels is called integrated marketing, and, in the next section, we'll go into detail on integrated marketing and help you find a HubSpot agency that can provide the integrated experience you need.

Integrated Marketing?

A HubSpot Agency Partner can add the most value for your company by using an integrated marketing approach. Marketing your company across all channels with on-brand, cohesive messages is the best way to make sure that prospects and customers are finding and positively interacting with your company.

Inbound and outbound methodologies are different from one another in key ways. You may be thinking that one group of services (either inbound or outbound) seemed much more like what you were looking for, but here are the top three needs that only an integrated marketing approach can meet and the reasons why inbound or outbound alone can't cut it:

THE NEED TO GENERATE MARKETING QUALIFIED LEADS:

The top sources are still a mix of inbound and outbound strategies. Without both, you'd only be getting some of the leads that are out there for your company.

THE NEED TO REGAIN SELLER POWER IN A BUYER'S MARKET:

Buyers now self-educate before engaging with marketing or sales teams. The materials they use to self-educate are part of inbound marketing (blogs and informative content) and outbound marketing (tradeshows).

THE NEED TO OPTIMIZE BUDGETS AND MAXIMIZE ROI:

Content marketing is an estimated 62% cheaper than outbound tactics, but outbound prospecting still brings in qualified leads. With both tactics at their disposal, a full-service agency can make the most from your budget with maximum returns.

It's important to look beyond simply the HubSpot capabilities an agency touts and examine their other capabilities. Many agencies showcase their work on their websites in the form of online portfolios and case studies that show how they've used their services to benefit their customers.

The quality of the integrated marketing experience a full-service agency can offer your company is fully dependent on that agency's ability to combine the inbound capabilities of HubSpot with their team's own knowledge, expertise and creativity in executing outbound marketing tactics.

Getting Started with HubSpot

Finding a HubSpot Agency Partner can be difficult. HubSpot's flexibility and user-friendly interface make it hard to discern what the HubSpot agency itself really brings to the table. By examining reviews and tiers, researching staff certifications and limiting your search to full-service agencies that will use HubSpot as only one component of their integrated marketing approach, you can be sure to find the best HubSpot Agency Partner for your needs.

FOR MORE INFORMATION OR HELP GETTING STARTED, CONTACT US AT:

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References:

1 HubSpot Agency Partner Program | Tiers & Benefits 2019, HubSpot

2 The 2019 B2B Marketing Mix Report, Sagefrog Marketing Group

