HubSpot

How to Build a Successful HubSpot Practice

A Guide for Solutions Partners

This playbook contains guidance on selling and go-to-market strategies, servicing, hiring, program resources, and more. It's designed to be used as a reference that you will come back to again and again as you grow in the solutions partner program.

We're excited to partner with you and empower you to start building your HubSpot practice to help you and your customers grow better. Let's dive in.

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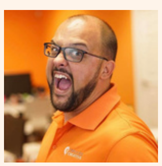
Getting Started

Going all in on HubSpot

The most successful HubSpot partners go “all in” – that is, they put their heart and soul into selling and servicing HubSpot. To get the most out of HubSpot and the Solutions Partner Program, you need to be fully engaged. Make it your mission to become an expert in the software.

One of the easiest ways to do this is to become a power user of the software as you use it for your own business. Try to go beyond focusing on just base level functionality. Build on top of the core platform and create something no one has done before to become an expert in a variety of HubSpot use cases. You can then take some of these same strategies to your clients with confidence, knowing that these strategies will work because you’ve seen success in your own business.

Partner Pro Tip



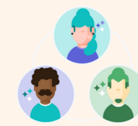
"Your business should be your first case study on HubSpot.”

– Remington Begg, [Impulse Creative]

Get the most out of HubSpot by making it one of your business's core services. HubSpot is the perfect platform to build a core offering around, and is also extensible with thousands of app integrations that customers need. HubSpot rewards its partners that are engaged. Staying engaged looks like:

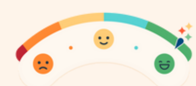
Invest and stay active with new leads and opportunities

Create and build out your directory profile



Meet often with your PDM

Learn and grow by completing certifications, attending events and workshops, and participating in trainings



Go the extra mile and always solve for the customer

Some of the benefits from engaging in the above activities include referrals, exclusive beta invites, guest speaking opportunities, and other co-marketing and collaboration opportunities.

Be sure to take advantage of the various tools and resources HubSpot provides. Some resources to help you get started include:

Campaign Kits

White Label Assets

Packaging & Pricing Courses

But if you rely only on those resources without putting your own spin on them, your messaging and services will fall flat. Going all in requires creativity. What makes your business unique? What do you bring to the table that no other agency does? The answers to these questions will make your services stand out. It will also help in attracting the customers that are the best fit for your business, customers that want the unique experience that only you can provide.

Essential HubSpot Resources

To learn more about the product and stay up to date on new features, capabilities, and messaging, stay close to HubSpot resources. The Releases and Updates blog in the HubSpot Community will keep you abreast of any changes to the product. To go deeper in your product expertise, the Partner Resource Center houses keystone resources for partners at any stage in their journey, including the program rules, product information, tiers and benefits guide, training and development, and branding materials. Within the Partner Resource Center, you'll find the Onboarding Resource Center, which includes everything you'll need as a new partner to get up to speed on all things HubSpot. It's also a great place to send new hires.

Another key resource will be the HubSpot Academy. Here, you'll find courses to help you develop strategies and grow your business, as well as key certifications in HubSpot software skills. As a partner, you can use both the public-facing Academy page, where any HubSpot user can find courses and certifications, and the in-app Academy link for partners, the only place to find partner-specific courses and certifications. The most successful partners incentivize and even require their staff to keep up to date on certifications.

You and your technical staff can also take advantage of developer documentation to learn how to create custom integrations, leverage APIs, and develop websites for your customers. For additional support and specific questions, sign up for the developer Slack workspace and the Developer Community space to join a community of like-minded individuals. Similarly, the partner Slack workspace offers a safe space for the global community of HubSpot partners to give tips, tricks, and strategies to help customers and each other grow better.

Keep up with official HubSpot documentation and events that introduce new products, features, and program updates. These include:

- Flywheel campaign materials, which enable you to go to market along with HubSpot using the same messaging
- Partner-only events that occur throughout the year to bring together the community and announce updates
  - As you move forward in the program and tier up, you'll gain access to more exclusive events like product previews
- Webinars designed to help you hone your skills and selling tactics on a specific product or topic
- HubSpot's Products & Services Catalog, which lists all product features by tier
- Hubspot.com/new, where the latest product updates are always posted

Betas

Participating in product betas is a valuable way to help steer the direction of product development and give feedback to HubSpot on the changes you'd like to see in the software. The HubSpot product team runs small, confidential private betas in which partners and customers can participate on an invite-only basis. Once the product or feature is nearer to completion, it goes to public beta. Certain public beta features are available to opt into right from your HubSpot portal. Learn more in this Knowledge Base article. Public betas have larger cohorts of users and are often open to all eligible users.

Because betas represent such a strong opportunity to influence product development, it's important to stick to the principle of "going all in" when participating. Private betas are an extremely exclusive experience. Those that participate in them will get a lot of real-time interaction with the product team as they're providing feedback and a lot of general visibility to other HubSpotters. Take this as an opportunity to show HubSpot your level of commitment by providing the product team with valuable feedback through interviews, surveys, and brainstorms. If selected to participate, you're in a great position to drive the direction of our product for your customers and become a go-to expert on that aspect of the software.

If you're interested in participating in a beta, ask your PDM about any public betas that would be most helpful for your business. You might also be selected to participate in a private beta by the product team after you've demonstrated expertise in a specific product. If you're not selected, don't worry – HubSpot will always provide plenty of resources to prepare you for changes to the product.

Working with your Partner Development Manager (PDM)

Your PDM is there to support you - both with selling and closing deals, and onboarding and servicing strategy. PDMs have a wealth of HubSpot knowledge and can help you navigate the organization.

Setting up meetings

To get the most out of these HubSpot-provided human resources, plan to meet regularly with your PDM. Determine the right cadence with them and stick to it – whether it's weekly, bi-weekly, or monthly.

Set a clear agenda and goals to get the maximum value out of your meetings. Do you need information updates? To collaborate on a deal? Selling or servicing strategies? Being clear and vocal about what you need will help your PDM help you more effectively.

Consider discussing the following topics:

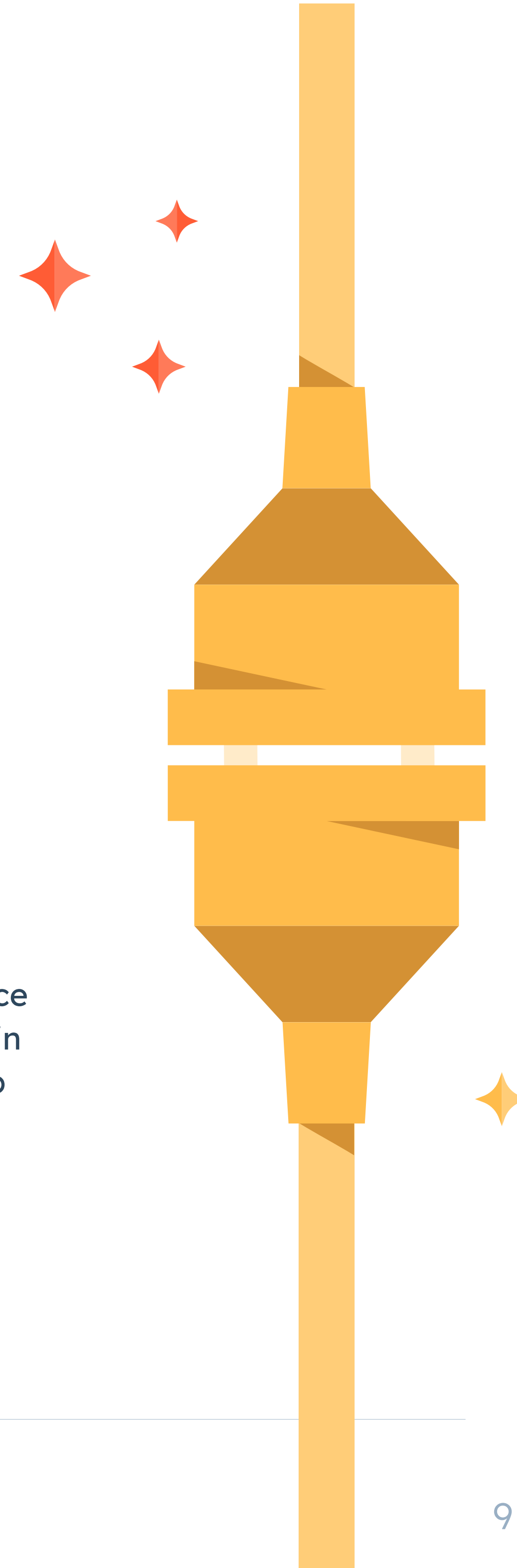
- Onboarding
- Co-selling with Growth Specialists
- Sales coaching
- Connecting with internal teams
- Retention & renewal strategies

HubSpot prioritizes highly engaged partners, so it's worth the time and energy to meet with your PDM even if you don't have a lot to discuss. And when you're in between meetings, communicate frequently to maintain the connection.

Establishing roles and responsibilities

After meeting with your PDM a few times, you'll begin to get a sense of what kind of support they can provide, where there are knowledge gaps that they can fill, and where they can bring the most value. Establish early on what kind of help you'll need from your PDM, including what you don't need help with. For example, you might feel that you don't need advice on business or selling strategies, and need your PDM to provide valuable information, like product updates, that will help you make the best business decisions.

Don't be afraid to communicate exactly what you need to your PDM.
They're there to help you with everything they can, and you're in the driver's seat.



Collaboration and integration

Several successful partners agree on this practice: treat your PDM like they are an extension of your team. This can go beyond just including them on staff meetings. For example, at Six & Flow, every team member has a skateboard with a picture of their face on it hanging in the office – including their PDM. And at Manobyte, the PDM is included in the company Slack workspace so they can get answers immediately. Other partners tap their PDM to help onboard new hires.

Finding creative ways to fully integrate your PDM into the everyday rhythms of your business can go a long way toward establishing rapport and setting you up for success. Before you know it, working with them will come naturally, and they'll be essential to your success.

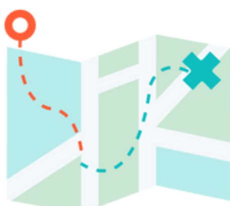
GTM & Selling

Generating leads

Generating leads can be accomplished in multiple ways. While this opens up the door for several different strategies you can employ to convert your audience, it can also be frustrating knowing that there's not one specific lead-gen process that works for every website.

Inbound marketing is one powerful marketing strategy for generating leads. To demonstrate the power of inbound marketing to your prospects, be your own best case study. Employ the tactics of inbound in your own business to build your own flywheel and show your prospects and customers how it's done. Some partners have seen great success with 100% organic marketing. For example, Impulse Creative grew their customer base from a very local market to a global scale using a completely organic go-to-market strategy.

How can you employ a successful inbound marketing strategy to start generating leads for your business?



Start Local

Many businesses, especially since 2020, are serving customers outside of their regional markets. However, that doesn't mean local SEO isn't a viable or lucrative strategy, especially when starting your business. Start local and expand, and you'll see that by focusing on local discoverability, the leads you generate might be more familiar with your brand and could monetize faster and at higher rates.

- Make sure your website and all websites where your business is listed (think Yelp, Google My Business, etc.) are consistent with your name and current address. If you're not listed on these directory sites, submit your information for more visibility.
- Fully build out your Google My Business page with all your product and/or service offerings.
- Identify geo-specific keywords and bake them into your SEO strategy. Some examples of this can include regional-specific landing pages or blogs about current challenges or market trends in the specific area.

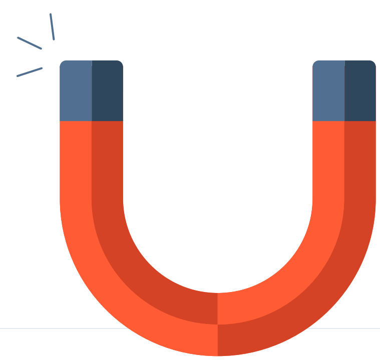
Increase your website traffic

More traffic to the right areas of your site means more leads. But how do you drive quality traffic to your website?

- Start by running a report to analyze which pages are already bringing traffic to your site. You can do this by simply running a report on Google Analytics or within your HubSpot account.
- Once you have a list of those pages, select the ones that contribute to a lead generation path. (If none of them do, consider how you can add lead gen elements like forms. Or consider creating some new pages that are designed to convert.) Start giving those pages some extra attention. Consider updating them with fresh content. Perform keyword research via Google Keyword Planner or Semrush and make sure those keywords are adequately used throughout the page text, as well as in the metadata (including page header and description). Lastly, avoid keyword stuffing, as Google will penalize you for this. Keyword stuffing is considered spamdexing, in which keywords are repeatedly added into a webpage's meta tags, content, or anchor text in an attempt to rank higher in search engines.

Pro tip: Make sure to look at keywords with a high search volume (at least 100-1000 searches per month) but low SEO difficulty. Anything with a score above 80 will be very difficult to compete with, so it's best to stick with scores under that.

- Your last on-page task is to start link building. Link other blogs and webpages on your website to this page to create an organic path for readers to continue diving deeper into related subjects. You should also reach out to these publications to build domain authority for your own site by securing backlinks from their sites to yours.
- Amplify your revised blogs and webpages via your social media pages (and personal pages) and via email marketing.
- Over time, keep an eye on historical optimization – that is, continue to fine-tune your old blogs and webpages to generate even more traffic and conversions. High-converting blog posts should be monitored for their placement on search engine results pages (SERPs). It's often more worthwhile to protect traffic to existing posts that convert well rather than create new posts that may or may not convert well.



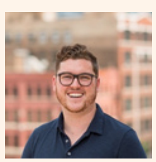
Increase conversions

To generate leads and collect their contact information, you need to have forms on your website. In this step, examine how well these forms are converting. If you successfully implement the previous two steps, your number of conversions will naturally increase. But how can we increase the percentage and quality of those conversions?

- First, audit pages to see which don't have some sort of conversion opportunity – whether that's a form, an exit pop-up, or a chatbot. Start by analyzing where in the funnel those visitors might be. If it's a blog page, consider adding a newsletter signup or content available for download for the reader to dive deeper.
- Carefully consider the questions you're asking in the form as well as the length. For example, a newsletter signup should only ask for an email and maybe a first name, whereas a "contact us" form on a services page should ask for their phone number and possibly some more information about what services they need or the challenges they're experiencing. Chatbots are also a great way to collect leads and can be automated or re-routed to a human, based on the visitor's requests and needs.
- Once you've created and optimized your forms, you can start building a lead nurture for each one. Analyzing where and on what topic leads converted will help you build the perfect nurture campaign, further engaging them and converting them into opportunities.

Collaborating with HubSpot is another great way to generate leads. Participating heavily in the partner community, doing collaborative events with HubSpot, and becoming a thought leader in the HubSpot ecosystem gives you more visibility.

Partner Pro Tip



"HubSpot is always creating demand so focus on creating expertise. Demonstrate expertise and people will come to you."

– Connor Jeffers, Aptitude 8

Account-Based Marketing (ABM)

Account-based marketing (ABM) is a key strategy for many partners to land the type of business they need for their company to grow. The most successful ABM strategies involve getting hyper-specific on your target company's persona. This way you can create content that speaks directly to them. Once you have the ear of your target accounts, seal the deal by blowing them away with remarkable case studies. Case studies give you credibility and demonstrate your expertise, making it more likely to win business.

How can you employ an ABM strategy? Start by defining your Ideal Customer Profile, a.k.a. your ICP. This is different from your buyer personas. ICP is at the organizational level – the kind of companies you are selling to. Buyer personas are the individuals within the company that you are selling to.

What similarities are you seeing in repeat customers? Consider:

- Location
- Industry
- Business size
- Tech stack
- Annual revenue
- Budget
- Maturity

Partner Pro Tip

"Identify common themes and pain points, use cases, and recurring requests. It doesn't matter what everyone is asking for, but if the right clients are asking, you need to be able to build and service it."

– Sam Anderson, Origin 63

To learn more about building an effective ABM strategy, check out our Ultimate Guide to Account-Based Marketing.

Defining the sales process

If you find yourself struggling to actually close deals and turn leads into clients, take another look at your sales process. Make sure you listen more than you talk. Study the pain points that come up most often in your sales conversations to make sure you're asking the right questions. Active listening can go a long way toward the prospect feeling seen and heard, and will help you create the best solution for their pain points.

Things you should listen for:

What challenges does your prospect face?

What are the consequences of this challenge?

What themes are recurring?

Questions you can ask:

1. Can you tell me more about that?
2. Why is that important to you?
3. Can you share more about the specific support you think you'd need?
4. Have you considered/budgeted for any external assistance with this challenge?
5. Do you think you have the bandwidth internally to hit your deadline?
6. Do you think you have the bandwidth internally to accomplish your goal?
7. What other departments depend on getting HubSpot set-up properly?
8. What risks do you see in being able to get HubSpot up and running?

The sales process will differ from partner to partner, based on your Ideal Customer Profile, target accounts, the services provided, and the lead generation engine. Start with doing research on a typical sales cycle in your industry or business type. Create a simple framework that you can follow. Check out this example below:

As you work through the cycle with new customers and mature your sales process, make adjustments that address points of friction. Learn more about developing your sales process by [reading this blog] or [taking this Academy lesson]. You can also work with your CAM to help define a sales process when you first join the program. To learn more about co-selling, check out the [Selling with HubSpot page] on the Partner Resource Center.

Partner Pro Tip

"Evaluate friction points in the sales process. We used to go from discovery to proposal and we found that a lot of people would just sit on the proposal and would go silent, causing the sale to stall. So we added a stage with a micro-proposal, reiterating challenges and solutions with timeframe and estimated costs. This allows for asking questions – 'Does this work with your budget? Does this timeframe work? Does this resonate with you?' Then we can get feedback and re-work the proposal."

– Rich Wood, Six & Flow

Treat your prospects like customers to gain their respect and to quickly determine if they will be a fit. At Media Junction, the sales team behaves as if they've already acquired the customer as early as the discovery process and acts as if they are solving a problem for a paying customer. If the customer doesn't like the solution they've proposed, they chalk it up to it not being a fit.

While it's essential to listen to customers and offer solutions that will fulfill their needs, avoid simply doing whatever prospects and customers dictate in instances where what they're requesting doesn't align with the needs and pain points they've expressed to you. Demonstrate that you are solution-focused by applying your unique expertise to proposals. It's important to have and offer a distinct opinion, rather than just being an order-taker.

Above all, sell like a human.

If you genuinely care about your prospects and customers' challenges, it will shine through in your sales process. Respecting your customers and demonstrating expertise will go a long way toward winning business that you can feel good about. At the end of the day, people buy from people they like.

Leveraging the HubSpot community

You don’t have to rely only on yourself and your sales and marketing teams to drum up new business. The HubSpot ecosystem is, in large part, based on referrals and word-of-mouth. That’s why it’s a good idea to start building relationships with other partners right away. Creating a network in the HubSpot ecosystem will put you in a position to gain new business from partners who can’t help certain customers, and vice versa.

It’s impossible to be all things to all customers. Start by focusing on what you’re good at and become excellent at providing those services. Then look into collaborating with other HubSpot partners. Other partners with different skillsets can provide services in areas you don’t have expertise. Likewise, as you establish yourself as a leader in certain areas or industries, you’ll be more likely to get referrals from other partners.

You can also utilize the HubSpot ecosystem and network of partners to help customers in different geographic regions and with unique technical and servicing needs. As you work and collaborate with other partners though, please do remember that all HubSpot partners, providers, and their employees are expected to act in compliance with applicable antitrust and competition laws. Refer to the Antitrust section of our Program Events Code of Conduct for more information.

Although you might find other partners competing in a similar industry, region, or service, we rarely see this as an issue. The market opportunity is massive for partners, and there is plenty to go around for everyone. As you get your footing in our program, you'll quickly find that our partners are unique compared to other programs, with many partners being willing to help each other, teach each other, and refer business to each other. Utilize resources like the partner Facebook group, Slack workspace, and HubSpot-hosted events to meet other partners and build your network, as well as ask for help when you need it.

When to say no

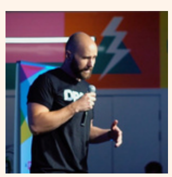
Declining work can be as important as winning business. Evaluate your business' staff size and capacity and set realistic limits on how much work your team can handle. Don't try to scale too big, too fast – there's only so many companies you can help in a year. Scaling too fast can cause the products and services you're offering to decrease in quality because your team will be too burnt out to deliver them effectively. Over time, this will hurt your reputation.

As tempting as it may be to take on any and all projects in the beginning stages of your partnership with HubSpot, take the time to evaluate each prospect and determine whether or not they are a good fit. Some clients might be good customers, but would be better served by another partner in the ecosystem (yet another reason to foster relationships with other partners and create a two-way referral system). Other clients are poor customers in general.

Some signs of customers that you may want to steer clear of include:

- Being rude or disrespectful of your time during the sales process
- Having unrealistic expectations
- Having demands that are unclear or are constantly changing
- Refusing to do any homework that you've provided during the sales process (customers like this are unlikely to close)
- Badmouthing other partners or vendors they've worked with in the past

Partner Pro Tip



"Bad customers are worse than no customers. One bad customer can ruin your life for a year and prevent you from growth."

– Rich Wood, Six & Flow

Bad customers not only wear out your team, but they also take more than their fair share of time and energy, time and energy that you could have spent on customers that grow your business in a way that aligns with your goals. Remember, ultimately you are in the driver's seat of your business, not your customers. When you encounter customers that will set you back rather than move you forward, it's time to exercise your power to say no.

Servicing Clients

Creating services

You don't have to start out with several complex services. Instead, start with a few simple, repeatable services and programs, like onboarding or auditing an existing portal. Make it easy to get a few quick wins and build up your confidence, as well as work out any kinks. These early wins can also serve as some of your first case studies, which will help you land more business.

What are some quick wins you can implement?

- **Increase website traffic**
  - Analyze your client's top pages that bring traffic to site
  - Perform keyword research via the Google Keyword Planner (free) and the HubSpot SEO tool (you can also pay for tools like Semrush)
  - Optimize pages with the chosen keywords with high search volume (at least 100-1000 searches per month) but low SEO difficulty
  - Start link building: do this by linking relevant pages on the site to the webpage you are optimizing. Bonus: get links featured on another site with high authority
  - Amplify the revised webpages via social media and email marketing
- **Increase conversions**
  - Add exit pop-ups to your client's site as an additional method of collecting emails
  - Add a chatbot to your client's high-traffic pages, opening new doors for conversations and conversion
  - Create new and optimize existing forms on their website. Typically, the shorter the form, the better
- **Generate more opportunities**
  - Help clients create a light/free version of their service (e.g. a free website audit or consultation). This foot-in-the-door offer gives the customer a little bit of help and helps convert them into a customer more quickly by building trust
  - Re-engage past sales opportunities and create a campaign for that target. This can be your existing install base or previously lost deals
  - Audit and refine their sales process – determine where in the process they are losing clients and make changes to improve the process and increase conversion

As you build a foundation on these core services, start to branch out into more specialized or complex service offerings. For example, you might start out offering simple services for each hub. The next level would be to create a multi-hub service offering. HubSpot products build on each other and become more powerful when combined, so multi-hub solutions create an opportunity for greater sophistication, allowing you to charge more. You might also experiment with custom packages for each customer.

For help with pricing your services, check out the Pricing and Packaging Your Inbound Services course from the Academy and the Pricing and Packaging Inbound Services Tool (USD | EUR | GBP | INR).

Yamini's Pro Tip: Build expertise around value pair

Marketing Hub™ + Sales Hub™ → 75% greater increase in deals closed-won after 12 months than Sales Hub alone

Marketing Hub™ + CMS Hub® → 80% more organic traffic than Marketing Hub alone

Sales Hub™ + Service Hub™ → 106% greater increase in deals closed-won after 12 months than Sales Hub alone

Listen to your customers' wants and needs. If you're consistently hearing the same demands, these could be indicators of services that your business could offer. Identify common themes, pain points, use cases, and requests from clients that fit your ideal customer profile (ICP), then use this data to craft new services. It's especially important to listen to customers that fit your ICP so that you can create service offerings that will attract more best-fit customers.

Keep up to date on industry trends to make sure that you're offering solutions that will produce maximum results in today's market. If you find that something is working well, explore how you can do it better. If it's not working, be ready to pivot quickly and try something else. Staying flexible is the key to nailing your service offerings.

Client retention

The key to client retention is simple in theory, but hard to execute: communication. Clear and consistent communication makes it easy for clients to work with you. And clients will stay with companies that are easy to work with.

Make it clear exactly what your firm is working on and how long it will take, and what the client is supposed to do to support your efforts. Be sure to log the communication as well, so that both parties have a record of what was discussed.

Effective communication can look different for each organization and each client:

- Utilizing a project management tool that you both have visibility into
- Regular email updates
- Using a dedicated workspace in a collaborative messaging environment
- A standing meeting with status updates and expectation setting
- A shared drive or document that provides status updates

Gaining your client's trust begins with transparency in all communication and business dealings. This includes when you make a mistake. Clients will respect a company that is able to own its mistakes if they remain honest and solution-oriented.

Hiring & Growth

How to hire HubSpot talent

Treat your hiring efforts like a sales and marketing channel by using the principles and tactics of inbound marketing on potential applicants. Build an employer brand on LinkedIn. Establish yourself as a thought leader by posting about HubSpot and other things you're passionate about. LinkedIn is not only for building a community of potential clients or partners but of potential employees. Make meaningful connections to expand your reach.

Consider using job boards like Connect.com, LinkedIn Job Search, Indeed, Glassdoor, ZipRecruiter, Google for Jobs, SprocketTalk.com, the HubSpot Community job board, and other communities you're part of. If you're not a part of any online communities, start seeking out groups that share your interests and goals. Organic posts combined with smart and targeted paid advertisements on these platforms that use the inbound methodology will help attract the right talent.

Outside of your conscious efforts to hire the right people, try having an "always hiring" mentality. If you come across someone with great talent during a period when you weren't planning to hire, reevaluate if you could hire. If you don't have room in your budget yet to hire in an off-season (or at all), consider having a "bench."

Think about whom you might need on your team to support your clients and goals in three to six months. What do those roles look like? Start defining those positions and consider listing them on your website as bench spots. This way you can build a pool of applicants before you're ready to hire and have people to revisit when the timing is right. Lastly, consider hiring experts in other CRM platforms like Salesforce and Microsoft Dynamics, and train them on the HubSpot software.

Partner Pro Tip

"It's easier to teach someone how to use a new software than it is to train them on the larger perspective of how to use a CRM. In your hiring process, look for people who understand your company's overall methodology and worry about the software later."

– Michelle O'Keeffe, Engaging.io

Growing junior hires

If you're struggling to find HubSpot talent, you may have to build it yourself. This takes significantly more time and resources than hiring someone who is already an expert. But this investment will be worth it, in the long run, to help your business grow.

Find out where younger candidates with less experience hang out on the internet. You can also attract these types of candidates by crafting your job postings appropriately – be flexible in the type and amount of experience and education required for the position you're hiring for. Also consider offering perks and benefits that matter most to younger applicants: remote or hybrid work environments, flexible work schedules, generous time off, and quality healthcare plans.

As you're vetting and interviewing your applicants, remember that you're not necessarily looking for an exact match to the ideal skillsets and experience you desire. Look for ancillary skillsets, or entry-level candidates that have demonstrated a high level of aptitude and are coachable and eager to learn. Also consider hiring from other agencies that don't sell HubSpot but have taught your applicants the right skills to succeed in marketing, CRM implementation, website design, or whatever service your business provides.

Once you've attracted and hired the right candidates, it's time to invest in them. Beyond giving them a thorough onboarding process, create a 6- to 12-month curriculum that will turn them into HubSpot rockstars.

Tip: Work with your PDM for help in creating this curriculum.

Make good use of the HubSpot Academy and HubSpot certifications. Along the way, you can provide mentorship that will help your junior hires upskill and master the platform more quickly.

New hire training

Training new hires with a sustainable, repeatable process is essential for setting up your hires – and ultimately your business – for success. Here's an example adapted from Diamond partner Remotish's award-winning onboarding process:

Before you get started, document everything.

All processes, procedures, and policies should be documented so that anyone who starts can hit the ground running. If you do this now while your business is still in its infancy, it will allow you to easily and quickly scale when it's time to hire. Rather than sitting down with new employees and teaching them everything verbally, you can hand them the documentation to study on their own and ensure that everyone learns to do things the exact same way.

Onboard into the company.

For the first two weeks, Remotish trains employees about their company – their policies, procedures, and work methodology. If you're offering a flexible work schedule or unlimited time off, now is the time to teach best practices on how they can be used. This is the time for new employees to become experts on how your business accomplishes its day-to-day work.

Train via documentation and shadowing.

The next two weeks allow the new hire to learn by looking and listening. The employee usually doesn't work with clients during this period. While it's tempting for smaller agencies to get their new hires started working with clients right away, it's rare that a new employee can stand on their feet right away, says Nicole Pereira, CEO of Remotish. Avoid setting your new hires up for failure and give them adequate time to onboard.

Gradually transition into the new role.

For the next month, Remotish allows new employees to start working in their role at 50% capacity, gradually increasing to 100% capacity by the end of their third month. Throughout this time, the new employee is still being mentored, allowing them to continue to learn on the job. Their managers also build a 2-month plan after the employee's first month that includes instructions on how to do the work described in the job application, relevant resources, and people to talk to. Tip: To help your new hire invest their time appropriately during this stage, consider using a time-tracking tool.

Partner Pro Tip

"Focus on HubSpot certifications and accreditations. This is becoming important for matching for deals – not only taking certifications but maintaining them."

– Jeppe Nyrup, Avidly

In your early days, your new hire onboarding will likely be universal. As you scale and gain more employees that are doing the same role, you can expand into role-based onboarding.

Lean on HubSpot Academy lessons and certifications to help you train your new employees. You might even consider incentivizing getting and maintaining a certain set of certifications – HubSpot partner Manobyte does this by giving their employees a $25 Amazon gift card for every certification they earn. To go beyond HubSpot's certifications, consider paying for professional-level consulting and training services.

Another way to train your new hires before they work on a project with a real client is to assign roleplay projects. Provide briefing documents on a fake client and project, then give them access to a developer portal where they can try out solutions. In addition, shadowing current employees, especially account managers, on a project from beginning to end can give new employees valuable insights into your company's methodology and processes.

Outsourcing work

Different partners have different needs, and all of those needs should be taken into consideration before deciding whether or not to outsource a particular role or service. To decide what is right for your business while you're scaling, consider some of the pros and cons of working with contractors.

Pros

- Enables you to build a lean team without the costs of hiring a full-time employee
- Pay only for the time you need
- Don't need to spend valuable time training a contractor as you would a new employee
- Contractors can provide a fresh perspective on your organization's value proposition and your target clients' pain points
- Contractors often have a wider knowledge base due to working with a variety of clients

Cons

- Contractors will usually lack culture or company loyalty
- Contractors have limited knowledge of your company and your working methodology
- Contractors may overestimate their availability or underestimate the amount of time it will take to complete a task or project, incurring late work or extra costs for your business
- Reduced control over how work is completed

Books & Resources

HubSpot recommended

To dive more deeply into the topics covered in this playbook, check out the following resources, curated by HubSpot employees:

- Traction: Get a Grip on Your Business by Gino Wickman
- Empowering Marketing and Sales with HubSpot by Resa Gooding
- Open Book Management from HubSpot
- GWC framework - Get It, Want It, Capacity
- HubSpot's Monthly Flywheel Campaigns for Partners
- Never Lose a Customer Again by Joey Coleman
- Built to Sell by John Warrillow
- HubSpot Academy Learning Paths
- Videos on best practices for project management
- Ditto for Asana coaching
- Miro – online whiteboards for process mapping
- Agency Unfiltered podcast by HubSpot
  - Team Structure
  - Process Development
- Key HubSpot Academy lessons:
  - Building and Optimizing Your Team Structure
  - Inbound Sales for Solution Partners

Partner recommended

Here are some of the top tools and resources recommended by other HubSpot solutions partners:

- HubSpot knowledge base
- Project management: Asana, ClickUp
- Ticketing system: Jira
- Process documentation: Whimsical
- Communication: Slack
- Design: Canva, LucidChart, Figma
- Time tracking: Harvest, Toggl
- Video: Loom
- Accounting: Quickbooks, Xero

Our Contributors

We'd like to give a very special thank you to the partners who contributed to this playbook!
To learn more about these partners, click on their logo to visit their website.