

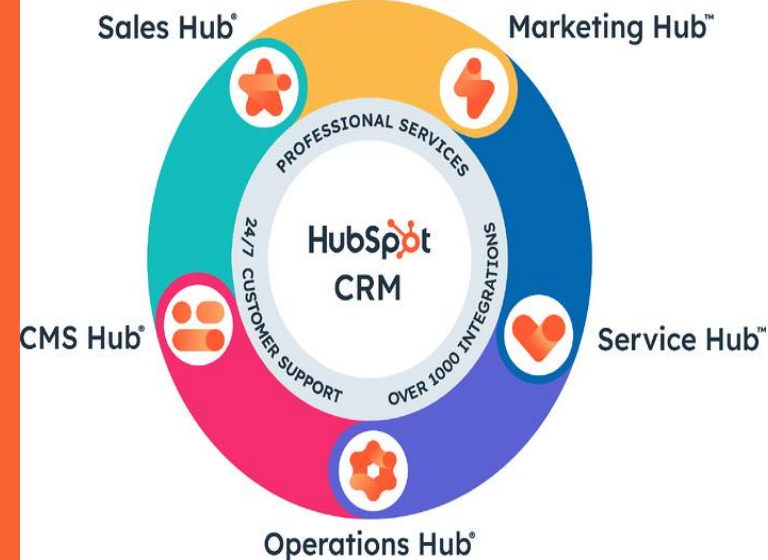
- ✓ Boost website traffic
- ✓ Capture leads
- ✓ Automate lead nurturing
- ✓ Convert the customer by making a sale

CRM application that creates an organized structure and enhances your sales process with automatic information on your leads.

HUBSPOT

Customization, Development, and Consulting Practice

Makes inbound sales very easy to manage



Our Offering:

HubSpot Offshoring – Building a dedicated software development team (complete with office space, administration, and management) in another country. There are many **benefits of offshoring**, most notably cost and access to a massive talent pool. You own the team entirely and they're fully integrated into your business but the administration is managed by your offshore development partner.

HubSpot Outsourcing – Hiring contractors to temporarily cover a lack of capacity. These are more like freelancers — called in when required, but independent from your organization.



Cognitive Convergence/MarConvergence Corp

<https://marconvergence.com/>
<http://cognitiveconvergence.com>

Our HubSpot Consulting:

<https://marconvergence.com/hubspot-management.html>

+1 4242530744

shahzad@cognitiveconvergence.com

Review us on the Microsoft website here:

<https://appsource.microsoft.com/en-pk/marketplace/partner-dir/01dec2cc-ce32-4da9-9d33-946f58de01dd/overview>

Review us on the HubSpot website here:

<https://ecosystem.hubspot.com/marketplace/solutions/cognitiveconvergencecorp>

👉 Our HubSpot Consulting Service as:

<https://marconvergence.com/hubspot-management.html>

👉 Our HubSpot Consulting Service as:

<https://www.youtube.com/watch?v=C6ybPbXJA8>

Kindly see Cognitive Convergence's vision for software development security below:

<http://www.cognitiveconvergence.com/ip-security.html>

To see other videos in Cognitive Convergence, please do visit this link:

https://www.youtube.com/channel/UCOdtEU8kIL_xC_Zu4yy7ycw/videos



About us

MarConvergence/Cognitive Convergence is a subject matter expert in HubSpot consulting has experienced consultants which will boost website traffic, capture leads, automate lead nurturing (i.e., build the relationship), and convert the customer by making a sale. Our core HubSpot consulting are:

- ✓ Planning marketing campaigns, establishing efficient sales processes, and building a customer-first services organization, as applicable.
- ✓ Best practices to set up HubSpot in a way that helps your team achieve optimal results.
- ✓ Quantifying the impact of your marketing, sales, and services activities with reporting and KPI tracking.

Current Location: Lewes, Delaware-USA/Lahore-Pakistan

Planned Front-end Office: California/Washington States- USA



Review us on the HubSpot website here:

<https://ecosystem.hubspot.com/marketplace/solutions/cognitiveconvergencecorp>



HubSpot – The Ultimate CRM Solution

- HubSpot is an inbound marketing and sales platform that helps companies to attract visitors, convert leads, and close customers.
- Bringing together a variety of functionalities and allowing marketing and sales departments to manage all their activities in one place.
- Includes content creation, social media sharing, workflow automation, lead capture, customer relationship management, sales pipeline mapping, and performance tracking.
- Companies are better equipped to manage sales and marketing activities efficiently, and leads can be nurtured through the buyer's journey effortlessly.
- No more siloed information , no more misaligned departments. Everything happens in one place.

With HubSpot, you can:

- Boost website traffic
- Capture leads
- Automate lead nurturing (i.e., build the relationship)
- Convert the customer by making a sale



HubSpot-Marketing Hub™ Consultancy

✓ Blog

Publish content audience is looking for, and get discovered in search, social media, and beyond.

✓ SEO

Build search authority and outrank competitors with tools

✓ Ad Tracking & Management

Stop struggling to justify ad spend. Manage Facebook, LinkedIn, and Google ads

✓ Social Media Management

Stop letting important interactions go unnoticed. Monitor and prioritize conversations

✓ Video

Enhance the impact of content through the power of video.

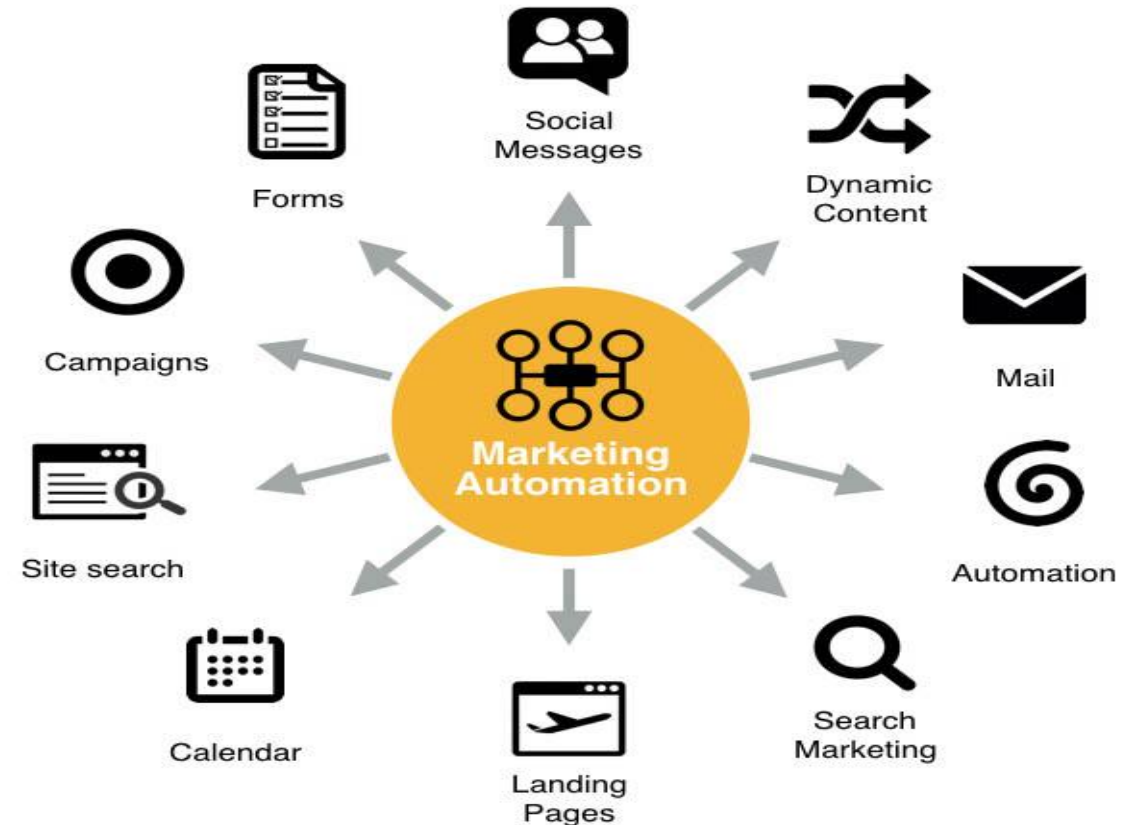
✓ Live Chat

Connect with and convert visitors in real time

Marketing Consultancy, Customization, implementation

✓ Marketing software to help attract the right audience, convert more visitors into customers, and run complete inbound marketing campaigns at scale — all on one powerful, easy-to-use platform.

✓ Attract visitors through blogging, social media, ads, and more. Convert visitors into customers with landing pages, email, marketing automation, ABM, and more. Track ROI with revenue attribution reporting. All powered by the customer data in your CRM to enable personalization at scale.



HubSpot-Sales Hub™ Consultancy

✓ Email Templates

Turn best sales emails into templates you can personalize

✓ Email Tracking

Know the second a lead opens an email so can follow up

✓ Document Management & Tracking

Build a library of helpful sales content, share documents right from Gmail or Outlook

✓ Conversation Intelligence

Automatically capture call details, then unlock coaching opportunities

✓ Call Tracking

Prioritize day's sales calls. Make, record, and automatically log calls

✓ Sales Automation

Set up a series of automated, personalized emails and follow-up tasks

Sales Consultancy, Customization, implementation

✓ Powerful sales software to help teams close more deals, deepen relationships, and manage their pipeline more effectively — all on one connected platform.

✓ Includes a fully featured sales CRM, sales engagement tools, quote and CPQ functionality, reporting and analytics, and more — plus the ability to seamlessly integrate with more than 1,250 tools in HubSpot's App Marketplace.



HubSpot-Service Hub™ Consultancy

✓ Customer Portal

Empower customers to gain ownership over their experience with a secure customer portal.

✓ Knowledge Base

Help customers help themselves, and reduce number of support requests.

✓ Omni-Channel Messaging

Provide a superior customer experience regardless of the channel.

✓ Inbound Calling

Receive inbound calls from customers and track them in HubSpot.

✓ Live Chat

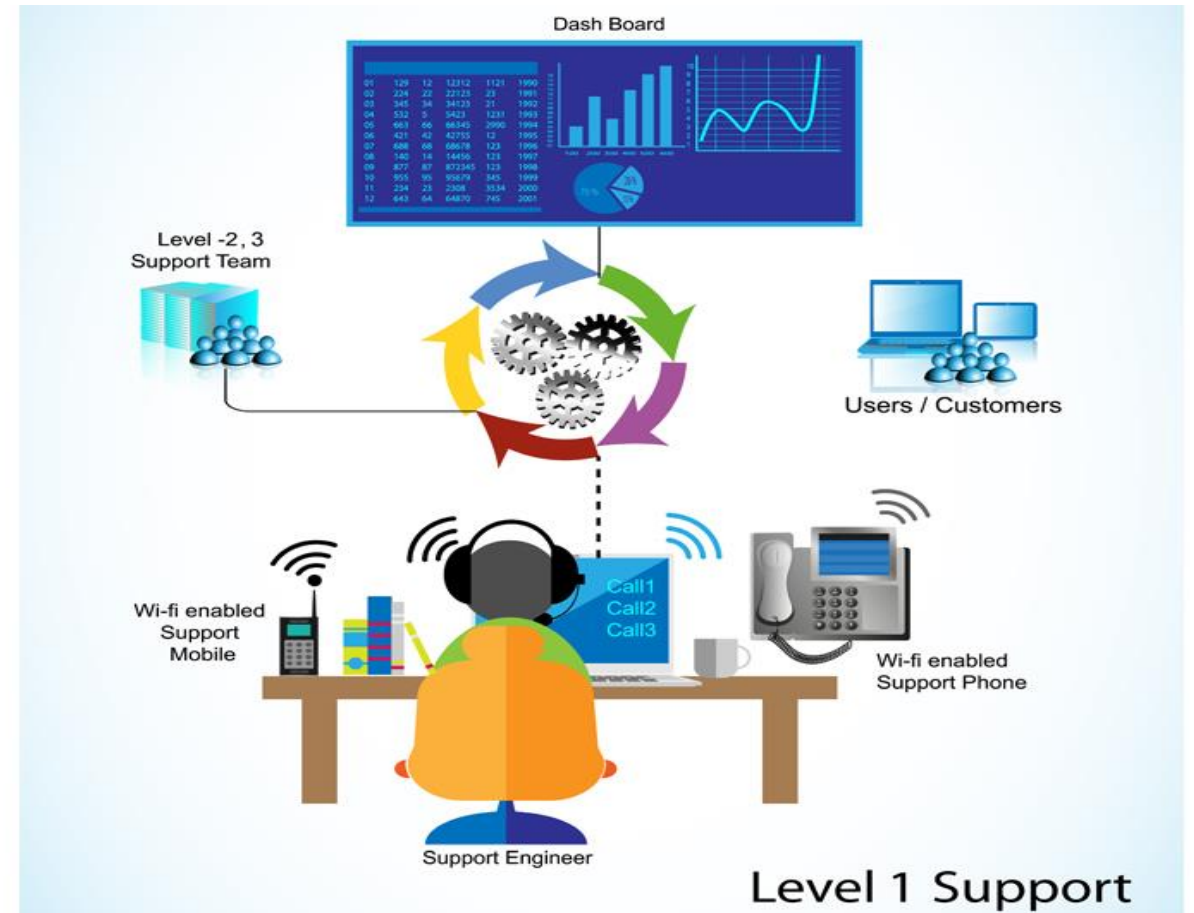
Help customers on website in real time.

✓ VoIP Calling

Call customers directly from the HubSpot platform with HubSpot's VoIP software.

Service Consultancy, Customization, implementation

- ✓ Customer service software that helps you deepen customer relationships, connect to the front office, and drive team efficiency. Service Hub is easy to use and connected to HubSpot's full CRM platform to help deliver authentic service and put the customer first.
- ✓ Includes conversational tools, a shared inbox, help desk automation, knowledge base functionality, customer feedback and custom surveys, reporting, a customer portal, playbooks, and more — all powered by a CRM to give business one unified view of each customer interaction.



HubSpot-CMS Consultancy

✓ Drag and Drop Website Builder

Update and create pages without a developer's help or custom code.

✓ Website Themes and Templates

Use one of HubSpot's pre-built website themes with the option for custom development.

✓ Fully integrated CRM

Track visitors to site in one place and create personalized digital experiences leveraging CRM data.

✓ Web Hosting

Host website on a fully managed and optimized infrastructure that scales with your business.

✓ Custom Domain Connection

Connect a custom domain to your website to instill trust in brand and build organic search authority from the start.

✓ Blog Maker

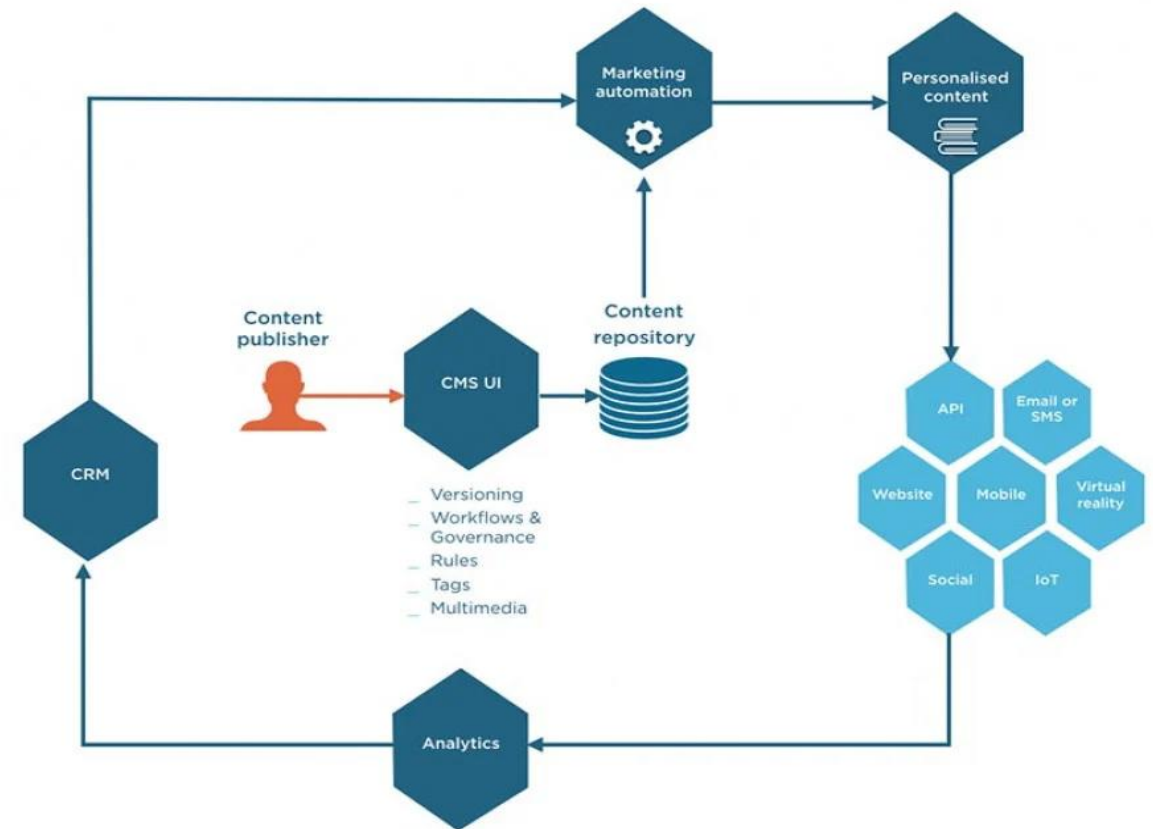
Grow audience with SEO-friendly content.

CMS Consultancy, Customization, implementation

✓ Content management software that's flexible for marketers, powerful for developers, and gives your customers a personalized, secure experience.

✓ Includes hosting, flexible themes, dynamic content, drag-and-drop page editing, memberships, and more — all powered by a CRM platform that allows you to build seamless digital experiences for your customers.

THE MODERN CMS



HubSpot-Operations Hub® Consultancy

✓ Data Sync

Keep your apps and data in sync in an easy, no-code package.

✓ Data Quality Automation

Eliminate time-consuming data cleanup. Automatically fix date properties, format names, and more

✓ Data Quality Command Center

Get at-a-glance insights on the health of your HubSpot data in one central place.

✓ Programmable Automation

Keep your team efficient and customers happy.

✓ Workflow Extensions

Trigger actions in third-party systems—a Slack message, a Zoom invite, an Asana task

✓ Trigger actions in third-party systems—a Slack message, a Zoom invite, an Asana task, and dozens more—from your HubSpot workflows.

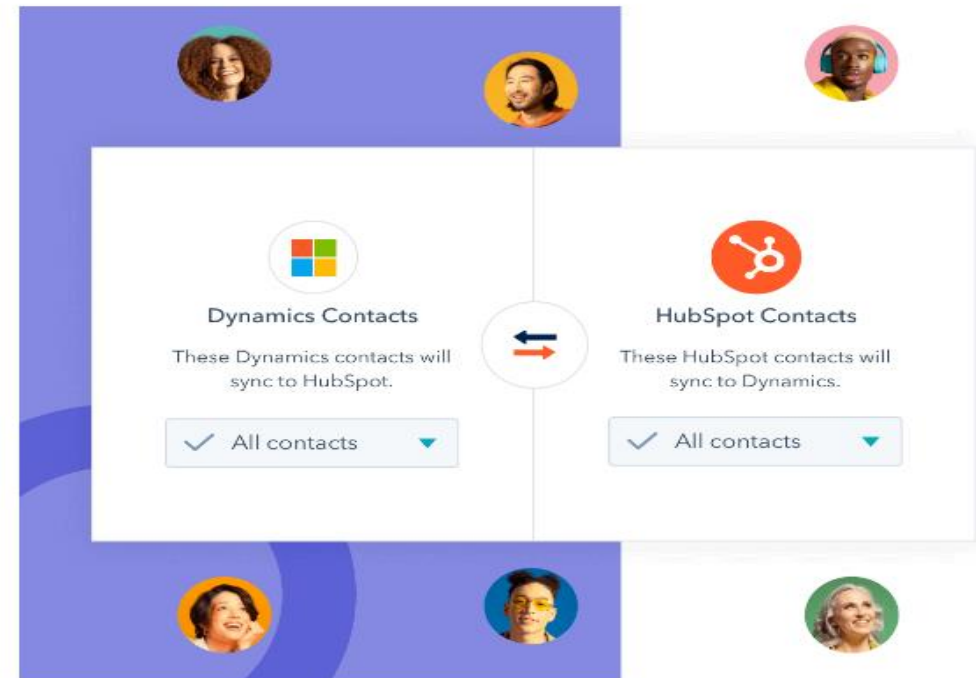
✓ Team Management and Permissions

Keep your team organized and efficient by ensuring every user has access to the right assets

Operations Software - Consultancy, Customization, implementation

✓ Operations software that lets you easily sync, clean, and curate customer data, and automate business processes. Your entire team will stay aligned with a clean, connected source of truth for customer data, and your business will be empowered to adapt to the ever-changing needs of your customers.

✓ Includes programmable automation, data sync, data curation, and data quality tools — all powered by HubSpot's CRM platform. Your business will have one unified view of every customer interaction, and be empowered to deliver friction-free customer experiences.



HubSpot- Commerce Hub® Consultancy

✓ Invoices

Quickly turn quotes into cash with invoices sent directly from your HubSpot Smart CRM. Stay on top of invoices with overdue invoice tracking and management.

✓ Payment Links

Create simple yet powerful payment links that enable you to sell from anywhere — your website, forms, email, and more.

✓ Quotes

Create and send quotes on beautifully branded templates, powered by data in your CRM.

✓ Subscriptions

Collect, manage, and report on recurring payments directly alongside your HubSpot Smart CRM.

✓ B2B Checkout

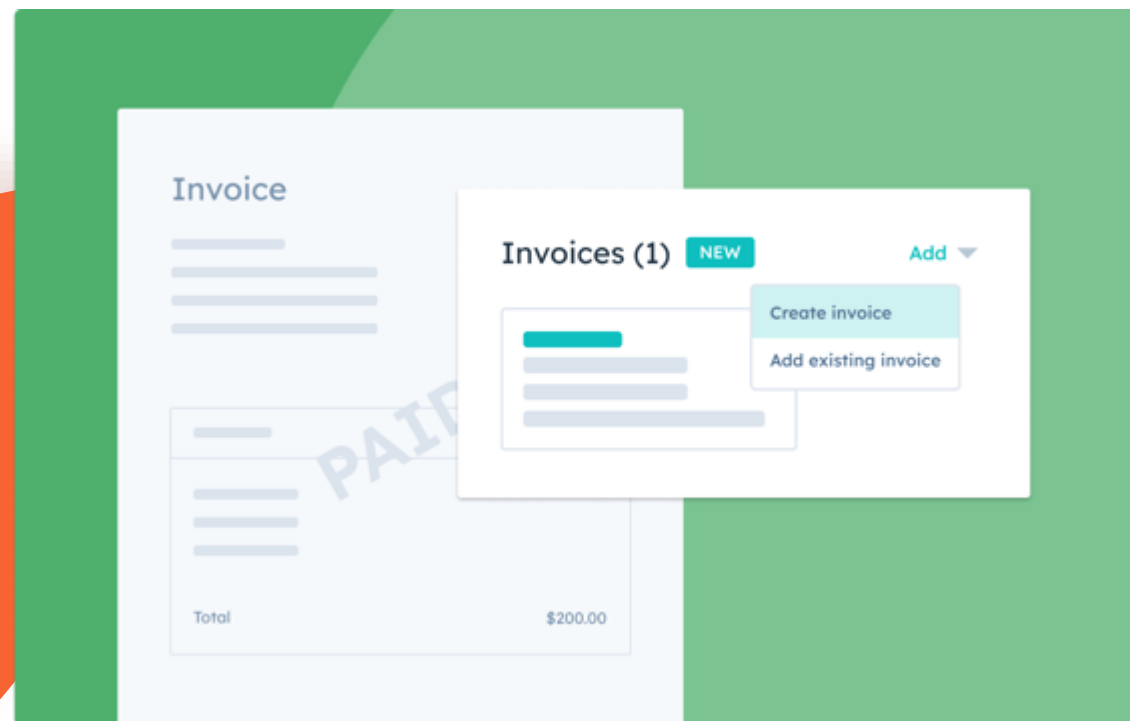
Create an exceptional checkout experience for your customers, all on top of your HubSpot Smart CRM.

✓ Flexible Payment Processing

Seamlessly and quickly collect money from your customers directly from HubSpot's Smart CRM with your existing Stripe log-in (beta) or HubSpot payments.

Commerce Software - Consultancy, Customization, implementation

- ✓ Powerful and easy-to-use commerce tools to help business bill customers and collect revenue.
- ✓ Fully featured commerce software with: payment links, invoices, quotes, subscription management, automation and revenue reporting. Choose your payment processor — HubSpot payments or Stripe payment processing.





Easily Create and Add Contacts



- Add a contact by clicking on the **Create contact**
- Adding all the details the system is asking for.

Import contacts from your computer through the Excel file because manually putting all the information for each contact is difficult.

Import a regular list of people who you want to have as contacts, click File from Computer, then click Next.

Option to import one or multiple files, and then you have the option to import one or multiple objects.

Contact Notes

Notes section (in the center of the card), you can view or create notes to keep important info front and center.

Contact owner

- Can be any HubSpot user or Salesforce integration user and can be set manually or via Workflow.
- Assign additional users to the contact record by creating a custom HubSpot user field type property.

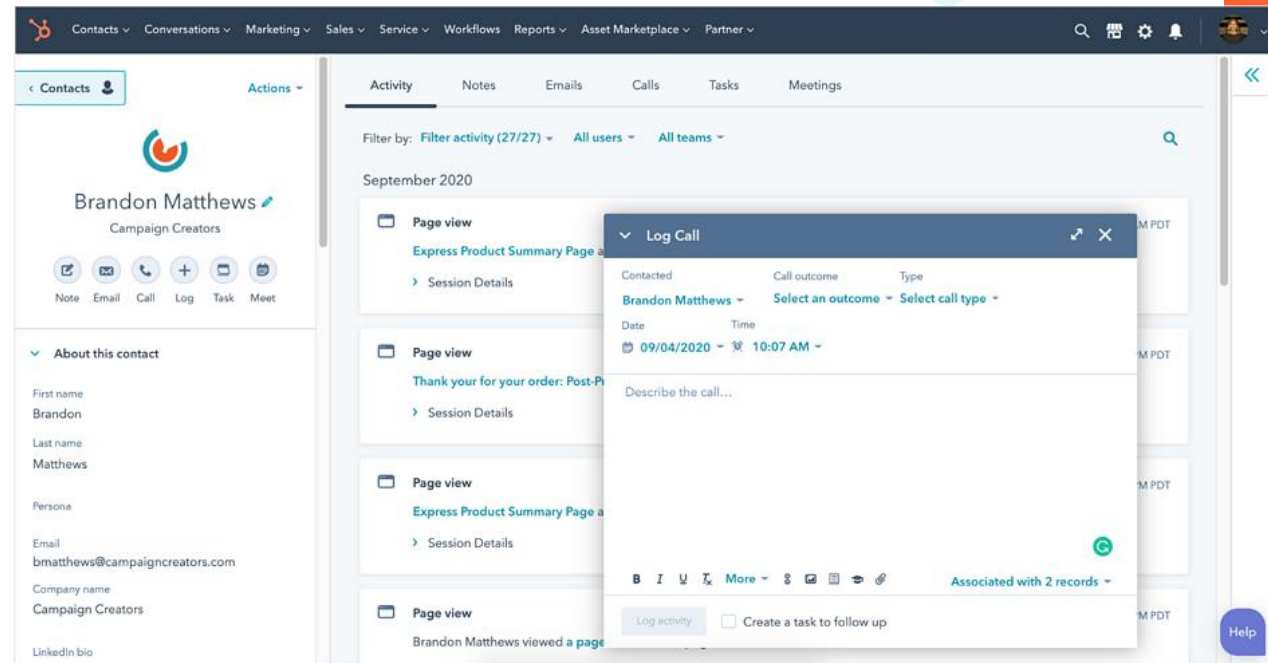
Calls from HubSpot

- Easily make a direct call to contacts that you have already created or imported from your computer.
- Receive or dial a call the history that will appear in the Call tab, can log or make a phone call.
- Can make a phone call right from the HubSpot plugin which lets you record call information and notes on the contact's card.



Companies in HubSpot

- Create data according to the companies by clicking the **Create Companies**.



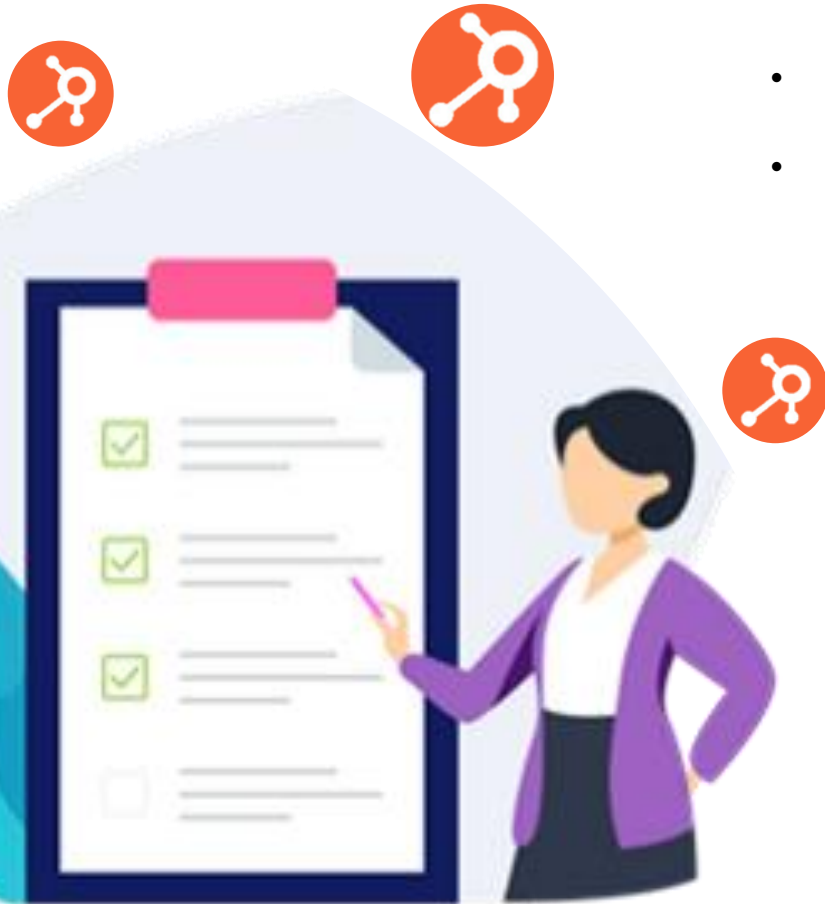
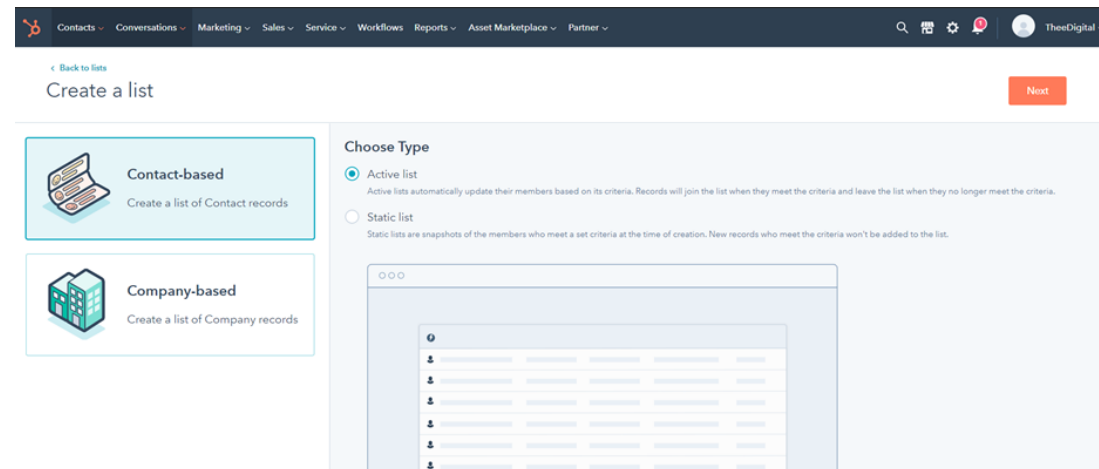
Activity feed

Activities that you have performed on HubSpot will be visible on the activity feed.



Lists

- Categorize the contacts by making a list
- The lists tool in HubSpot allows you to create a list of contacts or companies based on property values and other characteristics, including activities.
- To set up your list criteria and add records to existing lists, learn how to determine criteria or manually add records to static lists.
- Some uses of lists in HubSpot include:
 1. Sending a marketing email to a list of contacts;
 2. Creating a list of bounced contacts;
 3. Enrolling a list in a workflow;
 4. Using List membership filters in other lists and custom reports;
 5. Creating ads audiences with lists



Types of lists

There are two types of lists in your HubSpot account:

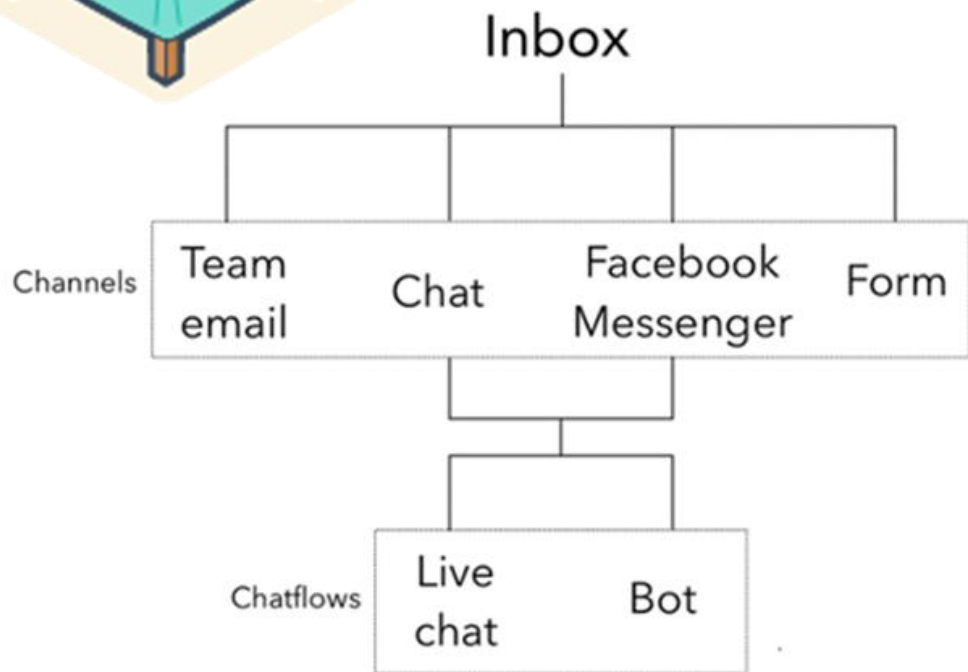
Active lists

- Active lists automatically update their members based on theirs.
- Records will join the list when they meet the criteria and leave the list when they no longer meet the criteria.

Static lists

- Static lists include records that meet set criteria at the point when the list is saved.
- Do not update automatically, so new records that meet the criteria will not be added to the list.
- Records can be manually added and removed from static lists.



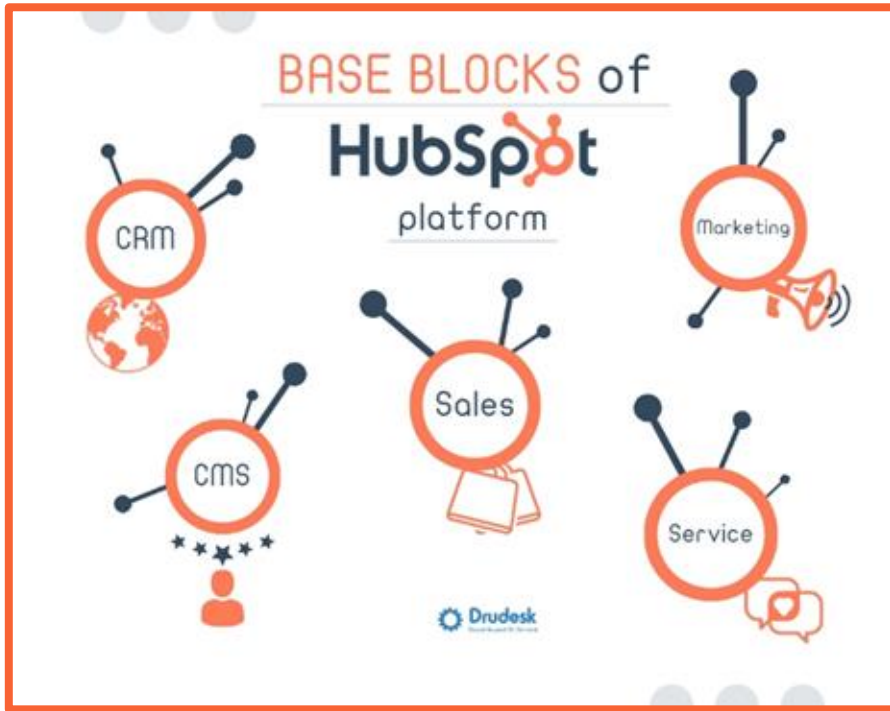


Conversations

- Manage 1-to-1 customer communications at scale through a universal, collaborative, inbox that aggregates customer emails, chats, and more — and is accessible to your entire team.
- Your team can view, manage, and reply to incoming messages from multiple channels.
- Triage messages are sent via email address, Facebook, or your website in one unified inbox.
- Create tickets from each conversation to track a visitor's experience with your business.

Conversations inbox

- Enter a name for your inbox and add team members.
- Haven't connected a team email yet, HubSpot will automatically create a fallback email address in the inbox that allows you to use certain HubSpot tools, such as ticket automation.
 1. Set up the conversations inbox
 2. A guide to the conversations inbox
 3. Manage your inbox users



Chat flow

- Create chat flows for your website pages.
- Depending on your goal, you will either create a live chat.
- Use targeting rules so that the chat flow appears on some of your pages or all of your pages.
- Set up your user profile so your avatar, name, and preferred meeting link display when visitors are chatting with you.

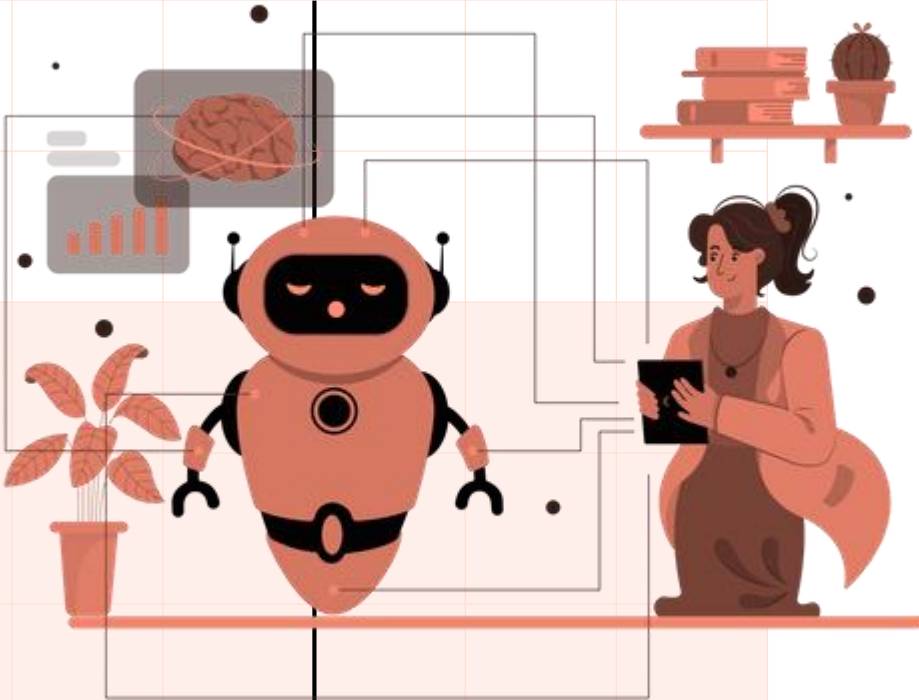
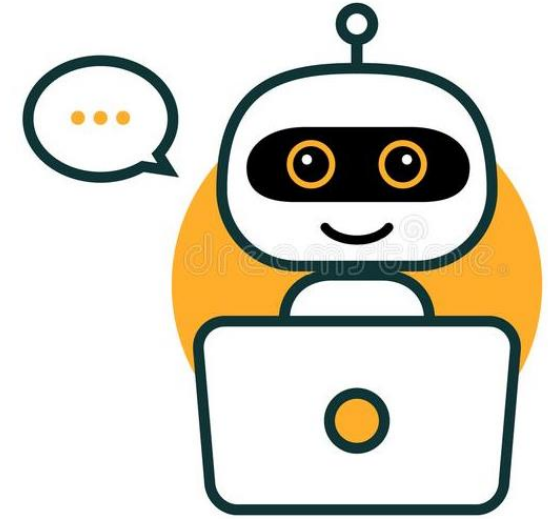
Using the inbox

- Visitor who sends an email, starts a chat, or submits a form, can reply to them in the inbox.
- Can create a contact record to add them to your database.
- Any contact who has messaged your team before, you'll see the known information about the contact, associated records, and past conversations in the right sidebar.
- Add a comment to an ongoing thread or reassign the conversation to another team member.
 1. Compose and reply to emails in the conversations inbox
 2. Chat with your website visitors
 3. Collaborate with your team in the inbox
 4. Manage tickets in your inbox



Create a live chat

- Create a chat flow with live chat to connect visitors directly with members of your team.
- Live chat will appear as a widget on your website pages that visitors can click to start a real-time conversation with someone on your team.
- Create a live chat to connect a visitor on your pricing page to a member of your sales team,
- Another live chat that connects a visitor on your knowledge base articles to a member of your support team.

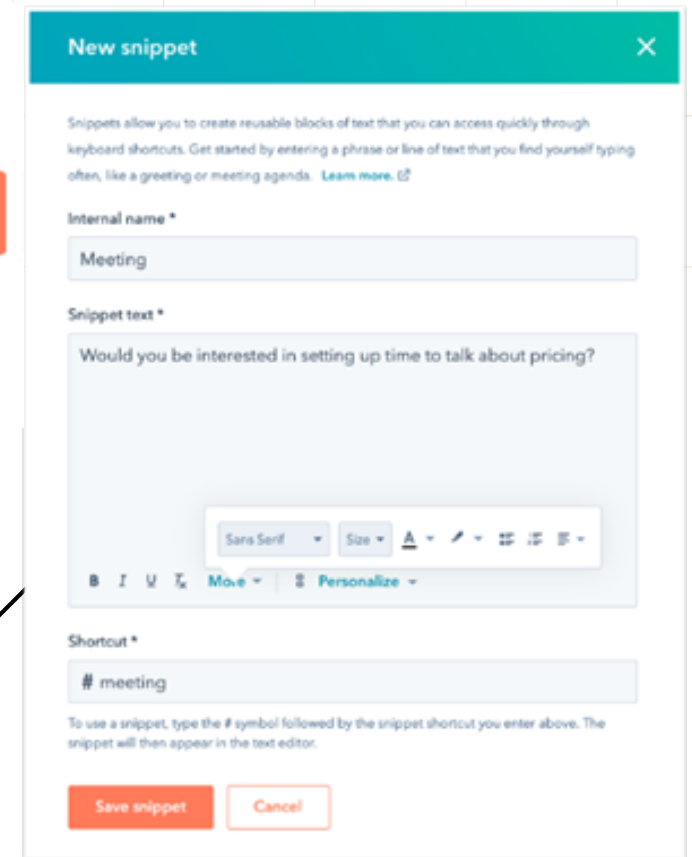


Create a bot

- Create a chat flow with a bot to connect with your website visitors.
- Bot will appear as a chat widget on your website pages where a visitor can start a conversation.
- Helps qualify leads, book meetings, or create support tickets by sending a series of questions and automated responses.
- Gather initial information about the visitor before a member of your team takes over the conversation.



Create and use Snippets

The screenshot shows a "New snippet" form. It has a teal header with a close button. The form includes a text field for "Internal name" (containing "Meeting"), a text area for "Snippet text" (containing "Would you be interested in setting up time to talk about pricing?"), a text field for "Shortcut" (containing "# meeting"), and a rich text editor with a toolbar. At the bottom are "Save snippet" and "Cancel" buttons.

New snippet

Snippets allow you to create reusable blocks of text that you can access quickly through keyboard shortcuts. Get started by entering a phrase or line of text that you find yourself typing often, like a greeting or meeting agenda. [Learn more.](#)

Internal name *

Meeting

Snippet text *

Would you be interested in setting up time to talk about pricing?

Sans Serif Size A B I U T Move Personalize

Shortcut *

meeting

To use a snippet, type the # symbol followed by the snippet shortcut you enter above. The snippet will then appear in the text editor.

Save snippet Cancel

- ✓ Snippets are short, reusable text blocks that can be used on contact, company, deal, and ticket records; in email templates; in chat conversations; and when logging activity or notes.
- ✓ Create reusable emails, and learn more about the templates tool.
Leave notes about prospects in the CRM, quickly pull in important details when writing an email to a prospect, and quick responses during a live chat conversation.



- ✓ Insert a snippet when logging activity or leaving a comment on a record using the HubSpot mobile app for Android.
- ✓ There are two ways to add a snippet:
 1. Type the # symbol into the text editor. Start typing the snippet shortcut, then select the snippet from the dropdown menu. The snippet will automatically populate in the text editor.
 2. At the bottom of the text editor, click the snippets icon, then select a snippet from the dropdown menu.

Email

- Email templates are used by the email tool.
- Astringent set of requirements since they need to be viewed by many different email clients and conform to best practices to ensure proper deliverability.
- Both HTML + HubL and design manager drag and drop email templates come pre-populated with baseline components upon creation
- Template types are only visible for template selection when creating an email.

Send invite email:

- By default, HubSpot sends an invite email to new users with a link to set their password.
- If the user has already set up a HubSpot password for another account, you can skip sending the welcome email by selecting the **don't send an email invite when this user is added to the HubSpot** checkbox.



Templates

- Layout of your HubSpot pages, emails, and themes.
- consists of modules and partials, and can reference other assets such as stylesheets and JavaScript files.
- Created either using the HubSpot CLI or in HubSpot's design manager
- For content creators, the template is the first thing they'll select when creating a page or email.

Template types:

- Used for different types of content, such as website pages and blog posts.
- In coded templates, you designate the type of template by adding an annotation at the top of the file



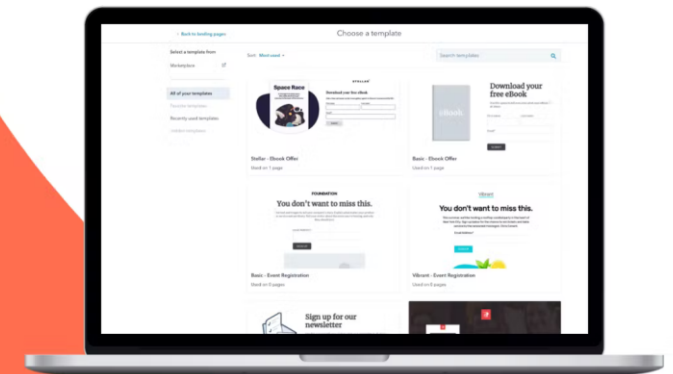
Landing Pages

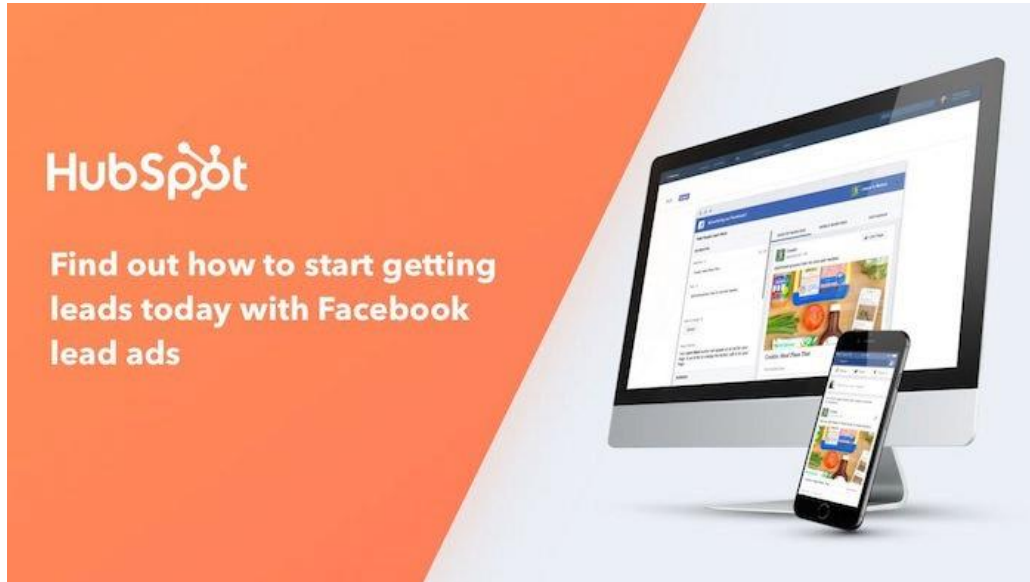


- Page templates are the most open-ended template type.
- Serve as any flavor of web page or landing page.
- Page Layouts are not pre-populated with any components.
- Coded page templates come pre-populated with sparse markup including suggested HubL tags for meta info, title, and required header/footer includes.
- **Examples** of pages that would typically use a page template would include but are not limited to:
 1. Homepage
 2. About us
 3. Contact

Select your template.

Choose from any of our pre-built templates and edit it to meet your exact needs.





Ads

- Generate new leads with simple ad creation and seamless lead syncing.
- Creating, measuring, and optimizing ads across multiple platforms is time-consuming.
- It's hard to commit a budget to ads when you are seeing less and less return on your ad spend.
- HubSpot ad management helps marketers stay targeted and relevant throughout the customer journey and, most importantly, drive more conversions and ROI.
- With CRM-powered targeting, the ability to report on data at every stage, you can manage your leads at scale and with efficiency--all from one data source, on one platform.

Ad tracking in HubSpot

- Tracking allows HubSpot to attribute contacts to specific ads, by applying tracking parameters to the end of your ad URLs.
- Connect your ad account, and HubSpot will apply tracking to ads that are currently active or pending review.
- If HubSpot is unable to track an ad, some reporting data from the network like clicks and impressions will still display for that ad in the HubSpot ads tool.
- HubSpot is only able to track the following types of ads for contact attribution:

Google Ads, Facebook Ads, Instagram Ads, and LinkedIn Ads



HubSpot Forms

- HubSpot Forms is simply an online form creation tool in HubSpot.
- HubSpot Forms is an intelligent way to capture contact information from your inbound efforts.
- Quickly add forms to your website, whether it was created in HubSpot or not.

Choose a pop-up form type



Pop-up box



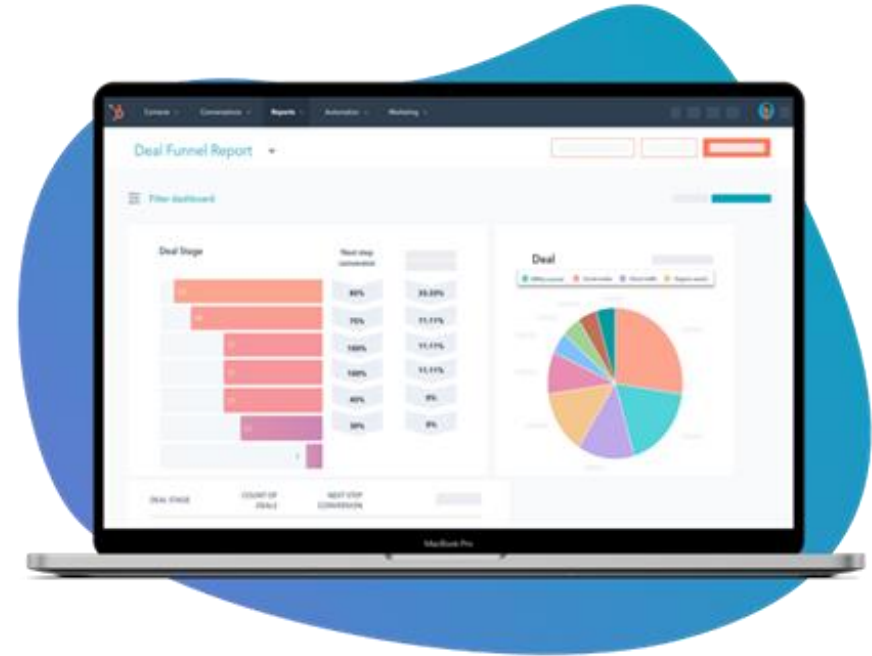
Drop-down banner



Slide-in box left



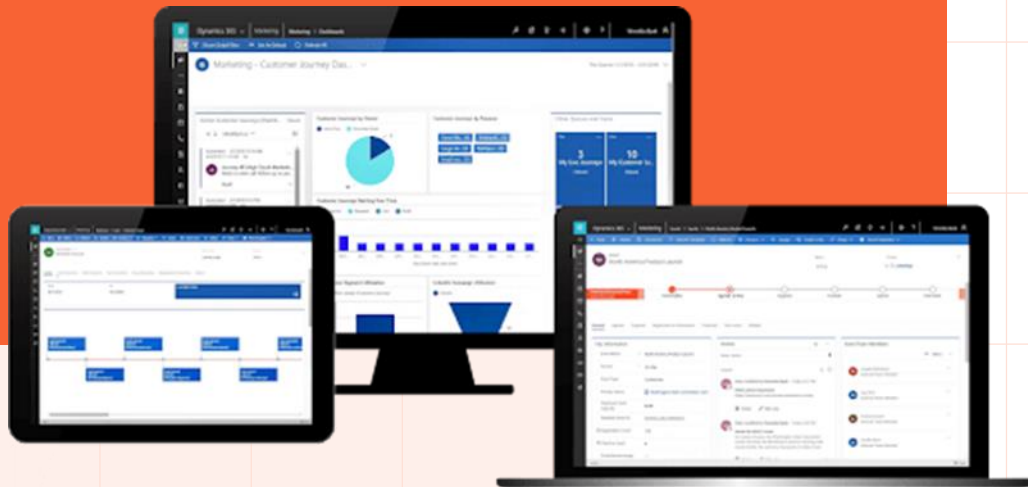
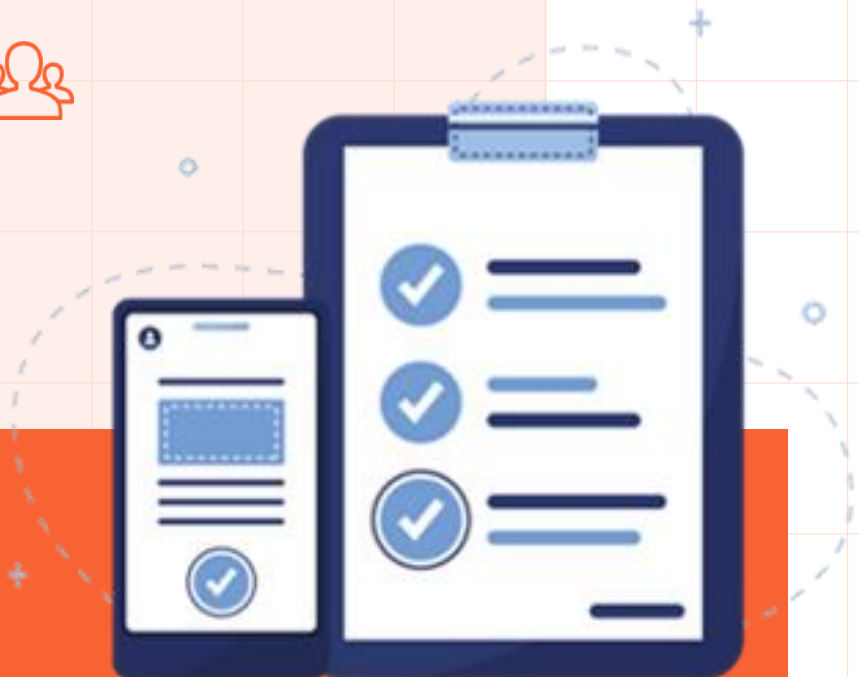
Slide-in box right



Deals

- Deals in HubSpot to track potential revenue.
- Contact takes an action that could lead to revenue, such as booking a meeting with you to discuss your product or service.
- When created, a deal record should be associated with the contacts and companies that are involved with the deal. This helps HubSpot associate the relevant activities to the deal record.

Tasks



- Keep track of your to-do list in HubSpot by creating tasks.
- Create tasks as reminders for specific records and manage multiple tasks in task queues.
- Once you've created tasks, learn how to edit, complete, and delete tasks.

Task details:

- Regardless of where you create a task in HubSpot, you can fill in the following information.
1. **Title:** enter a **task name** in the *Title* field.
 2. **Type:** select **Call**, **Email**, or **To-do**.
 3. **Priority:** select if the task is a high priority.
 4. **Associate with records or [x] associations:** search and select **records** to associate with the task.
 5. **Assigned to:** select the **user** to who the task is assigned.
 6. **Queue:** add the task to an existing task queue or create a new task queue.
 7. **Due date:** select the **date** and **time** the task is due.
 8. **Task reminders** or **Send reminders**
 9. **Notes:** enter details about your task.

Upload documents

With the documents tool, you can build a library of content for your entire team to upload and share documents with your contacts.

Share your document with contacts:

- HubSpot will automatically apply to track when you share a document
- Show you if/when your contact views the document.
- Require recipients to enter their email addresses before viewing the content.



13 of 1,000 created

New folder

Upload new document ▼

Search all documents

LINKS CREATED	VIEWS	OWNER ▼
7	9	Julia Mongea

Local file

Choose existing file

Dropbox

Google Drive

Box

Create tickets

- Organize all of your customer inquiries in one place and track trends over time.
- Create individual tickets from your tickets index page, a contact record, or your conversations inbox.
- Automate the process using workflows and the support form.



Connect your calendar

Calendar that is hosted with Google Apps (G Suite), Gmail (Google Free), or Office 365 to the meetings tool. Before connecting your calendar, keep in mind the following:

1. When you connect a calendar to the meetings tool, the associated inbox will automatically connect in your email integration settings.
2. Once your calendar is integrated, you can disable the inbox connection without disabling the calendar connection
3. Connect your inbox as a shared inbox in the conversation tool, your calendar cannot be connected with the meetings tool.
4. Only personal inboxes can be connected to the meetings tool.



Manage meetings tool settings:

- Connect a Google or Office 365 calendar to the meetings tool
- An event on your connected calendar, the scheduling page will show that you're busy during the event time.
- Edit the default scheduling page
- If Calendar is not connected, the scheduling page will be in offline mode, so meetings can be requested but will not be automatically added to the calendar.

A screenshot of a meeting scheduling interface. On the left, a dark grey sidebar shows a profile picture of a woman, the title 'Schedule Your Meeting with Kara', and a calendar for September with the 4th highlighted. The main area on the right is white and contains two sections: 'How long do you need?' with a '30 mins' button, and 'What time works best?' with a dropdown menu showing 'UTC -07:00 Pacific Time' and a list of time slots from 11:30 am to 12:45 pm.

How long do you need?

30 mins

What time works best?

UTC -07:00 Pacific Time

11:30 am

11:45 am

12:00 pm

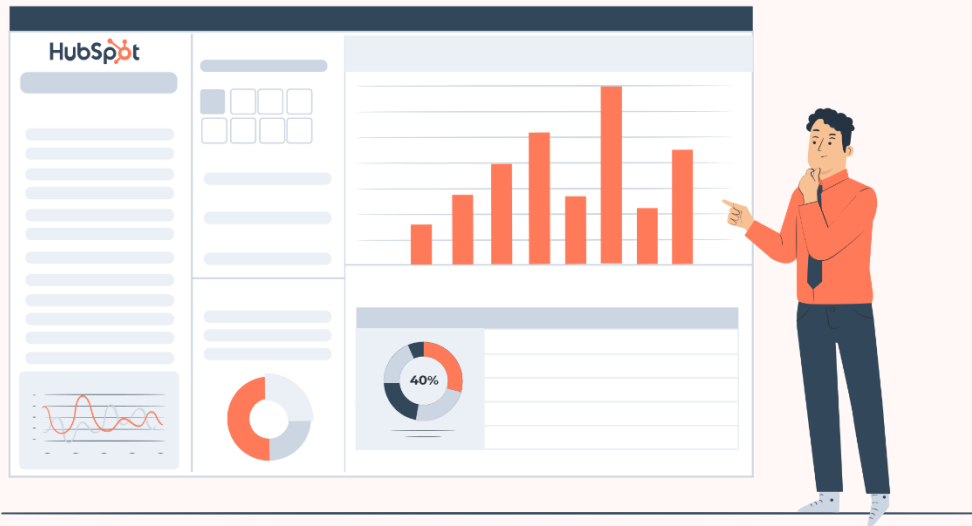
12:15 pm

12:30 pm

12:45 pm

Create custom reports

- Flexibility in analyzing objects and activities in your HubSpot account.
- Different types of custom reports that you can create, based on your reporting needs.
- Custom report to your [reports list](#), a [dashboard](#), or save it as an export.
- Depending on your subscription, you can create the following types of custom reports:



- ✓ [Single object reports](#): analyze contacts, companies, deals, tickets, quotes, custom objects, activities, line items, or feedback submissions.
- ✓ [Funnel reports](#): measure the conversion rates between certain stages in a customer's lifecycle or deal's pipeline. You can also create a custom events funnel if you have an Enterprise subscription.

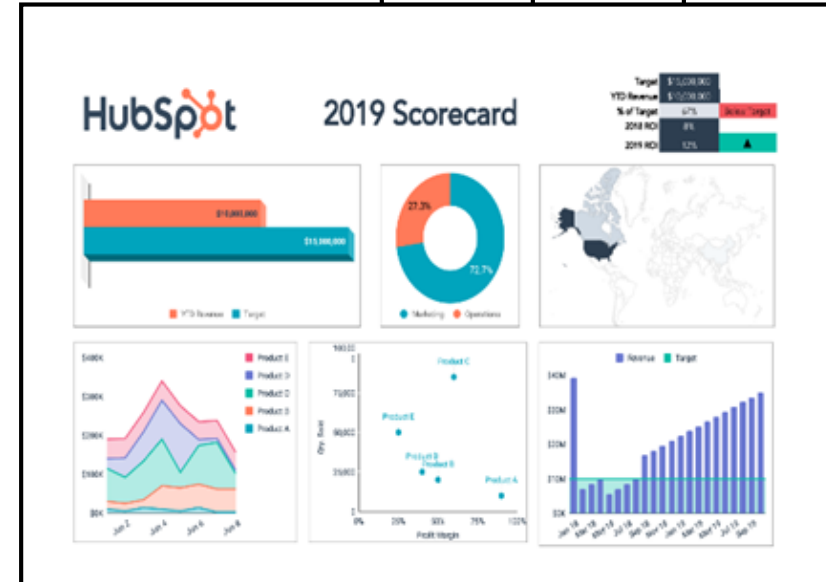
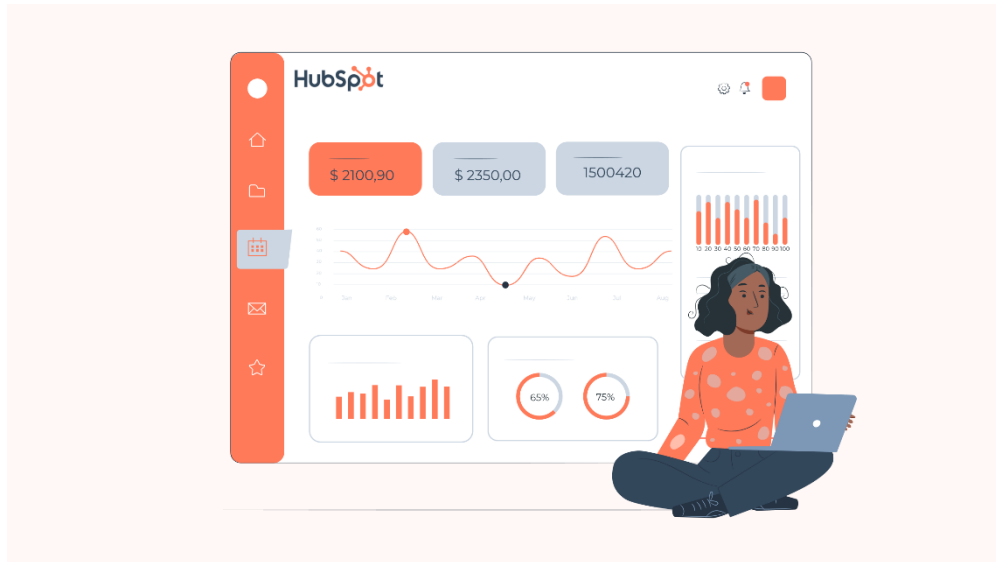
- ✓ [Custom report builder](#): an advanced report builder that enables you to analyze objects in relation to marketing, sales, and service activities.
- ✓ Measure of which sources, assets, and interactions impacted lead generation (**Marketing Hub** and **CMS Hub Enterprise** only).



- ✓ [Deal creates attribution reports](#): a measure of which sources, assets and interactions impacted deal generation (**Marketing Hub Enterprise** only).
- ✓ Measure which sources, assets, and interactions impacted revenue (**Marketing Hub Enterprise** only).

Manage your dashboards with HubSpot

- Organize related reports into one view using a dashboard.
- Share dashboards with other users in your account, and clone or delete existing dashboards to stay organized.
- Customize reports for your personal use.
- Share a dashboard with others in your HubSpot account, and edit its visibility.
- Clone dashboards that are visible to you and delete dashboards you've created to reduce clutter.



Contact us

HubSpot Consulting Services of Cognitive Convergence offers strategic opportunities to clients, investors, and partners.

Cognitive Convergence/MarConvergence

<https://marconvergence.com/>

<http://cognitiveconvergence.com>

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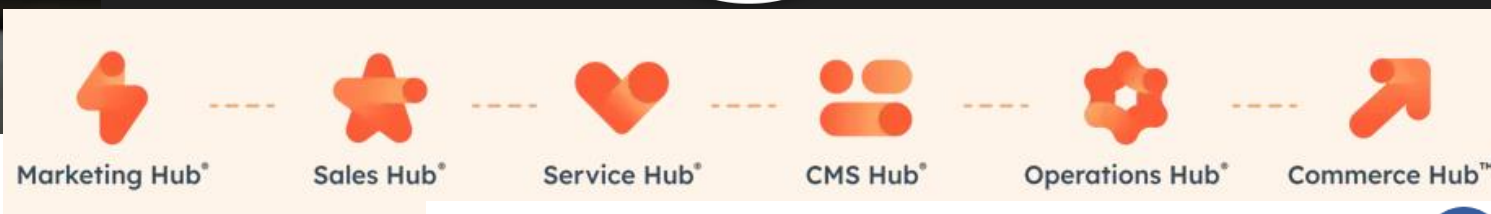
For questions or queries, contact us, we will be sure to get back to you as soon as possible

Review us on the HubSpot website here:

<https://ecosystem.hubspot.com/marketplace/solutions/cognitiveconvergencecorp>

Our HubSpot Consulting Service as:

<https://marconvergence.com/hubspot-management.html>



Review us on the Microsoft website here:

<https://appsource.microsoft.com/en-pk/marketplace/partner-dir/01dec2cc-ce32-4da9-9d33-946f58de01dd/overview>

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👉👉Our HubSpot Consulting Service as:

<https://www.youtube.com/watch?v=C6ybPbXJAt8>

As most of our clients are from USA and Europe, so we take security related to software development important.

Kindly see Cognitive Convergence's vision for software development security below:

<http://www.cognitiveconvergence.com/ip-security.html>

To see other videos in Cognitive Convergence, please do visit this link:

https://www.youtube.com/channel/UCOdTEU8k1L_xC_Zu4yy7ycw/videos

THANK YOU

Our Offering:

HubSpot Offshoring – Building a dedicated software development team (complete with office space, administration, and management) in another country. There are many **benefits of offshoring**, most notably cost and access to a massive talent pool. You own the team entirely and they're fully integrated into your business but the administration is managed by your offshore development partner.

HubSpot Outsourcing – Hiring contractors to temporarily cover a lack of capacity. These are more like freelancers — called in when required, but independent from your organization.