**How to Add and Update a Contact to HER Business Revolution Hubspot CRM Database**

1) Visit www.herbusinessrevolution.biz and add the contact in the site top bar or through the form on www.herbusinessrevolution.biz/free-gifts-training if the top bar doesn't show. This step MUST be completed before going into Hubspot directly as it is how the contacts get saved into the database and sent our automated emails of value! Remember to do this for ALL new contacts your receive through Eventbrite, directly or via social media.

2) Log in to Hubspot and find and select this contact and assign it to you (by going into the contact and changing the contact owner on the left hand side). Your profile settings only allow you to see your owned contacts and unassigned ones therefore any contacts owned/managed by another Area Event Manager won't show up under contacts for you. You can select 'My Contacts' at anytime just to show the contacts you manage, or use the search function to find a particular contact record.

3) Any contact you have with this person can then be recorded and the lead status (on left hand side) changed depending on your progress to convert them to membership/your Hostess/etc. You can also send and email to a contact directly within Hubspot by clicking on the 'Email' icon when it their contact record, which will then be saved within Hubspot and any replies will come into the Hubspot inbox. You are welcome to use this function but if you prefer not to then just update the contact manually with any communication you have with the contact under the 'Notes' icon within their contact record.

4) If you are organising an event or need these contacts on some sort of list then you can add them to a list when within their contact record to the right hand side. In the future you can view this list with the lists option under the 'Contacts' tab.

5) The aim of the above is so we can monitor what is happening with our subscribers and more easily convert them into paying customers, without the need of various systems and spreadsheets.

6) When contacts convert to members you DO NOT need to do anything within Hubspot as this process will happen automatically and also work out your commission due. Due to this you will not need to touch the 'Deals' tab unless you want to use this to check whether a contract is already a member.

The above instructions are Stage One of the use of Hubspot CRM for HER Business Revolution, of which additional stages will be implemented to improve the process in the future. Full details will be communicated as appropriate.