



Beginner's Guide To  
HubSpot's Free Tools

# Overview

## What is HubSpot?

- Key Features
- Impact for Small Businesses

## Introduction to Free Tools

- Customer Relationship Management
- Email Marketing
- Forms
- Live Chat
- Pop-up Forms
- Meeting Scheduling
- Analytics Dashboard
- Landing Page

## Limitations and Considerations

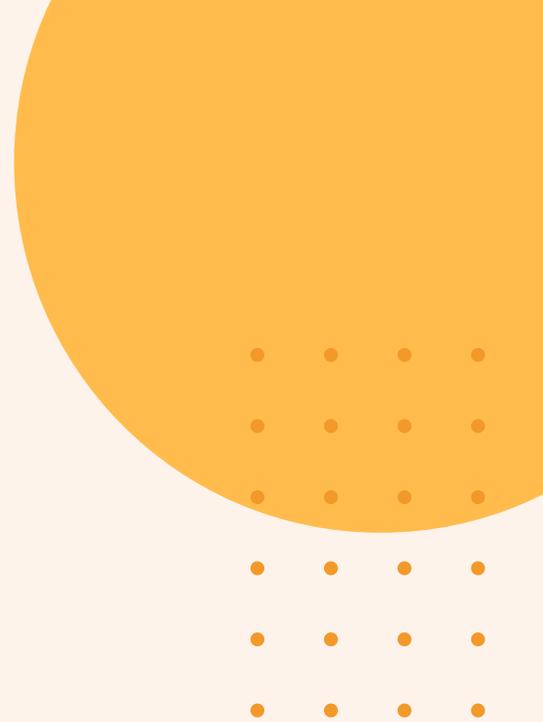
- Outgrowing Free Tools
- 

# What is HubSpot?

Leading all-in-one platform for marketing, sales, and customer service.

Empowering businesses to grow better by transforming the way they attract, engage, and delight customers.

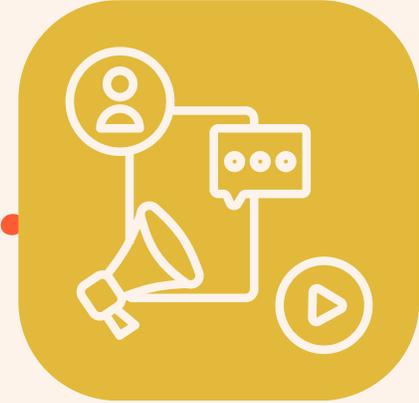
- Attract: Generate interest in your business.
- Engage: Convert prospects into customers.
- Delight: Keep customers happy and turn them into promoters.



# Key Features

## Marketing Hub

Attract, engage, and delight customers with HubSpot's powerful inbound marketing tools. Create and optimize campaigns with email marketing, landing pages, and forms—all seamlessly integrated with your CRM. Track performance with detailed analytics and automation to nurture leads effectively.



## Sales Hub

Accelerate sales with tools designed to simplify lead management and automate outreach. HubSpot's free Sales Hub includes email tracking, meeting scheduling, and pipeline management, helping you close deals faster. Streamline your workflow with automation and gain insights into prospect engagement.



## Service Hub

Deliver exceptional customer support and build lasting relationships. Manage conversations across channels with a unified inbox, automate responses for efficiency, and track customer inquiries through ticketing. Access knowledge base tools and customer feedback insights to continually improve service quality.



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# How HubSpot Helps Small Businesses

## Streamline Operations

Say goodbye to juggling multiple tools—HubSpot provides a centralized platform to manage marketing, sales, and customer service seamlessly. Keep everything connected for a smoother workflow and better collaboration.

## Drive Growth

Attract more leads with inbound marketing, convert prospects with seamless sales tools, and retain customers through exceptional service. By optimizing every stage of the customer journey, HubSpot empowers businesses to scale and succeed.

## Enhance Customer Engagement

Deliver tailored experiences by tracking interactions, segmenting contacts, and personalizing communication. Whether through targeted emails, chat support, or automated workflows, HubSpot helps you nurture relationships and boost customer loyalty.

## Improve Efficiency

Automate repetitive tasks like follow-ups, data entry, and lead nurturing. Small businesses can save time and focus on high-value activities that drive results, from building relationships to refining strategies.

# Tools You Can Start Using For FREE Today



01

## Customer Relationship Management

- Centralized database for managing contacts, leads, and customers.
  - Track interactions, store contact details, and manage deals seamlessly.
- 

02

## Email Marketing

- Create, send, and track email campaigns.
- Customize templates, automate email sequences, and analyze campaign performance.

03

## Forms

- Build custom forms to capture leads and gather information.
  - Integrate forms with websites or landing pages to collect valuable data.
- 

04

## Live Chat

- Engage with website visitors in real-time.
- Provide instant support and address inquiries promptly.



# Tools You Can Start Using For FREE Today



05

## Pop-up Forms

- Capture leads with targeted pop-up forms on websites.
  - Engage visitors and encourage conversions with strategically placed forms.
- 

06

## Meeting Scheduling

- Simplify the process of scheduling meetings with prospects and clients.
- Eliminate back-and-forth emails with automated scheduling.

07

## Analytics Dashboard

- Gain insights into website performance, email campaigns, and marketing efforts.
  - Track key metrics, analyze data, and make data-driven decisions.
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08

## Landing Page

- Create customized pages for specific campaigns or promotions.
- Design using intuitive templates and drag-and-drop editor.

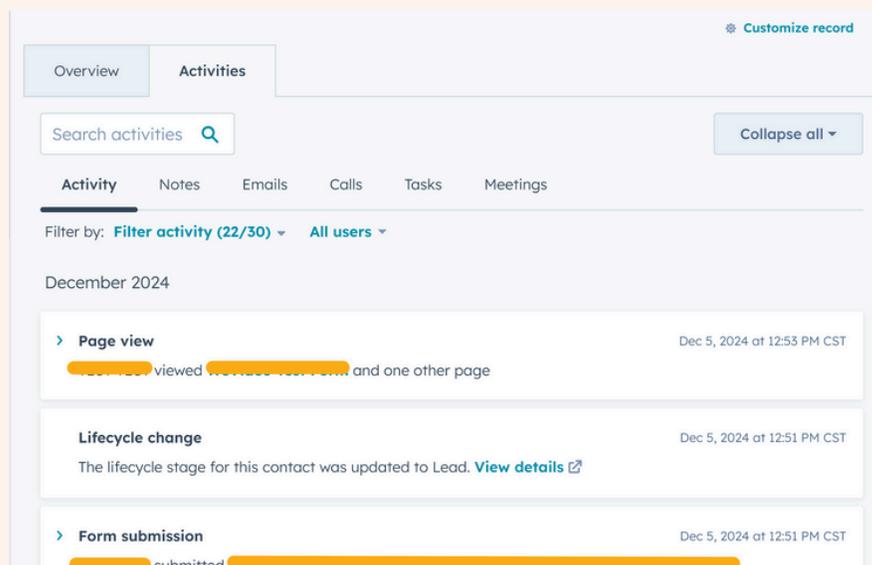


# Customer Relationship Management (CRM)

More than just organization. HubSpot's free CRM empowers users to efficiently manage and interact with their entire database, fostering stronger connections.

## Contact Interaction

View scheduled meetings, emails, associations, and lifecycle stage updates all in one place for a complete contact history.



▼ **Companies (0)** + Add

See the businesses or organizations associated with this record.

---

▼ **Deals (0)** + Add

Track the revenue opportunities associated with this record.

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▼ **Tickets (0)** + Add

Track the customer requests associated with this record.

---

▼ **Payment Links (0)** Add ▼

Give customers a fast, flexible way to pay. Add a payment link to accept a payment and associate it with this record.

## Lifecycle Stages

Track where each contact is in their journey—from new lead to loyal customer.

- **Lead:** Identify and nurture new potential customers who have shown interest in your business.
- **Opportunity:** Track prospects who have received proposals and are considering your services.
- **Qualified Lead:** Spot contacts who meet your ideal customer profile and are ready for deeper engagement.
- **Customer:** Monitor existing customers and maintain strong relationships through personalized interactions.

# Email Marketing

Create and send personalized campaigns, track performance, and engage your audience with automated email sequences—all without the need for a big budget.

## Add Buttons & Attachments

Easily include call-to-action buttons and attach guides or PDFs to provide valuable resources.



**Team Building Activities**



**New The Great Escape**  
In Person | 60 mins | 10+ people

Suspendisse potenti. Proin et fermentum mauris. Suspendisse tincidunt tincidunt aliquet. Donec vel dui velit. Phasellus nibh ipsum, congue id eros ut, porta ultricies sapien. Donec condimentum ante enim, sed varius ex dignissim ut. Donec leo nunc, aliquet vel feugiat vitae, aliquet quis lectus

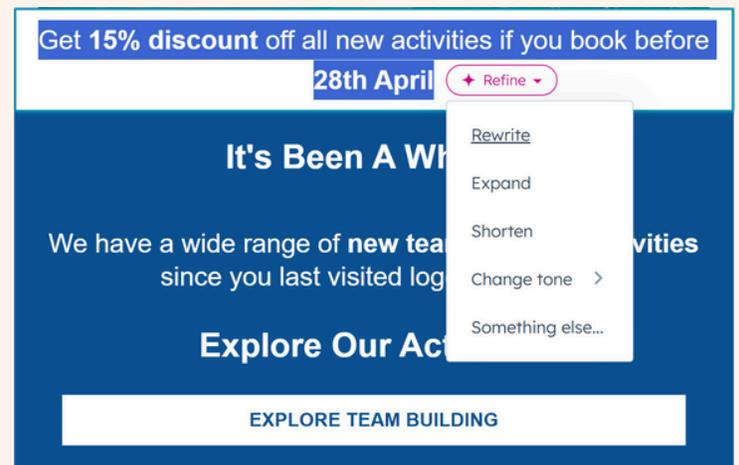
**BOOK NOW**

## Segment Contacts

Send targeted emails by segmenting your list—like reaching only non-customers with special offers.

## Schedule Email Campaigns

Plan ahead and send emails to reach your audience at the perfect time.



Get 15% discount off all new activities if you book before 28th April Refine

**It's Been A Wh**

We have a wide range of **new tea** since you last visited log **ivities**

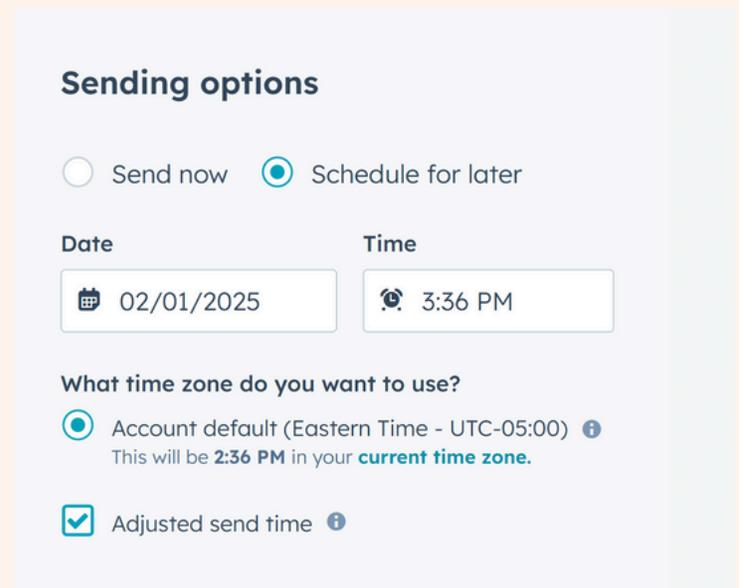
**Explore Our Ac**

**EXPLORE TEAM BUILDING**

- Rewrite
- Expand
- Shorten
- Change tone >
- Something else...

## Pre-Built Templates

Get started quickly with professional, customizable email templates—no coding required.



**Sending options**

Send now  Schedule for later

**Date**  **Time**

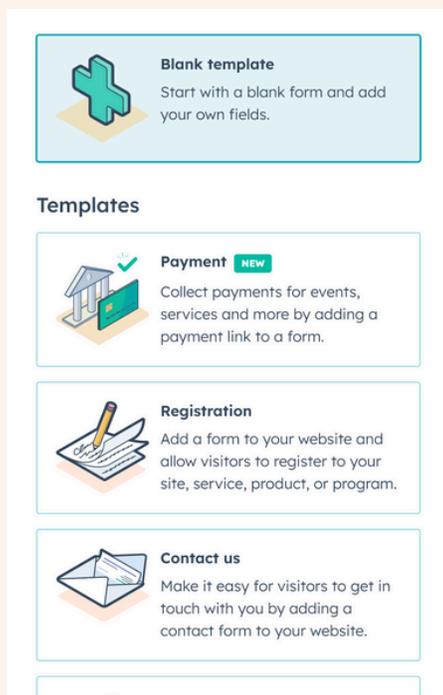
What time zone do you want to use?

Account default (Eastern Time - UTC-05:00) ⓘ  
This will be 2:36 PM in your **current time zone**.

Adjusted send time ⓘ

# Forms

Easily capture valuable lead data with custom forms. Whether on your website or landing pages, HubSpot's free forms help you gather essential information to nurture leads and grow your business.



## Form Types

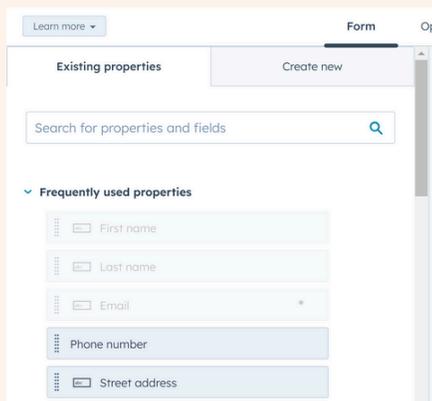
Select a form type that suits your needs, with options ranging from embedded forms to dropdown banner forms.

## Templates & Custom Builds

Choose from a variety of pre-built templates for easy form creation, or start from scratch to fully customize your form design.

## Style & Preview Tab

Use the style & preview tab to view how your form looks on different devices and adjust the design to match your brand's look and feel.

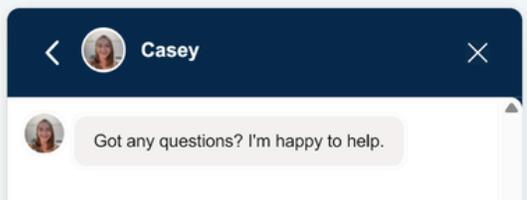


## Drag-and-Drop Properties

Effortlessly add common form properties with the drag-and-drop feature, or create your own custom fields to capture the exact information you need.

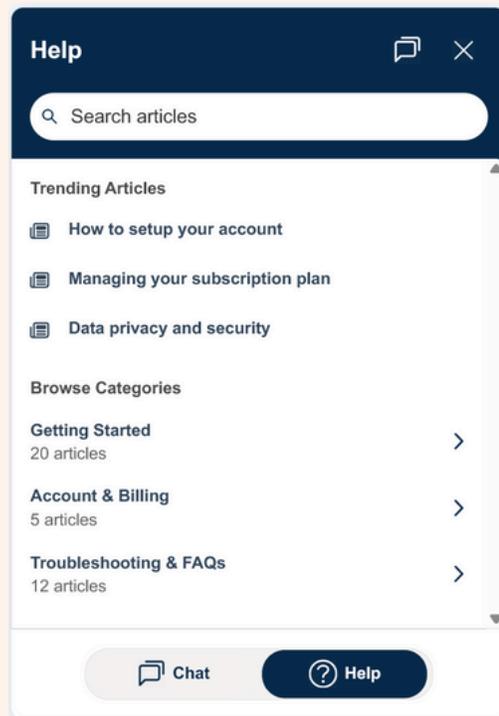
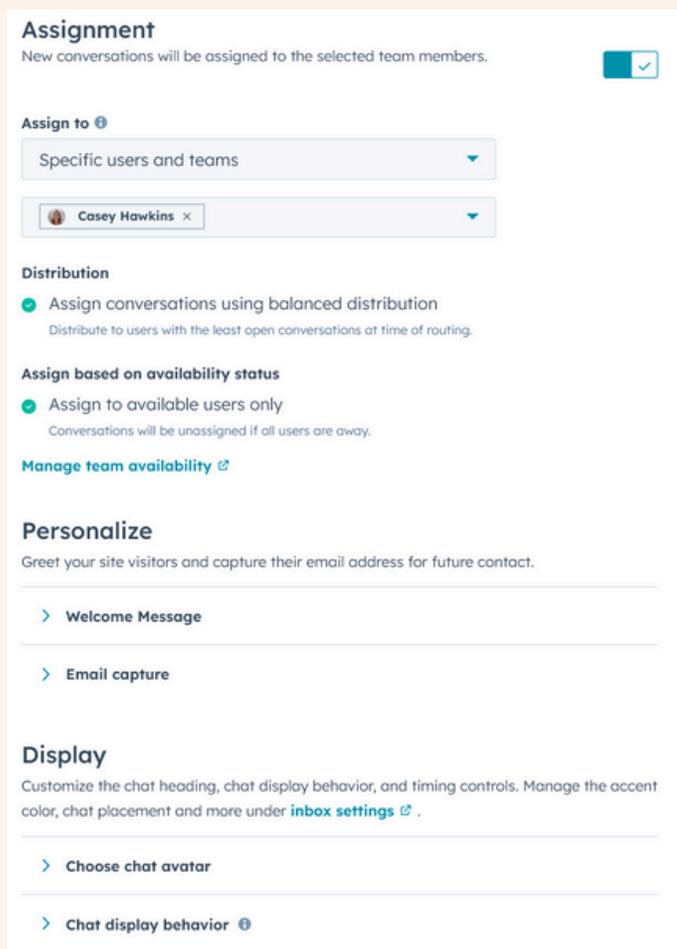
# Live Chat

Enhancing real-time communication with website visitors, this tool helps convert new leads, close more deals, and deliver top-notch support to valued customers.



## Customization

Match your brand by customizing chat colors, welcome messages, and chatbot responses.



## Automate Responses

Streamline engagement with automated replies for common questions and lead qualification.

## Set Availability

Control when live chat is active by setting available days and hours for support.

# Pop-up Forms

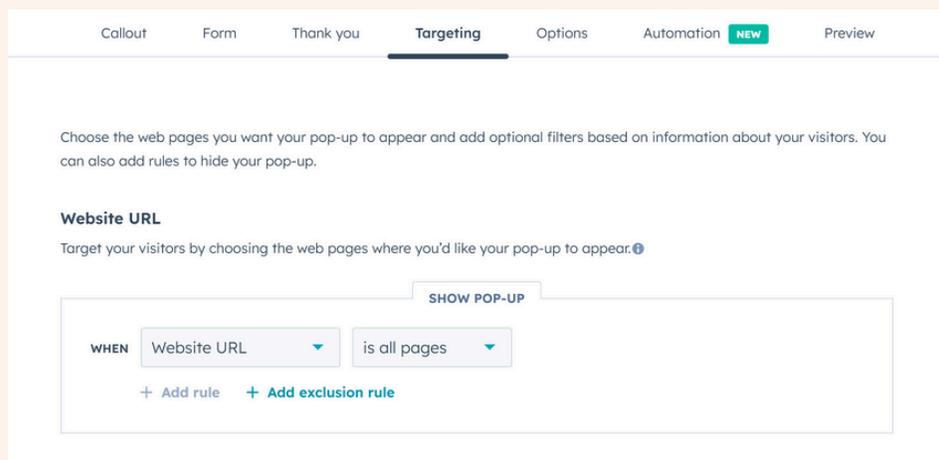
Boost lead generation by capturing visitor attention with strategic pop-up forms. HubSpot's free tool lets you target specific visitors at the right time, turning passive visitors into active leads.

## Capture Leads

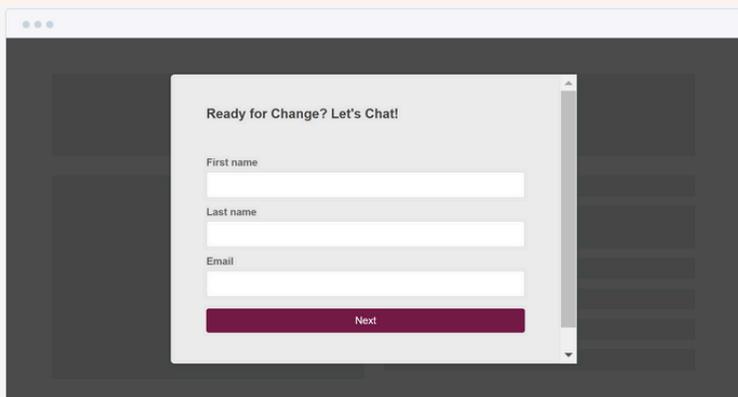
Engage visitors with targeted pop-ups designed to collect leads and grow your contact list.

## Convert Visitors

Turn website traffic into subscribers and customers with well-placed, high-converting forms.



The screenshot shows the HubSpot pop-up targeting configuration interface. At the top, there are tabs for 'Callout', 'Form', 'Thank you', 'Targeting' (which is selected), 'Options', 'Automation' (with a 'NEW' badge), and 'Preview'. Below the tabs, there is a heading 'Choose the web pages you want your pop-up to appear and add optional filters based on information about your visitors. You can also add rules to hide your pop-up.' Underneath, there is a section titled 'Website URL' with the instruction 'Target your visitors by choosing the web pages where you'd like your pop-up to appear.' A 'SHOW POP-UP' button is visible. The configuration area shows a rule: 'WHEN Website URL is all pages'. Below this, there are links to '+ Add rule' and '+ Add exclusion rule'.



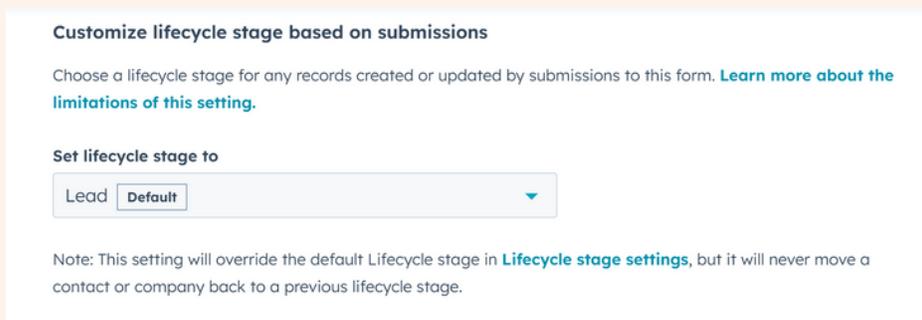
The screenshot shows a pop-up form titled 'Ready for Change? Let's Chat!'. The form has three input fields: 'First name', 'Last name', and 'Email'. Below the input fields is a red 'Next' button.

## Targeting & Customization

Adjust pop-up targeting based on visitor behavior to show the right message at the right time.

## Lifecycle Stage Mapping

Customize form submissions to automatically categorize contacts into lifecycle stages for better segmentation and follow-up.



The screenshot shows the HubSpot form lifecycle stage mapping settings. The heading is 'Customize lifecycle stage based on submissions'. Below the heading, there is a text block: 'Choose a lifecycle stage for any records created or updated by submissions to this form. [Learn more about the limitations of this setting.](#)' Underneath, there is a section titled 'Set lifecycle stage to' with a dropdown menu. The dropdown menu is currently set to 'Lead' and 'Default'. Below the dropdown menu, there is a note: 'Note: This setting will override the default Lifecycle stage in [Lifecycle stage settings](#), but it will never move a contact or company back to a previous lifecycle stage.'

# Meeting Scheduling

Streamlining the scheduling process, this tool allows for easy availability comparison and enables prospects and customers to schedule meetings effortlessly.

## Calendar Sync

Seamlessly integrate with your calendar to avoid double bookings and keep your schedule organized.

The screenshot shows a scheduling form with the following sections:

- Schedule** / **Form** tabs
- Scheduling title**: "Meet with [redacted]"
- Duration options**: 15 min, 30 min, 1 hr
- Your time zone**: UTC -05:00 Eastern Time
- Availability window**: Mon - Fri, 9:00 AM to 5:00 PM
- + Add hours** button
- Consider working hours**: Check working hours to know when users are available for meetings. Users will not be booked outside of their working hours.

The screenshot shows a meeting scheduling interface with the following elements:

- CHOOSE TIME** / **YOUR INFO** tabs
- Meet with Casey Hawkins**
- January 2025** calendar view with the 29th selected
- How long do you need?**: 15 mins, 30 mins, 1 hour
- What time works best?**: Showing times for January 29, 2025
- UTC -05:00 Eastern Time** dropdown
- Time slots: 12:45 pm, 1:15 pm, 4:15 pm, 4:45 pm
- [Create your free meeting booking page](#) to schedule meetings faster.

## Set Availability

Define available time slots so prospects can book meetings when it works for you.

## Time Zone Adjustments

Ensure hassle-free scheduling with automatic time zone detection—perfect for international clients.

The screenshot shows an automation settings panel with the following sections:

- Automation**
- Confirmation email**: Send a confirmation email to attendees immediately after they schedule a meeting.
- Send test email**: Test email will be sent to [redacted]
- Pre-meeting reminder**: Send an email reminder to attendees before a meeting starts.

# Analytics Dashboard

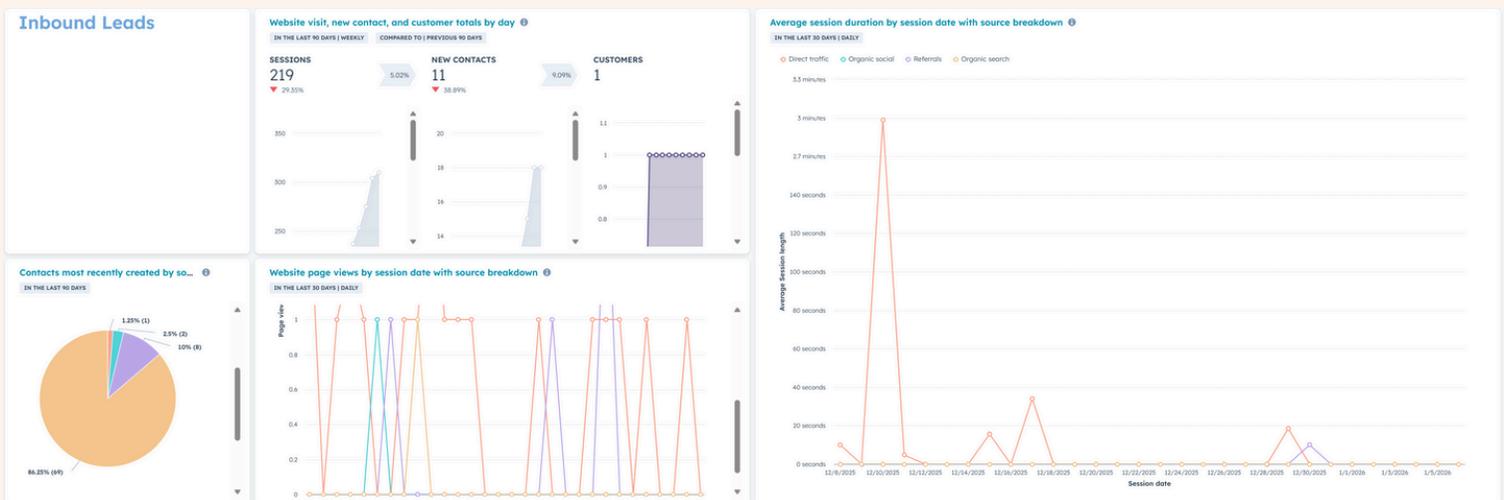
Leveraging flexible dashboards, users can integrate multiple reports to ensure a comprehensive view of the metrics that truly matter to everyone involved.

## Traffic & Conversions

Understand how visitors engage with your website and track which sources drive the most conversions.

## Contact Sources

See where your leads come from—organic search, paid ads, social media, and more.



## Customer Lifecycle Tracking

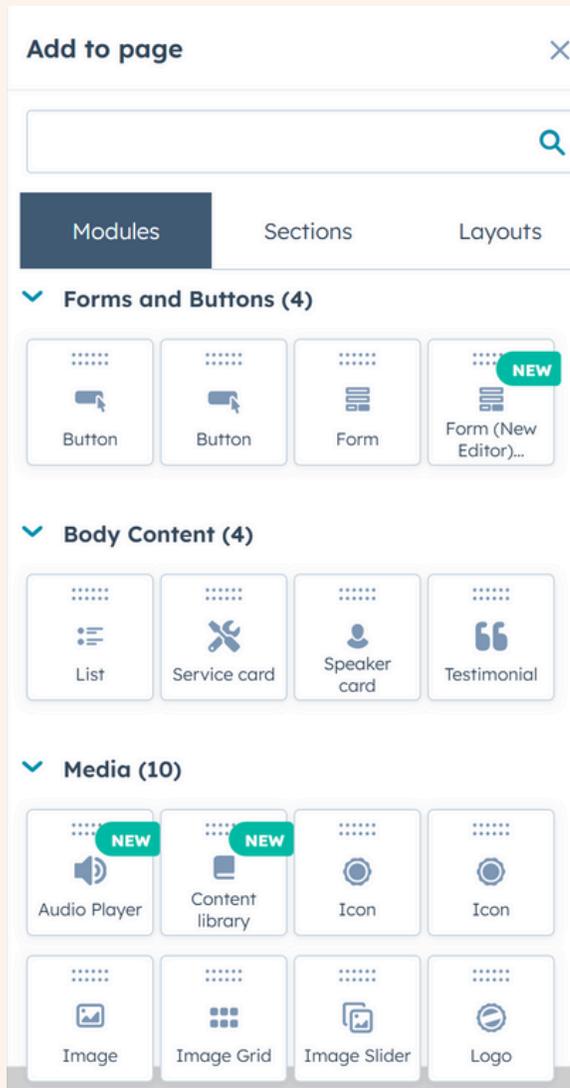
Analyze how contacts move through your funnel and pinpoint opportunities to improve conversions.

## Email Performance

Monitor key metrics like open rates, click rates, and engagement to optimize campaigns.

# Landing Page

Design engaging landing pages for campaigns with HubSpot's intuitive drag-and-drop editor. Create pages that convert, without any design or coding skills, and tailor them to your goals.



## Drag-and-Drop Editor

Easily design landing pages with a user-friendly drag-and-drop interface—no coding required.

## Customization

Tailor layouts, images, and content to align with your brand and campaign goals.

## Conversion Optimization

Add forms, CTAs, and personalized content to drive engagement and capture leads.

## Mobile-Friendly Design

Ensure a seamless experience across all devices with automatically responsive pages.

### Claim Your FREE Bread Masters Guide Book Today!

Unlock the secrets of artisan baking with the Bread Masters guide! Sign up today to receive your free copy and embark on a journey to perfect your bread-making skills.

#### You will learn:

- Understanding the importance of ingredient ratios and how they affect the texture and flavor of your bread.
- Mastering various kneading techniques and fermentation times to achieve the desired crumb.
- Learning how to troubleshoot common baking issues, such as dense loaves or uneven baking.

First Name

Last Name

Email\*

Bake Better Bread



# Limitations of HubSpot's Free Tools

## Limited Functionality

HubSpot's free tools provide essential features, but they may not fully support growing business needs. For example, while you can create email campaigns, advanced automation workflows and A/B testing are only available in paid plans.

## Restrictions on Usage

The free plan comes with usage caps, such as a limit of 2,000 email sends per month and up to 1,000 static lists. Additionally, contact storage is free, but advanced segmentation and predictive lead scoring require an upgrade.

## Lack of Advanced Features

While free users can access basic reporting and dashboards, deeper analytics, custom reporting, and revenue attribution are reserved for paid tiers. Similarly, CRM users can track deals and tasks, but advanced pipeline automation and forecasting require a subscription.

# Why You Might Outgrow the Free Plan...

## AUTOMATION

If you need advanced email automation features or scalability, the free plan may not be sufficient.

## CUSTOM PROPERTIES

Limited to 10 custom properties, if you're capturing extensive unique data, you may need another option.

## INTEGRATIONS

If your business requires integrations with other tools or systems that are not available in the free plan, you may need to upgrade to access these integrations.

## REPORTING

If you need more robust reporting capabilities or access to advanced analytics beyond what the free plan offers, upgrading to a paid plan may be necessary.

## SUPPORT

As your business grows, you may require additional support beyond the free plan, such as priority support or dedicated account management.

## BRANDING

Free plan features may include HubSpot branding; if you require branding customization, consider an alternative.



# Key Takeaways



01

## Centralized & Connected

Keep all your customer interactions, marketing campaigns, and analytics in one platform, creating a seamless experience across teams and processes.

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02

## Efficiency & Automation

Save time and reduce manual effort with tools like email scheduling, meeting booking, and basic automation that keep things running smoothly.

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03

## Scalability

Start with the free tools and unlock more powerful features as your business grows, allowing HubSpot to scale with you as your needs evolve.

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04

## Seamless Integration

Integrate smoothly with other apps and platforms, helping you consolidate your tech stack and improve workflows without the hassle of multiple tools.

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05

## Comprehensive Insights

Gain valuable insights into your marketing and sales efforts through intuitive dashboards and analytics, enabling data-driven decisions that move your business forward.

06

## Customization & Flexibility

From personalized emails to custom forms and live chat, HubSpot allows you to tailor each interaction to fit your brand and customer needs, enhancing the overall customer experience.





# What's Next?

## Get Started Today

Begin implementing what you've learned by setting up your first email campaign, form, or live chat.

## Stay Connected

HubSpot offers extensive learning resources, including blogs, webinars, and an active community to support your journey.

## Earn HubSpot Academy Certifications

Take advantage of HubSpot's free Academy courses to deepen your expertise and earn certifications that can boost your skills.

## Explore More Features

As you continue to grow, explore additional tools and features within HubSpot to see how the platform can evolve and support your business needs.

HubSpot's free tools provide a strong starting point for small businesses looking to streamline operations, engage customers, and drive growth. The more you explore, the more value you'll uncover!