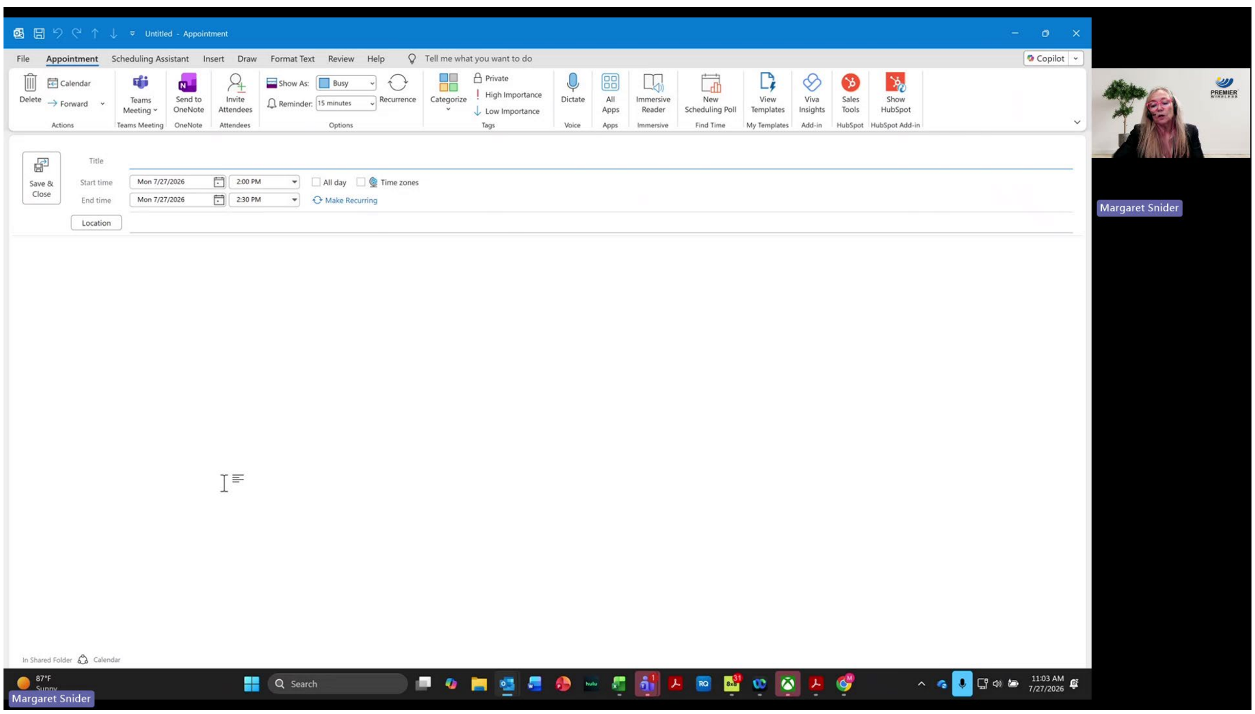
HubSpot Companion Guide: Updating Meetings

Follow these steps demonstrated in the training video.

Step 1

Create the meeting in Outlook. This is a best practice as it will allow you to view other Premier employees calendars/availability. Your Outlook Calendar is sync'd with Hubspot so the meeting you create will also appear in Hubspot.

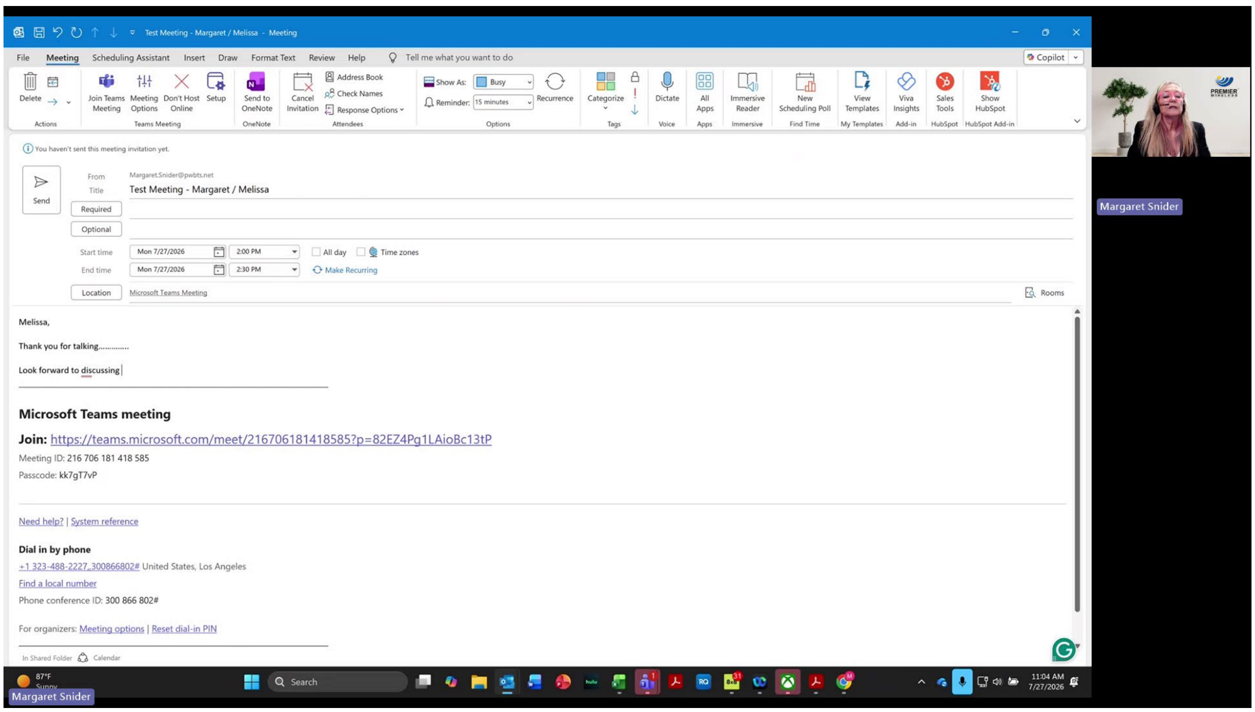


Refer to the highlighted screen shown above while performing this step.

Step 2

Add your Teams Meeting link to the invitation. You will see a “Teams Meeting” icon in your menu bar. Once you select Teams, your meeting pane and location will populate with the Team Meeting information.

You will want to create a meaning meeting Title as well as a brief communication that addresses your contact and the reason for the meeting (agenda if possible).

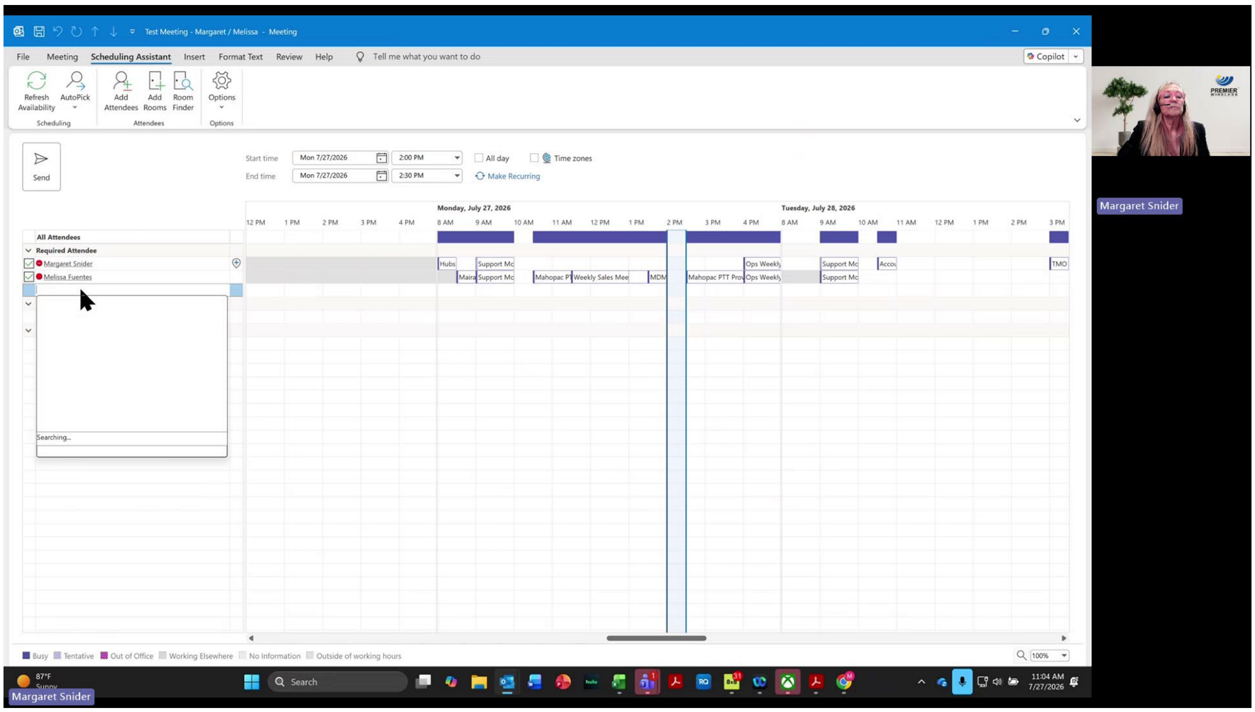


Refer to the highlighted screen shown above while performing this step.

Step 3

Review fellow Premier employees calendars/availability by selecting the menu option “Scheduling Assistant”. You can enter in the Premier employees here that you wish to invite and view their calendars – allowing you to schedule the meeting when your resources are available.

You can also add the email address for anyone you are inviting in this step – but you will only see the calendars associated with Premier employees.



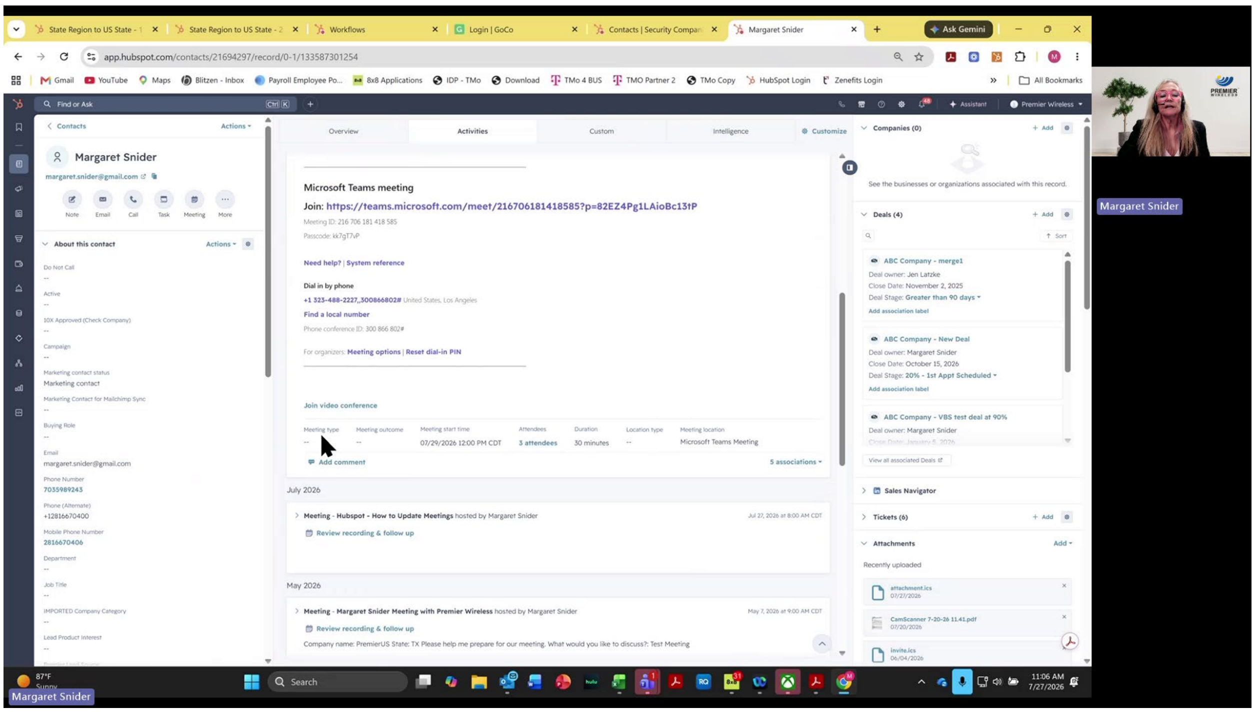
Refer to the highlighted screen shown above while performing this step.

Step 5

When first scheduling your meeting, you will want to locate the meeting in Hubspot and edit it. You will be adding the “Meeting Type” on the same day you scheduled/created the meeting. Your meeting will NOT show up in Activity reporting if a Meeting Type is not selected.

You find your newly scheduled meeting by first searching in the top-line search bar for the contact you scheduled the meeting with. You should be searching for the non-employee here as employee-to-employee activities are NOT logged in Hubspot.

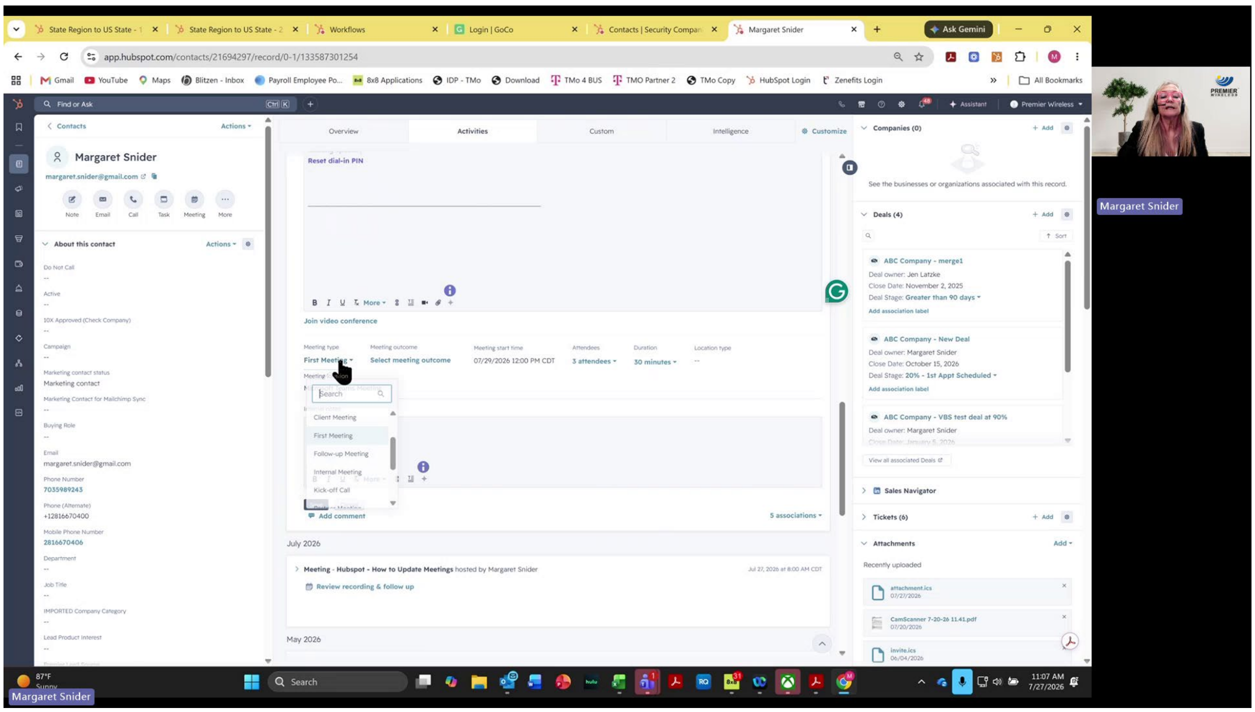
Once you locate your contact, you can filter “Meetings” in the center screen to make it easier to locate.



Refer to the highlighted screen shown above while performing this step.

Step 6

You will access the “Action” option at the top of the meeting record and select “edit”. You will then scroll down to the bottom of the meeting and select the appropriate Meeting Type (i.e., First Meeting, Follow Up Meeting, etc.). Make sure to save your changes.

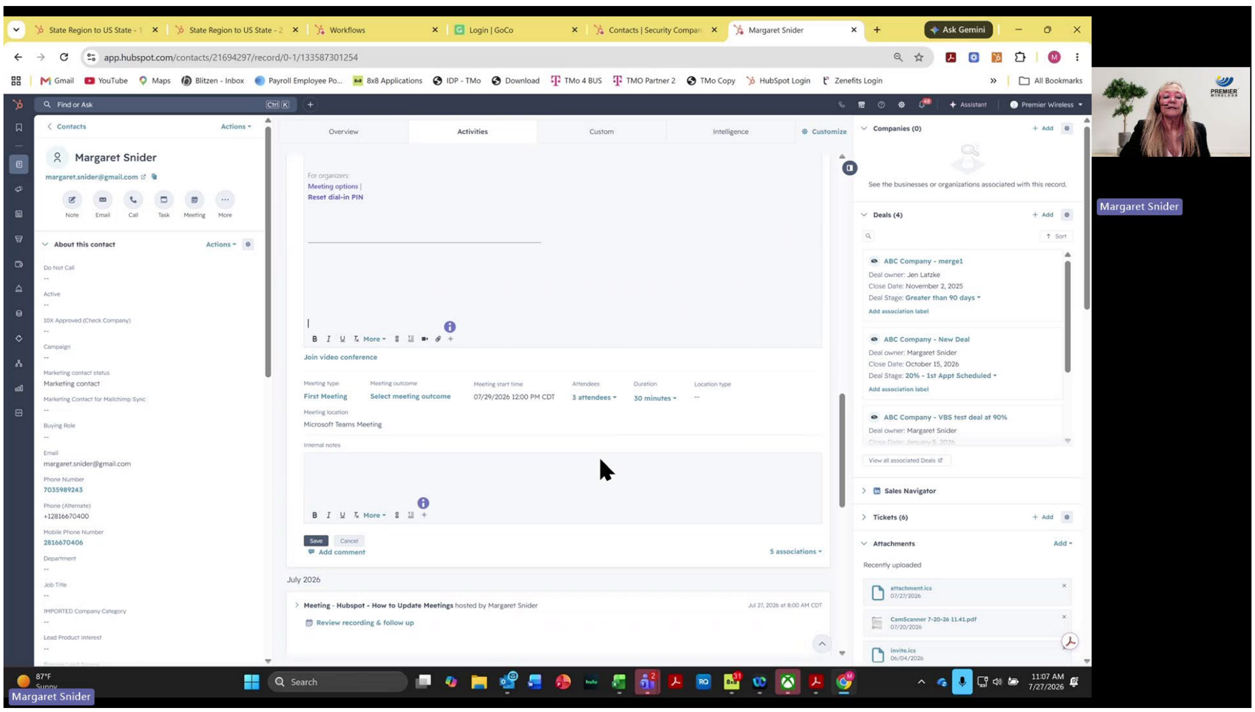


Refer to the highlighted screen shown above while performing this step.

Step 7

Directly next to Meeting Type is the Meeting Outcome. You should update this on the same day the meeting has taken place to record the "Outcome" (i.e., Completed, Rescheduled, etc.).

This step must be done by the end of the day the meeting took place so that it can be captured in the Activity Reporting.



Refer to the highlighted screen shown above while performing this step.