Beyond Personalization

Advanced Use of HubSpot Tokens

Aptitude 8

Implement. Integrate. Optimize. Extend.

- Aptitude 8 is an **Elite HubSpot Solutions Partner** with expertise across RevOps, Marketing Ops, WebOps, AI Ops, and Solutions Architecture.

- We help companies **Implement, Integrate, Optimize** and **Extend** the HubSpot platform along with any other tools they have in their stack.

- As HubSpot has moved from a **tool to a platform,** businesses have found themselves needing a true consulting partner to help them build solutions on HubSpot.

- With the **largest technical consulting team** of any HubSpot partner, Aptitude 8 helps clients deliver the buying experiences their customers demand.
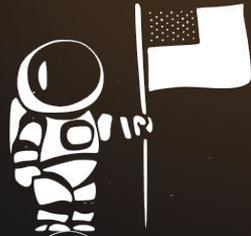
What we're discussing:

- Anatomy of a token
- Typical uses of personalization tokens
- Extending personalization tokens
  - Hyperlinks
  - Customizing images
  - URL parameters
  - Large chunks of customized text
- Q&A

Personalization

Why does it matter?

Better connection
- Consumers are looking for personalization experiences now more than ever. Users demand complex tools that are easier than ever to use.

More accurate data
- No more guessing, let the data tell you.

Higher conversion rates
- A 2021 Mckinsey & Company report found that 78% of consumers are more likely to make repeat purchases from brands that personalize.

Personalization Tokens

The anatomy of a token

- You know how to select a token in the UI, but what does the actual code look like?

Contacts & Companies

- {{ contact.firstname }}
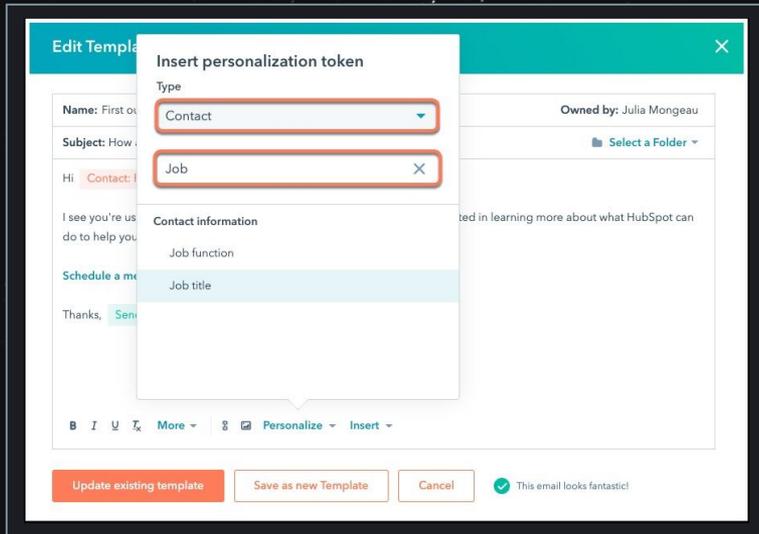- Braces, object.internal property name, relies on default values in settings

Other Objects

- {{ personalization_token('deal.amount', 'default_value') }}
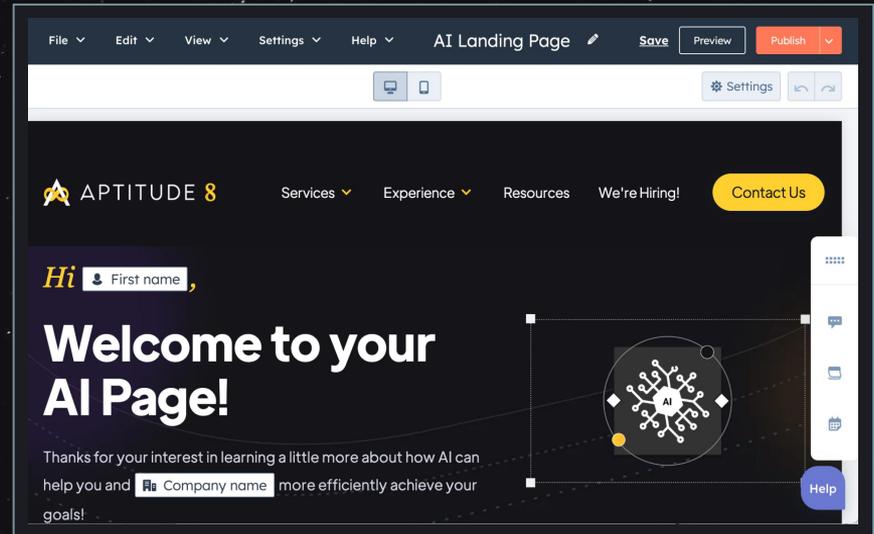- Braces, identifier, object.internal property name, default value after comma within the parenthesis

Typical Uses
Basic application in emails and landing pages

Email

Landing Page

Extending Personalization

Beyond Personalization

A few questions to consider

- When/how are you using them?

- Is the fallback default value logical or will it break the experience?

Subscription type	Phone number	First name
Became a customer date	LinkedIn bio	Personal Intro
Company city	Industry	First conversion

Hyperlinks

What can they do with personalization?

- Provide a **direct link**

- Create **scalable links** that can be used for streamlining builds & assets

- Concentrate data input for better **accuracy and follow-through**

Hyperlink Example

Sending a prospect a personalized recommendation

1. **Create a Custom Enumeration Property**
    - Create a custom enumeration property (e.g., "Interest Area") used in forms or surveys with internal values that match webinar registration landing page URL slugs

2. **Build a workflow**
    - Build a workflow to automate an email to that contact after form submission

    - Don't build a bunch of if/then branches with different emails

    - Use a single email with smart rules and a single dynamic button URL

3. **Add the Token as a Slug**
    - Using contacts, add the {{contact.interest_area}} token as a slug in the URL to link the contact to a related webinar registration page

Hyperlink Example #2
Manually updating properties on specific records

1. **Copy the HubSpot URL**
   - Copy the HubSpot URL path to an object's individual record display page

2. **Replace Record ID with Token**
   - Using contacts, replace the record ID with the {{ contact.hs_object_id }} token and append /properties?search=your%20property%20name

   - Build a workflow to send an internal email notification to the owner with a direct link to the property on the contact record

3. **View the Link**
   - The link takes the rep directly to the individual record and displays only the property that needs to be updated

Customizing Images
What power does this hold?

- **Dynamically** change image content based on properties

- Personalize **at scale**

Edit source code   ✕

```
1  <p>About {{ contact.companyname }}</p>
2  <p><br><img src="{{ contact.company_logo }}" width="270" height="178" alt="logo" style="height: auto; max-width: 100%;
   width: 270px;"></p>
```

Customizing Images Example
Add personalized images to quotes, emails, or landing pages

1. **Create a Logo Property**
    - Create a property for "Company Logo" and paste the URL for the image.

    - *Pro tip:* Some lead enrichment solutions will even provide this for you, so you don't have to do it manually
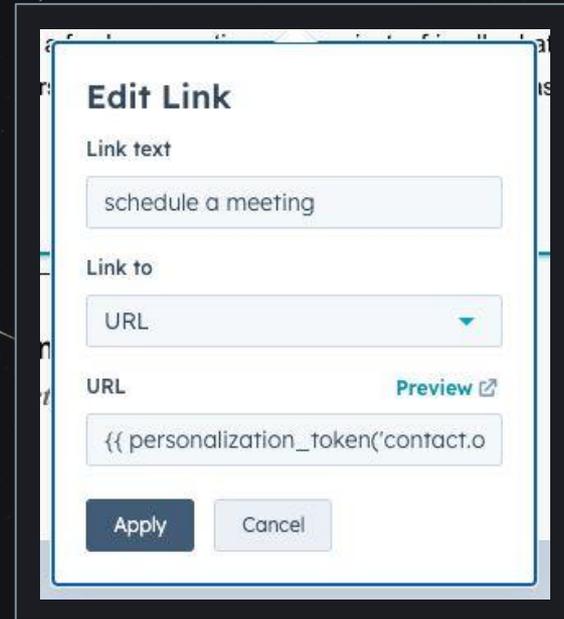
2. **Use the token as the Source URL**
    - Use the {{ contact.company_logo }} or {{ company.company_logo }} personalization token as the source URL inside of an <img> tag anywhere that uses rich text or HTML code

URL Parameters

What can you do with URL parameters?

- Create **customized reporting** based on property values using tokens in UTM parameters, especially in 3rd-party tools like GA

- **Automate** the Meetings link form submission while passing custom values as "hidden" fields

Edit Link

Link text

schedule a meeting

Link to

URL ▼

URL   Preview ⬏

{{ personalization_token('contact.o

Apply   Cancel

UTM Parameters Example

Enable contacts to book meetings easier & faster

1. **Identify Your Use Case and UTM Parameter**
   - You want to analyze what lifecycle stage customers are in when they submit a high-value form, like your main Contact Us form

   - Memorializes what lifecycle stage a contact had when they submitted the form before they are graduated (ie. Subscriber submits an MQL form)

2. **Add Your Link**
   - Insert a link in your email using a personalization token for your specified UTM parameter

   - Ex: https://aptitude8.tech/revops?utm_content={{ contact.lifecyclestage }}

URL Parameters Example

Enable contacts to book meetings easier & faster

1. **Create and Set Up Your Meeting Link**
    - Create a Meetings link with options to pre-populate fields and auto-submit when the form fields are known (email, first, last name, "hidden" custom question properties)

2. **Add Your Link**
    - Insert a link in your email to the Meetings link URL and append tokens along with desired custom question property values

    - Ex: https://meetings.hubspot.com/bserocke1?firstname={{ contact.firstname }}&lastname={{ contact.lastname }}&email={{ contact.email }}&productinterest__c=GC1000%20series

    - The Meetings link form will auto-submit as soon as the contact selects a day/time on your calendar

Customized Text

What would we use this for?

- **Dynamically** crafting messages for deeper personalization

- Using properties to create **unique messages**

- Prompt **AI** using known CRM data like a contact's **interaction history**, **challenges**, or **interests**
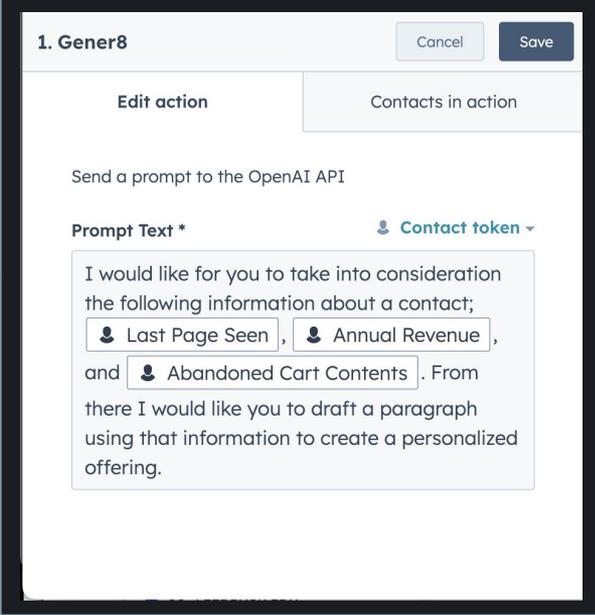
1. Gener8

Cancel   Save

Edit action   Contacts in action

Send a prompt to the OpenAI API

Prompt Text *   👤 Contact token ▾

I would like for you to take into consideration the following information about a contact; 👤 Last Page Seen , 👤 Annual Revenue , and 👤 Abandoned Cart Contents . From there I would like you to draft a paragraph using that information to create a personalized offering.

Customized Text Example
Sending personalized services offerings

1. **Collect Background Information**
   - Create a form for clients to fill out and collect the necessary information

2. **Use AI to build a Prompt and Insert Tokens**
   - Use an AI workflow action and prompt the tool to use the information saved in tokens to output a personalized plan

3. **Add the Prompt Output to a Contact Property**
   - Add an action to store the personalized workout plan on your new property

Customized Text Example
Sending personalized services offerings

4. **Create an Email and Add to Your Workflow**
   - Create an automated email with your personalization token that contains the individual workout plans.

   - Add that automated email to your workflow

Customized Text Example #2

Personalize sales outreach at scale without a ton of research

1. **Create a new Contact Property**
   - Create a text property for "Personal Sales Email Intro"

2. **Use AI to build a Prompt and Insert Tokens**
   - Use an AI workflow action to build a prompt and insert tokens for relevant properties (company name, industry, state/region, last page seen, etc).

3. **Generate a Custom Email Intro for new Property**
   - Have AI generate a custom email intro and store it to your intro text property
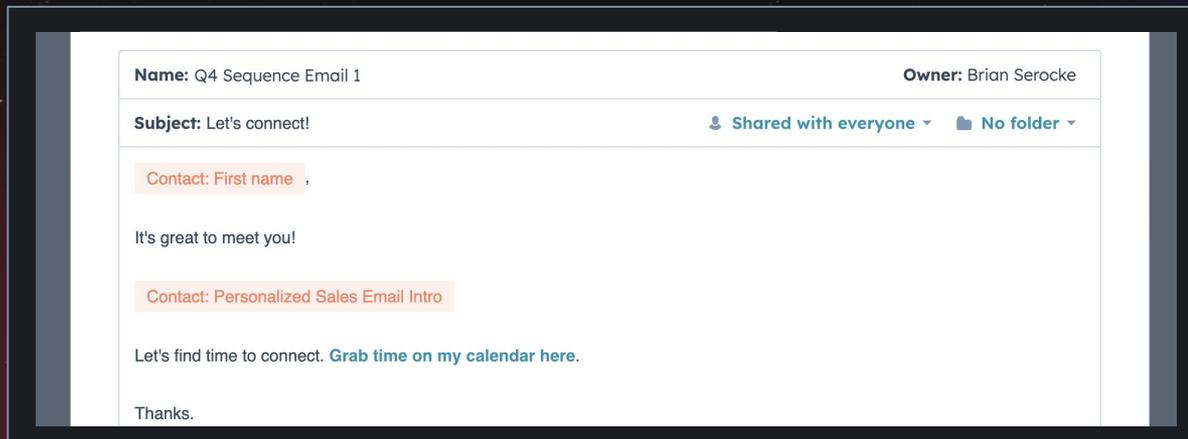
Customized Text Example Cont.
Personalize sales outreach at scale without a ton of research

4. **Add to sequence**
   - Use the {{ contact.personalized_sales_email_intro }} in your sequence email to open with a personalized, relevant intro

Name: Q4 Sequence Email 1   **Owner:** Brian Serocke

Subject: Let's connect!   👤 Shared with everyone ▾   📁 No folder ▾

Contact: First name ,

It's great to meet you!

Contact: Personalized Sales Email Intro

Let's find time to connect. **Grab time on my calendar here.**

Thanks.

Q&A

What do you want to know more about?

Need HubSpot help?

- Implementations & migrations
- Integrations with other platforms
- Optimization & support
- Extensibility & development

Schedule a meeting at **aptitude8.com/contact-us**