Guide to Submitting a Marketing Request Ticket in HubSpot

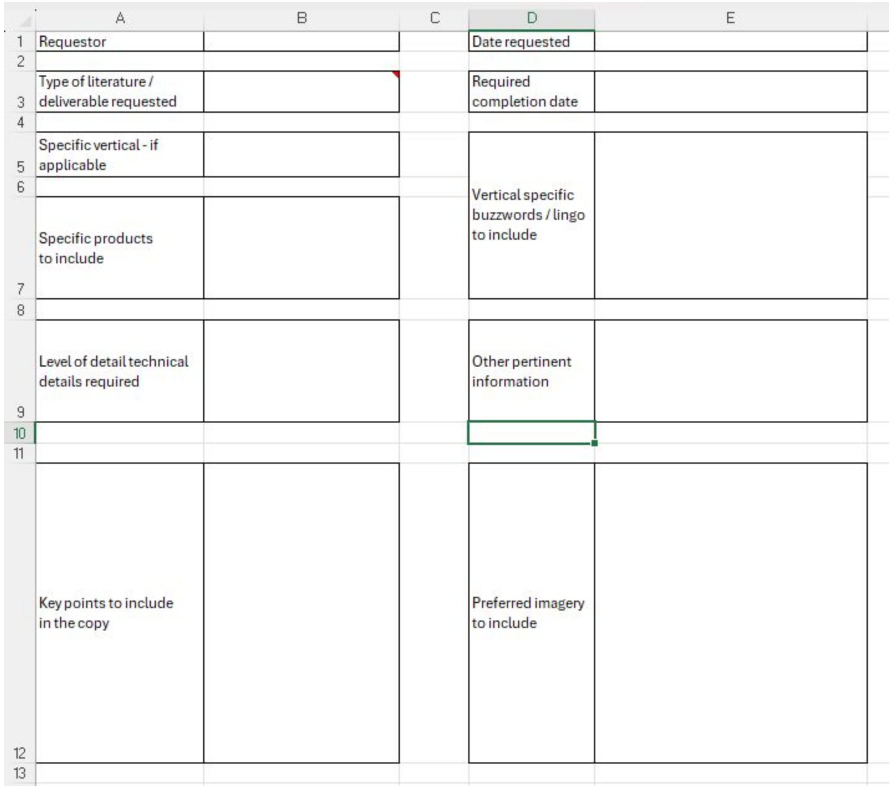
When you need literature or marketing materials, please fill out the “Marketing Literature Creation Request Form” and then submit a ticket (with the form attached) through the “Marketing Requests” ticket pipeline in HubSpot. Following this process helps us stay organized and ensures you receive the materials you need as quickly as possible.

The following slides will provide step-by-step instructions on how to properly submit a marketing request in HubSpot.

How to submit a marketing request ticket

First, fill out the “Marketing Literature Creation Request Form” and save/download it as an PDF attachment. Please fill out all of the fields to the best of your ability.

You can access the request form [here](). This is a link an article in the Knowledge Base where you can download the form.

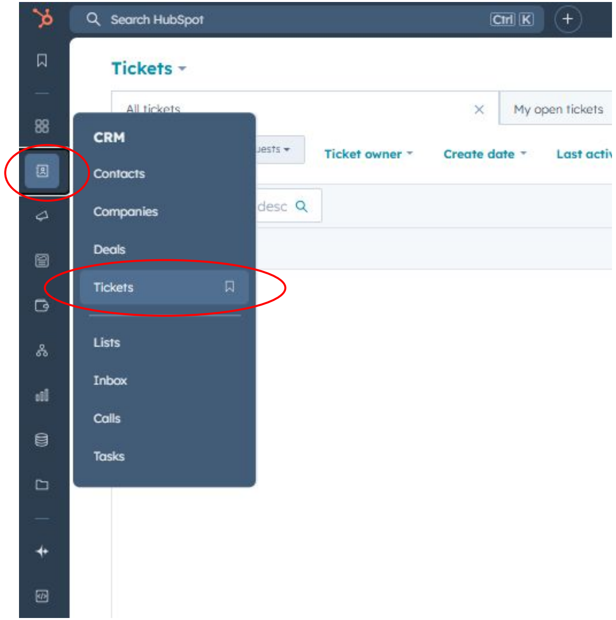


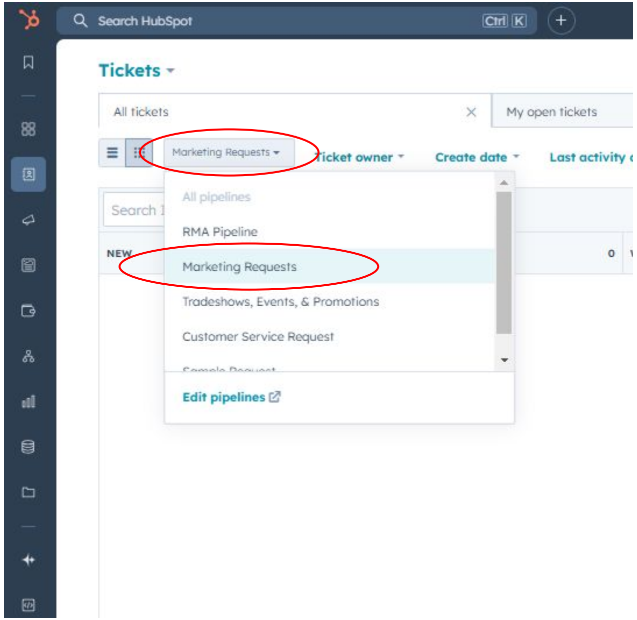
	A	B	C	D	E
1	Requestor			Date requested	
2					
3	Type of literature / deliverable requested			Required completion date	
4					
5	Specific vertical - if applicable			Vertical specific buzzwords / lingo to include	
6					
7	Specific products to include				
8					
9	Level of detail technical details required			Other pertinent information	
10					
11					
12	Key points to include in the copy			Preferred imagery to include	
13					

How to submit a marketing request ticket

Find the Marketing Requests tickets by clicking on “Tickets” under “CRM”.

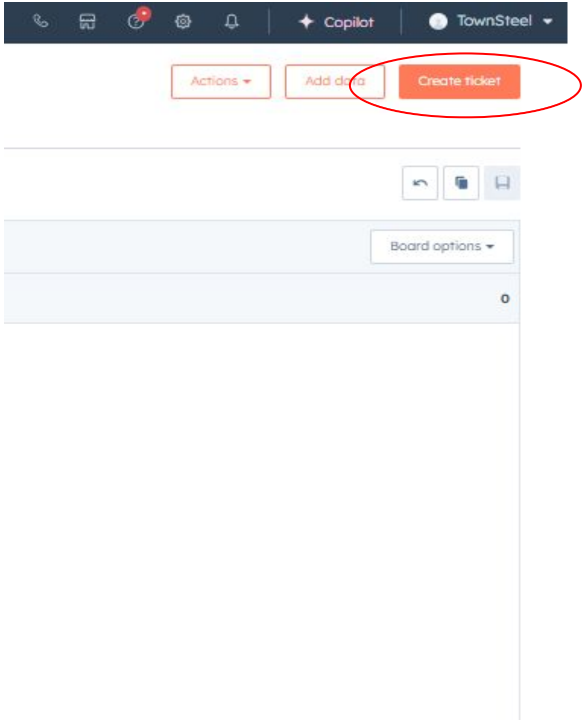
Click on the pipeline dropdown and choose “Marketing Requests”.





How to submit a marketing request ticket

On the right side of the screen, click “Create Ticket” and a “Create Ticket” form will pop up on the right side. Please fill out all of the required fields on this form.



How to submit a marketing request ticket

Ticket name: Type in a title for what you are requesting

Pipeline: Make sure “Marketing Requests” is selected

Ticket Status: New

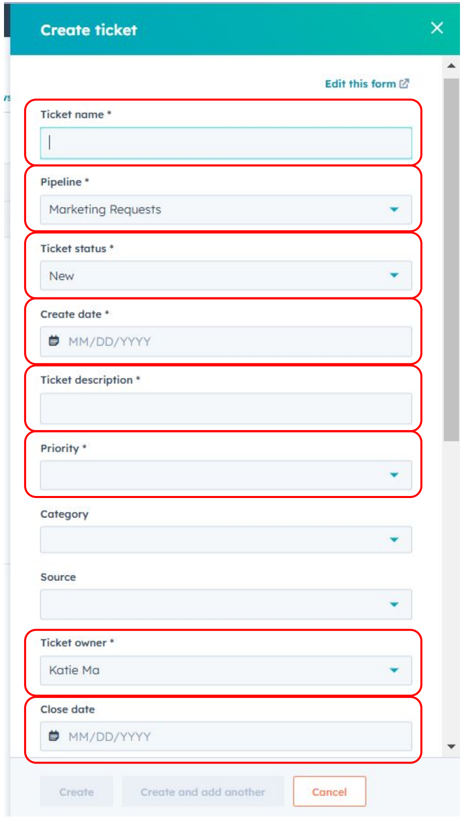
Create date: Type the date you are creating the ticket

Ticket description: Type in a brief description of what you are requesting (ex. Requesting a sell sheet for the Aegis ….)

Ticket owner: Make sure to select your own name

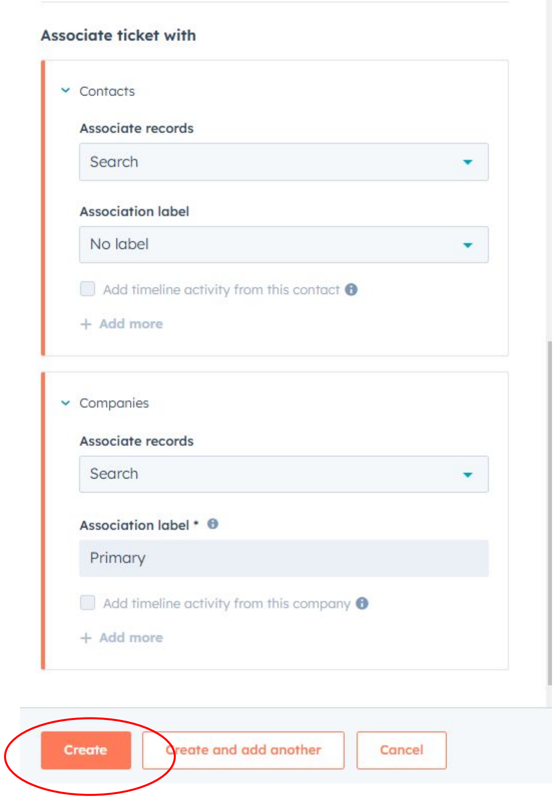
Priority: Be realistic in your dates and give us as much time as you can. If every request is marked “high” we will do FIFO

Close date: Type in the due date for the request



How to submit a marketing request ticket

After you fill out the required fields, there will be a section at the bottom of that “Create Ticket” form. You do not need to worry about associations for this specific scenario. You will be able to hit the orange “Create” button after filling out all of the required fields.



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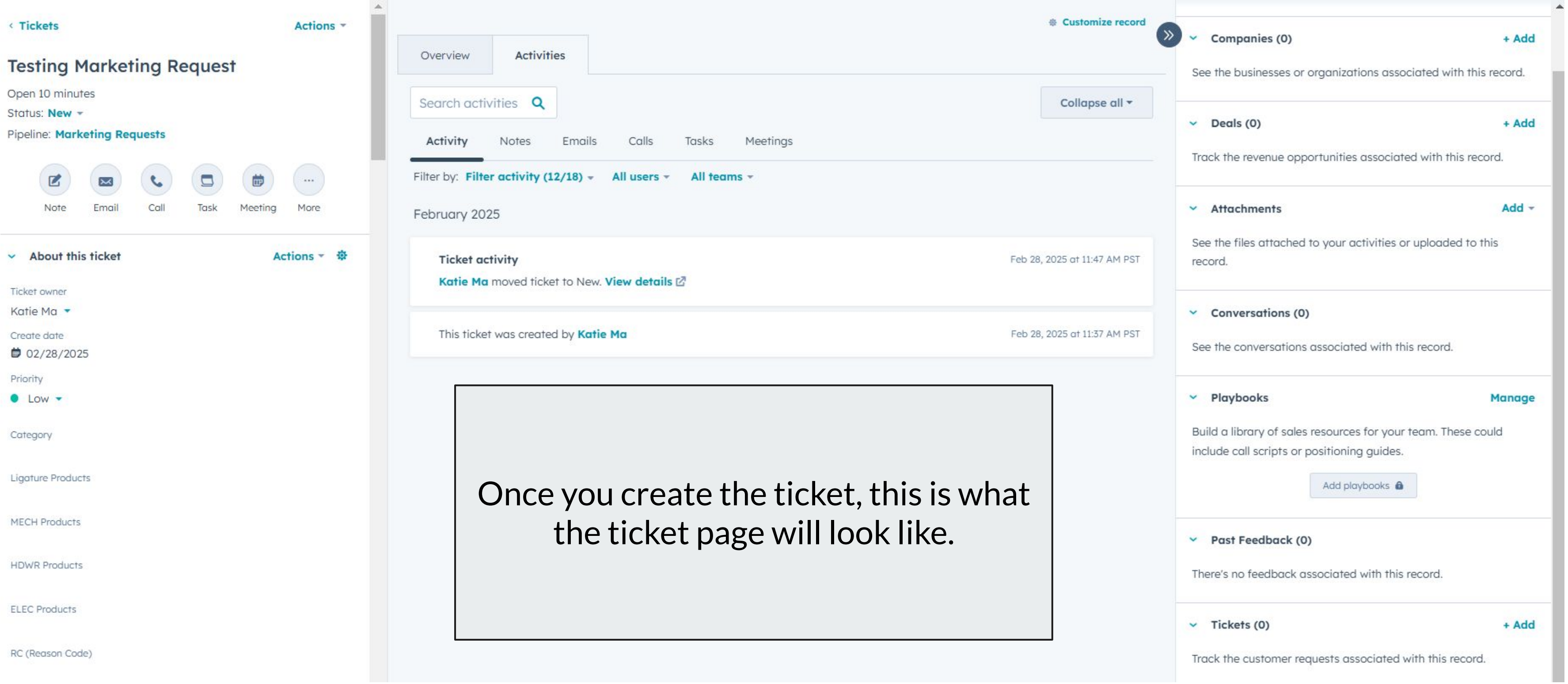


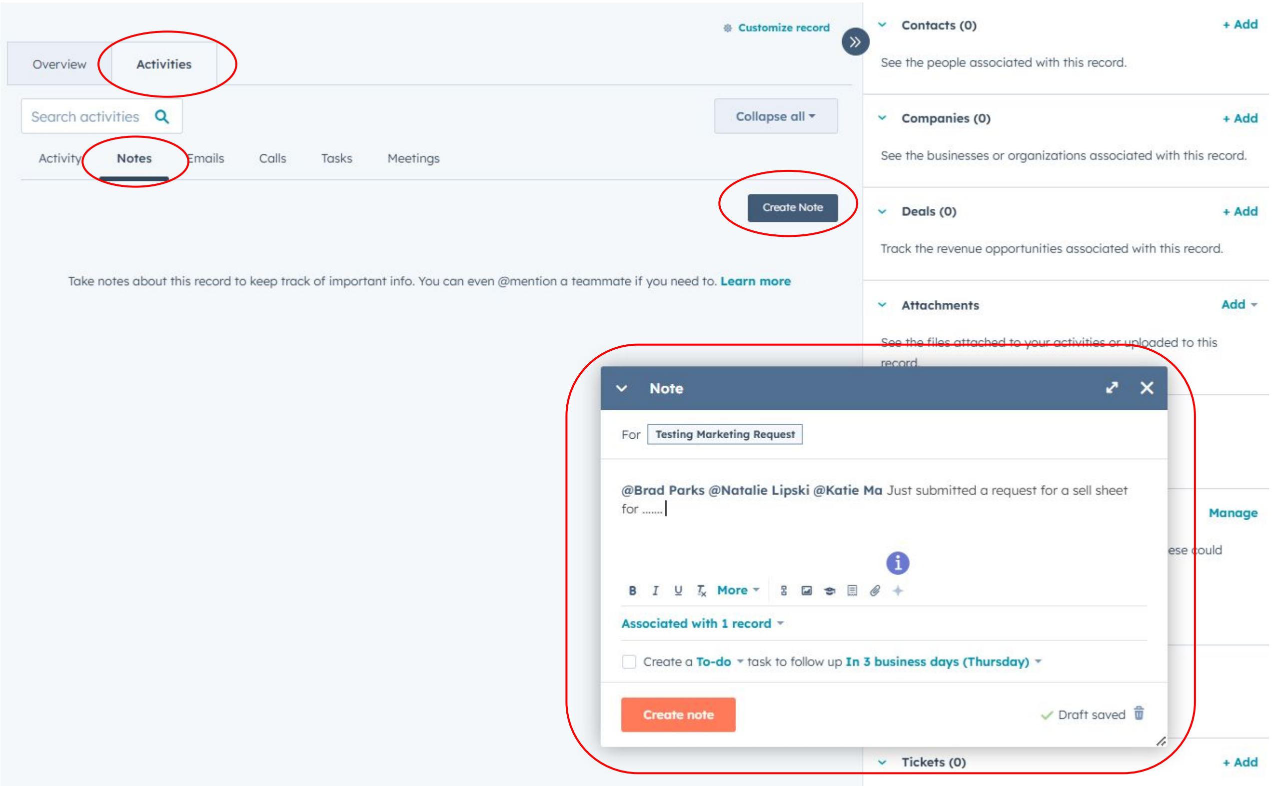
Once you create the ticket, this is what the ticket page will look like.

How to submit a marketing request ticket

*THIS IS CRUCIAL!

After you create the ticket, navigate to “Activities” and then “Notes”.

Click “Create Note” and then **remember to @ Brad Parks, Natalie Lipski, and Katie Ma in order for us to get notified about this ticket and respond to you ASAP. Please do this every time you submit a ticket.**



How to submit a marketing request ticket

*ONE LAST CRUCIAL THING!

On the right side of the ticket page, you will see this column.

Navigate to “Attachments”. Click “Add” and then “Your computer”.

Upload the PDF attachment of the “Marketing Literature Creation Request Form” that you previously filled out. This ensures that we will be able to access the official form and get in contact with you/get started on the request.