

# Architektura CRM a jeho prvky

## Práce v systému HubSpot CRM



**SILESIAN  
UNIVERSITY**  
SCHOOL OF BUSINESS  
ADMINISTRATION IN KARVINA

**Ing. Radka Bauerová, Ph.D.**

Seminář č. 7

3. 11. 2021

# CÍLE SEMINÁŘE

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1. Diskuze nad výhodami využívání CRM softwarů v rámci operativní a kolaborativní části CRM
2. Tvorba prodejního e-mailu (tvorba obsahu a designu + tvorba loga pomocí Canvy)

## **Přednášky odborníků z praxe:**

- 16.11.; B206; 8:00 – 9:30 + seminář do 10:20
- 3.12.; A211?; 9:45 – 11:15



# Jaké jsou výhody využívání CRM softwarů v rámci operativní a kolaborativní části CRM?

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# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



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Contacts ▾ Conversations ▾ **Marketing ▾** Sales ▾ Service ▾ Automation ▾ Reports ▾

🔍 🏠 ⚙️ 🔔 👤 Slezská univerzita v Opavě ▾

## Marketing Email



Manage Analyze Health **BETA**

List Folders


Search for emails 🔍

Manage columns Export emails

### All emails

- Draft
- Scheduled
- Sent
- Archived

### Email tools

 Create hard bounced list

<input type="checkbox"/>	TITLE ▾	LAST UPDATED ▾	OPEN R... ▾
<b>Remove the HubSpot logo from your emails.</b> Unlock premium features with Marketing Hub Starter. <a href="#">Upgrade</a>			
<input type="checkbox"/>	<b>New email</b> ● Draft - Updated 9/11/2021 by Radka Bauerová	Sep 11, 2021	0%
<input type="checkbox"/>	<b>New email</b> ● Draft - Updated 9/11/2021 by Radka Bauerová	Sep 11, 2021	0%
<input type="checkbox"/>	<b>fm</b> ● Draft - Updated 9/11/2021 by Radka Bauerová	Sep 11, 2021	0%
<input type="checkbox"/>	<b>My first test email</b> ● Sent - Updated 9/11/2021 by Radka Bauerová	Sep 11, 2021	0%

# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



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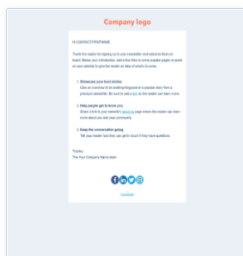
Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾

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[← Back to emails](#)

Select a template

## Basic



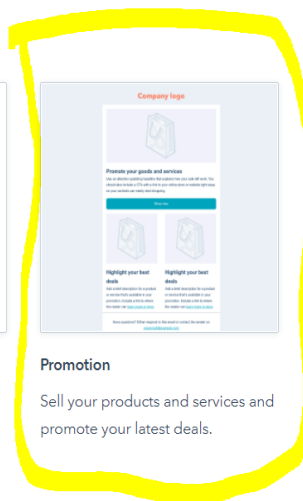
### Welcome

Send an email to your new customers to welcome them to your product.



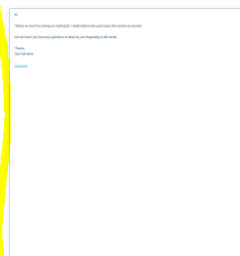
### Simple

Start with a simple template if you like to have or to begin with minimal formatting in your emails.



### Promotion

Sell your products and services and promote your latest deals.



### Plain email

Create an email with little formatting that will look and feel like a personal email to your readers.



### Newsletter

Keep your contacts engaged with your brand by sharing content that you both care about.

# TVORBA LOGA POMOCÍ CANVY



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The screenshot displays an email design tool interface. At the top, there is a dark navigation bar with buttons for 'Exit', 'Save', and 'Saved', and a 'New email' title. On the right side of this bar is a red 'Review and send' button. Below the navigation bar, there are tabs for 'Edit', 'Settings', and 'Send or schedule', along with 'Send test email' and 'Actions' buttons. The main workspace is divided into two panels: 'Content' and 'Design'. The 'Content' panel on the left contains a grid of design elements: Image, Text, Button, Divider, Social, and Video. Below this is a 'LAYOUTS' section with six pre-designed grid templates labeled 1 through 4. The 'Design' panel on the right shows a live preview of an email template. At the top of the preview, a yellow oval highlights a red text placeholder that reads 'Company logo'. Below this is a large image of a shopping bag. Underneath the image is a heading 'Promote your goods and services' followed by a paragraph of text: 'Use an attention-grabbing headline that explains how your sale will work. You should also include a CTA with a link to your online store or website right away so your contacts can easily start shopping.' At the bottom of the preview is a teal 'Shop now' button. In the bottom right corner of the design tool, there are 'Chat' and 'Help' buttons.

# TVORBA LOGA POMOCÍ CANVY



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Exit Save Last saved 6:48 AM New email Review and send

Create A/B test Edit Settings Send or schedule Send test email Actions

Done

Edit Image

Image\* Replace Remove

Company logo

Alt text

HubSpot logo orange

Width 240 Height 72

Show as maximum width on mobile devices

Link (optional)

Company logo

Promote your goods and services

Use an attention-grabbing headline that explains how your sale will work. You should also include a CTA with a link to your online store or website right away so your contacts can easily start shopping.

Shop now

Chat Help

KLIKNOU ZDE

# TVORBA LOGA POMOCÍ CANVY



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The screenshot displays the Canva 'Insert image' panel. On the left, a dark grey area shows a blurred 'Company logo' placeholder. The main panel is white with a teal header. Below the header, there is a search bar with the text 'Search images, folders or stock images' and a magnifying glass icon. Underneath, the 'Recent images' section shows three thumbnails: a blue logo with a gear, a colorful storefront illustration, and a logo with a green leaf and the text 'Okružní listek'. At the bottom right, the 'Design with Canva' button is highlighted with a yellow rectangular box.

Insert image ×

Select an image to insert. svg, tiff, and tif files are not supported.

Search images, folders or stock images 🔍

Recent images Browse folders

Okružní listek

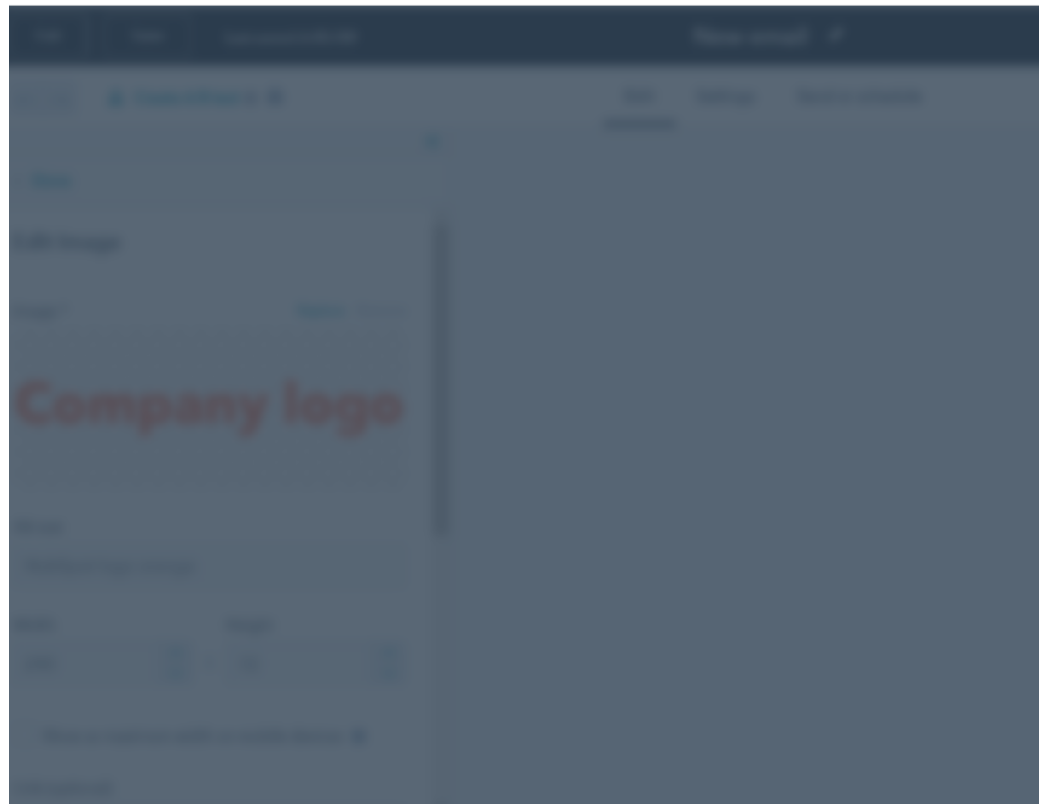
Design with Canva



# TVORBA LOGA POMOCÍ CANVY



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### Insert image ✕

Select an image to insert. svg, tiff, and tif files are not supported.


 🔍

**Recent images** Browse folders



🔍

- Invitation (14 × 14 cm)
- Label (6 × 4 in)
- Leaderboard Ad (728 × 90 px)
- Logo (500 × 500 px)**
- Photo Collage (25 × 20 cm)
- Poster (5.5 × 4.2 in)

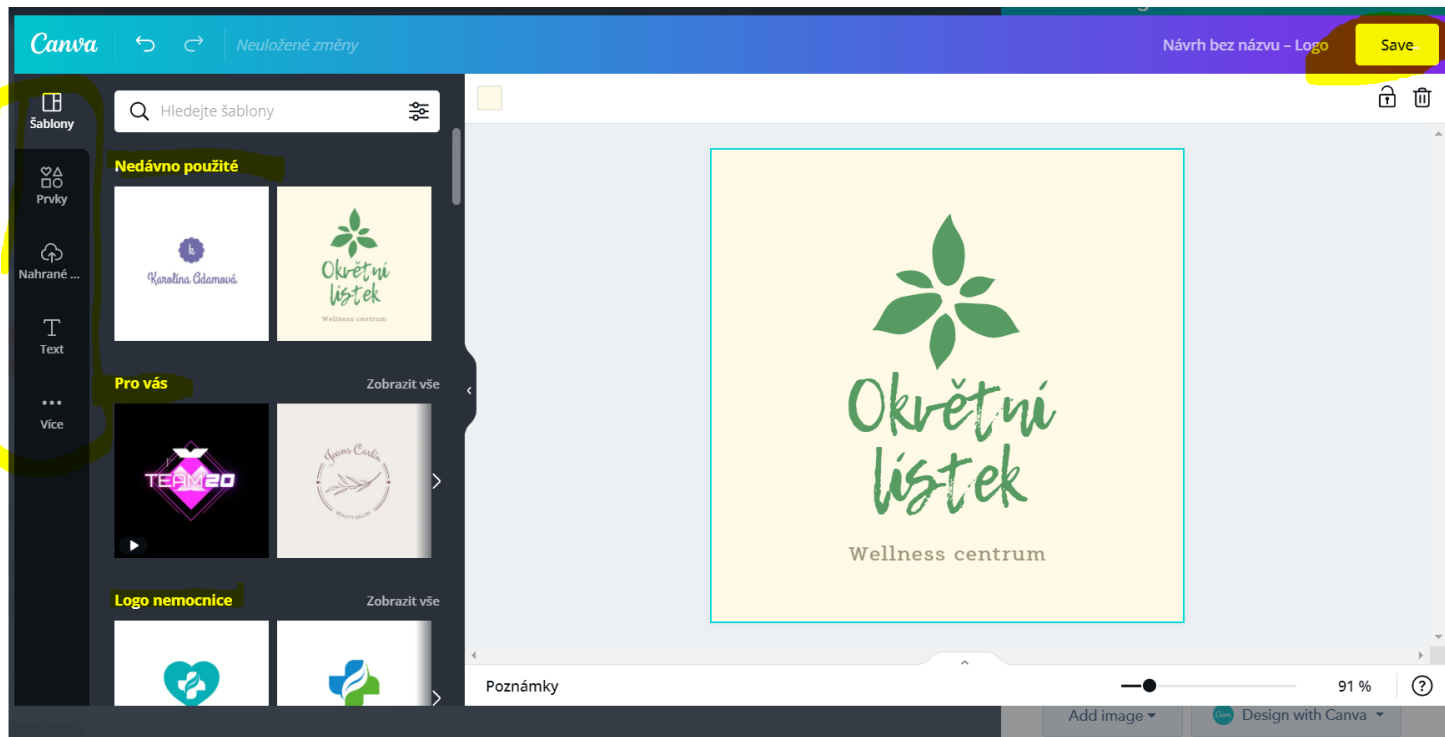
Add image ▾  Design with Canva ▾



# TVORBA LOGA POMOCÍ CANVY



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# TVORBA LOGA POMOCÍ CANVY



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Company logo

Insert image

Select an image to insert. svg, tiff, and tif files are not supported.

Search images, folders or stock images

Recent images

Browse folders

Okružní léstek

Okružní léstek

Design with Canva

# TVORBA LOGA POMOCÍ CANVY



SLEZSKÁ  
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Exit Save ✓ Saved New email ✎ Review and send

↶ ↷ Create A/B test 🔒 Edit Settings Send or schedule Send test email Actions

< Done

### Edit Image

Image \* Replace Remove




Alt text  
Truhlárna

Width 500 Height 500

Show as maximum width on mobile devices ⓘ

Link (optional)



Chat Help

Upravíme  
šířku a  
výšku loga



# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



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FAKULTA V KARVINĚ

Exit Save Last saved 6:57 AM New email Review and send

↶ ↷ Create A/B test Edit Settings Send or schedule Send test email Actions

Content Design

Image Text Button

Divider Social Video

LAYOUTS

1 2 3

1/3 : 2/3 2/3 : 1/3 4

Promote your goods and services

Use an attention grabbing headline that explains how your goods will make You

Chat Help

# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



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## Personalizace e-mailu

The screenshot displays the HubSpot email editor interface. At the top, there is a dark header bar with buttons for "Exit", "Save" (with a checkmark and "Saved" status), "New email" (with a pencil icon), and "Review and send". Below this is a secondary toolbar with "Send test email" and "Actions" (with a dropdown arrow). The main editing area features a rich text editor toolbar with options for Paragraph, Arial font, 15px size, and various text formatting tools (bold, italic, underline, link, unlink, list, indent, outdent, link, unlink, image, video, embed, code, help). A yellow highlight is placed over the "Personalize" button in the toolbar. The email content area shows a placeholder for "Company logo" in orange text. Below it is a large image placeholder containing a shopping bag icon. Underneath the image is a text field containing "Dobrý den, " followed by a yellow highlight, indicating a personalized name. Below the text field is a teal "Shop now" button. At the bottom of the email content area, there are two smaller shopping bag icons and a "Chat Help" button.

Exit Save ✓ Saved New email Review and send

Send test email Actions

Paragraph Arial 15px B I U A More Personalize

< Done

Edit Text

Padding

Apply to all sides

Top Bottom

10 10

Left Right

20 20

Company logo

Dobrý den,

Shop now

Chat Help

# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



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FAKULTA V KARVINĚ

## Personalizace e-mailu

The screenshot displays the HubSpot email editor interface. At the top, there are buttons for 'Exit', 'Save', and 'Review and send'. The main content area shows a draft email with a 'Company logo' and a 'Shop now' button. A dialog box titled 'Insert Personalization Token' is open, allowing the user to select a token type (currently 'Contact') and search for specific tokens. The 'Edit Text' sidebar on the left provides options for padding and applying changes to all sides. The email content includes a personalized greeting 'Dobrý den,' and a 'Shop now' button.

Exit Save Last saved 8:43 AM New email Review and send

Create A/B test

Edit Settings Send or schedule Send test email Actions

Paragraph

### Insert Personalization Token

Type

Contact

Search Contact tokens

- Annual revenue
- Average page views
- Became a customer date
- Became a lead date
- Became a marketing qualified lead date
- Became a sales qualified lead date

Company logo

Dobrý den,

Shop now

Chat Help

### Edit Text

Padding

Apply to all sides

Top Bottom

10 10

Left Right

20 20

# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



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FAKULTA V KARVINĚ

## Personalizace e-mailu

The screenshot displays the HubSpot email editor interface. At the top, there is a dark navigation bar with buttons for 'Exit', 'Save', and 'Review and send'. The main editing area features a rich text editor with a toolbar containing various text formatting options. A modal dialog box titled 'Insert Personalization Token' is open, showing a list of available tokens. The 'Contact: First name' token is selected, and its default value is 'zákazník'. The 'Insert' button in the dialog is highlighted with a yellow circle. Below the dialog, a preview of the email content is visible, showing a 'Company logo' placeholder, a personalized greeting 'Dobry den,', a 'Shop now' button, and two product images. The left sidebar contains an 'Edit Text' panel with padding settings and a 'Done' button.



# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



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## Personalizace e-mailu

The screenshot displays the HubSpot email editor interface. At the top, there is a dark navigation bar with buttons for 'Exit', 'Save', 'Saved', 'New email', and 'Review and send'. Below this, a toolbar includes 'Create A/B test', 'Edit', 'Settings', 'Send or schedule', 'Send test email', and 'Actions'. The main editing area features a rich text editor with a 'Paragraph' dropdown, font selection (Arial, 15px), and various text formatting options (bold, italic, underline, link, etc.). A 'Personalize' button is also visible. On the left, the 'Edit Text' sidebar is open, showing a 'Padding' section with a checked toggle and an 'Apply to all sides' checkbox. Below this, there are four input fields for padding: Top (10), Bottom (10), Left (20), and Right (20). The main content area shows a preview of an email template. At the top of the preview is the text 'Company logo'. Below it is a large image of a shopping bag. Underneath the image is a text field containing 'Dobry den, 'First name'', where 'First name' is highlighted in red and circled in yellow with a checkmark. Below the text field is a teal 'Shop now' button. At the bottom of the preview, there are two smaller images of shopping bags and a 'Chat Help' button.

# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT

youremail@example.com'."/>

Exit Save Last saved 7:11 AM New email Review and send

Create A/B test Edit Settings Send or schedule Send test email Actions

Done

Edit Button

Link to \*  
URL

Link URL \*  
http://

Button text \*  
Shop now

Font \*  
Arial 16px

Background color  
# 00a4bd

Lze vložit i zajímavou infografiku

Shop now

Have questions? Either respond to this email or contact the sender on [youremail@example.com](mailto:youremail@example.com)

Zkouška, Osoboditelů 1020, Bohumin, Czech Republic 73581  
[Unsubscribe](#) [Manage preferences](#)

Chat Help

bauerova@opf.slu.cz'."/>

Nakupte zde

Have questions? Either respond to this email or contact the sender on [bauerova@opf.slu.cz](mailto:bauerova@opf.slu.cz)

youremail@example.com'."/>

Okřetí listek Truhlárna

Zde bude představení společnosti (název, představení mise a vize, čím se zabýváte)

Zde může být představení prodávaného produktu a jeho fotografie

It's all about the DATA INFOGRAPHIC

Zde můžou být specifikovány výhody produktu

Lze vložit i zajímavou infografiku

Shop now

Have questions? Either respond to this email or contact the sender on [youremail@example.com](mailto:youremail@example.com)

# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



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FAKULTA V KARVINĚ

Exit Save Last saved 7:36 AM Zkušební prodejní e-mail v rámci výuky Vztahového marketingu a... Review and send

Create A/B test

Edit

Settings

Send or schedule

Send test email

Actions

## Email settings

From name \*

Radka Bauerová

From address \*

Use this as my reply-to address

bauerova@opf.slu.cz

Make sure you're using a [HubSpot connected inbox](#) as your reply-to address to track replies

Subject line \*

[Help me write a great subject line](#)

Zkušební prodejní e-mail v rámci výuky Vztahového marketingu a CRM



Personalize

Preview text

Personalize

Internal email name \*

Zkušební prodejní e-mail v rámci výuky Vztahového marketingu a CRM

Chat Help

# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



SLEZSKÁ  
UNIVERZITA  
OBCHODNĚ PODNIKATELSKÁ  
FAKULTA V KARVINĚ

Exit Save ✓ Saved Zkušební prodejní e-mail v rámci výuky Vztahového marketingu a... Review and send

Create A/B test ? ? Edit Settings **Send or schedule** Send test email Actions ▼

### Recipients

Send to\* ?

Raduš Bauerová <bauerovaradu@gmail.com> ×

Don't send to ?

Select lists or contacts ▼

Don't send to **unengaged contacts** ?

### Sending options

Send now  Schedule for later

Total recipients :  
**1**

Sending limit 0/2,000

You have 2,000 email sends left for this month. To add more emails to your sending limit, you'll need to [upgrade to Marketing Starter](#) ↗

# TVORBA PRODEJNÍHO EMAILU V SYSTÉMU HUBSPOT



SLEZSKÁ  
UNIVERZITA  
OBCHODNĚ PODNIKATELSKÁ  
FAKULTA V KARVINĚ

Exit Save Last saved 8:52 AM Zkouška Review and send

Create A/B test

Content Design

Image Text Button

Divider Social Video

LAYOUTS

1 2 3

1/3 : 2/3 2/3 : 1/3 4

Dobry den, Fin

Highlight

**Remove HubSpot Branding** Upgrade Upgrade

Upgrade to Marketing Hub Starter to eliminate HubSpot branding from all your emails.

**Email type**  
Regular

**From name**  
Radka Bauerová

**From address**  
bauerova@opf.slu.cz

**Subject line**  
Zkouška

**Preview text**  
-

**Send to:**  
[Raduš Bauerová <bauerovaradu@gmail.com>](mailto:Raduš Bauerová <bauerovaradu@gmail.com>)

**Don't send to:**

Send Preview Cancel



# TÝMOVÝ ÚKOL – Naše fiktivní společnost

<b>Zadání:</b>	v týmu vytvořte prodejní e-mail
<b>Termín odeslání e-mailu:</b>	nejpozději 8. 11. 2021
<b>Hodnocení:</b>	<b>1 bod</b> , po doručení na e-mail vedoucí semináře

1) Vytvořte obsah e-mailu, kde představíte svou společnost a prodávaný produkt.

**E-mail bude obsahovat:**

- ✓ název společnosti,
- ✓ logo společnosti vložené pomocí rozšíření Canva,
- ✓ představení mise a vize společnosti,
- ✓ prodávaný produkt a jeho fotografie,
- ✓ odkaz, kde je možné si produkt zakoupit (není nutné vytvářet reálný odkaz na reálné webové stránky, je třeba zmínit, že se jedná pouze o testovací odkaz, který zavede příjemce zprávy na oficiální webové stránky fakulty),
- ✓ lištu s odkazem na soc.média.



2) Hotový prodejní e-mail **rozešlete na své kontakty** v databázi prostřednictvím systému **HubSpot**.



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Děkuji za pozornost



Máte dotazy?

