



Marketing Hub Professional Onboarding

What Is HubSpot Onboarding?

Are you new to HubSpot and overwhelmed by its complexities? You need expert help to navigate this vast platform and customize it to match your business.

Grab **INSIDEA's HubSpot onboarding service**, and we'll make it simple for you. We handle the technical setup, plus you gain an extra edge with your power team comprising of a dedicated account manager, an implementation partner, and a **HubSpot specialist**.

Give your HubSpot a phenomenal launch with INSIDEA!

What's included?



Expert Guidance

Access INSIDEA's certified HubSpot experts to fine-tune your platform for peak performance.



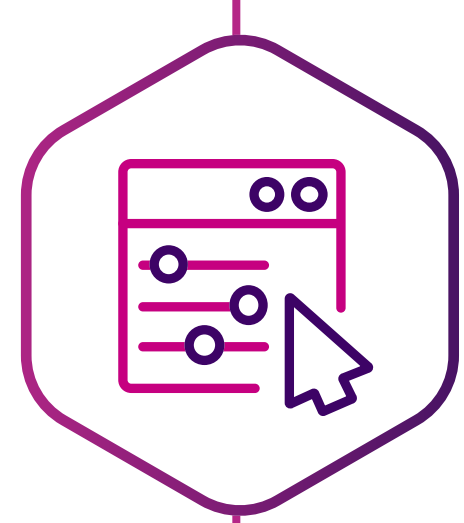
Done for You

We manage your entire HubSpot onboarding. From setting it up to optimizing your account, all to ensure it's fully operational and customized to your needs.



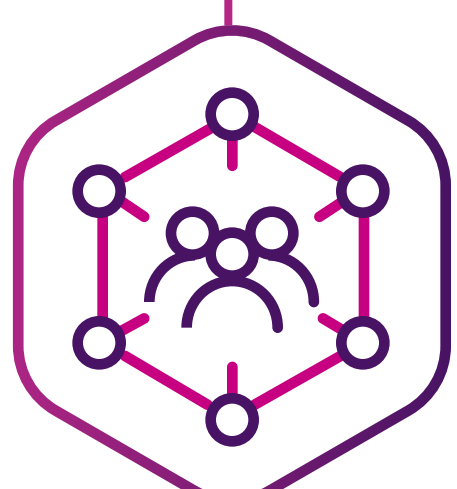
Weekly Meetings

We'll meet weekly to review your setup, address concerns, and ensure alignment with your goals. Slack/chat will be used for instant communication.



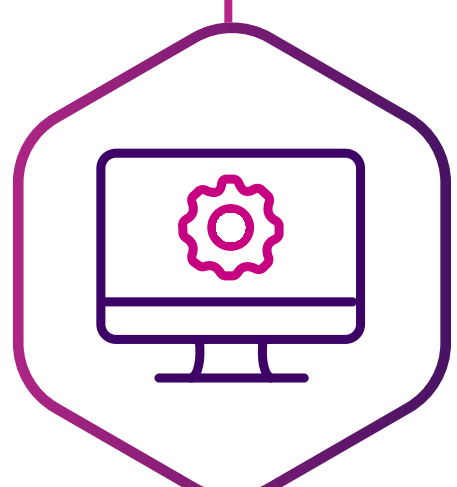
Portal Audit

We thoroughly review your existing system to pinpoint opportunities where HubSpot can optimize and improve your business operations.



Dedicated Success Team

Not just names on an email. Your Account Manager, Implementation Partner, and HubSpot Specialist meet you weekly to align HubSpot with your business goals.



Effortless Technical Setup

We handle all the technical setup details—ensuring your HubSpot platform's smooth, efficient launch.



Customized Training

Once we tailor HubSpot to fit your business, we train your team to navigate and utilize the system for optimal results.

How Does It Work?

Efficiently Set Up HubSpot in Just Weeks



Initial Call

We start with a call to understand your business needs and plan a HubSpot setup tailored to get you up and running in a few weeks.



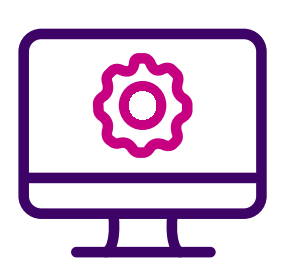
Customized Onboarding

We customize our standard onboarding roadmap to meet your business needs, ensuring your setup perfectly aligns with your goals.



Weekly Meetings

We'll hold weekly meetings to assess the progress on your setup, resolve any issues, and ensure alignment with your business objectives. Additionally, we'll utilize Slack/chat for continuous and instant communication throughout the process.



Technical Setup

Our technical team meticulously builds and customizes your HubSpot setup, ensuring seamless integration.



Customized Training

After setup, your team receives hands-on training to use your new HubSpot system effectively.

Deliverables:

Introduction + Kick-Off Call

During our kickoff call we will share more details on what to expect in the coming weeks as well as work through a series of questions to help us align on your technical & business requirements of HubSpot. Following the kickoff call, we will send over your Project Dashboard which we will use to keep track of all activities.

Setup Of Users & Associated Permissions

Maintain team organization and effectiveness by providing each member with the necessary data and resources. Our approach includes developing and allocating specific user permissions to control access where required. Additionally, we'll manage the allocation of super admins and paid Sales and coordinate the timely addition of users to HubSpot.

Integrate Email Forms with HubSpot CRM (Mailchimp, Campaign Monitor, AWeber, Constant Contact, GetResponse)

HubSpot's integration with your email service provider makes lead capture and management effortless. Our team will handle the setup by connecting your forms directly to HubSpot, ensuring that data flows automatically and stays in sync. This integration helps streamline your lead management process, saving time while keeping everything organized in one place.

Importing your Data (upto 1 .csv/.xls / .xlsx file)

Our team will handle the import of your standard object data (.csv) for Contacts, Companies, and Deals into HubSpot's CRM Database. This includes setting up custom properties and establishing record connections as needed. If you require extra support for data strategy, data cleaning, or data manipulation before the import, please note that additional fees may apply.

Please review our checklist to prepare yourself.

[Import File Checklist](#) [Import List Format](#)

Note: Please provide the import list in the format outlined above.

Properties, Objects & Associations labels (Upto 10 custom properties and 2 calculation properties)

Properties are fields that store information on HubSpot records. For example, you can use the City company property to specify where companies are located. There are default properties included for each object, but you can create custom properties to store unique data for your business. Our team will guide you in mapping/creating your custom properties.

Connect HubSpot with GPT to bring AI-powered assistance directly into the CRM

The HubSpot to GPT Connector allows your team to generate content, summarize notes, draft emails, and analyze data without leaving HubSpot. By connecting GPT with your CRM, users can streamline workflows, reduce manual effort, and enhance productivity with AI-driven insights and automation.

We will handle the setup and configuration, ensure secure integration, and guide your team on using GPT effectively within HubSpot to support sales, marketing, and service operations.

Note: You should have GPT Pro plan or above to setup the connection.

Enabling AI-Powered Assistance

Breeze Assistant reduces the time your team spends on repetitive tasks, helping them focus on strategy and customer engagement. From prospecting companies to preparing for meetings and generating content, it streamlines work across sales, marketing, and service. We'll handle the setup by activating the feature in your AI settings, assigning the right permissions, and installing any required apps so your team can start using it right away.

Connect Email & Calendar

We will seamlessly connect your email and calendar, ensuring a cohesive and synchronized experience. This integration aims to improve efficiency, allowing you to manage your communication and schedule seamlessly within a unified platform.

Integration with your existing tools from Hubspot App Marketplace

The HubSpot App Marketplace is a platform where you can search for and integrate the necessary tools for your business with your HubSpot account. With over 1,000 integrations available, the HubSpot Marketplace covers various apps, tools, and platforms in the marketing hub. If you let us know which apps you are currently using, we will integrate them for you.

HubSpot Native Apps Integration

Note:

1. Only the native apps and features listed in this sheet will be included during the onboarding duration. Anything beyond this will be scoped out and charged separately.
 2. Any type of CRMs Integration/ Migration will be scoped out separately.
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Domain and HubSpot Tracking Codes Setup

The account time zone setting localizes several of your HubSpot tools, including when your scheduled emails send, when scheduled social media content posts, and date and time information for your analytics.

Super Admins and users with Add and edit users permissions in your HubSpot account can change a user's permissions.

Every HubSpot account has a unique tracking code for monitoring website visits via cookies. We will set up your default domain and install this tracking code on any non-HubSpot pages to track the analytics.

Setting up CRM Branding

We will add logo, favicon, and default brand colors in your account settings to align with your company's branding and style guidelines, ensuring consistency across all HubSpot tools.

Setup GDPR Compliance Settings (optional)

HubSpot has a set of features that can be turned on in the portal to help enforce GDPR compliance. These features add functionality to help you comply, but they don't automatically make your processes compliant, so it's important to consult your legal team for specific instructions on what you should be doing.

Connect Email Sending Domain

Linking your email sending domain to HubSpot grants HubSpot authorization to send emails on your behalf through DKIM (Domain Keys Identified Mail) email authentication. Authenticating your domain with HubSpot ensures that your emails appear more legitimate to email servers. You have the flexibility to connect multiple domains if necessary.

Setup Subdomains For Landing Page, Blogs/ Quotes/ Meeting Page/ Service Emails & Email Web Version

Subdomains are often used to host content in a separate location from your main website. For instance, email.insidea.com. We will link your subdomains to HubSpot, allowing you to create HubSpot-hosted landing pages, blogs, and the web version of your sales emails.

Mapping Call (Marketing Strategy & Implementation)

Setting up your marketing campaigns is crucial for driving success. Our team will collaborate to understand your marketing goals, strategies, and workflows. We'll then configure HubSpot to manage your campaigns effectively, ensuring proper tracking of leads, audience segmentation, and campaign performance.

Configure Marketing Contacts Segmentation

The type of marketing contacts you have sets a limit on how many people you can send marketing emails to. If your database has more contacts than this limit, you can choose to categorize some contacts as non-marketing or purchase additional contacts from HubSpot. Once you've determined which contacts belong to your marketing audience and which don't, we'll ensure that any new contacts added to your database, whether through .csv file uploads or integrations, are properly categorized.

Buyer Persona Property Setup For Contacts (Up To 1 Personas)

Setting up buyer personas for contacts involves creating detailed profiles of your target audience segments. Personas are fictional general character profiles that represent the preferences, objectives, and behaviors of your customers. We'll gather the information about your buyer personas and input them into the 'Persona' contact property in HubSpot. This allows you to focus on specific groups and organize your contacts accordingly.

Enhancing Contact and Company Data

Buyer Intent and Data Enrichment help keep your CRM records accurate and highlight prospects who are most likely to engage. Data Enrichment updates your contact and company records with the latest information, while Buyer Intent tracking surfaces leads showing buying signals.

We will enable enrichment for your contacts and companies, configure Buyer Intent tracking, and integrate the enriched data into your CRM to ensure your team always has up-to-date and actionable insights.

Note: To view more than 20 companies per view, you must have HubSpot credits.

Set Up your Resubscription Automation

We'll create a default resubscription email. This will enable contacts who previously opted out of emails to resubscribe themselves if they complete a HubSpot form.

Creating Unsubscriber list

We'll import the email addresses of contacts who have previously chosen to unsubscribe from all email communications in an opt-out list. Importing this list won't add these contacts to your database. Instead, it will mark the email addresses on the list as ineligible to receive emails from your account.

Setup Basic Marketing Email Templates (1 Template according to Branding)

We will collaborate closely with your team to craft a compelling and personalized email newsletter template using the HubSpot standard template library using the drag-and-drop feature. These templates ensure that your messages are always professional and customized to your business needs. Additionally, they enhance your communications through personalization tokens. Our team can help you migrate and create email templates from your past CRM tools.

Note: Custom Design will be subject to additional charges.

Set Up Marketing Campaign

INSIDEA will help to confirm the validity of email addresses intended for sending emails, even if they aren't required to be registered as users in HubSpot.

Form Integration & Customization (Up to 2 Forms)

Use forms to gather important information about your visitors and contacts. In HubSpot, you can easily create forms to add to your HubSpot pages or external sites. INSIDEA will assist replace your existing website forms with HubSpot forms or create new ones from scratch, ensuring all data flows directly into your HubSpot account. We will provide an embedded code your developer can easily integrate into your website's backend. This code will enable seamless data transfer directly into HubSpot, streamlining your data collection process.

Segmentation & Creation Of Desired Lists (Up To 3 Active Or Static Lists)

HubSpot's lists tool allows you to effortlessly collect contacts or companies based on specific details like their activities or properties. This feature is useful for multiple tasks such as sending marketing emails, enrolling contacts in workflows, filtering lists for reports, creating targeted ad audiences, and more. It's a versatile tool that helps you streamline your tasks and gain a better understanding of your audience.

Create Conversations Inbox

The Conversations Inbox is a centralized location within your HubSpot account where you can view and manage messages from all connected channels, including live chat, chatbot, support emails, and support forms. This feature helps you to handle inquiries and resolve issues with greater clarity and coordination.

Setup basic Live Chat (upto 10 automated replies)

Create a chat flow with live chat to connect visitors directly with members of your team. The live chat will appear as a widget on your website pages that visitors can click to start a real-time conversation with someone on your team. Our team will integrate HubSpot's Live Chat into your website which can enable you to respond to your customer inquiries and concerns in real-time, right from your digital doorstep.

Automation Workflow Creation & Optimization (upto 3 workflows)

Automation workflows are like your personal assistants in the digital world. Create a workflow to automate your business processes and make your team more efficient. INSIDEA offers simple workflow templates, easy implementation of drip campaigns, and nurture flows to automate, streamline and organize tasks, processes, and procedures.

Setup Lead Scoring (Upto 5 Steps Scoring)

HubSpot offers a scoring feature that allows us to prioritize leads that closely match your business's target audience. INSIDEA can assist you build and automate lead assignment criteria to ensure each lead is assigned to the suitable owner.

Assistance with connecting Ads account (LinkedIn Ads / Google Ads)

In order to manage and analyze your ad campaign using HubSpot's ads tool, you can connect your Ads account to HubSpot. Once the connection is established, all existing ad campaigns in that account will be displayed and reported on by HubSpot. Once your Ads accounts are connected, you can also connect additional users so that they can manage and create ad campaigns for the account.

Assistance With Social Media Setup And Settings Configuration

Connect your social media accounts to HubSpot to start creating and publishing social posts, and tracking social media engagements in HubSpot. We're here to guide and support you through the setup process, offering step-by-step instructions and personalized assistance.

Setting Up Project Management Tool (in Beta)

The Projects object in HubSpot allows you to manage initiatives, track progress, and organize related work in one place. You can create project records, build customizable pipelines and stages, associate tasks with projects, and connect projects to deals for better visibility. We will assist in setting up and configuring your projects, ensuring pipelines, stages, and associations are tailored to support smooth workflow management.

Setting Up AI Agents/ Assistant (Up to 1 AI Agent/ Assistant in Professional Plan)

We help your team leverage HubSpot's AI Agents to automate tasks like customer support, lead generation, and content creation. Our focus is on template-based AI Agents or Assistants, ensuring proven, reliable setups that are quick to implement. Our team will configure the AI Agents, integrate them into your existing workflows, and guide your team on how to use them effectively to enhance efficiency and productivity.

List of AI Agent/ Assistant

Note:

1. Customer Agent to be scoped out separately.
2. These agents and assistants are currently in beta and don't use credits. In the future, they may require HubSpot credits.

Marketing Reporting Dashboard (upto 1 Dashboards and 3 Reports)

Setting up marketing reporting and dashboards enables to track and analyze performance effectively. It helps to visualize key metrics, identify trends, and make data-driven decisions to optimize your marketing efforts. INSIDEA will help you create a marketing-focused dashboard to track marketing activities across various channels and social media accounts, along with website analytics and performance metrics. We can even help analyze the lead flow and how marketing campaigns are performing.

Training session & Project Sign-Off Call (1 session included)

We will organize a training session to ensure that everyone has the necessary skills and knowledge to use the platform effectively. In addition, we will have a project sign-off call to review the completed work, address any remaining concerns, and obtain formal approval to conclude the project.

Note: Only one training session will be included during the onboarding session. Additional training sessions, if required, will be charged at \$250 per session separately.

Timeline: 6 Weeks



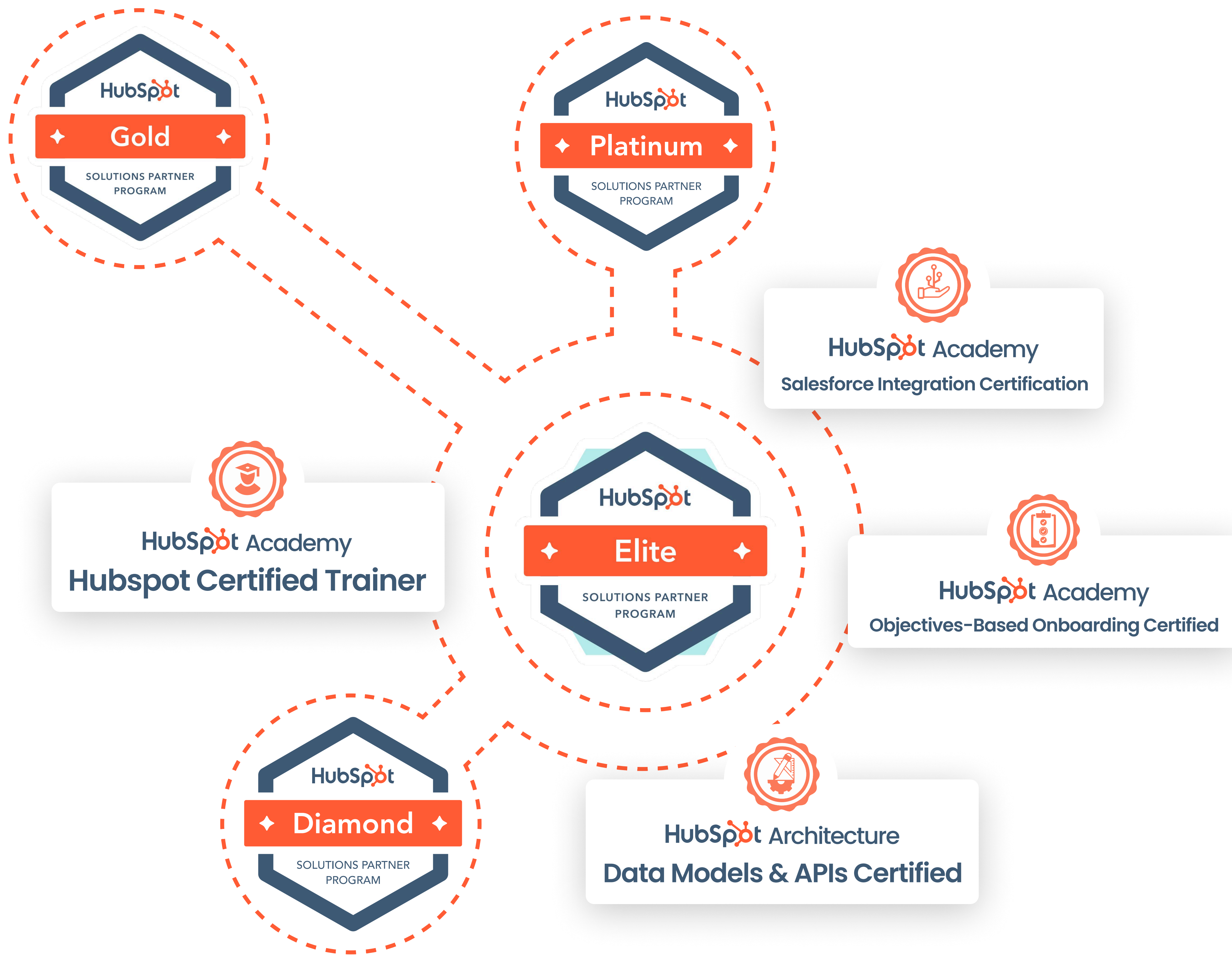
Marketing Hub

Professional

\$2000

Talk with a HubSpot Expert

Questions? Let's talk to learn more about your business needs and see how we can help.



Let's Talk

INSIDEA

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