

EMEA · ENTERPRISE ONBOARDING

HubSpot Enterprise, **set up for seats and credits pricing.**

For large, specialised teams. Choose the areas you want set up; the fee stops rising at 3 setups. A fixed-fee onboarding for new HubSpot customers in EMEA, with a seat and credit plan so you have an estimate of your monthly HubSpot cost before go-live.

PARTNER TIER

Elite Solutions Partner

HubSpot's highest partner tier

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations



HubSpot Onboarding



Platform Enablement



CRM Data Migration



Custom Integration



CRM Implementation

FIXED FEES Fixed per currency, excluding any applicable taxes

FIXED FEE	EUR	GBP	USD	TIMELINE
One setup	€3,500	£3,000	\$4,000	About 8 weeks
Two setups	€7,000	£6,000	\$8,000	12 weeks
3 or more setups	€10,500	£9,000	\$12,000	14 to 16 weeks
Fast Track, one setup	€4,400	£3,750	\$5,000	About 6 weeks
Fast Track, 3 or more	€13,200	£11,250	\$15,000	10 to 12 weeks

2 AI agent pilots per engagement. 2 training sessions per setup, up to 5. Setups overlap after the CRM foundation, so several setups take less than one setup multiplied.

IN EVERY ENGAGEMENT CRM foundation, and a seat and credit plan

- ✓ Introduction and kick-off call
- ✓ Set up users & associated permissions
- ✓ Integrate email forms with HubSpot CRM
- ✓ Importing your data (up to 1.csv, xls, or.xlsx file)
- ✓ Configure properties, objects & associations labels (up to 10 custom properties and 2 calculated properties)
- ✓ Connect email & calendar
- ✓ Integration with your existing tools from HubSpot App Marketplace
- ✓ Domain and HubSpot tracking codes setup
- ✓ Set up CRM branding
- ✓ Set up GDPR compliance settings (optional)
- ✓ Connect email sending domain
- ✓ Set up subdomains for landing page, blogs, quotes, meeting page, service emails & email web version
- ✓ Connect HubSpot with GPT to bring AI-powered assistance directly into the CRM
- ✓ Enabling AI-powered assistance

- ✓ **Seat map.** Every user assigned the right seat type (GTM, Ops or view-only), with the monthly cost of the seat mix.
- ✓ **Usage estimate.** Expected monthly email sends, workflow actions and AI agent use, built in HubSpot's own calculator with the assumptions shown.
- ✓ **Pack recommendation.** Which email, workflow and agent capacity packs to buy, compared with paying as you go.
- ✓ **Credit limits and usage alerts.** Account, feature and action credit limits set, and usage alerts switched on, before go-live.
- ✓ **Monthly cost sheet.** One page showing seats, packs and expected usage, so finance sees an estimate of the monthly HubSpot cost. HubSpot's own quote is the binding figure.
- ✓ **30-day usage check.** Actual credit usage reviewed against the plan a month after go-live, with adjustments.

WHAT IS IN EACH SETUP Enterprise limits

Marketing setup

Segmentation and lists, email templates, forms, workflows, lead scoring, live chat, ads and social, dashboard.

- ✓ Configuring approval workflows
- ✓ Mapping call (marketing strategy & implementation)

- ✓ Configure contact segmentation
- ✓ Buyer persona property setup for contacts (up to 2 personas)

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- ✓ Set up customer journeys (up to 1)
- ✓ Enhancing contact and company data
- ✓ Set up your resubscription automation
- ✓ Creating unsubscriber list
- ✓ Set up basic marketing email templates (1 template according to branding)
- ✓ Set up marketing email senders
- ✓ Form integration & customization (up to 5 forms)
- ✓ Segmentation & creation of desired lists (up to 5 active or static lists)
- ✓ Create conversations inbox

Sales setup

Deal pipelines, lead routing, calling, meetings, sequences, playbooks, forecasting, dashboard.

- ✓ Configuring approval workflows
- ✓ Mapping call (sales process & implementation)
- ✓ Filter out internal IPs
- ✓ Set up inbound and outbound calling feature (up to 3 phone numbers)
- ✓ Configuring lead routing
- ✓ Set up leads pipeline and automate lead progression and follow-ups (1 pipeline with up to 3 automated workflows)
- ✓ Assistance with setting up meetings tool & email tracking through Gmail or Outlook integration
- ✓ Build out 2 deal pipelines & 5 stages each
- ✓ Create basic deal-creation workflow for each pipeline
- ✓ Automation workflow creation & optimization (up to 5 workflows)
- ✓ Task management
- ✓ Set up sales snippets (up to 5 snippets)

Service setup

Ticket pipelines, SLAs, team inbox, customer portal, knowledge base, surveys, dashboard.

- ✓ Configuring ticket assignment & limits
- ✓ Configuring approval workflows
- ✓ Mapping call (Service Hub configuration and setup)
- ✓ Set up 2 ticket pipelines & 5 stages each
- ✓ Set up service level agreement (SLA) time to response and close
- ✓ Turn on settings to automatically update ticket status when someone replies
- ✓ Connect team inbox for service requests (1 for each channel)
- ✓ Set up basic live chat (up to 15 automated replies)
- ✓ Set up service playbook (up to 2 playbooks)

Revenue setup

Product library, price books, quotes and approvals, e-signature, payments, invoicing.

- ✓ Mapping call (quote-to-cash strategy & implementation)
- ✓ Product library setup with categories and variants (up to 10 products)
- ✓ Configure 2 active price books (segment or region based)
- ✓ Configure flat-rate, tiered, and volume-based pricing (multi-currency) (up to 10 products pricing structure)
- ✓ Create reusable product bundles with default quantities and discounts
- ✓ Automated sales tax
- ✓ Configure 2 quote templates (AI-generated quotes, single-page editor, activity tracking)

- ✓ Set up basic live chat (up to 15 automated replies)
- ✓ Automation workflow creation & optimization (up to 5 workflows)
- ✓ Assistance with connecting ads account (LinkedIn Ads or Google Ads)
- ✓ Assistance with social media setup and settings configuration
- ✓ Set up lead scoring
- ✓ Set up custom objects (up to 1 custom object)
- ✓ Set up project management tool (in beta)
- ✓ Marketing reporting dashboard (up to 2 dashboards and 6 reports)

- ✓ Set up sales email templates (up to 5 templates)
- ✓ Set up sales sequence (up to 3 sequences)
- ✓ Set up sales playbook (up to 2 playbooks)
- ✓ Set up sales goal and use the forecasting tool (up to 2 sales goals)
- ✓ Segmentation & creation of desired lists (up to 5 active or static lists)
- ✓ Upload files and documents
- ✓ Enhancing contact and company data
- ✓ Set up project management tool (in beta)
- ✓ Enabling meeting notes automation
- ✓ Set up custom objects (up to 1 custom object)
- ✓ Migrating parent/child relationships
- ✓ Sales reporting dashboard (up to 2 dashboards and 6 reports)
- ✓ Sales workspace and target accounts (enable account-based reporting and alerts)

- ✓ Set up service snippets (up to 5 snippets)
- ✓ Automation workflow creation & optimization (up to 5 workflows)
- ✓ Set up task queues (up to 5 task queues)
- ✓ Set up project management tool (in beta)
- ✓ Segmentation & creation of desired lists (up to 5 active or static lists)
- ✓ Set up feedback surveys (up to 2 surveys)
- ✓ Set up basic customer portal
- ✓ Set up & configure up to 3 knowledge base articles
- ✓ Set up help desk (if opted for the beta version)
- ✓ Service reporting dashboard (up to 2 dashboards and 6 reports)

- ✓ Connect HubSpot Payments & Stripe (payment links and stored payment methods)
- ✓ Set up subscriptions, billing schedules, mixed frequencies, and staggered start/end dates (up to 1)

- ✓ Create 5+ custom reports, revenue dashboards, and governance documentation

Add-ons

Extra training session (per session): €220 / £190 / \$250 · **Management retainer, with a monthly credit review** (per month, from): €1,750 / £1,500 / \$2,000

Custom integrations and CRM migrations are scoped separately. HubSpot licence, seats and credits are bought from HubSpot. Final scope and timeline lock in the proposal after a 30-minute scoping call.