

MARKETING HUB · PROFESSIONAL ONBOARDING

HubSpot Marketing Hub, configured to convert.

Comprehensive marketing software for automation, reporting and campaigns. A fixed-fee onboarding run by certified experts, scoped so you go live in weeks, not months.

ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

PARTNER TIER

Elite Solutions Partner

HubSpot's highest partner tier



HubSpot
Onboarding



Platform
Enablement



CRM Data Migration



Custom Integration



CRM Implementation

ONBOARDING OPTIONS Two ways to go live, same scope

FASTEST

FAST TRACK

\$3,000

Fixed fee · 4 weeks

Comprehensive marketing software for automation, reporting and campaigns.

✓ **34** deliverables included

STANDARD

\$2,000

Fixed fee · 8 weeks

Comprehensive marketing software for automation, reporting and campaigns.

✓ **34** deliverables included

HOW YOUR ONBOARDING RUNS Fast Track in 4 weeks, Standard in 8 weeks

01

Kickoff & discovery

Kickoff and mapping calls to align on goals, funnel, and the technical requirements of your portal.

02

Foundation & data

Users and permissions, email and domains, data import, properties, and CRM branding.

03

Campaigns & automation

Lists, segmentation, lead scoring, workflows, email templates, forms, and campaign setup.

04

Reporting & handover

Dashboards and reports, a live training session, and project sign-off.

WHAT WE SET UP Everything included in a Marketing Hub Professional onboarding

✓ 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...

✓ Setup Of Users & Associated Permissions

Maintain team organization and effectiveness by providing each member with the necessary data and resources. Our approach includes...

✓ Integrate Email Forms with HubSpot CRM

HubSpot's integration with your email service provider makes lead capture and management effortless. Our team will handle the setup by...

✓ Importing your Data (up to 1 .csv, .xls, or .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...

✓ Configure Properties, Objects & Associations Labels (Up to 10 custom properties and 2 calculated properties)

Properties are fields that store information on HubSpot records. For example, you can use the City company property to specify where...

✓ Connect Email & Calendar

We will seamlessly connect your email and calendar, ensuring a cohesive and synchronized experience. This integration aims to improve...

✓ 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...

✓ 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...

✓ 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...

✓ 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...

✓ Connect Email Sending Domain

Linking your email sending domain to HubSpot grants HubSpot authorization to send emails on your behalf through DKIM (Domain Keys...

✓ 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...

✓ **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...

✓ **Enabling AI-Powered Assistance**

Breeze Assistant reduces the time your team spends on repetitive tasks, helping them focus on strategy and customer engagement. From...

✓ **Mapping Call (Marketing Strategy & Implementation)**

Setting up your marketing campaigns is crucial for driving success. Our team will collaborate to understand your marketing goals,...

✓ **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...

✓ **Buyer Persona Property Setup For Contacts (Up To 1 Persona)**

Setting up buyer personas for contacts involves creating detailed profiles of your target audience segments. Personas are fictional general...

✓ **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...

✓ **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...

✓ **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...

✓ **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...

✓ **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...

✓ **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...

✓ **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...

✓ **Create Conversations Inbox**

The Conversations Inbox is a centralized location within your HubSpot account where you can view and manage messages from all connected...

✓ **Setup basic Live Chat (up to 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...

✓ **Automation Workflow Creation & Optimization (up to 3 workflows)**

Automation workflows are like your personal assistants in the digital world. Create a workflow to automate your business processes and make...

✓ **Setup Lead Scoring**

HubSpot offers a scoring feature that allows us to prioritize leads that closely match your business's target audience.INSIDEA can assist...

✓ **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...

✓ **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...

✓ **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...

✓ **Setting Up AI Agents/ Assistant (Up to 1 AI Agent/ Assistant)**

We help your team leverage HubSpot's AI Agents to automate tasks like customer support, lead generation, and content creation. Our focus is...

✓ **Marketing Reporting Dashboard (up to 1 Dashboards and 3 Reports)**

Setting up marketing reporting and dashboards enables to track and analyze performance effectively. It helps to visualize key metrics...

✓ **Training session & Project Sign-Off Call**

We will organize a training session to ensure that everyone has the necessary skills and knowledge to use the platform effectively. In...

Native apps we integrate (22)

Email and Communication: Gmail, Slack, Outlook · **Marketing Automation and Campaigns:** Mailchimp, Facebook Ads & LinkedIn Ads · **Analytics:** Google Search Console, Google Tag Manager, Google Analytics 4 · **Project Management:** Asana, Monday.com · **Customer Support:** Intercom · **Telephone Systems:** Aircall, Dialpad, Ring Central, Aloware · **Payments and Invoicing:** Stripe · **Video Conference and Meetings:** Zoom, Google Meet, Microsoft Teams · **Meeting Recording:** Fathom AI Notetaker, Otter.AI, Gong Calls

Only the native apps and features listed here are included during onboarding. Anything beyond this is scoped and charged separately. Any CRM integration or migration is scoped separately.

AI agents & assistants (19)

Social Post Agent · Deal Loss Agent · Call Recap Agent · Customer Health Agent · Company Research Agent · Blog Research Agent · Sales to Marketing Feedback Agent · Customer Agent · Cross-sell/Upsell Agent · Prospecting Agent · RFP Agent · Developer Tool Testing Agent · Shopify Store Performance Agent · Internal FAQ Assistant · Brand Assistant · Sales Coach Assistant · ICP Assistant · Data Agent · Closing Agent

Template-based AI agents and assistants: select up to 1 for Professional and up to 2 for Enterprise. Customer Agent and Prospecting Agent are scoped separately.