

MARKETING HUB PROFESSIONAL PLUS · PROFESSIONAL PLUS ONBOARDING

HubSpot Marketing+, configured to convert.

Marketing Hub Professional bundled with Content Hub Professional features: campaigns, lifecycle, web and landing pages, blog, memberships, and content. 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

FAST TRACK

\$2,500

Fixed fee · 4 weeks

Marketing Hub Professional bundled with Content Hub Professional features: campaigns, lifecycle, web and landing pages, blog, memberships, and content.

✓ **44** deliverables included

FASTEST

STANDARD

\$1,500

Fixed fee · 8 weeks

Marketing Hub Professional bundled with Content Hub Professional features: campaigns, lifecycle, web and landing pages, blog, memberships, and content.

✓ **44** 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 & content

Campaigns, workflows, forms, plus web pages, landing pages, blog, and content remix.

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 Plus Professional Plus onboarding

✓ Introduction and kick-off call

During our kickoff call we will share more details on what to expect in the...

✓ Set up users & associated permissions

Maintain team organization and effectiveness by providing each member with the...

✓ Integrate email forms with HubSpot CRM

HubSpot's integration with your email service provider makes lead capture and...

✓ 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...

✓ 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...

✓ Connect email & calendar

We will seamlessly connect your email and calendar, ensuring a cohesive and...

✓ Integration with your existing tools from HubSpot App Marketplace

The HubSpot App Marketplace is a platform where you can search for and integrate...

✓ Domain and HubSpot tracking codes setup

The account time zone setting localizes several of your HubSpot tools, including...

✓ Set up CRM branding

We will add logo, favicon, and default brand colors in your account settings to...

✓ Set up GDPR compliance settings (optional)

HubSpot has a set of features that can be turned on in the portal to help enforce...

✓ Connect email sending domain

Linking your email sending domain to HubSpot grants HubSpot authorization to send...

✓ Set up 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...

✓ 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...

✓ **Enabling AI-powered assistance**

Breeze Assistant reduces the time your team spends on repetitive tasks, helping...

✓ **Mapping call (marketing strategy & implementation)**

Setting up your marketing campaigns is crucial for driving success. Our team will...

✓ **Configure marketing contacts segmentation**

The type of marketing contacts you have sets a limit on how many people you can...

✓ **Buyer persona property setup for contacts (up to 1 persona)**

Setting up buyer personas for contacts involves creating detailed profiles of...

✓ **Enhancing contact and company data**

Buyer Intent and Data Enrichment help keep your CRM records accurate and...

✓ **Set up your resubscription automation**

We'll create a default resubscription email. This will enable contacts who...

✓ **Creating unsubscriber list**

We'll import the email addresses of contacts who have previously chosen to...

✓ **Set up basic marketing email templates (1 template according to branding)**

We will collaborate closely with your team to craft a compelling and personalized...

✓ **Set up marketing campaign**

INSIDEA will help to confirm the validity of email addresses intended for sending...

✓ **Form integration & customization (up to 2 forms)**

Use forms to gather important information about your visitors and contacts. In...

✓ **Segmentation & creation of desired lists (up to 3 active or static lists)**

HubSpot's lists tool allows you to effortlessly collect contacts or companies...

✓ **Create conversations inbox**

The Conversations Inbox is a centralized location within your HubSpot account...

✓ **Set up basic live chat (up to 10 automated replies)**

Create a chat flow with live chat to connect visitors directly with members of...

✓ **Automation workflow creation & optimization (up to 3 workflows)**

Automation workflows are like your personal assistants in the digital world...

✓ **Set up lead scoring**

HubSpot offers a scoring feature that allows us to prioritize leads that closely...

✓ **Assistance with connecting ads account (LinkedIn Ads or Google Ads)**

In order to manage and analyze your ad campaign using HubSpot's ads tool, you can...

✓ **Assistance with social media setup and settings configuration**

Connect your social media accounts to HubSpot to start creating and publishing...

✓ **Set up project management tool (in beta)**

The Projects object in HubSpot allows you to manage initiatives, track progress...

✓ **Set up AI agents or assistants (up to 1)**

We help your team leverage HubSpot's AI Agents to automate tasks like customer...

✓ **Journey mapping and navigation**

As a HubSpot partner, we will enhance your website navigation to ensure a...

✓ **Set up and optimize your web pages (up to 2)**

As a HubSpot partner, we will assist you in creating and optimizing your website...

✓ **Set up and optimize your landing pages (custom templates) (up to 1)**

We build and optimize your landing pages in HubSpot using custom templates and...

✓ **Set up blog page (up to 1)**

We set up your blog on HubSpot with starter posts, configured with your branding...

✓ **SEO recommendations & content strategy**

As a HubSpot partner, we will optimize your site with tailored SEO...

✓ **Podcast**

As a HubSpot partner, we will help you create and manage your podcast to engage...

✓ **Media management (video, audio, files)**

In HubSpot, you can upload files to the files tool and use them in your HubSpot...

✓ **Memberships & member blogs (with blog teasers)**

With memberships, you can manage which visitors can access specific content...

✓ **Create call-to-action (CTA) buttons (up to 3)**

Use the calls-to-action (CTA) tool to create button CTAs, banners, or pop-ups to...

✓ **Essential traffic and website analytics report dashboard (up to 1 dashboard and 5 reports)**

Setting up marketing reporting and dashboards enables to track and analyze...

✓ **Repurposing content using AI**

We will handle the setup of HubSpot's Content Remix feature. This includes...

✓ **Training session & project sign-off call (1 session included)**

We will organize a training session to ensure that everyone has the necessary...

Additional training sessions beyond those included are charged at \$250 per session.

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.