

REVENUE HUB · ENTERPRISE ONBOARDING

HubSpot Revenue Hub, configured for quote-to-cash.

Revenue Hub Enterprise depth: multi-currency pricing, advanced approvals, the Quote Rules engine, field-level permissions, and governance reporting. 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

\$5,000

Fixed fee · 6 weeks

Revenue Hub Enterprise depth: multi-currency pricing, advanced approvals, the Quote Rules engine, field-level permissions, and governance reporting.

✓ **33** deliverables included

FASTEST

STANDARD

\$4,000

Fixed fee · 10 weeks

Revenue Hub Enterprise depth: multi-currency pricing, advanced approvals, the Quote Rules engine, field-level permissions, and governance reporting.

✓ **33** deliverables included

HOW YOUR ONBOARDING RUNS Fast Track in 6 weeks, Standard in 10 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

Quote-to-cash

Product library, price books, quotes, e-signature, contracts, payments, and billing.

04

Reporting & handover

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

WHAT WE SET UP Everything included in a Revenue Hub Enterprise onboarding

✓ Introduction and 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...

✓ Set up 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...

✓ Set 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...

✓ Set up 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...

✓ 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 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 (quote-to-cash strategy & implementation)**

Setting up Revenue Hub at enterprise scale is the foundation for a connected quote-to-cash engine built for larger teams and complex deals...

✓ **Product library setup with categories and variants (up to 10 products)**

Your Product Library is the most critical foundation in Revenue Hub, everything downstream inherits from it. We will configure categories,...

✓ **Configure 2 active price books (segment or region based)**

Price Books give your RevOps team a centralized way to define and apply pricing across deals and quotes. We will set the right prices once...

✓ **Configure flat-rate, tiered, and volume-based pricing (multi-currency) (up to 10 products pricing structure)**

Transparent, consistent pricing is the foundation of customer confidence. We will configure flat-rate and tiered or volume-based pricing...

✓ **Create reusable product bundles with default quantities and discounts**

Product Bundles let you group commonly sold items into a repeatable configuration defined once and reused everywhere. Reps insert a bundle...

✓ **Automated sales tax**

Compliance and accuracy are essential for smooth financial operations. We will use Revenue Hub automation to set up dynamic tax rules based...

✓ **Configure 2 quote templates (AI-generated quotes, single-page editor, activity tracking)**

Creating quotes should feel like presenting your offer on a polished, branded stage. We will configure branded, reusable quote templates...

✓ **Configure advanced approvals (multi-step, conditional routing)**

Advanced Approvals give enterprise teams precise, automated oversight. We will build multi-step approval workflows triggered automatically...

✓ **Configure the quote rules engine (incompatibility, compatibility, pricing, quantity)**

The Quote Rules engine ensures every quote is accurate as it's built, automatically enforcing incompatibility, compatibility, pricing...

✓ **Configure field-level permissions for price, cost, margin, and custom properties**

Field-level permissions protect your most sensitive commercial data. We will control who can view and edit price, cost, margin, and custom...

✓ **Implement e-signature**

E-signatures are the digital handshake of modern business. We will set up secure e-signature workflows (up to 25 signatures/user/month on...

✓ **Configure and activate Breeze Closing Agent on quotes (basic setup)**

The Closing Agent is your AI-powered sales assistant that answers buyer questions about pricing, terms, and product details around the...

✓ **Enable contracts and 'Create contracts from accepted quotes'**

Contracts turn Revenue Hub into a connected system, a contract record lives alongside every contact, deal, and company, auto-created when a...

✓ **Activate the connected quote-to-cash flow (contract-driven billing)**

Connected CPQ, Billing, and Payments automates the end-to-end revenue lifecycle, an accepted quote flows into a contract, billing schedules...

✓ **Connect HubSpot Payments & Stripe (payment links and stored payment methods)**

Payments are where customer trust meets convenience. We will configure HubSpot Payments or Stripe to accept credit cards, ACH, and stored...

✓ **Set up subscriptions, billing schedules, mixed frequencies, and staggered start/end dates (up to 1)**

For subscription and recurring models, automation keeps revenue flowing and operations efficient. We will set up billing schedules,...

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

Your dashboards are the control tower of your revenue operation, giving you a clear view of what is working and what needs attention. We...

✓ **Configure up to 2 AI agents (lead generation, content, or support)**

Revenue Hub provides a unified platform to manage the entire revenue lifecycle across deals, quotes, contracts, invoices, and payments...

✓ **Training session & project sign-off call (2 sessions included)**

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

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.