

REVENUE HUB · PROFESSIONAL ONBOARDING

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

Quote-to-cash configured end to end: product library, price books, quotes, e-signature, payments, and subscriptions. 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

\$3,000

Fixed fee · 4 weeks

Quote-to-cash configured end to end: product library, price books, quotes, e-signature, payments, and subscriptions.

✓ **31** deliverables included

FASTEST

STANDARD

\$2,000

Fixed fee · 8 weeks

Quote-to-cash configured end to end: product library, price books, quotes, e-signature, payments, and subscriptions.

✓ **31** 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

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 Professional 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 to help us...

✓ Set up users & associated permissions

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

✓ 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 connecting your...

✓ 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 includes setting...

✓ 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 companies are...

✓ Connect email & calendar

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

✓ 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...

✓ 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...

✓ 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, ensuring...

✓ 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 you comply...

✓ 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...

✓ **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 subdomains to...

✓ **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...

✓ **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...

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

Setting up your Revenue Hub is the foundation for a connected quote-to-cash engine that streamlines sales operations, automates billing, and accelerates...

✓ **Product library setup with categories and variants (up to 5 products)**

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

✓ **Configure 1 active price book (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 so sellers...

✓ **Configure flat-rate and tiered pricing (up to 5 products pricing structure)**

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

✓ **Create reusable product bundles from the product library**

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

✓ **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 on product...

✓ **Configure 1 quote template (AI-generated quotes, single-page editor, activity tracking)**

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

✓ **Set up standard quote approvals and automated workflows**

Approvals protect your commercial strategy without slowing your team down. We will configure standard quote approvals so that quotes meeting defined...

✓ **Implement e-signature**

E-signatures are the digital handshake of modern business. We will set up secure e-signature workflows, included at up to 25 signatures per user per...

✓ **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 clock, trained on...

✓ **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 quote is...

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

Connected CPQ, Billing, and Payments streamlines your revenue lifecycle by automating contracts, billing, invoicing, and payments, reducing manual work,...

✓ **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 payment...

✓ **Set up subscriptions and invoice automation (automated reminders included) (up to 1)**

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

✓ **Create 3 custom reports & 1 standard dashboard**

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

✓ **Configure up to 1 AI agent (lead generation, content, or support)**

AI is not only about speed, it is about smart efficiency. We will configure AI agents and assistants to automate lead generation, content, and customer...

✓ **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...

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.