

SALES HUB · PROFESSIONAL ONBOARDING

HubSpot Sales Hub, configured to close.

Pipeline, sequences, forecasting, and the sales motion configured end to end. 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

Pipeline, sequences, forecasting, and the sales motion configured end to end.

✓ **38** deliverables included

FASTEST

STANDARD

\$2,000

Fixed fee · 8 weeks

Pipeline, sequences, forecasting, and the sales motion configured end to end.

✓ **38** 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

Pipelines & sequences

Deal pipelines, lead routing, sequences, playbooks, snippets, and forecasting.

04

Reporting & handover

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

WHAT WE SET UP Everything included in a Sales 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...

✓ 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 (sales process & implementation)**

Setting up your sales process is like laying the foundation for your sales success. Our team will work together to understand and map your...

✓ **Filter out internal IPs**

After connecting your domain to HubSpot or installing the HubSpot tracking code on your external site, the next step is to exclude traffic...

✓ **Set up HubSpot inbound and outbound calling feature (1 phone number)**

Our team will assist you in setting up a phone number in HubSpot, allowing you to make calls directly from your CRM. This will track call...

✓ **Configuring lead routing**

Lead routing helps assign leads to the right team members from different parts of the world. It evenly distributes leads among team...

✓ **Set up leads pipeline and automate lead progression and follow-ups (1 pipeline with up to 1 automated workflow)**

Leads Object serves as a critical component for tracking and managing prospective customers throughout the sales funnel. HubSpot's...

✓ **Assistance with setting up meetings tool & email tracking through Gmail or Outlook integration**

With HubSpot's meetings tool, prospects can automatically book a meeting with you or multiple people in your company. If you have an...

✓ **Build out 1 deal pipeline & 5 stages**

Think of deal pipelines as your sales GPS. They give you a clear map of your sales journey, helping you predict how much revenue you'll...

✓ **Create basic deal-creation workflow for each pipeline**

Set up workflows in HubSpot that trigger the creation of a deal when certain criteria are met (e.g., when a contact fills out a specific...

✓ **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...

✓ **Task management**

Keep track of your to-do list in HubSpot by creating tasks. You can create tasks as reminders associated with specific records. You can...

✓ **Set up sales snippets (up to 2 snippets)**

Snippets are short, reusable text blocks that can be used on contact, company, deal and ticket records, in email templates, in chat...

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

✓ **Set up sales email templates (up to 3 templates)**

Within this phase, we will collaborate closely with your sales and marketing teams to craft compelling and personalized email templates...

✓ **Set up sales sequence (up to 1 sequence)**

Creating sequences in HubSpot allows you to automate and personalize your outreach efforts by setting up a series of follow-up emails and...

✓ **Set up sales playbook (up to 1 playbook)**

With the playbooks tool, you can create interactive content cards displayed in contact, company and deal records. When speaking with...

✓ **Set up sales goal and use the forecasting tool (up to 1 sales goal)**

Setting up sales goals involves defining specific targets or objectives for your sales team to achieve within a certain timeframe. These...

✓ **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...

✓ **Upload files and documents**

Asset and Content Management lets you store and organize all your files and documents in HubSpot, including images, PDFs, spreadsheets, and...

✓ **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 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...

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

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

✓ **Enabling meeting notes automation**

HubSpot's Sales Meeting Notetaker acts like a personal assistant in every meeting. It automatically captures notes, allowing your team to...

✓ **Creation of sales reporting dashboard (up to 1 dashboard and 3 reports)**

HubSpot's Dashboard and Reporting provides comprehensive tracking of key performance indicators and metrics vital to your sales operations...

✓ **Sales workspace and target accounts (enable account-based reporting and alerts)**

We'll help you align sales efforts with high-value accounts by setting up custom views, account properties, and activity alerts. With...

✓ **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...

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.