

SERVICE HUB · PROFESSIONAL ONBOARDING

HubSpot Service Hub, configured to retain.

Tickets, knowledge base, automation, and the service motion live and 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

\$3,000

Fixed fee · 4 weeks

Tickets, knowledge base, automation, and the service motion live and reporting.

✓ **32** deliverables included

FASTEST

STANDARD

\$2,000

Fixed fee · 8 weeks

Tickets, knowledge base, automation, and the service motion live and reporting.

✓ **32** 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

Tickets & SLAs

Ticket pipelines, SLAs, help desk, live chat, playbooks, and customer portal.

04

Reporting & handover

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

WHAT WE SET UP Everything included in a Service 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 (Service Hub configuration and setup)**

We will work with you to optimize your service processes within HubSpot, including automating ticket assignments, tracking customer feedback, and...

✓ **Set up 1 ticket pipeline & 5 stages**

HubSpot's ticketing system is a comprehensive solution that allows you to track all customer interactions from beginning to end. With the default...

✓ **Set up service level agreement (SLA) time to response and close**

Our specialized approach ensures that SLA criteria are customized to your business's unique requirements, focusing on variables such as channels,...

✓ **Turn on settings to automatically update ticket status when someone replies**

Align with Sales and Marketing leaders on hand-off processes and team-led communication channels. Establish a seamless handoff between your sales and...

✓ **Connect team inbox for service requests (1 for each channel)**

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

✓ **Set up 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 website pages...

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

HubSpot Playbooks are interactive guides that provide teams with structured scripts, templates, and resources. They help ensure consistent and effective...

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

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

HubSpot Snippets are short, reusable blocks of text that can be easily inserted into emails, chat conversations, and tickets within the HubSpot platform....

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

HubSpot Workflows are automation features within the HubSpot platform designed to streamline service processes. They allow you to significantly reduce...

✓ **Set up task queues (up to 2 task queues)**

Task Queues are like dynamic to-do lists that allow users to compile tasks in an ordered manner and work through them systematically, one at a time. This...

✓ **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 project records,...

✓ **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 on...

✓ **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 properties. This feature...

✓ **Set up feedback survey (up to 1 feedback survey)**

HubSpot Feedback Surveys allow you to easily collect customer feedback right within your HubSpot account using customizable surveys. You can use popular...

✓ **Set up basic customer portal**

Customer Portal becomes a one-stop-shop for your customers to manage their interactions, access vital information, and communicate directly with your...

✓ **Set up & configure up to 1 knowledge base article**

The Knowledge Base feature of HubSpot's Service Hub is an essential tool for businesses looking to create a self-service resource for their customers....

✓ **Service reporting dashboard (up to 1 dashboard and 3 reports)**

HubSpot's Dashboard and Reporting feature offers a comprehensive tracking system for your service operations. It helps you keep track of key performance...

✓ **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...

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.