

SMART CRM · ENTERPRISE ONBOARDING

HubSpot Smart CRM, configured as your foundation.

The Smart CRM foundation at enterprise depth: expanded configuration, more custom objects and properties, and the governance larger teams need. 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

The Smart CRM foundation at enterprise depth: expanded configuration, more custom objects and properties, and the governance larger teams need.

✓ **26** deliverables included

FASTEST

STANDARD

\$4,000

Fixed fee · 10 weeks

The Smart CRM foundation at enterprise depth: expanded configuration, more custom objects and properties, and the governance larger teams need.

✓ **26** 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

CRM intelligence

Lifecycle stages, enrichment, duplicate governance, intent signals, and automation.

04

Reporting & handover

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

WHAT WE SET UP Everything included in a Smart CRM 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 to help us align on your technical & business...

✓ Set up teams, users & associated permissions

Maintain team organization and effectiveness by providing each member with the necessary data and resources. Our approach includes developing and allocating specific user permissions to...

✓ 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 up custom properties and establishing...

✓ Review properties, objects & record relationships

Properties and relationships define how information is stored and connected across records in HubSpot. During this step, we review the existing properties for Contacts, Companies, and Deals...

✓ Connect email & calendar

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

✓ Salesforce integration review & alignment

We review the existing Salesforce setup to understand synced objects, field mappings, ownership rules, and data flow direction. This ensures Smart CRM is configured without conflicts and...

✓ 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 posts, and date and time information for...

✓ 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 consistency across all HubSpot tools.

✓ 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, but they don't automatically make your...

✓ **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 authentication. Authenticating your...

✓ **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 HubSpot, allowing you to create...

✓ **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 companies to preparing for meetings and...

✓ **Salesforce custom object sync configuration (up to 10 objects)**

We review Salesforce custom objects to understand structure, relationships, and sync feasibility with Smart CRM. This ensures custom data models are aligned early, avoids sync conflicts, and...

✓ **Configure contact, company & deal objects with advanced lifecycle stages and multi-object relationships**

Designing your CRM data model is like creating the blueprint for your customer journey. We structure lifecycle stages to clearly reflect how contacts move from first interaction to closed...

✓ **Configure advanced duplicate management rules and enable ongoing data quality monitoring**

As your CRM grows, maintaining clean data becomes critical. AI-assisted duplicate detection and ongoing data quality monitoring protect reporting accuracy and automation reliability. INSIDEA...

✓ **Create up to 4 calculated properties and configure required fields by lifecycle stage**

Important calculations are automated and required fields are enforced at key lifecycle stages so critical information is captured as records progress. This strengthens forecasting reliability...

✓ **Configure advanced association labels, (up to 5 labels) object tags, (up to 5) and set up up to 1 custom object**

This step supports complex account structures by clearly defining how records relate to each other. Custom objects and advanced associations allow you to track non-standard data such as...

✓ **Buyer intent setup on CRM records and intent-based priority field creation (1 field)**

Buyer Intent signals are converted into a simple prioritization system so your sales team can focus daily efforts on accounts actively researching solutions instead of low-engagement...

✓ **Intent-based workflow setup (up to 2 workflows) and alert/follow-up automation**

Automation ensures that high-intent activity triggers immediate and consistent internal action. This reduces response time, improves follow-up, and prevents missed opportunities. INSIDEA will...

✓ **Apply data governance rules and intelligence indicators to deal records**

Deal data is structured using standardized properties and intelligence indicators to maintain a clean pipeline and accurate reporting. This supports reliable forecasting and AI-ready insights...

✓ **Configure payment links, invoices, commerce analytics, and Stripe (if applicable)**

Commerce tools connect deal activity with revenue collection, giving you visibility from deal stage to payment status. This improves revenue reporting and financial transparency. We will...

✓ **Product library setup (standard products) and multi-currency configuration (up to 2 currencies)**

The product and currency setup supports global selling while keeping pricing organized and consistent. This ensures accurate quoting, reporting, and revenue tracking across regions. We will...

✓ **Record view setup (up to 5 views), custom tab creation (up to 2 tabs), and index page configuration**

CRM layouts are optimized so each role sees relevant information without unnecessary clutter. This improves navigation, increases efficiency, and supports consistent adoption across teams. We...

✓ **Enable Data Agent for enrichment, insights, and advanced AI overviews (credits-based usage as per HubSpot plan)**

Data Agent supports enrichment and insights across CRM records and views. Usage is managed through HubSpot credits to ensure predictable and controlled value delivery. Our team will enable...

✓ **Reporting dashboard**

Reporting provides leadership-level visibility into pipeline health, conversion trends, and revenue performance. Dashboards are designed to support strategic decisions, not just display...

✓ **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 addition, we will have a project sign-off call to review...

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.