

SMART CRM · PROFESSIONAL ONBOARDING

HubSpot Smart CRM, configured as your foundation.

The Smart CRM foundation every onboarding is built on: users, permissions, data import, properties, and the core configuration that keeps your data clean. 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

The Smart CRM foundation every onboarding is built on: users, permissions, data import, properties, and the core configuration that keeps your data clean.

✓ **24** deliverables included

FASTEST

STANDARD

\$2,000

Fixed fee · 8 weeks

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✓ **24** 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

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 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 align on your technical & business requirements of HubSpot. Following...

✓ 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 control access where required...

✓ 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 record connections as...

✓ 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 and understand how records...

✓ 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 schedule seamlessly within...

✓ 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 reporting remains accurate.

✓ 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 your analytics.

✓ 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 processes compliant, so it's...

✓ 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 domain with HubSpot ensures...

✓ 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 HubSpot-hosted landing pages,...

✓ 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 generating content, it streamlines...

✓ Configure contact & company objects and define lifecycle stages

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 deal, ensuring consistent...

✓ Enable contact and company enrichment and apply enriched fields to CRM record views

Smart CRM uses built-in enrichment to enhance contact and company records with trusted third-party data. This reduces manual research, improves qualification, and strengthens personalization across teams. Enriched...

✓ Configure duplicate management rules and enable AI-supported 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 will set up duplicate...

✓ Create (up to 2) 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 and encourages consistent...

✓ Configure (up to 2) association labels and create (up to 2) object tags

Association labels and tags clarify how records relate in practical scenarios, such as decision-maker versus influencer or parent versus subsidiary, so teams understand context instantly without overcomplicating the CRM...

✓ AI-driven buyer intent indicator setup and intent-based priority field creation

Buyer Intent tracking highlights accounts actively researching solutions, helping your team focus on high-interest prospects instead of low-engagement leads. We will configure Buyer Intent settings and create a simple...

✓ Configure intent-triggered alerts or workflows (up to 1 workflow) using intent custom properties

Automation ensures that important buying signals trigger internal actions like task creation or alerts. This keeps follow-ups timely and prevents missed opportunities. INSIDEA will build practical workflows that turn...

✓ Set up payment links and invoices with Stripe configuration (if applicable)

Commerce tools connect your deals to payment tracking, giving you visibility from pipeline stage to collected revenue. This improves revenue reporting without adding complex finance processes. We will configure deal and...

✓ Configure team-based CRM record views (up to 2 views), index page views, and up to 1 custom tab

CRM layouts are tailored so each role sees only the information they need to take action quickly. This reduces clutter, improves navigation, and makes the system easier to use. We will customize record views and...

✓ Enable Data Agent for enrichment and CRM insights (credits-based usage as per HubSpot plan)

Data Agent is enabled to support enrichment, insights, and record analysis within your CRM. Usage is managed through HubSpot credits to ensure controlled and predictable value. Our team will activate and configure Data...

✓ Reporting dashboard

Dashboards focus on pipeline health, conversion rates, and deal progress to support clear and confident decision-making. We will design and configure dashboards aligned with your key performance indicators to ensure...

✓ 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 have a project sign-off call to review the completed work, address...

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.