Enterprise Suite Onboarding

What Is HubSpot Onboarding?

Are you new to HubSpot and overwhelmed by its complexities? You need expert help to navigate this vast platform and customize it to match your business.

Grab **INSIDEA's HubSpot onboarding service**, and we'll make it simple for you. We handle the technical setup, plus you gain an extra edge with your power team comprising of a dedicated account manager, an implementation partner, and a **HubSpot specialist**.

Give your HubSpot a phenomenal launch with INSIDEA!

What's included?

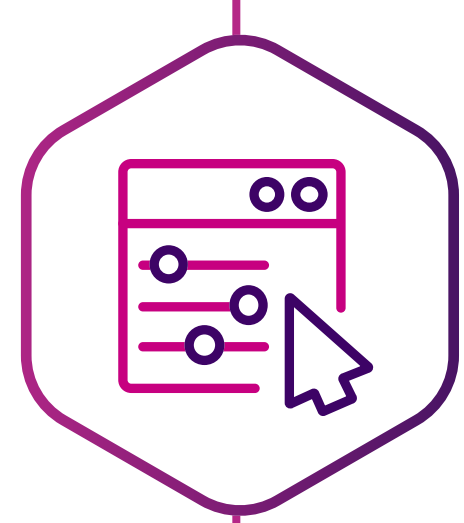|	
Expert Guidance	Access INSIDEA's certified HubSpot experts to fine-tune your platform for peak performance.
Done for You	We manage your entire HubSpot onboarding. From setting it up to optimizing your account, all to ensure it's fully operational and customized to your needs.
Weekly Meetings	We'll meet weekly to review your setup, address concerns, and ensure alignment with your goals. Slack/chat will be used for instant communication, with 60 hours of support.
Portal Audit	We thoroughly review your existing systems and workflows to pinpoint opportunities where HubSpot can optimize and improve your business operations.

Dedicated Success Team

Not just names on an email. Your Account Manager, Implementation Partner, and HubSpot Specialist meet you weekly to align HubSpot with your business goals.
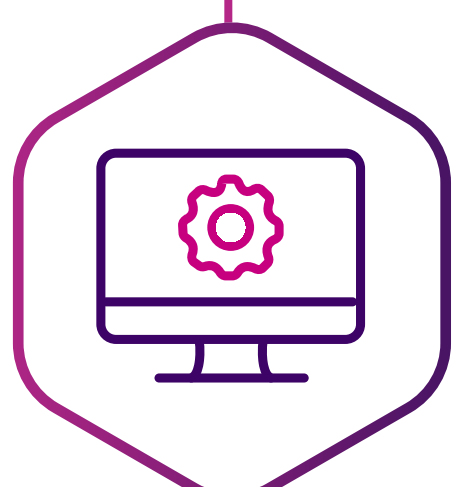
Effortless Technical Setup

We handle all the technical setup details—ensuring your HubSpot platform's smooth, efficient launch.

Customized Training

Once we tailor HubSpot to fit your business, we train your team to navigate and utilize the system for optimal results.

How Does It Work?

Efficiently Set Up HubSpot in Just Weeks

Initial Call

We start with a call to understand your business needs and plan a HubSpot setup tailored to get you up and running in a few weeks.

Customized Onboarding

We customize our standard onboarding roadmap to meet your business needs, ensuring your setup perfectly aligns with your goals.

Weekly Meetings

We'll hold weekly meetings to asses the progress on your setup, resolve any issues, and ensure alignment with your business objectives. Additionally, we'll utilize Slack/chat for continuous and instant communication throughout the process. You have access to a total of 60 hours of support.
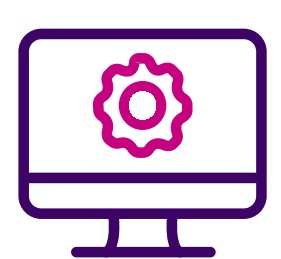
Technical Setup

Our technical team meticulously builds and customizes your HubSpot setup, ensuring seamless integration.

Customized Training

After setup, your team receives hands-on training to use your new HubSpot system effectively.

Marketing Hub Enterprise Deliverables:

Introduction + Kick-Off Call

We initiate your onboarding with a detailed call to outline the roadmap, introduce your dedicated success manager, and set up necessary access permissions.

Post Kick-Off Call

Our team sends a follow-up email detailing project deliverables and a checklist to secure all necessary information and permissions.

Setup of Users & Associated Permissions

We allocate and manage specific user permissions and roles to enhance team effectiveness and ensure data security.

Domain and HubSpot Tracking Codes Setup

We install unique tracking codes on your website to monitor performance and analyze visitor behavior comprehensively.

Setting up CRM Branding

Our team customizes your CRM with your company's logo, colors, and fonts to maintain branding consistency across all platforms.

Importing your Data

Our team will import 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 needed. If you require extra data strategy, cleaning, or manipulation support before the import, please note that additional fees may apply. Please review our checklist to prepare yourself. Additional support for data strategy and cleaning is available if required.

Creation of Custom Properties

We develop customized properties tailored to store and manage information crucial to your business operations.

Creating an Unsubscribe List

We compile and manage lists of unsubscribed contacts to ensure their communication preferences are respected.

Configuring 1 Sandbox Environment

We establish a sandbox environment for you, enabling safe testing and validation of configurations without impacting live data.

Connect Email Sending Domain

We link and authenticate your email domain to ensure optimal deliverability and prevent emails from landing in spam filters.

Integration with Your Existing Tools from the HubSpot App Marketplace

Our team enables integrations with essential apps from the HubSpot Marketplace to enhance your system's functionality.

Configure Marketing Contact Segmentation

We strategically segment marketing contacts to tailor communications and maximize engagement.

Setup Subdomains for Landing Page, Blog, & Email Web Version

We create subdomains to host your marketing assets, optimizing content management separately.

Buyer Persona Property Setup for Contacts (Up to 6 Personas)

We define up to six buyer personas to refine your marketing strategies and target communications more effectively.

Set Up Marketing Email Senders

We configure email sender profiles to manage and personalize your outbound communications.

Setup Marketing Email Templates (Up to 5 Emails)

Our team designs up to five email templates using HubSpot's drag-and-drop editing features for efficient campaign execution.

Segmentation & Creation of Desired Lists (Up to 10 Active or Static Lists)

We organize contacts into up to ten tailored lists for focused marketing initiatives.

Create Conversations Inbox

We implement a unified inbox to manage all customer interactions in one central place, enhancing response efficiency.

Setup Live Chat

We deploy live chat on your website to facilitate real-time customer engagement and support.

Create Call-to-Action (CTA) Buttons

Our team develops up to three compelling CTAs to drive user engagement and increase conversion rates.

Assistance with Connecting Ads Accounts (LinkedIn Ads / Google Ads)

We set up and integrate your advertising accounts for targeted ad management and detailed reporting.

Assistance with Social Media Setup and Settings Configuration

We connect and configure your social media platforms for centralized management and performance tracking.

Form Integration & Customization (Up to 6 Forms)

We create and customize up to six forms, integrating them seamlessly into your marketing strategy.

Setup of Lead Scoring

We establish criteria for lead scoring to prioritize leads based on their engagement and conversion potential.

Automation Workflow Creation & Optimization (Up to 6 Workflows)

Our team designs up to six workflows to automate marketing processes, enhancing efficiency and consistency.

Setup Custom Objects (Up to 2 Custom Objects)

We create up to two custom objects to manage unique data types and enhance your CRM's functionality.

Sales Hub Enterprise Deliverables:

Introduction + Kick-Off Call

We initiate your onboarding with a strategic call to understand your business needs and introduce your dedicated success manager from INSIDEA.

Post Kick-Off Call

We send a detailed follow-up email outlining the project deliverables and the information needed to start your project effectively.

Setup of Users & Associated Permissions

Our team configures user roles and permissions to ensure optimal organization and data security within your HubSpot environment.

Domain and HubSpot Tracking Codes Setup

We implement tracking codes on your website to capture detailed analytics and monitor visitor interactions.

Setting up CRM Branding

We customize your CRM with your company's branding, ensuring a consistent look and feel across all user interactions.

Importing Your Data

Our team will import 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 needed. If you require extra data strategy, cleaning, or manipulation support before the import, please note that additional fees may apply. Please review our checklist to prepare yourself.

Creation of Custom Properties

We develop custom properties specifically tailored to meet your business needs and enhance data utilization.

Connect Email Sending Domain

We authenticate your email domain with HubSpot to ensure reliable delivery and enhance communication strategies.

Configuring 1 Sandbox Environment

We set up a sandbox environment for you to test changes safely without affecting your live setup.

Integration with Your Existing Tools from the HubSpot App Marketplace

Our team enables seamless integrations with critical apps from the HubSpot Marketplace to enhance your CRM's functionality.

Setting Up Sales Process

We tailor HubSpot to optimize your sales process, ensuring seamless integration and maximizing sales efficiency.

Assistance with Setting Up Meetings Tool & Email Tracking Through Gmail or Outlook Integration

We integrate meeting scheduling and email tracking, streamlining your communication tools with Google or Outlook.

Setup Inbound / Outbound Calling feature (Up to 3 Phone Numbers)

We enable HubSpot's calling features to facilitate direct client communication and enhance your sales engagement.

Filter Out Internal IPs

Our team manages the exclusion of internal IPs from your analytics to ensure data accuracy.

Setting Up Deal Pipeline & Stages

We customize your deal pipeline and stages in HubSpot to streamline your sales process and enhance deal tracking.

Automation Workflow Creation & Optimization (Up to 6 Workflows)

We design and implement up to six automation workflows to streamline your sales operations and increase efficiency.

Configuring Lead Routing

We automate the distribution of leads to ensure the appropriate sales personnel promptly handle them.

Setup Lead Scoring

We implement a scoring system to prioritize leads based on their potential value and engagement level.

Segmentation & Creation of Desired Lists (Up to 10 Active or Static Lists)

We organize your contacts into up to ten targeted lists for focused sales and marketing efforts.

Setup Sales Snippets (Up to 10 snippets)

We create quick-response snippets to facilitate efficient communication across your sales team.

Setting Up Sales Sequence (Up to 2 Sequences)

We implement automated sales sequences to nurture leads through scheduled email communications.

Setting Up Sales Goals and Leveraging Forecasting Tool (Up to 2 Sales Goals)

We configure forecasting tools to help you set and manage sales goals effectively.

Setting Up Quotes and Product Library (Up to 2 Quote Templates)

We organize your product offerings and create templates to streamline the quoting process. (Note: Custom quotes will be charged separately.)

Setting up HubSpot Payments (Available in Limited countries)

We configure HubSpot Payments to simplify and secure your transaction processes.

Setting Up Sales Playbook (Up to 3 Playbooks)

We develop comprehensive sales playbooks to standardize sales procedures and enhance team performance.

Setup Custom Objects (Up to 2 Custom Objects)

We create custom objects tailored to your specific data management needs, enhancing CRM functionality.

Sales Reporting Dashboard (Up to 2 Dashboards and 10 Reports)

We develop detailed sales reporting dashboards to track performance metrics and provide actionable insights.

Training Session & Project Sign-Off Call

We conclude with a tailored training session to ensure your team is fully equipped to use the new systems, followed by a final review call to confirm all setups and answer any remaining questions.

Service Hub Enterprise Deliverables:

Introduction + Kick-Off Call

We'll start with an in-depth discussion to outline your onboarding roadmap, introduce you to your dedicated success manager, and set the stage for a customized implementation.

Post Kick-Off Call

Expect a follow-up with a detailed email outlining project deliverables and gathering essential access permissions and access to various tools or platforms to move forward.

Setup of Users & Associated Permissions

Our team configures user roles and permissions, ensuring each team member has the appropriate access for effective collaboration and security.

Importing Your Data

Our team will import your standard object data (.csv) for Contacts, Companies, Tickets, and Deals into HubSpot's CRM Database. This includes setting up custom properties and establishing record connections as needed. If you require extra data strategy, cleaning, or manipulation support before the import, please note that additional fees may apply. Please review our checklist to prepare yourself.

Creation of Custom Properties

We'll create specific properties tailored to store and manage your unique business data effectively within HubSpot.

Integration with Your Existing Tools from the HubSpot App Marketplace

Our experts facilitate seamless integration with over 1,000 available apps in HubSpot's marketplace to enhance your CRM capabilities.

Connect Email Sending Domain

We ensure your email-sending domain is correctly linked and authenticated with HubSpot for reliable communication and deliverability.

Configuring 1 Sandbox Environment

We set up a sandbox environment for safe testing and experimentation with new configurations, enabling risk-free innovation.

Setup Custom Objects (Up to 2 Custom Objects)

Our team creates up to two custom objects, complete with necessary properties and associations, to support your unique operational requirements and associate them with the other default HubSpot objects seamlessly.

Setting Up Ticket Pipeline & Statuses

We configure ticket pipelines and statuses tailored to your service processes, enhancing your team's ability to track and manage customer interactions efficiently.

Connect Team Inbox for Service Requests (Up to 2 for Each Channel)

We integrate multiple service request channels into a unified team inbox, streamlining your communication and response strategy.

Setup Live Chat

We enable live chat on your platforms, allowing real-time customer support and engagement.

Set Up Service Level Agreement (SLA) Time to Response and Close

We establish SLAs to ensure timely responses and issue resolutions, setting clear expectations for your service team.

Domain and HubSpot Tracking Codes Setup

We install tracking codes to monitor and track web interactions and gather valuable analytics, helping you understand customer behavior and site performance.

Setting Up CRM Branding

Our team customizes your CRM with your branding elements to maintain a consistent and professional appearance across all customer touchpoints.

Setting Up Customer Portal

We create a customer portal that aligns with your brand, offering a seamless self-service experience for your customers such as creating a new ticket/issue, etc.

Setting Up Help Desk (if Opted for the Beta Version)

If selected, we implement a comprehensive help desk system to enhance your support operations.

Setting Up Playbook (Up to 5 Playbooks)

We develop detailed playbooks to guide your service strategies and interactions, ensuring consistency and quality in customer service.

Set Up Service Snippets (Up to 20 Snippets)

We create and organize snippets for common responses, enhancing communication efficiency across your service team.

Setting Up Task Queues (Up to 10 Task Queues)

We organize tasks into queues based on category, enhancing management and oversight of team activities.

Setting Up Support Email Templates (10 Email Templates)

Our team designs customizable email templates for your support communications, ensuring consistency and professionalism.

Setting Up Feedback Surveys (Up to 5 Surveys)

We configure multiple feedback surveys to gather insightful customer feedback, aiding in service improvement and customer satisfaction.

Setting Up & Configure (Up to 5 Knowledge Base Articles)

We create and set up detailed knowledge base articles, providing valuable resources to help customers resolve issues independently.

Automation Workflow Creation & Optimization (Up to 6 Workflows)

We design and implement customized workflows to automate and optimize your service processes, boosting efficiency and effectiveness.

Service Reporting Dashboard (Up to 2 Dashboards and 10 Reports)

We develop detailed reporting dashboards to monitor service performance and gain insights into key metrics and trends.

Training Session & Project Sign-Off Call

We conclude with tailored training sessions to ensure your team is fully equipped to use the new systems. We conduct a final review and sign-off to ensure complete satisfaction and readiness for launch.

Timeline: 8 Weeks

		HubSpot	INSIDEA
Marketing Hub	Enterprise	$7000	$4000
Sales Hub	Enterprise	$3500	$4000
Service Hub	Enterprise	$3500	$4000

Talk with a HubSpot Expert

Questions? Let's talk to learn more about your business needs and see how we can help.

Let's Talk

INSIDEA

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