Marketing Hub Enterprise 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?

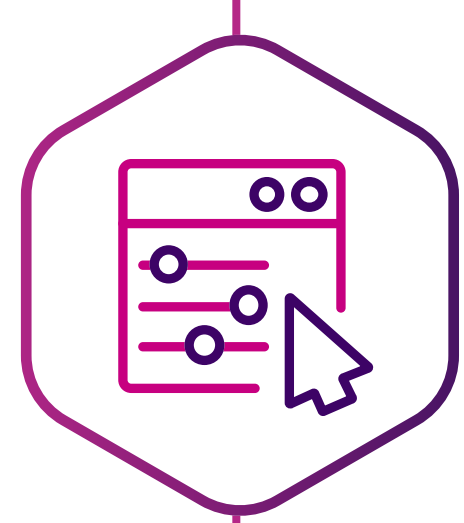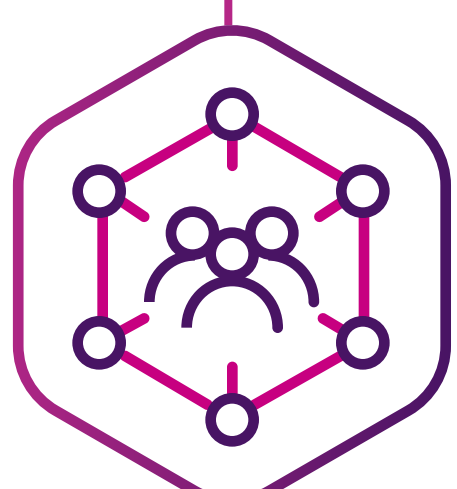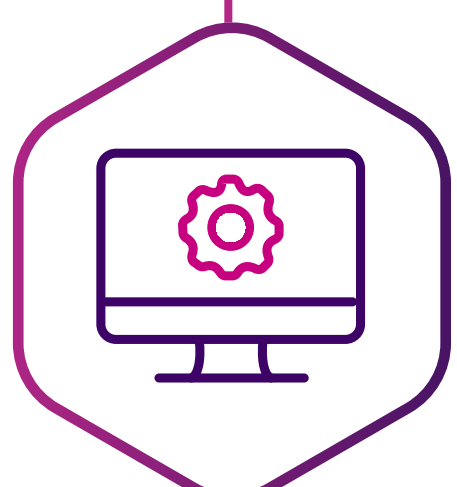|	
Expert Guidance	Access INSIDEA's certified HubSpot experts to fine-tune your platform for peak performance.
Done for You	We manage your entire HubSpot onboarding. From setting it up to optimizing your account, all to ensure it's fully operational and customized to your needs.
Weekly Meetings	We'll 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.
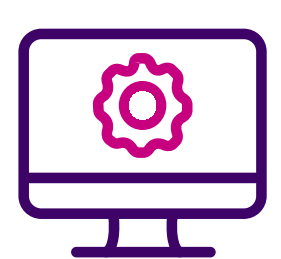
Customized Onboarding

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.

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.

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

We develop comprehensive dashboards to monitor and report your marketing performance and provide actionable insights.

Training Session & Project Sign-Off Call

We conclude the project with a tailored training session and a final review call to ensure all systems are functional and your team is ready to operate the new setup effectively.
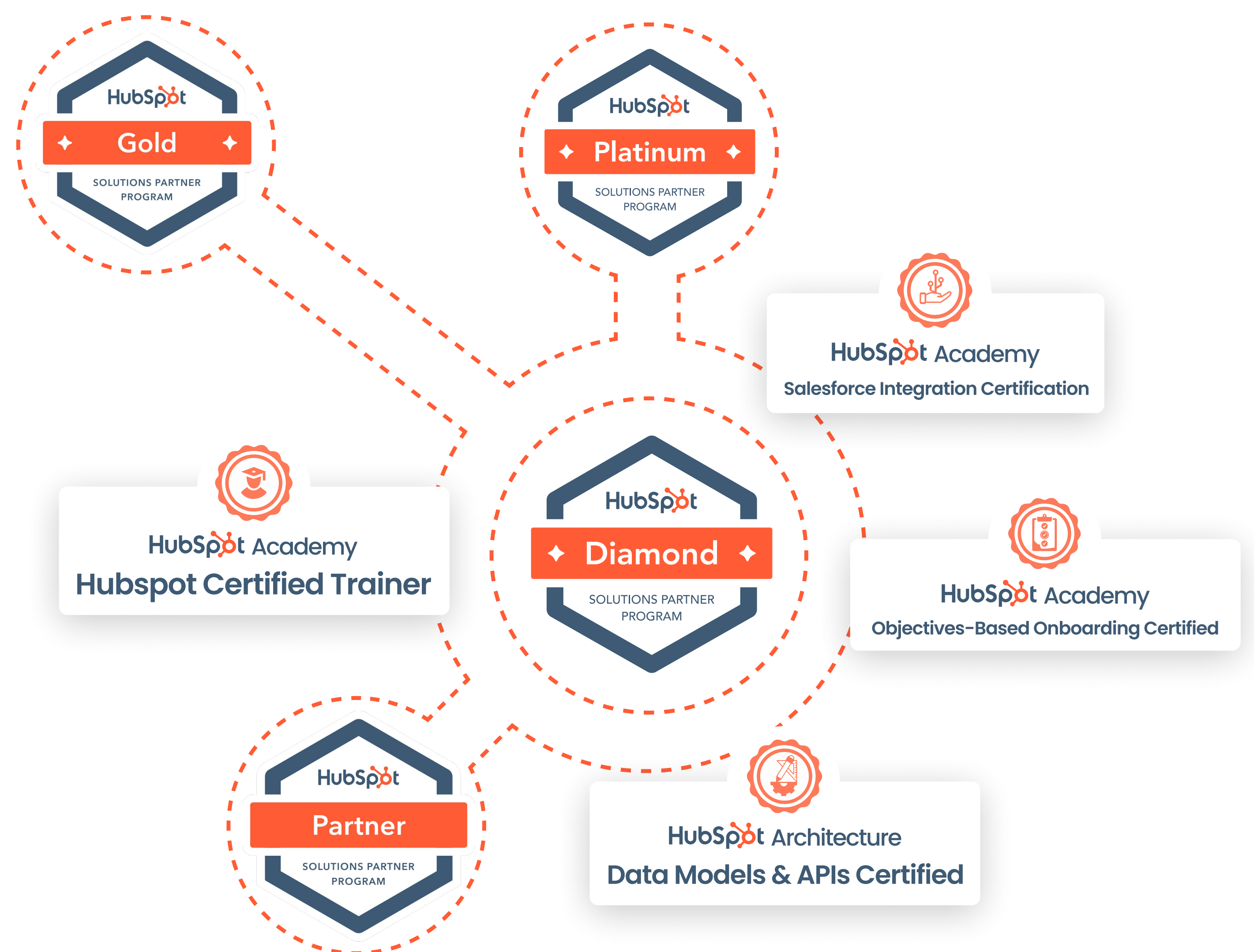
Timeline: 8 Weeks

		HubSpot	INSIDEA
📢 Marketing Hub	Enterprise	$7000	$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

HubSpot Gold — SOLUTIONS PARTNER PROGRAM

HubSpot Platinum — SOLUTIONS PARTNER PROGRAM

HubSpot Academy — Salesforce Integration Certification

HubSpot Academy — Hubspot Certified Trainer

HubSpot Diamond — SOLUTIONS PARTNER PROGRAM

HubSpot Academy — Objectives-Based Onboarding Certified

HubSpot Partner — SOLUTIONS PARTNER PROGRAM

HubSpot Architecture — Data Models & APIs Certified

INSIDEA

Follow Us [in] [twitter] [youtube] [instagram] [facebook]

🌐 www.insidea.com