



Marketing Hub Professional 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.



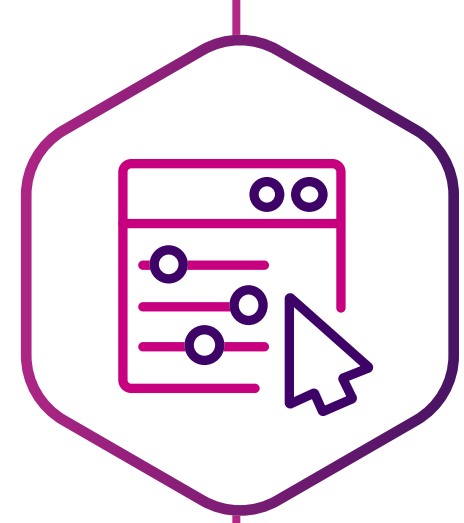
Done for You

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 30 hours of support.



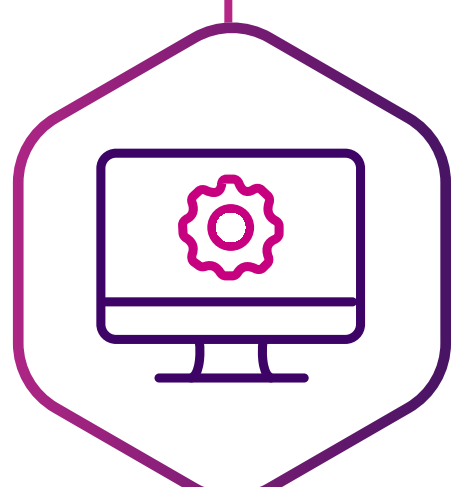
Portal Audit

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.



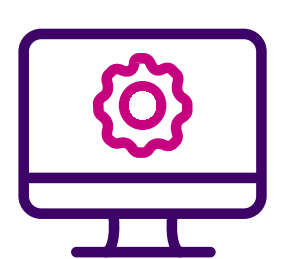
Customized Onboarding

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 assess 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 30 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 begin your onboarding with a comprehensive discussion to map out the process, introduce our project team, and understand your business needs.

Post Kick-Off Call

Our team follows up to review the project's deliverables and outlines the information and permissions needed to proceed.

Setup of Users & Associated Permissions

We manage and assign user roles and permissions within your HubSpot environment to ensure each team member has appropriate access.

Domain and HubSpot Tracking Codes Setup

We implement tracking codes on your website to enable detailed analytics and visitor tracking.

Setting up CRM Branding

Our team customizes your CRM with your company's logos, 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.

Creation of Custom Properties

We develop unique fields within HubSpot to store and manage information crucial to your business operations.

Creating an Unsubscribe List

We compile lists of contacts who have opted out of communications to ensure their preferences are respected.

Connect Email Sending Domain

We authenticate your email domain with HubSpot to secure reliable email delivery.

Integration with Your Existing Tools from HubSpot App Marketplace

We enable integrations with essential apps from the HubSpot Marketplace to enhance your CRM's functionality.

Configure Marketing Contacts Segmentation

The type of marketing contacts you have limits how many people you can email. If your database exceeds this limit, you can categorize some as non-marketing or purchase additional contacts from HubSpot, and we'll ensure new contacts are properly categorized.

Setup Subdomains for Landing Page, Blog & Email Web Version

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

Buyer Persona Property Setup for Contacts (Up to 3 Personas)

We define up to three buyer personas to refine your marketing strategies and personalize content.

Set Up Your Resubscription Automation

We implement automation processes allowing previously unsubscribed contacts to opt in.

Setting up Marketing Email Templates (Up to 2 Templates)

Our team designs and customizes up to two email templates using HubSpot's drag-and-drop feature to streamline your email marketing campaigns.

Segmentation & Creation of Desired Lists (Up to 5 Active or Static Lists)

We create and manage up to five lists based on specific criteria to enhance campaign targeting.

Form Integration & Customization (Up to 3 Forms)

We develop and integrate up to three customized forms into your marketing strategy.

Automation Workflow Creation & Optimization (up to 3 workflows)

We set up to three workflows to automate your marketing processes and enhance operational efficiency.

Create Call-to-Action (CTA) Buttons (Up to 3)

Our team designs effective calls-to-action (CTAs) using HubSpot's tools to boost engagement and conversions. We design up to three types of CTAs—button, banner, or pop-up—that can be integrated on your HubSpot pages or external sites. These CTAs can also be used in your emails or landing pages to track and improve user interactions.

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

We support setting up and integrating your advertising accounts for effective campaign management.

Assistance with Social Media Setup and Settings Configuration

We configure and manage your social media platforms through HubSpot, enabling you to create and publish social posts, as well as track social media engagements directly within HubSpot.


Marketing Reporting Dashboard (Up to 1 Dashboard and 5 Reports)

We create a comprehensive dashboard to visualize and track your marketing performance, providing actionable insights.

Training Session & Project Sign-Off Call

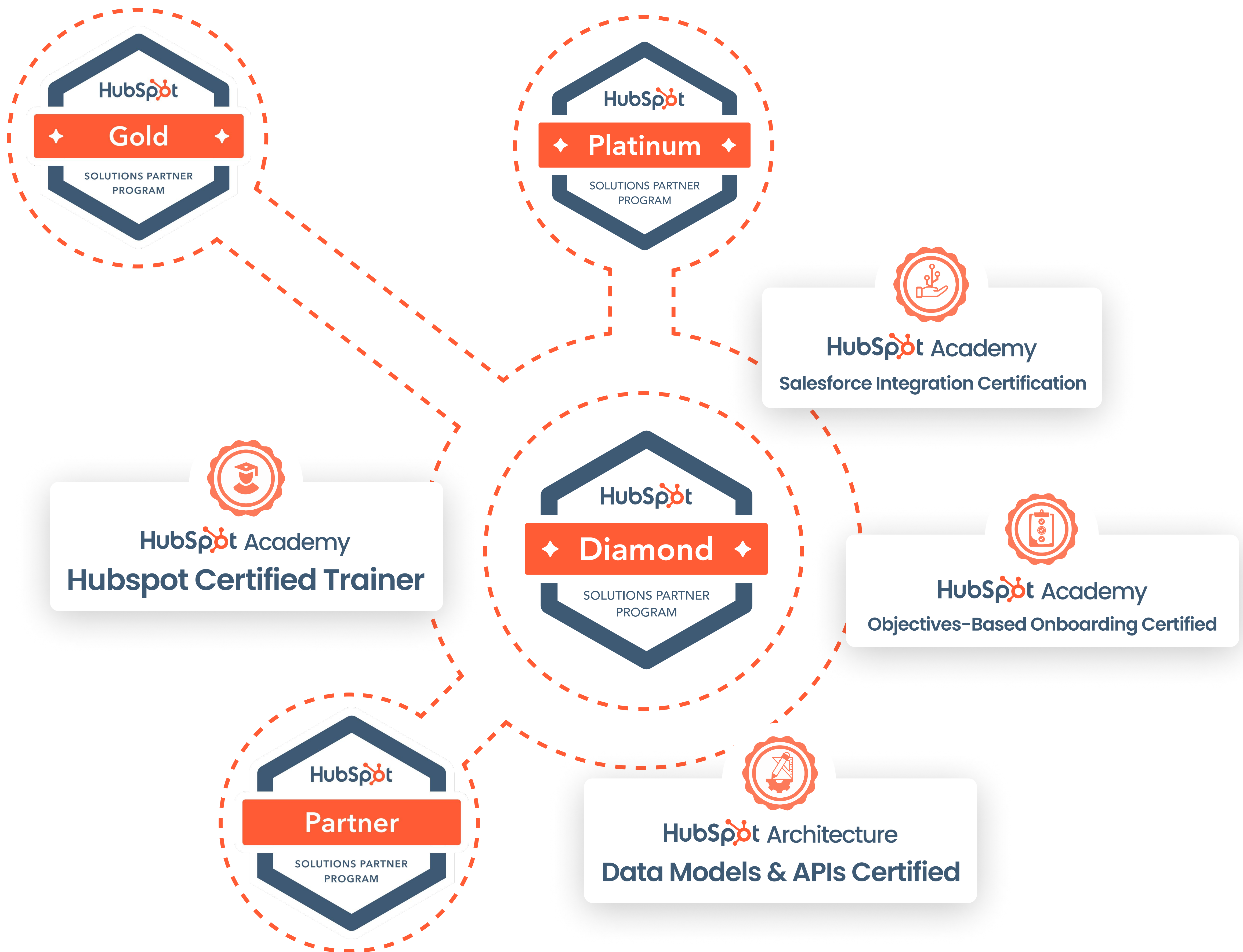
We conclude with a detailed training session and a final review to ensure a smooth transition and project completion, making sure your team is fully equipped to use the new setup effectively.

Timeline: 4 Weeks

		HubSpot	INSIDEA
 Marketing Hub	Pro	\$3000	\$2000

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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