

# Professional 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.



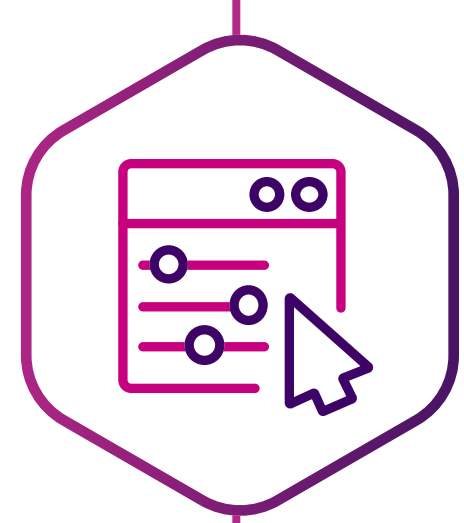
### Done for You

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 30 hours of support.



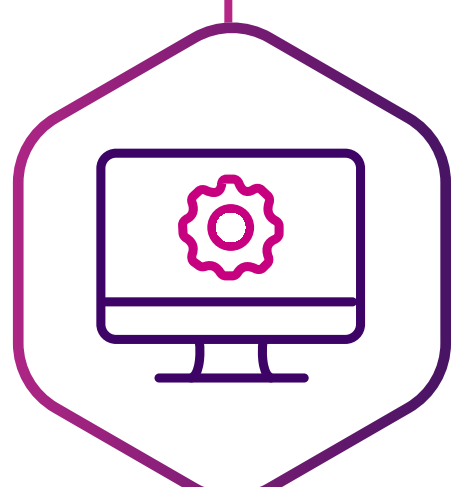
### Portal Audit

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.



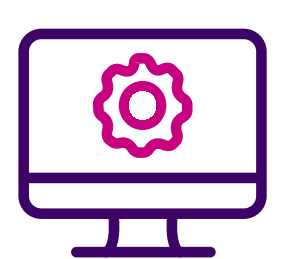
#### **Customized Onboarding**

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.



# Marketing Hub Professional 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.

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## Post Kick-Off Call

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

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## 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.

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## Domain and HubSpot Tracking Codes Setup

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

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## Setting up CRM Branding

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

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## 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.

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## Creation of Custom Properties

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

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## Creating an Unsubscribe List

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

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## **Connect Email Sending Domain**

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

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## **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.

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## **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.

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

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

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## **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.

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## **Set Up Your Resubscription Automation**

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

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## **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.

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## **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.

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## **Form Integration & Customization (Up to 3 Forms)**

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

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## **Automation Workflow Creation & Optimization (up to 3 workflows)**

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

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## **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.

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

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

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## **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.

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## **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.

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## **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.

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# Sales Hub Professional Deliverables:

## Introduction + Kick-Off Call

We begin your onboarding with a comprehensive call to outline the roadmap, align your business needs, and introduce your dedicated success manager from INSIDEA.

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## Post Kick-Off Call

We'll send you a welcome email outlining the project deliverables and necessary steps to ensure all information and permissions are ready for the next stages.

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## Setup of Users & Associated Permissions

Our team will configure user roles and permissions within your HubSpot environment to ensure optimal organization and secure access.

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## Domain and HubSpot Tracking Codes Setup

We will implement tracking codes on your domain to enable detailed analytics and performance monitoring.

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## Setting up CRM Branding

We'll customize your CRM with corporate branding to ensure consistency across all customer interactions and HubSpot tools

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## 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.

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## Creation of Custom Properties

We will create custom properties tailored to effectively capture and utilize your unique business information.

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## Connect Email Sending Domain

We will authenticate your email domain with HubSpot to improve email deliverability and project your brand consistently.

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## **Integration with Your Existing Tools from the HubSpot App Marketplace**

Our team will integrate essential tools from the HubSpot Marketplace to enhance your CRM's functionality and streamline workflows.

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## **Setting up Sales Process**

We will customize HubSpot to enhance and replicate your sales processes, improving productivity and lead management.

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## **Filter out Internal IPs**

Our team will manage excluding internal IPs from your traffic analytics for more accurate reporting.

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## **Setting Up a Deal Pipeline & Stages**

We will design and implement a customized deal pipeline with defined stages to streamline your sales process and enhance deal visibility.

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## **Automation Workflow Creation & Optimization (Up to 3 Workflows)**

We will develop up to three automation workflows to streamline your sales tasks and increase efficiency.

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

We will set up meeting scheduling and email tracking for your team, integrating these tools with your daily platforms.

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## **Setup Inbound / Outbound Calling feature (1 Phone Number)**

Our team will enable the HubSpot calling feature to facilitate seamless direct communication with your clients.

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## **Configuring Lead Routing**

We will automate the lead distribution process to ensure leads are promptly assigned to the appropriate sales personnel.

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## **Setup Lead Scoring**

We will implement a lead scoring system to prioritize and manage leads based on their potential conversion likelihood.



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

We will create and manage up to five targeted lists for focused marketing and sales efforts.

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

We will design compelling CTAs to enhance user engagement and improve conversion rates on your digital platforms.

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## **Set Up Sales Snippets (Up to 5 Snippets)**

We will develop snippets for common responses to facilitate quick and consistent communication across your team.

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## **Setting Up Sales Sequence (Up to 2 Sequences)**

We will organize and implement up to two automated sales sequences to ensure adequate lead nurturing and follow-up.

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## **Setting Up Sales Goals and Leveraging Forecasting Tool (Up to 1 Sales Goal)**

We will set up and manage a sales goal using HubSpot's forecasting tools to aid performance tracking and strategic planning.

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## **Setting Up Quotes and Product Library (Up to 1 Quote Template)**

We will establish a quote template and organize your products within HubSpot to streamline the quoting process. (Note: Custom quotes will be charged separately.)

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## **Setting Up HubSpot Payments (Available in Limited Countries)**

We will configure HubSpot Payments to simplify billing processes and enhance customer payment experiences. (Note: This only includes HubSpot's payment feature, not third-party payment tools.)

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## **Creation of Sales Reporting Dashboard (Up to 1 Dashboard and 5 Reports)**

We will create a detailed sales reporting dashboard to track performance metrics and provide actionable insights.

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## **Training Session & Project Sign-Off Call**

We will conclude your onboarding with a detailed review and training session to ensure your team is fully equipped to use all new systems and tools effectively.

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# Service Hub Professional Deliverables:

## Introduction + Kick-Off Call

We start your onboarding with a strategic discussion to outline the project, introduce your success manager, and establish necessary access permissions.

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## Post Kick-Off Call

Our team sends a follow-up email with detailed deliverables and a checklist to ensure all required information, access to various tools or platforms, and permissions are secured.

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## Setup of Users & Associated Permissions

We configure user roles and permissions within your HubSpot environment to optimize team functionality and secure data access.

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## Domain and HubSpot Tracking Codes Setup

We implement tracking codes on your website to monitor and track interactions and gather detailed analytics.

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## Setting Up CRM Branding

Our team customizes your CRM with your company's branding to ensure consistency across all customer interactions.

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## Importing your Data

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

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## Creation of Custom Properties

We create custom properties to effectively manage and utilize your specific business information within HubSpot.

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## Integration with Your Existing Tools from the HubSpot App Marketplace

We facilitate seamless integration of essential apps from the HubSpot Marketplace to enhance your CRM's functionality.

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## **Connect Email Sending Domain**

We authenticate your email-sending domain with HubSpot to ensure reliable email delivery and maintain your brand integrity.

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## **Setting Up Ticket Pipelines & Statuses**

We customize ticket pipelines and statuses to streamline your service processes and enhance ticket management.

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## **Connect Team Inbox for Service Requests (1 for Each Channel)**

We set up a team inbox to centralize service requests, ensuring effective communication and timely responses.

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## **Setup Live Chat**

We implement live chat on your platforms to enable real-time customer support and enhance engagement.

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

We configure SLAs to ensure timely responses and resolutions, improving service efficiency and customer satisfaction.

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## **Setting Up Customer Portal**

We establish a customer portal that reflects your branding and facilitates easy access for customer self-service such as creating a new ticket/issue, etc.

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

We configure a comprehensive help desk system to efficiently manage and streamline support interactions.

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## **Setting Up Service Playbook (Up to 2 Playbooks)**

We develop service playbooks to standardize procedures and enhance the effectiveness of your service team.

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## **Set Up Service Snippets (Up to 10 Snippets)**

We create quick-response snippets to facilitate efficient communication across service interactions.

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## **Setting Up Email Templates (Up to 5 Email Templates)**

Our team designs customizable email templates for consistent and efficient customer communication.

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

We organize contacts into targeted lists for more effective service and marketing outreach.

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## **Setting Up Feedback Survey (1 Feedback Survey)**

We configure a feedback survey to gather valuable customer insights and improve service strategies.

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## **Basic Setup of the Portal's Knowledge Base and Setup 1 Knowledge Base Page**

We establish your Knowledge Base with one fully set up page, aligning with your branding and customer support strategies.

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## **Setting Up & Configure Up to 3 Knowledge Base Articles**

We create and optimize Knowledge Base articles to provide valuable information and support to your customers.

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## **Automation Workflow Creation & Optimization (Up to 3 Workflows)**

We develop automation workflows to streamline your service processes, enhancing efficiency and consistency.

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## **Service Reporting Dashboard (up to 1 Dashboard and 5 Reports)**

We create a service reporting dashboard to monitor and analyze your service performance, providing insights into key metrics.




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## **Training Session & Project Sign-Off Call**

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

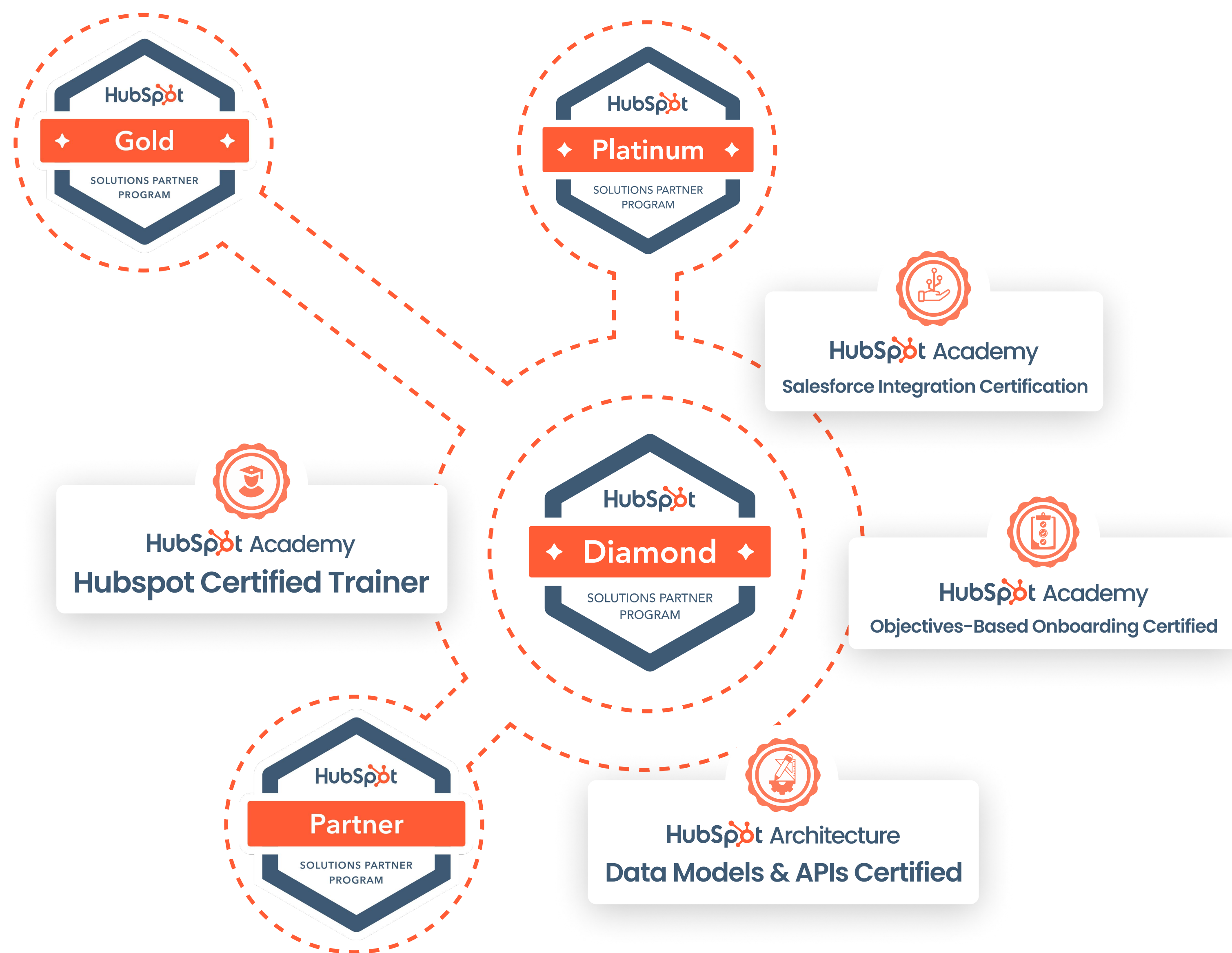
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# Timeline: 4 Weeks

		HubSpot	INSIDEA
 <b>Marketing Hub</b>	<b>Pro</b>	<b>\$3000</b>	<b>\$2000</b>
 <b>Sales Hub</b>	<b>Pro</b>	<b>\$1500</b>	<b>\$2000</b>
 <b>Service Hub</b>	<b>Pro</b>	<b>\$1500</b>	<b>\$2000</b>

## 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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