



Sales 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.



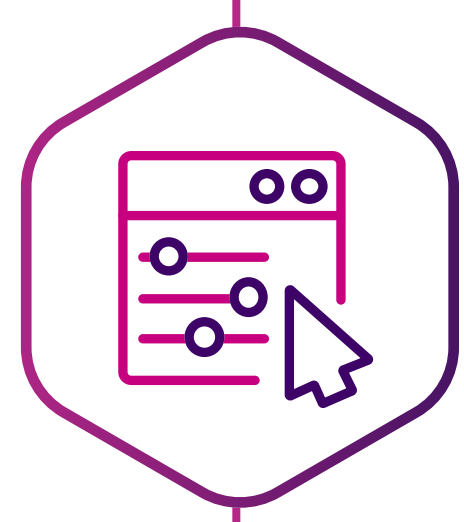
Done for You

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.



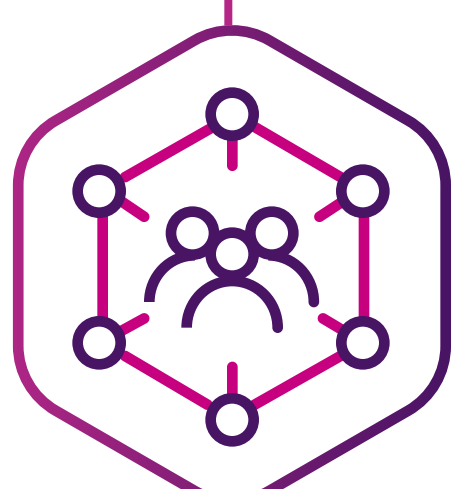
Weekly Meetings

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.



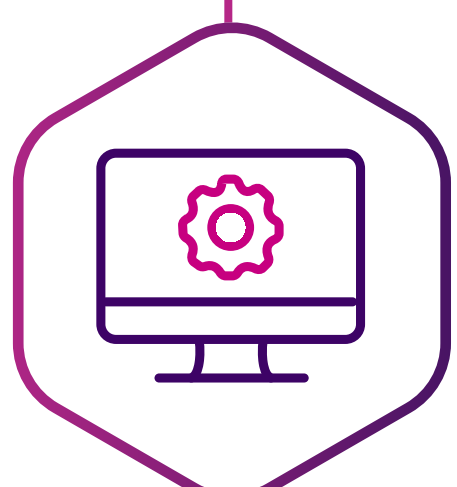
Portal Audit

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.



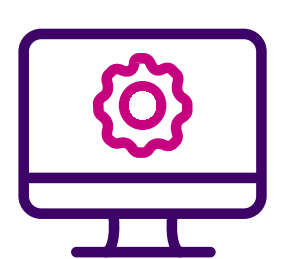
Customized Onboarding

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 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 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 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.

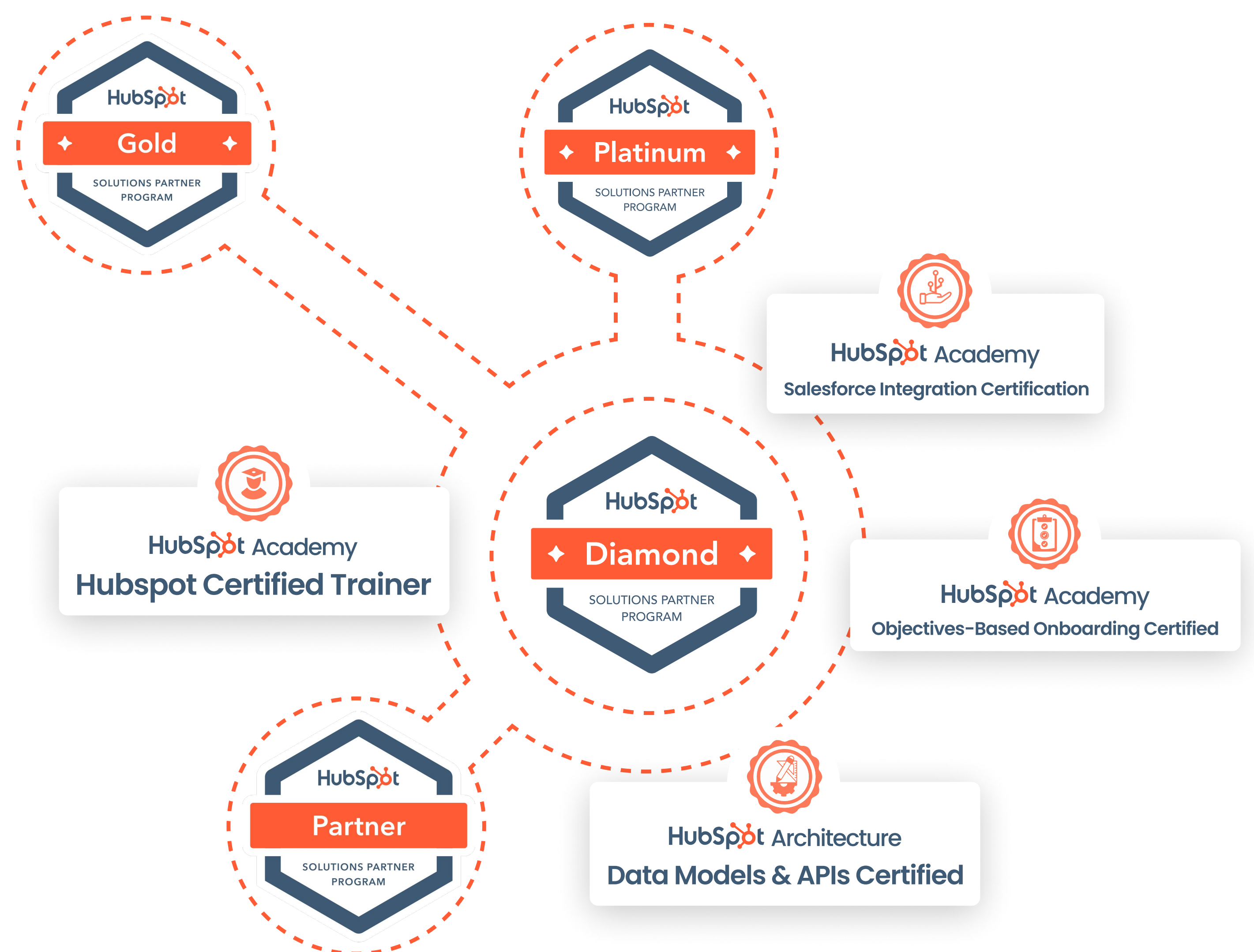
Timeline: 8 Weeks

		HubSpot	INSIDEA
 Sales 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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