



Sales 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.



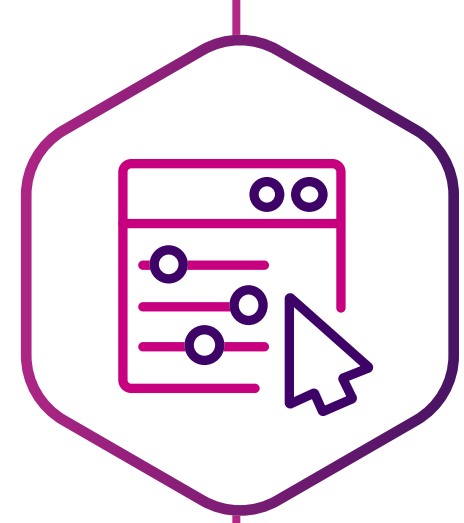
Done for You

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.



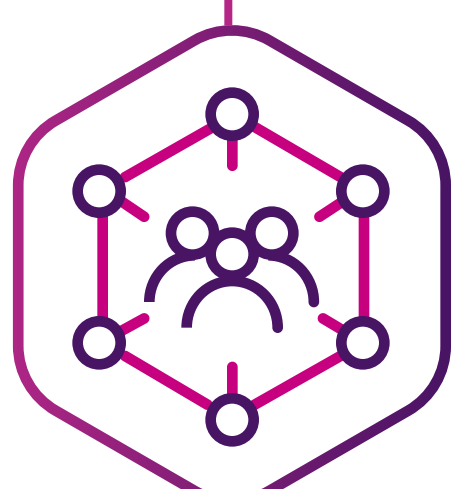
Weekly Meetings

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.



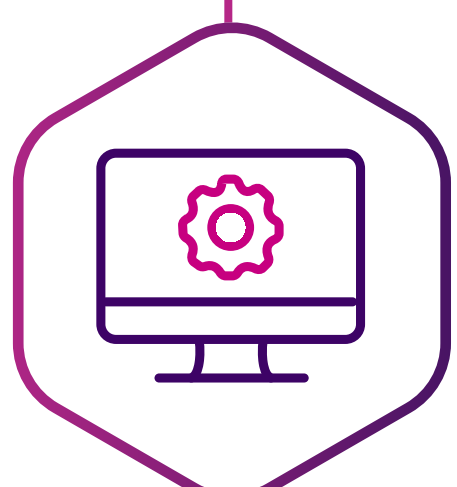
Portal Audit

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.



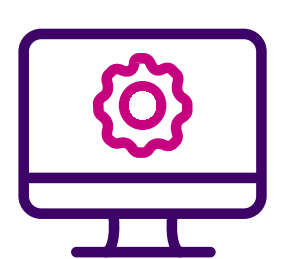
Customized Onboarding

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 call to outline the roadmap, align your business needs, and introduce your dedicated success manager from INSIDEA.

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.

Setup of Users & Associated Permissions

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

Domain and HubSpot Tracking Codes Setup

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

Setting up CRM Branding

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

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

Connect Email Sending Domain

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

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.

Setting up Sales Process

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

Filter out Internal IPs

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

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.

Automation Workflow Creation & Optimization (Up to 3 Workflows)

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

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.

Setup Inbound / Outbound Calling feature (1 Phone Number)

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

Configuring Lead Routing

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

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.

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.

Set Up Sales Snippets (Up to 5 Snippets)

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

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.

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.

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.)

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.)


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.

Training Session & Project Sign-Off Call

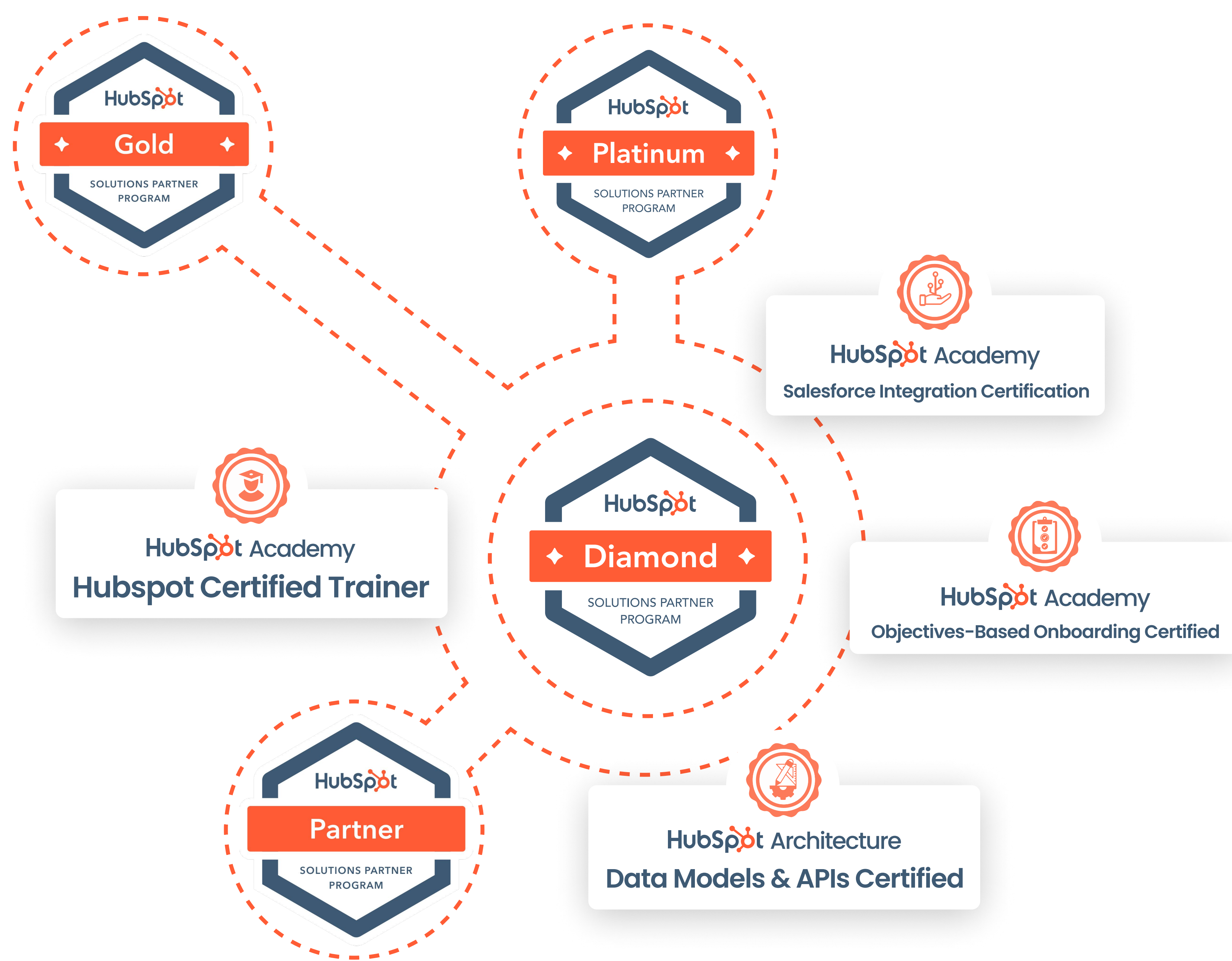
We will conclude your onboarding with a detailed review and training session to ensure your team is fully equipped to use all new systems and tools effectively.

Timeline: 4 Weeks

		HubSpot	INSIDEA
 Sales Hub	Pro	\$1500	\$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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