Service 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.
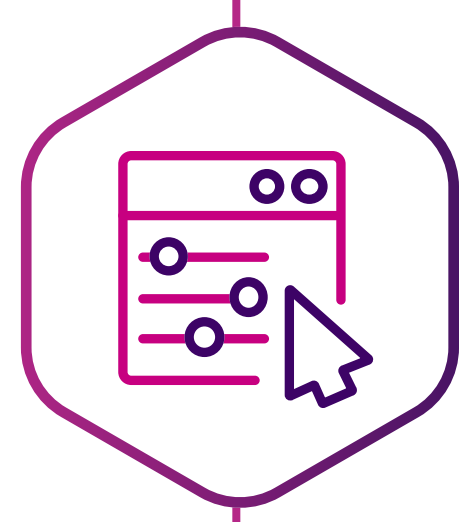
Done for You
We manage your entire HubSpot onboarding. From setting it up to optimizing your account, all to ensure it's fully operational and customized to your needs.
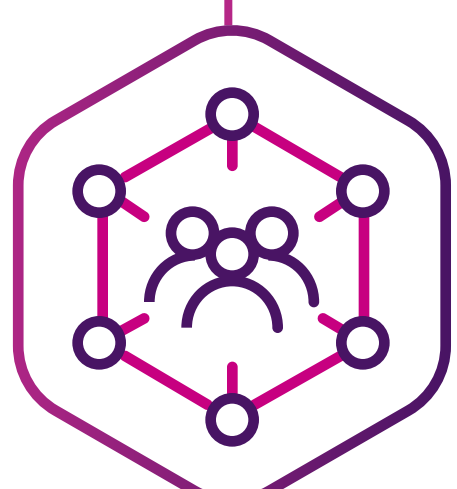
Weekly Meetings
We'll meet weekly to review your setup, address concerns, and ensure alignment with your goals. Slack/chat will be used for instant communication, with 60 hours of support.
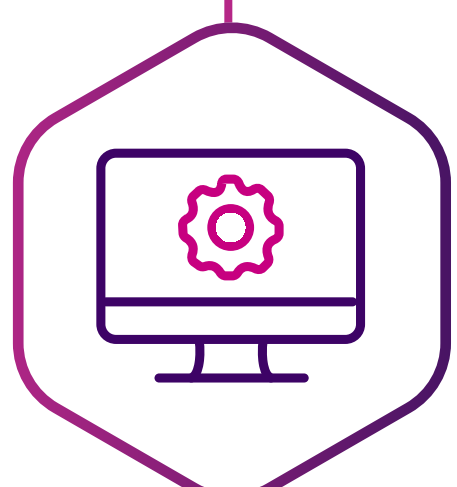
Portal Audit
We thoroughly review your existing systems and workflows to pinpoint opportunities where HubSpot can optimize and improve your business operations.

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.
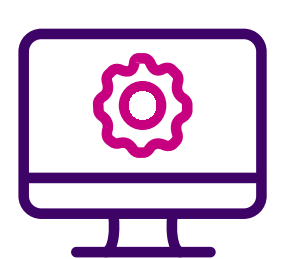
Technical Setup

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'll start with an in-depth discussion to outline your onboarding roadmap, introduce you to your dedicated success manager, and set the stage for a customized implementation.

Post Kick-Off Call

Expect a follow-up with a detailed email outlining project deliverables and gathering essential access permissions and access to various tools or platforms to move forward.

Setup of Users & Associated Permissions

Our team configures user roles and permissions, ensuring each team member has the appropriate access for effective collaboration and security.

Importing Your Data

Our team will import your standard object data (.csv) for Contacts, Companies, Tickets, 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'll create specific properties tailored to store and manage your unique business data effectively within HubSpot.

Integration with Your Existing Tools from the HubSpot App Marketplace

Our experts facilitate seamless integration with over 1,000 available apps in HubSpot's marketplace to enhance your CRM capabilities.

Connect Email Sending Domain

We ensure your email-sending domain is correctly linked and authenticated with HubSpot for reliable communication and deliverability.

Configuring 1 Sandbox Environment

We set up a sandbox environment for safe testing and experimentation with new configurations, enabling risk-free innovation.

Setup Custom Objects (Up to 2 Custom Objects)

Our team creates up to two custom objects, complete with necessary properties and associations, to support your unique operational requirements and associate them with the other default HubSpot objects seamlessly.

Setting Up Ticket Pipeline & Statuses

We configure ticket pipelines and statuses tailored to your service processes, enhancing your team's ability to track and manage customer interactions efficiently.

Connect Team Inbox for Service Requests (Up to 2 for Each Channel)

We integrate multiple service request channels into a unified team inbox, streamlining your communication and response strategy.

Setup Live Chat

We enable live chat on your platforms, allowing real-time customer support and engagement.

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

We establish SLAs to ensure timely responses and issue resolutions, setting clear expectations for your service team.

Domain and HubSpot Tracking Codes Setup

We install tracking codes to monitor and track web interactions and gather valuable analytics, helping you understand customer behavior and site performance.

Setting Up CRM Branding

Our team customizes your CRM with your branding elements to maintain a consistent and professional appearance across all customer touchpoints.

Setting Up Customer Portal

We create a customer portal that aligns with your brand, offering a seamless self-service experience for your customers such as creating a new ticket/issue, etc.

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

If selected, we implement a comprehensive help desk system to enhance your support operations.

Setting Up Playbook (Up to 5 Playbooks)

We develop detailed playbooks to guide your service strategies and interactions, ensuring consistency and quality in customer service.

Set Up Service Snippets (Up to 20 Snippets)

We create and organize snippets for common responses, enhancing communication efficiency across your service team.

Setting Up Task Queues (Up to 10 Task Queues)

We organize tasks into queues based on category, enhancing management and oversight of team activities.

Setting Up Support Email Templates (10 Email Templates)

Our team designs customizable email templates for your support communications, ensuring consistency and professionalism.

Setting Up Feedback Surveys (Up to 5 Surveys)

We configure multiple feedback surveys to gather insightful customer feedback, aiding in service improvement and customer satisfaction.

Setting Up & Configure (Up to 5 Knowledge Base Articles)

We create and set up detailed knowledge base articles, providing valuable resources to help customers resolve issues independently.

Automation Workflow Creation & Optimization (Up to 6 Workflows)

We design and implement customized workflows to automate and optimize your service processes, boosting efficiency and effectiveness.

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

We develop detailed reporting dashboards to monitor service performance and gain insights into key metrics and trends.

## Training Session & Project Sign-Off Call

We conclude with tailored training sessions to ensure your team is fully equipped to use the new systems. We conduct a final review and sign-off to ensure complete satisfaction and readiness for launch.

Timeline: 8 Weeks

		HubSpot	INSIDEA
Service 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.
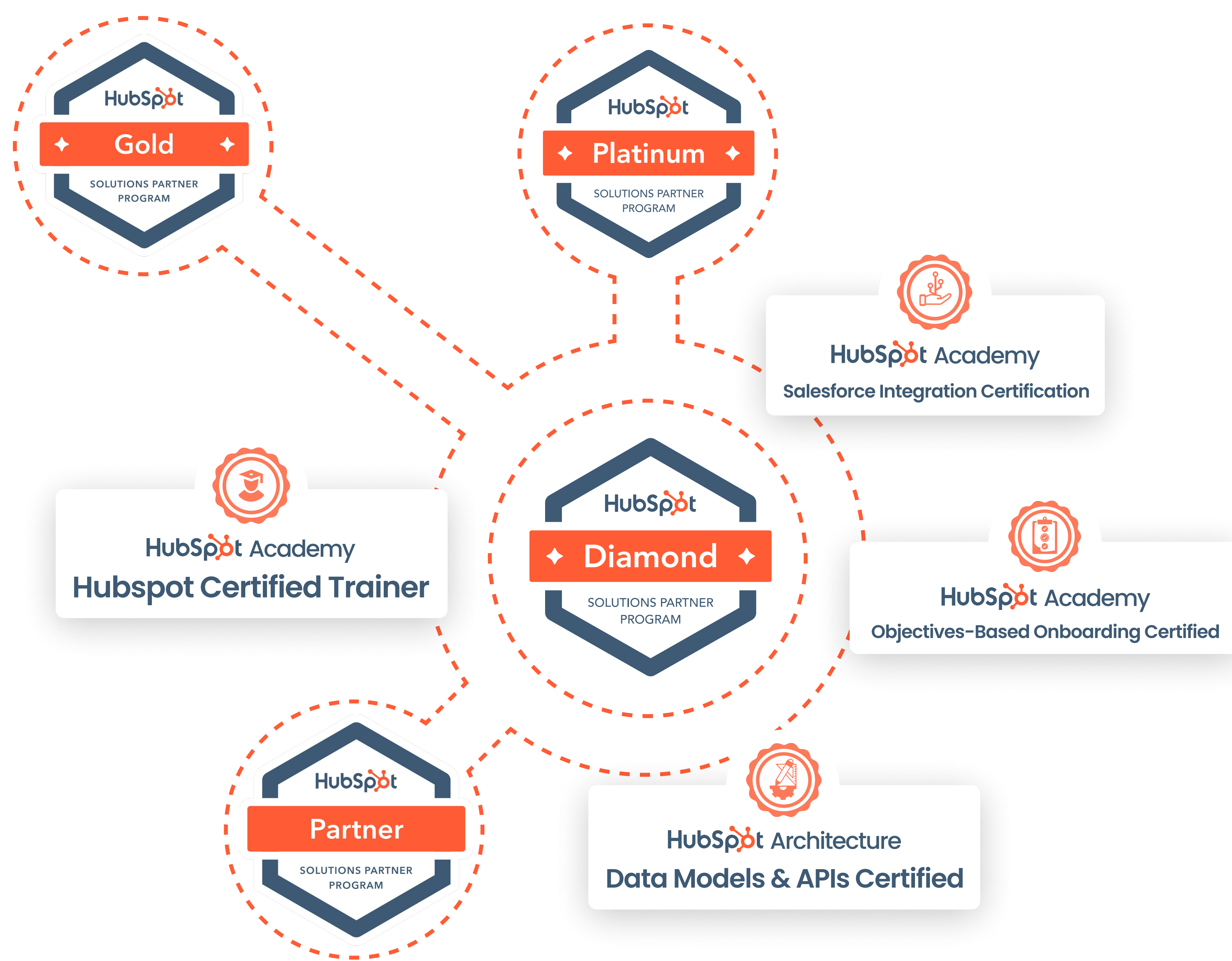
Let's Talk

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