



Service 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.



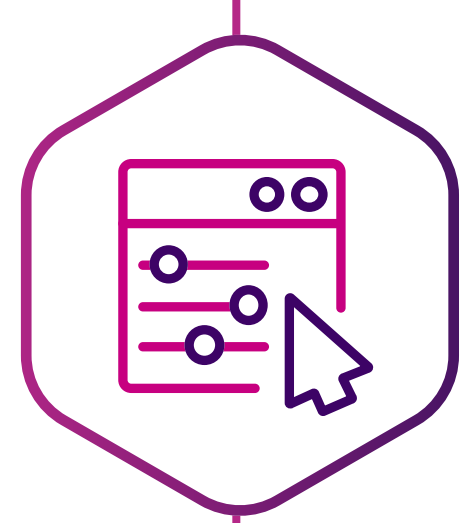
Done for You

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.



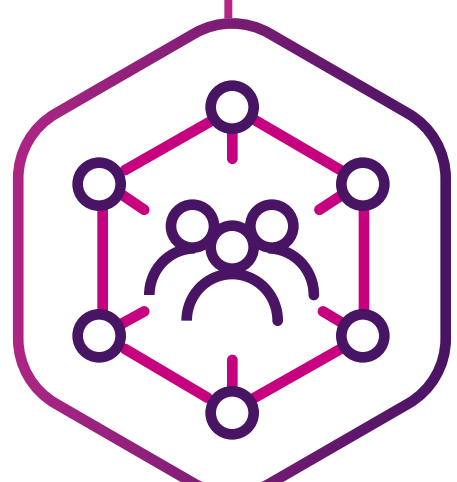
Weekly Meetings

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.



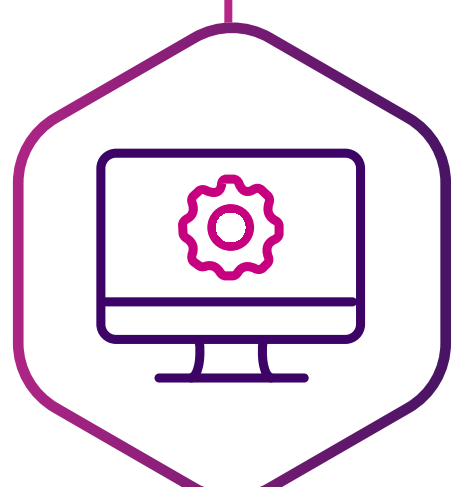
Portal Audit

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.



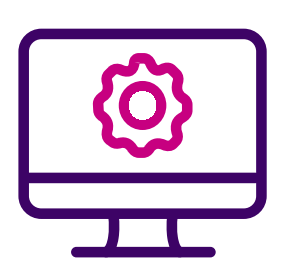
Customized Onboarding

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

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.

Setup of Users & Associated Permissions

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

Domain and HubSpot Tracking Codes Setup

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

Setting Up CRM Branding

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

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.

Creation of Custom Properties

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

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.

Connect Email Sending Domain

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

Setting Up Ticket Pipelines & Statuses

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

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.

Setup Live Chat

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

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.

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.

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

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

Setting Up Service Playbook (Up to 2 Playbooks)

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

Set Up Service Snippets (Up to 10 Snippets)

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

Setting Up Email Templates (Up to 5 Email Templates)

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

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.

Setting Up Feedback Survey (1 Feedback Survey)

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

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.

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.

Automation Workflow Creation & Optimization (Up to 3 Workflows)

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


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.

Training Session & Project Sign-Off Call

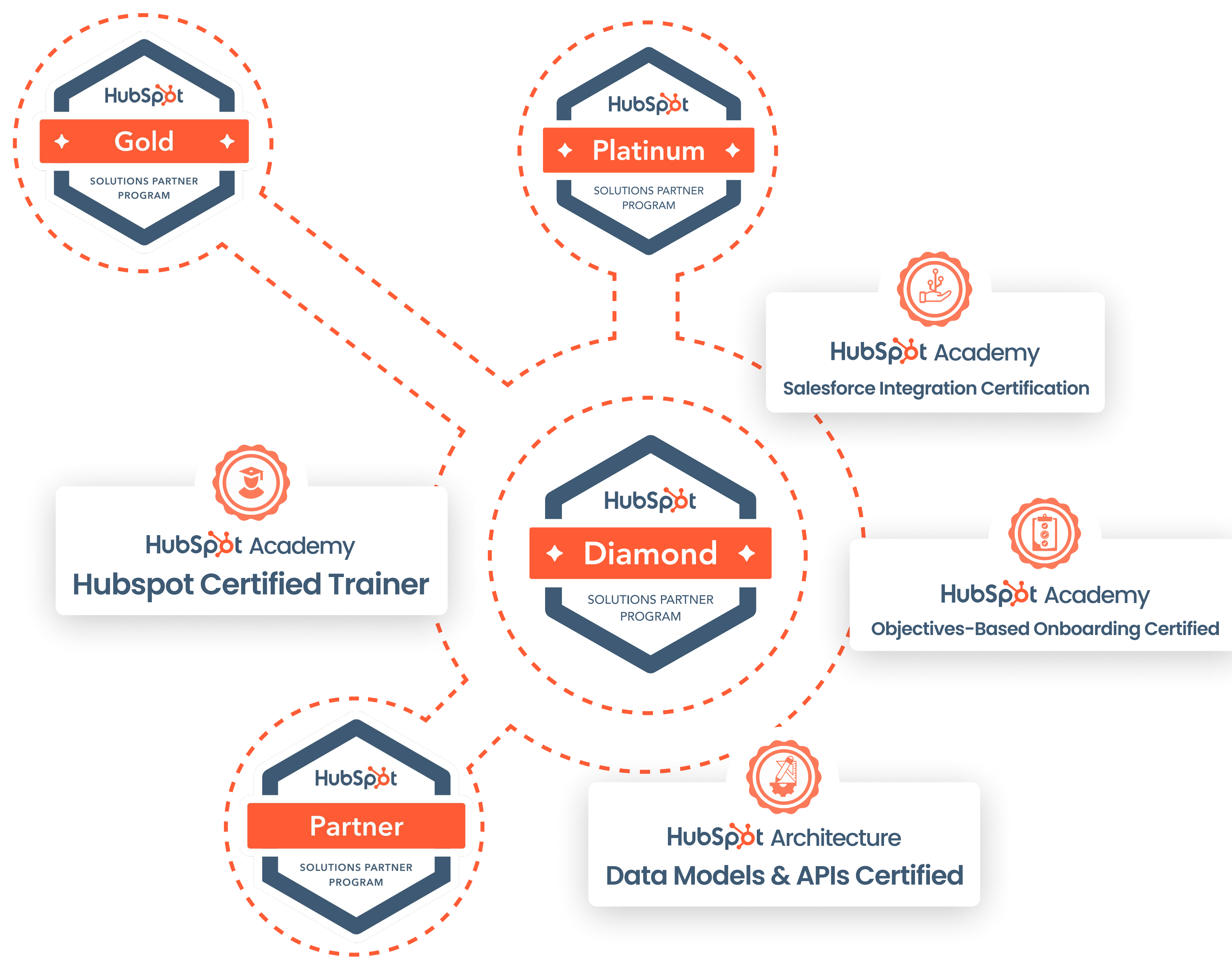
We conclude with a comprehensive training session to ensure your team is fully equipped to use the new systems effectively, followed by a final review call to confirm all setups and answer any remaining questions.

Timeline: 4 Weeks

		HubSpot	INSIDEA
 Service 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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