

# Sales Hub Enterprise Onboarding



Sales Hub Enterprise Onboarding	Task Overview	WK 1	WK 2	WK 3	WK 4	WK 5	WK 6	WK 7	WK 8	WK 9	WK 10	WK 11	WK 12
Basic Technical Setup + Productivity Tool Review	<ul style="list-style-type: none"> <li>- Productivity tools</li> <li>- Onboarding your team (invite, permissions, and resources)</li> </ul>	█	█										
Process Workshops - Deal / LF Stages, Lead Scoring, Personas	<ul style="list-style-type: none"> <li>- Overview of your custom sales process in HubSpot</li> </ul>		█	█									
Automation & Buyer Journey Strategy	<ul style="list-style-type: none"> <li>- Overview of your custom sales process in HubSpot</li> <li>- Customization of the CRM for your processes</li> <li>- Standard sales automation setup</li> </ul>			█	█	█	█						
Data Formatting, Integrations & Custom Property Creation & Mapping*	<ul style="list-style-type: none"> <li>- Baseline reporting setup and review (Custom report setup and review)</li> <li>- Turning on standard integrations (App Marketplace/native)</li> </ul>		█	█	█								
Automation, Playbooks, Forecasting, Emails, Meetings, Dashboards & Report Setup	<ul style="list-style-type: none"> <li>- Standard sales automation setup</li> <li>- Baseline reporting setup and review (Custom report setup and review)</li> </ul>					█	█	█	█	█			
Sales Content, Tools & Collateral Creation	<ul style="list-style-type: none"> <li>- Sequences, templates etc.</li> </ul>								█	█	█	█	
User Training, Documentation & Handoff												█	█

\*This time estimate is based on a single legacy CRM migration into HubSpot, covering no more than 4 default object types (contacts, companies, deals, tickets). Data syncs/imports from multiple, languages, sources or CRMs, custom object mapping, bespoke integrations or large database imports will need additional scoping beyond this example timeline.

<https://www.noisylittlemonkey.com/hubspot-sales-onboarding>

