

Service Enterprise Onboarding



| Service 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 + Reporting Review | <ul style="list-style-type: none"> - Measuring customer experience - Managing multiple teams | █ | | | | | | | | | | | |
| CX / CS Strategy Workshop(s) | <ul style="list-style-type: none"> - Creating a customized ticket pipeline | | █ | | | | | | | | | | |
| Support Channel Setup* | <ul style="list-style-type: none"> - Live chat implementation - Setting up intake channels (Conversations inbox only) - Contact + Ticket imports | | █ | | | | | | | | | | |
| Ticket Triage Automation & Setup | <ul style="list-style-type: none"> - Ticket automation - Scheduling meetings | | | █ | | | | | | | | | |
| NPS Emails, Knowledge Base, Dashboards & Report Setup | <ul style="list-style-type: none"> - Measuring customer experience - Helping customers self-serve through the knowledge base - Reporting on productivity and closed tickets | | | | | █ | | | | | | | |
| Agent Productivity Tool Setup | <ul style="list-style-type: none"> - Standardized email and chat responses - Scheduling meetings - Reporting on productivity and closed tickets - Creating custom dashboards | | | | | | | █ | | | | | |
| 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-service-onboarding>

