Service Hub Pro Onboarding

Service Hub Pro 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	- Measuring customer experience	██	██										
CX / CS Strategy Workshop(s)	- Creating a customized ticket pipeline		██	██									
Support Channel Setup*	- Live chat implementation - Setting up intake channels (Conversations inbox only) - Contact + Ticket imports		██	██	██								
Ticket Triage Automation & Setup	- Ticket automation - Scheduling meetings			██	██	██							
NPS Emails, Knowledge Base, Dashboards & Report Setup	- Measuring customer experience - Helping customers self-serve through the knowledge base - Setting up intake channels (Conversations inbox only) - Reporting on productivity and closed tickets					██	██	██					
Agent Productivity Tool Setup	- Standardized email and chat responses - Scheduling meetings - Reporting on productivity and closed tickets								██	██	██		
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.

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