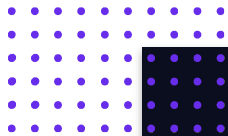


HubSpot Essential Onboarding





Overview

1. HubSpot Essential Onboarding
2. Onboarding details
3. Support & resources

1

HubSpot Essential Onboarding

Essential Onboarding

If you have used HubSpot before, and just want an experienced partner to set things up for you

- HubSpot baseline portal setup
- 1 x Strategic workshop
- HubSpot implementation (any hub)
- Chat & email support

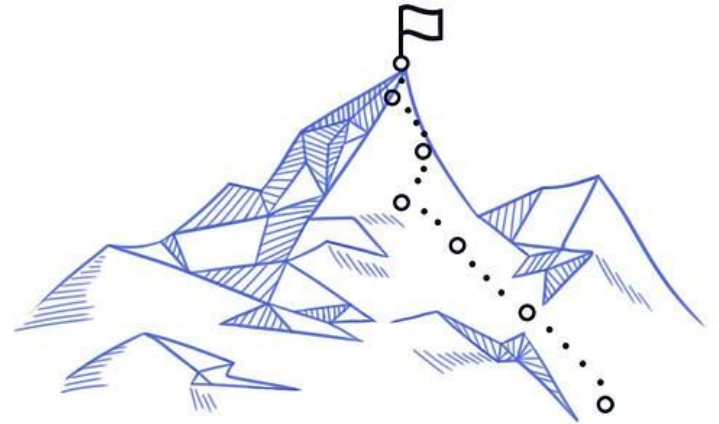
2 Onboarding details

Strategic workshop

The Essential Onboarding include a strategic workshop where we work together to set goals for the implementation, decide where to focus, and add the first tasks for us to complete.

We'll discuss your:

- Highest priority goals with HubSpot
- Timeline
- Organization (size, structure, industry)
- HubSpot subscription
- Current technology stack

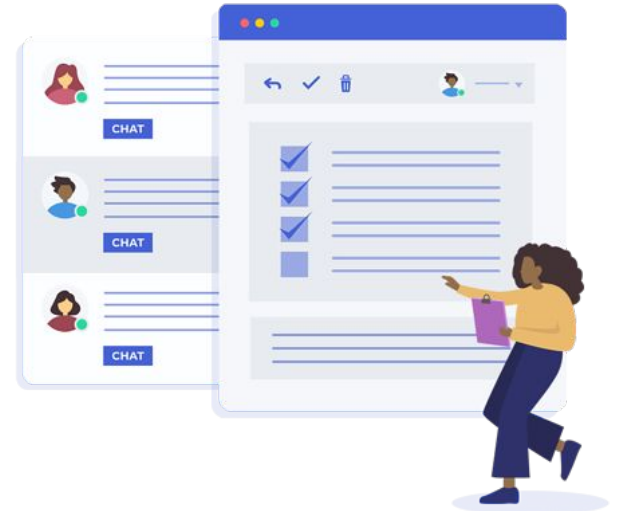


HubSpot CRM setup

During the baseline setup we typically help you with:

- Data import (.csv, .xls, .xlsx)
- Initiate standard template setup
- IP filtering
- Time zone and currency setup
- Standard branding setup

Note that the data import file has to meet [the criteria outlined on this page](#) for it to be included in the baseline CRM setup.



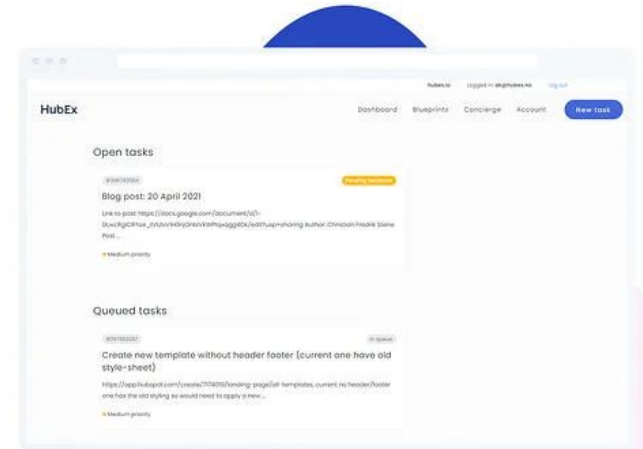
HubSpot implementation help

A full team of HubSpot at your disposal for the duration of the onboarding

- The Unlimited queue will be used to complete pre-planned onboarding-related tasks.
- Add tasks based on specific needs that come up during the onboarding.
- Submit tasks on your own should you need additional help with tasks not related to the onboarding workshops.*

*Keep in mind that we can only work on one task simultaneously with the Unlimited Lite package.

Should you have many additional tasks you need to get done, you are free to upgrade your subscription.



What kind of tasks can we help with?

As long as it's in HubSpot, we can help.

Typical tasks includes

- Blog listing template setup
- Landing page template setup
- Email template setup
- Custom dashboards & reports
- Knowledge base setup
- Automation and workflows
- Database segmentation
- Sales pipeline setup
- Lead scoring setup

3 Support & resources

Ongoing support

Chat and email support

Unlimited support over chat and email for the duration of your onboarding.

Designated onboarding contact

Your designated onboarding specialist will work with you to make sure you get the most out of the HubSpot tools.

Why do I need onboarding?

Avoid pitfalls and guesswork

It's easy to get stuck in a new system, even one as intuitive as HubSpot. Getting stuck often lead to hours wasted.

The result? Frustration, implementation delays, and little time for other tasks.

Get results faster

Instead of spending hours figuring out where to start and what to focus on, you can focus on getting results by following a tried and tested approach.

All while you are having the support of a team of specialists ready to help you if you get stuck.

Ideas and best practices

Our onboardings are done by experienced HubSpot specialists with over 6 years of HubSpot experience each.

By combining the lessons from working at HubSpot, at traditional inbound agencies, and with a large number of customers, we've crafted an onboarding experience where you get results and become proficient in using HubSpot in the shortest time possible.

What happens after the onboarding?

And what if I need more help after the onboarding is completed?

Venture out on your own

Some prefer to do things independently, usually as they have resources in-house that will manage HubSpot on an ongoing basis or simply prefer things on their own.

Outsource to a full-service agency

Some prefer to outsource their project, manage their inbound marketing, and execute their ongoing lead generation efforts.

Ongoing HubSpot support through the Unlimited Subscription

Our ongoing services are ideal if you:

- Want a team of HubSpot specialists at your disposal
- Want to focus on revenue-generating work instead of HubSpot
- Need ongoing support but don't want to pay hefty agency fees or manage a team of freelancers

HubEx