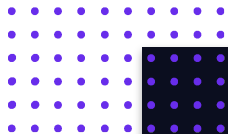


# HubSpot Guided Onboarding





# Overview

1. HubSpot Guided Onboarding
2. Onboarding details
3. Support & resources
4. Onboarding pricing

1

# HubSpot Guided Onboarding

# Guided Onboarding

If you want to do most of the HubSpot setup on your own

- HubSpot baseline portal setup
- 1 x Strategic workshop
- 3 x HubSpot workshops (any hub)
- 1 x Follow up Q&A call
- Chat & email support

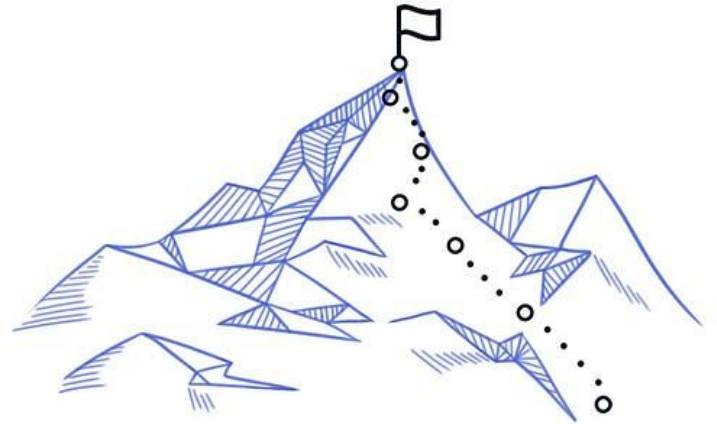
# 2 Onboarding details

# Strategic workshop

Your first onboarding session is a strategic workshop where we work together to set goals for the implementation, decide where to focus, and schedule your first onboarding workshop.

We'll discuss your:

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

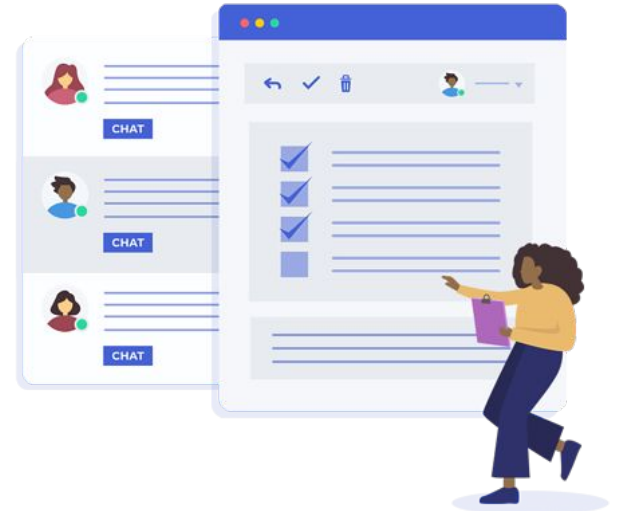


# HubSpot CRM setup

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.

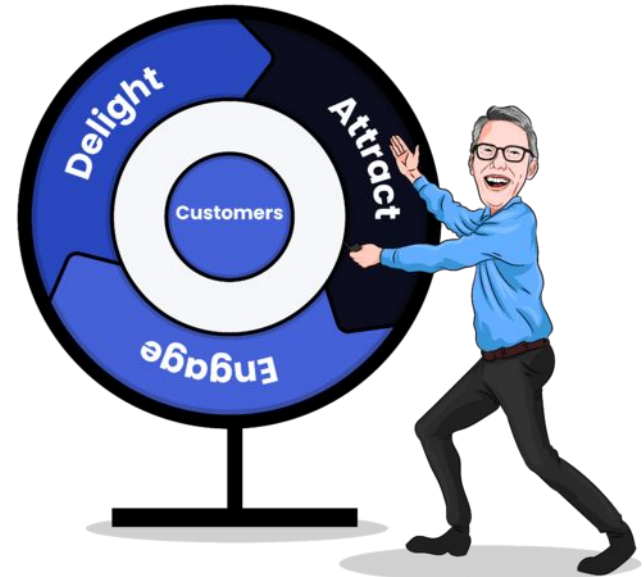


# Onboarding workshops

The onboarding packages contains a set number of onboarding workshops

- Choose between open and set agenda workshops (any HubSpot Hub)
- Each workshop is 60-90 minutes long
- Recommended group size is 1-4 people
- The ideal time between workshops is 1-2 weeks
- Workshops are done remotely over Google Meet

*We recommend that each participant dedicates at least 3-5 hours for onboarding-related work and certifications between each workshop.*





# Two workshop types

Choose between two types or workshops

## Set agenda workshop:

- Pre-planned workshop from our workshop library
- Includes presentation slides and homework
- More structure and less flexibility
- Recommended if you're new to HubSpot

## Open agenda workshop:

- Flexible agenda focusing on anything you'd like within HubSpot
- Less structure, and without slides and structured homework
- Recommended if you already have a lot of experience with HubSpot and want to focus on a particular topic

*Not sure what is the best fit for you? We're happy to recommend a structure for you based on your situation.*

# 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.

## Start your [free trial](#) of our ongoing 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

# 4 Pricing & packaging

# Onboarding by Hubex

## Option 1:

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### HubSpot Guided Onboarding NOK 9900

- HubSpot baseline portal setup
- 1 x Strategic workshop
- 3 x HubSpot workshops (any hub)
- 1 x Follow up Q&A call
- Chat & email support during the onboarding

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**TOTAL** NOK 9900

NET14 by invoice  
Price excl. MVA

Additional workshops can be added for NOK 2990 each

## Option 2:

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### HubSpot Complete Onboarding NOK 26700

- HubSpot baseline portal setup
- 1 x Strategic workshop
- 3 x HubSpot workshops (any hub)
- 1 x Follow up Q&A call
- HubSpot implementation help for 3 months (any hub)
- Chat & email support for 3 months
- Designated CSM meeting link

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**TOTAL** NOK 26700

**HubEx**