A HubSpot **Onboarding** that Fits Your Needs.

MarketingHub

Pro:
3 Objectives are offered

- Import & Organize Your Data
- Generate More Website Traffic
- Measure Traffic & Understand Your Results

Enterprise:
5 Objectives are offered

- Increase Conversion Rates
- Capture Convert & Engage Your Leads
- Automate & Personalize Your Marketing

MarketingHub Plan of Action

PHASE 1
Completion of general set-up tasks

- Hubspot Tracking Code Added to Site

PHASE 2
Complete Goal Priority #1

- Connection of Email Sending Domain and Subdomain
- Import of Contact list
- Email & Landing Page Template Creation Walkthrough
- Form Creation Walkthrough

PHASE 3
Complete Goal Priority #2

- Workflow Discovery
- Workflow Mapping Walkthrough
- Automated Email Set-up

PHASE 4
Complete Goal Priority #3

- Reporting Discovery
- Reporting Walkthrough

PHASE 5
Complete Onboarding + Transition

SalesHub

Pro:
3 Objectives are offered

Enterprise:
5 Objectives are offered

- Import & Organize Your Data
- Automate Your Sales Process
- Accelerate Your Sales Efforts
- Track Iterate & Improve

- Configure Price & Quote
- Manage Large Scale Teams
- Keep Your Data Organized

SalesHub Plan of Action

PHASE 1
Completion of general set-up tasks

- Sales Email Set-up
- Meeting Link Creation

PHASE 2
Complete Goal Priority #1

- Sales Pipeline Discovery
- Confirmation of Deal Stages
- Initial Deal Creation Walkthrough

PHASE 3
Complete Goal Priority #2

- Workflow & Sequence Discovery
- Workflow Mapping Walkthrough
- Automated Email Set-up

PHASE 4
Complete Goal Priority #3

- Reporting Discovery
- Reporting Walkthrough

PHASE 5
Complete Onboarding + Transition

ServiceHub

Pro:
3 Objectives are offered

Enterprise:
All objectives completed

- Quantify and Visualize Results
- Set-up Your Helpdesk in Hubspot

- Help Customers Help Themselves
- Measure & Improve Customer Experience

ServiceHub Plan of Action

PHASE 1
Completion of general set-up tasks

- Connection of Shared Email Inbox

PHASE 2
Complete Goal Priority #1

- Creation of ticket pipeline and review of properties
- Hubspot chat review & set-up

PHASE 3
Complete Goal Priority #2

- Hubspot Knowledge Base Discovery
- Knowledge Base set-up walkthrough

PHASE 4
Complete Goal Priority #3

- Reporting Discovery
- Reporting Walkthrough

PHASE 5
Complete Onboarding + Transition