

HubSpot Onboarding Checklist



To truly maximize the value HubSpot has to offer, a successful onboarding process is a must. Proper onboarding unlocks HubSpot's full potential. Without it, your team may face inefficiencies, missed opportunities, and frustration.

Use this checklist to guide your onboarding process with HubSpot. Depending on your subscription level, you may not have access to all features on the checklist. Most sections have basic and bonus tasks. The basics are what we recommend implementing in your onboarding, while the bonuses can be implemented at any time.

Pre-Onboarding Prep

- Define your goals
- Document marketing, sales, and service needs
- Audit existing CRM and marketing tools
- Gather stakeholder input
- Determine HubSpot subscription level needed
- Document project timeline
- Assign onboarding roles

CRM Setup

- Invite team members and apply permissions
- Set up portal settings and branding defaults
- Connect integrations
- Connect subdomains
- Verify email sending domain
- Install HubSpot tracking code on your website
- Set up custom properties
- Import contacts, companies, deals, and tickets
- Customize record views
- Set up website, landing page, and/or blog templates

Service Hub

BASIC TASKS:

- Set up your service pipelines and inboxes
- Set up ticket assignment automation
- Set up automated tasks
- Set up service reports and baseboards

BONUS TASKS:

- Create chatbot
- Create customer feedback surveys
- Create knowledge base and articles
- Create service templates and snippets
- Create service playbooks

ONBOARDING PROCESS WITH HIVEHOUSE

- 1. Discovery & Goal Alignment:** Understanding your goals, challenges, and needs.
- 2. HubSpot Setup & Data Migration:** Configuring settings and migrating data.
- 3. CRM Configuration & Optimization:** Configuring your Hubs to match your business processes and needs.
- 4. Team Training & Adoption:** Ensuring your team effectively uses HubSpot's features.
- 5. Ongoing Support & Optimization:** Continued support to further optimize your CRM usage over time.

Sales and Commerce Hub

BASIC TASKS:

- Configure lead statuses and automation
- Set up automated lead assignments
- Set up deal pipeline and automation
- Set up automated sales notifications and tasks
- Set up sales meeting calendars
- Set up call tracking
- Configure payment setup
- Import products and subscriptions
- Set up invoices
- Set up payment links
- Set up quote templates
- Set up sales forecast and goals
- Set up sales reports and dashboards

BONUS TASKS:

- Import sales documents
- Set up sales sequences
- Create sales playbooks
- Create sales templates and snippets
- Explore AI tools

Marketing and Content Hub

BASIC TASKS:

- Configure email subscription types
- Import existing marketing opt-out lists
- Set up email templates
- Connect social accounts
- Configure personas
- Configure lifecycle stages and automation
- Set up lead scoring
- Create forms
- Connect ad accounts
- Create segmented lists
- Create existing website pages, landing pages, and blogs
- Set up marketing reports and dashboards

BONUS TASKS:

- Set up marketing campaigns
- Configure calls to action
- Set up marketing workflows and nurture campaigns
- Explore SEO, podcast, and case study tools
- Explore AI tools

Onboard HubSpot with Hivehouse Digital

With over a decade of experience, Hivehouse Digital specializes in onboarding and optimizing HubSpot for B2B businesses. We customize the onboarding process to fit your business needs, ensuring a more effective HubSpot implementation.

Need help getting started?

We're ready to work with you! Contact us to get pricing and learn more about how we can help.

[Contact Us](#)