



# HUBSPOT ONBOARDING HUB GUIDE

This guide is right for you if you are getting started on your CRM journey.

	Phase 1	Phase 2	Phase 3	Phase 4
<b>Onboarding</b>	Invite your team users	✓		
	Configure your domain	✓		
	Install HubSpot tracking code and remove your internal traffic.	✓		
	Security: Determine which users you want to set up two-factor identification (2FA) for login.	✓		
	Add company branding and address.	✓		
	Connect social accounts	✓		
	Connect your Ads accounts to Hubspot (Adwords, Meta, LinkedIn)	✓		
	Configure your marketing email settings (Ensure regional compliance)	✓		
	Edit and embed the support form on your website	✓		
	Import contacts and tasks/tickets/deals into HubSpot	✓		
	Connect your email to Hubspot	✓		
	Connect your calendar to HubSpot	✓		
	Connect your VOIP phone to Hubspot	✓		

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<b>Systemise</b>	Map your business processes that Hubspot will support	✓		
	Map the customer journey from marketing to sales to service	✓		
	Setup your deal pipeline aligned to your sales process	✓		

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<b>Automate</b>	Create and embed Hubspot forms on your website		✓	
	Set up lead flows from your forms into marketing nurture sequence or sales deals pipeline		✓	
	Create lists to segment your leads		✓	
	Set up your ticket pipelines for service/delivery teams		✓	

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<b>Automate</b>	Create meeting links for the sales process and marketing CTAs		✓	
	Test shared inbox and responding		✓	
	Set up live chat and embed into your website		✓	
	Create Email Templates, Sequences, and Snippets		✓	
	Begin to build out landing pages and conversion paths			✓
	Build out marketing emails			✓
	Create Buyer Personas and add them to HubSpot			✓
	Determine what processes can be automated			✓
	Begin to build out workflows to automate those processes			✓
	Finalize and begin to publish your workflows			✓
	Send your first sequence			✓
	Embed calls to action (CTAs) in your eDMs, Social Posts and Website			✓
	Set up and deploy customer surveys			✓
	Define customer survey response management			✓
Test your automations as a customer and user			✓	

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<b>Delegate</b>	Setup Task creation workflows to remind the team which actions to take and when.			✓
	Set up teams.			✓
	Begin to build out your knowledge base			✓
	Define KPIs and Goals			✓
	Leverage HubSpot Analytics Tools and Reports Library for ready-to-go reports.			✓
	Set up dashboards and custom reports.			✓
	Automate reporting to key stakeholders.			✓



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