Getting Started

❖ Connect your personal email inbox

❖ Set up your personal profile & settings

❖ Invite your team

❖ Create custom properties to store your data

❖ Import your contacts, companies, deals, and notes into HubSpot

❖ Review existing CRM & lead management system(s)

❖ Install HubSpot tracking code on your website

❖ Set up your deal currencies

❖ Set up external system integrations

INTEGRATE **IQ**™

Connect with Prospects on their Terms

❖ Set up live chat on your webpages.

❖ Learn how to use conversations to answer your prospects' questions.

❖ Connect your email and calendar so you can use the meetings tool to let prospects book time with you.

❖ Use email scheduling to send to prospects at their preferred times.

❖ Email prospects directly from the CRM.

INTEGRATE IQ™

Automate your Sales Process

❖ Creating deal stages to automate the pipeline process.

❖ Customize deal pipelines to fit your sales process.

❖ Adding tasks so that sales reps can more efficiently execute daily objectives.

❖ Automating how leads are rotated to sales reps.

❖ Confirm that the deal stage properties are ready.

❖ Set up workflow extensions to automate sales processes.

❖ Explore how other tools integrate with HubSpot.

INTEGRATE **IQ**™

Personalize your Outreach at Scale

❖ Using 1:1 video creation and outreach to get higher response rates.

❖ Adding videos to CRM emails.

❖ Create sequence queues to automatically follow up with prospects so you don't have to do the manual work.

❖ Using personalization tokens in emails to send emails faster.

❖ Remove back-and-forth communication when setting up meetings by using the meetings tool.

❖ Set up quotes to get deals closed faster.

❖ Set up your product library to include the items that you sell.

INTEGRATE **IQ**™

Sales Hub Onboarding

Platform Setup

- ❏ Set up your personal profile & settings
- ❏ Connect your personal email inbox
- ❏ Invite your team
- ❏ Create up to 10 custom properties to store your data
- ❏ Create up to 10 automation workflows
- ❏ Review existing CRM & lead management system(s)
- ❏ Set up deal stages
- ❏ Create up to 10 products in the product library
- ❏ Set up your deal currencies
- ❏ Provide you the HubSpot tracking code to install on your website

Communication Setup

- ❏ Create up to two email templates
- ❏ Show you how to email prospects directly from the CRM
- ❏ Show you how to use email sequences
- ❏ Show you how to set up live chat on your webpages
- ❏ Connect your email and calendar so you can use the meetings tool
- ❏ Use email scheduling to send to prospects at their preferred times

Reporting

- ❏ Create up to two dashboards and 10 total reports
- ❏ Create up to three custom views

INTEGRATE IQ™ 7

Account and Tech Setup

❖ Invite your team members

❖ Connect your subdomains and configure your settings

❖ Install the HubSpot tracking code and filter out your internal traffic

❖ Set up your email sending domain and CAN-SPAM

❖ Import your contacts, companies, deals, tickets, and notes.

❖ Import your marketing opt-out lists

❖ Configure email types

❖ Connect your social accounts

❖ Consider integrations

INTEGRATE IQ™

Capture and Convert Leads

❖ Create personas to better understand the different audiences in your customer's database.

❖ Explore forms and pop-up forms for quick wins.

❖ Create custom properties that will help you qualify leads when filling out forms.

❖ Set up lead scoring.

❖ Define each Lifecycle Stage based on your own qualifications.

INTEGRATE **IQ**™

Engage and Nurture Your Leads

❖ Map out a nurturing process flow that considers the tools you're using.

❖ Define lifecycle stages and ensure contacts go through different nurturing tracks depending on their stage.

❖ Create your first welcome flow series for a new lead.

INTEGRATE **IQ**™

Marketing Hub Onboarding

Platform Setup

❑ Review Marketing Hub Professional covering key features

❑ Set up your email sending domain

❑ Create up to 3 email templates

❑ Configure up to 4 social media platforms

❑ Connect Google Analytics

❑ Provide web tracking code to install on your website

❑ Install and configure up to 3 HubSpot Marketplace apps

❑ Set up Facebook and Google Ads accounts

❑ Review Marketing Hub Professional covering key features

Communication Setup

❑ Create up to two email templates

❑ Show you how to email prospects directly from the CRM

❑ Show you how to use email sequences

❑ Show you how to set up live chat on your webpages

❑ Connect your email and calendar so you can use the meetings tool

❑ Use email scheduling to send to prospects at their preferred times

Reporting

❑ Create up to two dashboards and 10 total reports

❑ Create up to three custom views

INTEGRATE **IQ**™