HubSpot Onboarding Checklist

lynton

Congratulations! You've just purchased HubSpot. You're now ready to embark on an adventure of sales, marketing, service, and operations automation — and so much more. Or are you?

You can meet and exceed your business goals with HubSpot, but implementing the platform isn't easy. The software is advanced, and without any guidance, you may end up under utilizing the tools and failing to maximize ROI. No need to do that. Our checklist can help ensure you've completed different onboarding items for your respective hub(s). Follow along by checking which items you've finished and what else you need to accomplish.

When you're done, you'll better understand how thoroughly you've implemented your new hub. If you're still unsure whether your team is ready to use HubSpot daily, you'll know for sure, and we'll give you some next steps. Let's go!

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HubSpot CRM

With HubSpot's CRM , you can bring your team's tools and data into one easy-to-use system so they can start conversations, deepen relationships, and grow your business. There are a few things to look closely at to ensure you're doing just that.

Tools/Assets	Yes	No
Does your team know how to update notification preferences?	☐	☐
Have you updated User and Team permissions?	☐	☐
Have you utilized the deduplication tool provided by HubSpot to keep your data clean?	☐	☐
Have you added custom contact and deal properties?	☐	☐
Have you customized your contact and company record views?	☐	☐
Have you installed your HubSpot tracking code?	☐	☐

Marketing Hub

With Marketing Hub, you can use your contact data in one place to attract the right people, convert the best leads, and delight your users over time. Here's what you should look at to see if you're on the right track to powering your marketing campaigns.

Tools/Assets	Yes	No
Have you defined your lifecycle stages?	☐	☐
Have you utilized HubSpot's lead scoring system to move contacts through lifecycle stages?	☐	☐
Are you leveraging marketing campaigns?	☐	☐
Have you moved your blog into HubSpot?	☐	☐
Does your team have meeting links set up?	☐	☐
Have you set up the SEO tool for tracking?	☐	☐
Have you used A/B testing to optimize emails?	☐	☐
Do you have personas built inside HubSpot?	☐	☐
Have you set up data scrubbing workflows or processes?	☐	☐
Have you set up custom behavioral events to track how users interact with your site?	☐	☐
Are you leveraging workflows to follow up after form submissions?	☐	☐

Sales Hub

Sales Hub brings your most valuable information about the contacts and companies you interact with to your fingertips, helping you save time and sell more. However, you'll only accomplish that if you're utilizing the following tips and tricks.

Tools/Assets	Yes	No
Have you tried the prospects tool to see who has visited your website?	☐	☐
Have you set up sales team performance reports?	☐	☐
Is your sales team utilizing snippets?	☐	☐
Is your sales team leveraging sequences or playbooks?	☐	☐
Have you set up forecasting reports to predict incoming revenue?	☐	☐
Do you currently have any sales reports to attribute to revenue?	☐	☐
Have you created a workflow to internally assign leads?	☐	☐
Do your pipelines align with your current sales process?	☐	☐

Service Hub

Prospects matter — and so do your current customers. Service Hub lets you create a seamless customer experience that enables you to connect with your customers in the ways they prefer, exceeding their expectations. Certain tools and tactics, listed below, make this as easy as 1, 2, 3.

Tools/Assets	Yes	No
Have you created a service pipeline?	☐	☐
Are you familiar with assigning tickets via automation?	☐	☐
Are you leveraging tasks?	☐	☐
Do you currently have reports to show your support metrics?	☐	☐
Have you created a chatbot for your team?	☐	☐
Have you leveraged the knowledge base for self-service?	☐	☐

Conclusion

You made it to the end of our checklist! So, how was it? Did you answer mostly “yes” to everything or mostly “no?” Take a minute to write in what you’ve personally learned from going through our items here:

My takeaways:

Whether you’re confident in your new hub’s setup or are nervous you haven’t learned enough about it, don’t sweat it. No matter which hub you’re using or how well-versed you are in the HubSpot ecosystem, we can help. With our onboarding services, you don’t have to go it alone. We’ll work with you to explain specific terminology, how everything operates and its full capabilities, and how to make it work for your business so you can realize a quicker time to value.

Ready to Get Started?

Let's talk about how Lynton can help your team onboard and implement HubSpot.

Reach Out Now

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