

Lynton HubSpot Onboarding Packages





Whether you're new to HubSpot or just looking to maximize your investment, we've got your back! At Lynton, we have a team of certified, highly-technical strategists, designers, and developers who leverage HubSpot and other advanced platforms to help organizations get the most out of their tech stack. We are intimately familiar with the challenges of migrating data, assets, automation, processes, and users to a new platform, and we have tactics to make the transition as seamless as possible. With every engagement, we aim to understand your unique objectives, execute a tailored project plan, and increase your time to value.

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Marketing Hub Onboarding Services

We work with you to identify your marketing goals and processes so you can create and manage content with insights and data that drive your marketing strategy. After setting up your portal, learn how to structure a cohesive campaign to attract, nurture, and convert new leads. **What's included:**

	Marketing Hub Professional	Marketing Hub Enterprise
Stakeholder Meeting	✓	✓
Goals Analysis	✓	✓
Process Planning Documentation	✓	✓
Portal Setup – Users, Teams, Permissions, & Settings	✓	✓
Privacy & Consent Settings Configuration	✓	✓
Connecting Brand Domains & URLs	✓	✓
Intro to Marketplace Apps	✓	✓
CRM Customization & Segmentation Tools	✓	✓
CRM Data Hygiene Best Practices	✓	✓
Data Import/Migration Tools, Tips, & Best Practices	✓	✓
Review Contact Import	✓	✓
Marketing Campaign Intro	✓	✓
Blogging, Smart Content, & SEO Tools	✓	✓
Connecting Social & Ad Accounts	✓	✓

Marketing Hub Onboarding Services (Cont.)

	Marketing Hub Professional	Marketing Hub Enterprise
Forms Tool Intro & Strategy	✓	✓
Landing Page Intro & Strategy	✓	✓
Call-to-Action Intro & Strategy	✓	✓
Marketing Emails Functionality & Automation	✓	✓
Email Template Design Tools	✓	✓
Email Automation Tools	✓	✓
Workflows Introduction & Best Practices	✓	✓
HubSpot Analytics Tools & Report Dashboards Introduction	✓	✓
Offboarding Meeting	✓	✓
Support with CRM Customization	Add on / Enterprise Package	✓
Support with Custom Property Implementation	Add on / Enterprise Package	✓
Journey Mapping Support	Add on / Enterprise Package	✓
Lifecycle Stage & Lead Scoring Strategy	Add on / Enterprise Package	✓
Lifecycle Strategy Implementation Support	Add on / Enterprise Package	✓
Permission Strategy Support	Add on / Enterprise Package	✓
Import Users with Permissions & Teams	Add on / Enterprise Package	✓
Lifecycle Stage & Lead Scoring Strategy	Add on / Enterprise Package	✓
Lifecycle Strategy Implementation Support Support	Add on / Enterprise Package	✓

Marketing Hub Onboarding Services (Cont.)

	Marketing Hub Professional	Marketing Hub Enterprise
Permission Strategy Support	Add on / Enterprise Package	✓
Import Users with Permissions & Teams	Add on / Enterprise Package	✓
Data Import Checklist	Add on / Enterprise Package	✓
Campaign Setup & Configuration	Add on / Enterprise Package	✓
Build a Form, Landing Page, & CTA	Add on / Enterprise Package	✓
Build an Email Template	Add on / Enterprise Package	✓
Build an Email Workflow	Add on / Enterprise Package	✓
Build an Automated [Process] Workflow	Add on / Enterprise Package	✓
Timeline	8 Weeks	12 Weeks
Investment	\$3,000 \$2,250	\$6,000

What Our Marketing Hub Process Looks Like Week by Week

We will identify your marketing goals and processes so you can create and manage content with insights and data that drive your marketing strategy. We do this through a series of hands-on calls over the course of several weeks. Take a look at what we cover.

1. Foundations: Settings & Objects

We'll empower your team to complete foundational setup tasks and gain familiarity with HubSpot objects with the right context, resources, and support. We will cover:

- ✓ Your roadmap & any questions
- ✓ HubSpot projects & settings
- ✓ HubSpot 101 & intro to objects

2. Process & Properties

We'll dive into HubSpot's properties and tools for segmentation and how to best use them to create targeted, personalized experiences.

We will explore:

- ✓ Segmentation in HubSpot
- ✓ Property segmentation
- ✓ Segmentation tools
- ✓ Data hygiene

3. Intro to Campaigns

Together, we'll identify how HubSpot can attract the right person with the right message. We'll build the fundamentals of your strategy by covering:

- ✓ Campaigns
- ✓ Blogging
- ✓ SEO
- ✓ Social media
- ✓ Ads

4. Forms, Landing Pages, & CTAs

We'll continue building out your campaigns with HubSpot tools designed to convert visitors to leads. That includes:

- ✓ Forms
- ✓ Landing Pages
- ✓ CTAs

What Our Marketing Hub Process Looks Like Week by Week (Cont.)

5. Templates, Emails, & Workflows

We will review how to create emails in HubSpot and introduce how to deliver our pre-built messages through workflows as they apply to your business. We will look at:

- ✓ Emails & reporting
- ✓ Email templates
- ✓ Intros to workflows & automation

6. Marketing Automations

We'll look at other automation use cases to facilitate your marketing as it relates to day hygiene, processing data, and managing internal communications. We will review:

- ✓ Uses of the workflow tool
- ✓ Enrollment triggers
- ✓ The task tool & automation

7. Reports & Dashboards

After we've set up your campaigns, we'll figure out ways to build dashboards and reporting structures to enable deeper marketing insights. We will go over:

- ✓ Analytics
- ✓ Reporting tools & custom reports
- ✓ Dashboards

Sales Hub Onboarding Services

We elevate your sales team to the next level by enabling your reps to build better relationships with prospects and close more deals. We help you configure your portal and streamline your processes to better equip your sales team to effectively manage your pipeline. What's included:

	Sales Hub Professional	Sales Hub Enterprise
Stakeholder Meeting	✓	✓
Goals Analysis	✓	✓
Process Planning Documentation	✓	✓
Portal Setup – Users, Teams, Permissions, & Settings	✓	✓
Privacy & Consent Settings Configuration	✓	✓
Connecting Brand Domains & URLs	✓	✓
Intro to Marketplace Apps	✓	✓
Contact, Company, & Deal Properties	✓	✓
Activity & Product Properties (If	✓	✓
Create Custom Properties (Contacts, Companies & Deals)	✓	✓
CRM Customization Tools	✓	✓
Upload a Document	✓	✓
Create Snippets, Templates, & Sales Automation	✓	✓
Build a Dashboard	✓	✓

Sales Hub Onboarding Services (Cont.)

	Sales Hub Professional	Sales Hub Enterprise
Offboarding Meeting	✓	✓
Permission Sets	Add on / Enterprise Package	✓
Users/Teams	Add on / Enterprise Package	✓
Import Users	Add on / Enterprise Package	✓
Journey Mapping Support	Add on / Enterprise Package	✓
Setup Deal Pipelines in HubSpot	Add on / Enterprise Package	✓
Setup Deal Automations in HubSpot	Add on / Enterprise Package	✓
Add Product Library & Quote (if applicable)	Add on / Enterprise Package	✓
Data Import Checklist	Add on / Enterprise Package	✓
Import Contacts & Deals	Add on / Enterprise Package	✓
Review Data Import	Add on / Enterprise Package	✓
Reporting & Dashboards Strategy	Add on / Enterprise Package	✓
Reporting Dashboard Buildout	Add on / Enterprise Package	✓
Timeline	8 Weeks	8 Weeks
Investment	\$1,000 \$800	\$3,000

What Our Sales Hub Process Looks Like Week by Week

We help you configure your portal and streamline your processes to better equip your sales team to effectively manage your pipeline. We do this through a series of hands-on calls over the course of several weeks. Take a look at what we cover.

1. HubSpot Foundations, Object & Properties

We'll empower your team to complete foundational setup tasks with the right context, resources and support. We will cover:

- ✓ HubSpot projects tool
- ✓ HubSpot settings & permissions
- ✓ Intro to objects/properties/records
- ✓ Data hygiene

3. Productivity Tools, Chat & End User Setup

Let's review end user set-up and productivity tools within the Sales Hub that gives time back to your sales team and empowers high CRM adoption. We will review:

- ✓ Connection tools
- ✓ Productivity tools
- ✓ Adoption & ender user implementation

2. Sales Process & Deal Pipelines

We'll set your sales team up for success by explaining HubSpot terminology and functionality that will let them build better relationships and close more deals. We cover:

- ✓ Lead management
- ✓ Contact and company properties
- ✓ Lists
- ✓ Deal stages
- ✓ Data hygiene

4. Reports & Dashboards

After setting up your sales campaigns setup, let's figure out ways to build dashboard and reporting structures that enable deeper sales insights. We will go over:

- ✓ Goal setting
- ✓ Analytics
- ✓ Report Tools
- ✓ Dashboards

Service Hub Onboarding Services

We help you delight your clients and bring your flywheel full circle with one of our Service Hub onboarding packages. We help you determine your processes to keep support tickets and communication flowing seamlessly between your customers and success teams. **What's included:**

	Service Hub Professional	Service Hub Enterprise
Stakeholder Meeting	✓	✓
Goals Analysis	✓	✓
Process Planning Documentation	✓	✓
Portal Setup – Users, Teams, Permissions, & Settings	✓	✓
Privacy & Consent Settings Configuration	✓	✓
Connecting Brand Domains & URLs	✓	✓
Intro to Marketplace Apps	✓	✓
Contact & Company Properties	✓	✓
Ticket Properties	✓	✓
Activity & Feedback Properties (if applicable)	✓	✓
Create Custom Properties	✓	✓
Customize CRM	✓	✓
Create Snippets, Templates, & Sales Automation	✓	✓
Upload a Document	✓	✓

Service Hub Onboarding Services (Cont.)

	Service Hub Professional	Service Hub Enterprise
Create Snippets and Templates	✓	✓
Create & Implement Live Chat	✓	✓
Create a Knowledge Base Article	✓	✓
Create a Feedback Survey	✓	✓
Intro Reports & Dashboards	✓	✓
Offboarding Meeting	✓	✓
Workflows Introduction & Best Practices	✓	✓
HubSpot Analytics Tools & Report Dashboards Introduction	✓	✓
Offboarding Meeting	✓	✓
Permissions Sets	Add on / Enterprise Package	✓
Users/Teams	Add on / Enterprise Package	✓
Import Users	Add on / Enterprise Package	✓
Journey Mapping	Add on / Enterprise Package	✓
Setup Ticket Forms, Pipelines, & Automations	Add on / Enterprise Package	✓
Create a Connected Inbox	Add on / Enterprise Package	✓
Create a Customer Feedback Portal (if applicable)	Add on / Enterprise Package	✓
Data Import Checklist	Add on / Enterprise Package	✓
Import Contacts & Tickets	Add on / Enterprise Package	✓

Service Hub Onboarding Services (Cont.)

	Service Hub Professional	Service Hub Enterprise
Review Import	Add on / Enterprise Package	✓
Reporting & Dashboards Strategy	Add on / Enterprise Package	✓
Reporting & Dashboards Buildout Support	Add on / Enterprise Package	✓
Timeline	8 Weeks	8 Weeks
Investment	\$1,000 \$800	\$3,000

What Our Service Hub Process Looks Like Week by Week

We help you build processes to keep support tickets and communication flowing seamlessly between your customers and success teams. We do this through a series of hands-on calls over the course of several weeks. Take a look at what we cover.

1. HubSpot Foundations, Object & Properties

We'll empower your team to complete foundational setup tasks with the right context, resources, and support. We will start building your service process by covering:

- ✓ Your roadmap & any questions
- ✓ Projects & settings
- ✓ Objects & properties

3. Productivity Tools, Chat & End User Setup

Let's review end user set-up and productivity tools within the Service Hub that gives time back to your customer success team. We will review:

- ✓ Connection tools
- ✓ Knowledge base
- ✓ Service tools

2. Customer Service Process & Ticket Pipelines

For a successful customer service program, you need to nail down your processes and how to effectively manage a ticket pipeline. We will go over:

- ✓ Tickets & pipeline
- ✓ Conversations

4. Reports & Dashboards

After setting up your sales campaigns setup, let's figure out ways to build dashboard and reporting structures that enable deeper sales insights. We will go over:

- ✓ Goal setting
- ✓ Analytics
- ✓ Report Tools
- ✓ Dashboards

Custom HubSpot Onboarding

Price: Available upon request

Timeline: Dependent on scope

Description: Custom onboarding is for clients looking for a partner to consult, strategize, and implement their processes into HubSpot. We spend time learning your business, identifying goals, and bringing your data and assets into your portal.

Who is a good fit?: These partners are looking for full support in defining their HubSpot strategy, implementation, and portal configuration.

What's included: The scope is tailored to your specific objectives and could include some of the items below.

Add Strategy

Operational
Process Mapping

Lifecycle Stage/
Lead Scoring Strategy

Permissions/Partitioning
Strategy

Data Import Strategy

Asset Migration Audit/
Recommendations

Pipeline Strategy
(Deals, Tickets,
Custom Objects)

End User Training Strategy

App Integration
Recommendations

Add Implementation

Portal Implementation
(Tools, Properties,
Lists, Automation/
Logic, Reports)

Data Import Support/
Implementation

Asset Implementation
(Templates, Campaigns,
Webpages, Emails,
Documents, Reports)

End User LMS
Implementation

App Integration
Implementation

App Integration
Recommendations

Add Team Training

Live Training Sessions

Video Training Libraries

Training Workshops

End User LMS
Implementation

End User Adoption/
Engagement Reports

Portal Audits

Price: \$500

Timeline: One to two weeks following stakeholder meeting

Description: Whether you’ve had HubSpot for a few months or a few years, our portal audits will provide insight into your overall performance. Our consultants will review your portal and present areas for improvement.

Who is a good fit?: HubSpot users that want to understand how to maximize their portal performance.

What’s included:

Stakeholder Meeting	✓
User Adoption Metrics	✓
Permissions/Partitioning Strategy	✓
Asset Analysis by Hub	✓
Automation/Logic Audit	✓
Gap/Opportunity Assessment	✓
Data Analytics Review	✓
Integration Health Check	✓
Presentation of Findings/ Recommendations	✓

What Our Customers Say About Us



"We have been working with Lynton over the last few months to implement HubSpot and create integration flows to some complex customized programs. It has been a very productive learning event! Cannot recommend enough!"

- **Kimberly Dorsey Intagliata, Director of Customer Success Beretta**



"Roman and the Lynton team provided stellar HubSpot onboarding support, from understanding and managing a variety of custom objects through our core integration to creating workflows, lists, emails, and more. After completing our onboarding sessions, our team feels confident managing our HubSpot environment."

- **Lucas George, Senior Marketing Specialist Lafayette Federal Credit Union**



"We decided to go with HubSpot and partnered with Lynton for sales and operations onboarding. Katherine Gavin and Mitch Dumke were our consultants and created a process and roadmap that far outweighed the investment in the partnership. Without their shepherding, we would have been lost in HubSpot. If a non-profit is considering HubSpot, I would HIGHLY recommend partnering with Lynton to guide your setup, onboarding, and operational "train the trainer" approach."

- **Kristen Jacobson, Executive Director Youth in Arts**

Next Steps

If you're looking for HubSpot onboarding that's guided, customized, and focuses on heavy strategy and implementation, then our process may be the one for you.



**Schedule
an Introduction**



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