



Your HubSpot Implementation

CHECKLIST

A step-by-step guide to getting your new HubSpot portal set up.

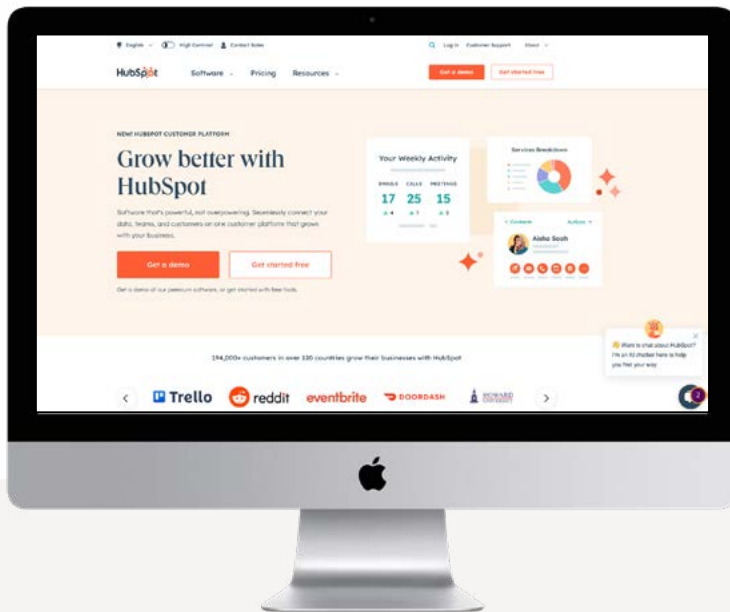


Your HubSpot Adventure is About to Begin!

Congratulations on your purchase of Hubspot. You made an excellent decision for your business. At Growth Spurt, we've seen the incredible impact this software can have on a business's growth and we want that for you too.

HubSpot is a powerful and flexible platform, but it needs to be set up right to unlock its full potential.

We created this easy-to-follow checklist to make sure your journey is smooth, stress-free, and filled with wins. If you find yourself getting overwhelmed as you read through these steps, know that Growth Spurt is here to help. With our HubSpot implementation services, we can manage the entire process for you!



Pre-Work: Like Packing for a Trip

Before you set off on your journey to HubSpot paradise, let's take a moment to highlight some best practices. These recommendations will save you time, help you avoid unnecessary headaches, and set you up for long-term success with HubSpot.

Decide on Naming Conventions

Consistency is key when it comes to managing your marketing assets and campaigns. Establish clear and standardized naming conventions for your lists, emails, landing pages, and other assets within HubSpot. This simple step will prevent confusion, make searching more efficient, and ensure that everyone on your team is speaking the same language.

Establish Processes

HubSpot's effectiveness is only limited by the processes that it supports. If leads are being passed from marketing to sales a different way each time or every sales rep has their own way of doing things, it will cause lots of problems downstream. So, document your marketing, sales, and customer service workflows and ensure everyone understands their role in these processes.

Train Your Team

HubSpot's capabilities are vast, and your team's ability to harness them fully depends on their knowledge and skills. Invest in comprehensive training for your team members to ensure they understand how to use HubSpot effectively. Provide ongoing education and resources as the platform evolves to keep everyone up-to-date. HubSpot offers fantastic on-demand training for free through the HubSpot Academy. A well-trained team will be more productive and find more creative solutions to your business problems.

Integrate Your Tech Stack

As a platform, HubSpot is designed to work seamlessly with other tools in your tech stack. Evaluate your existing software and identify opportunities to bring that data into HubSpot. This might include your CRM, email marketing software, analytics tools, or e-commerce platforms. Integrating these systems will centralize data, improve data accuracy, and enhance your ability to make data-driven decisions.

Now, Let's Get Started Setting up Your HubSpot Portal

1. Set Up Your Brand Kit

Time Required: 5-10 Minutes

Task Owner: HubSpot Admin or Marketer

Skill Level: ●○○○○

Start off with a quick and easy win! In your account settings, you can add your company's logo, favicon, and brand colors to HubSpot. Doing so will make it easy to create emails, blog articles, landing pages, and more that are on-brand.

[Click Here For Additional Instructions](#)

2. Install the HubSpot Tracking Code

Time Required: 10-15 Minutes

Task Owner: Webmaster

Skill Level: ●●●○○

The HubSpot tracking code is a snippet of JavaScript that must be installed on every page of your website within the <body> section, just above the closing </body> tag to unlock many of HubSpot's most exciting features, including:

- **Traffic Analytics:** These reports track the sources, pages, topics, and campaigns that are driving traffic to your website, generating new contacts, and converting customers.
- **Contact Intelligence:** Knowing who is visiting your website and what pages can help marketing identify sales-ready leads. Meanwhile, sales can use this information to understand their interests and how far into the research phase they are.
- **Live Chat:** HubSpot's live chat and chatbot tools can be embedded onto your site, automatically connecting those conversations to the appropriate contact record.

[Click Here For Additional Instructions](#)

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3. Connect Your Domain To Hubspot

Time Required: 10-15 Minutes

Task Owner: Webmaster

Skill Level: ●●○○○

Connecting your website domain to HubSpot is a crucial step in your initial HubSpot setup process. This enables you to publish content to your HubSpot-hosted website, landing pages, blog posts, knowledge base articles, and customer portal.

[Click Here For Additional Instructions](#)

4. Exclude Your Own Traffic From Analytics

Time Required: 5 Minutes

Task Owner: HubSpot Admin or Marketer

Skill Level: ●○○○○

To ensure the accuracy of your website analytics reports in HubSpot, it's important to exclude yourself and the rest of your team from the data. This prevents your visits to your own site from skewing your analytics.

[Click Here For Additional Instructions](#)



5. Set up your blog

Time Required: 15-30 Minutes

Task Owner: HubSpot Admin or Marketer

Skill Level: ●○○○○

Your blog will be the cornerstone of your inbound marketing strategy. Every blog article you publish is a new opportunity to rank on Google for your desired keywords and drive organic search traffic to your site.

The steps required to accomplish this task will vary depending on your starting point and your goals:

If you've never blogged before but would like to start using HubSpot:

[Click Here](#)

If you have a blog already and want to migrate it to HubSpot:

[Click Here](#)

If you have a blog already but want to manage your subscriptions in HubSpot:

[Click Here](#)

6. Connect Google Analytics

Time Required: 5-10 Minutes

Task Owner: Webmaster

Skill Level: ●○○○○

One of the biggest advantages of using a platform like HubSpot is the analytical power of having all of your data in one place. Still, there will occasionally be things you prefer Google Analytics to handle. When you integrate Google Analytics with HubSpot, your Google Analytics account will collect data on the visitors to your HubSpot web pages, landing pages, and blog.

[Click Here For Additional Instructions](#)

7. Connect Your Social Media Accounts

Time Required: 10-15 Minutes

Task Owner: HubSpot Admin or Marketer

Skill Level: ●○○○○

If your company uses social media, then make sure to integrate your LinkedIn, Facebook, Instagram, and X/ Twitter accounts with HubSpot. Doing so offers several benefits:

- **Blog Auto-Publish:** Share your new blog post on Facebook and Twitter automatically as soon as it's been published.
- **Social Media Scheduling:** The days of logging in at a specific time to make your social media posts are over. HubSpot allows you to schedule your posts in advance.
- **Dynamic "Follow Me" Module:** Display a dynamic module on your website pages that encourages visitors to follow you on social media.
- **Advanced Social Media Reporting:** Get access to reports on your reach, engagement, and conversion rates that spank the ones you get from the social media platforms themselves.

[Click Here For Additional Instructions](#)





8. Connect Your Ad Accounts

Time Required: 5-10 Minutes

Task Owner: HubSpot Admin or Marketer

Skill Level: ●○○○○

You can manage your Google, Facebook, and LinkedIn ad accounts directly in HubSpot, eliminating the need to switch between accounts. The usability of HubSpot makes managing your ads easy, and by connecting all of your ad accounts, you can combine your ad analytics with your website, social media, and marketing analytics to get a single view of your customer journey.

[Google Ads Instructions](#)

[Facebook Ads Instructions](#)

[LinkedIn Ads Instructions](#)

9. Create Drag-And-Drop Email Templates

Time Required: 15-20 Minutes

Task Owner: Marketer or Front-End Web Developer

Skill Level: ●●●○○

HubSpot's user-friendly drag-and-drop email editor offers an intuitive way to get started with marketing email campaigns to keep your subscribers informed with updates and showcase exclusive promotions for your business. It's so easy that a marketer with no coding experience can do it. Of course, getting a front-end web developer in the mix is fine, too, if you want to get wild with customizations!

[Click Here For Additional Instructions](#)

10. Embed Hubspot Forms On Your Site

Time Required: 10-20 Minutes

Task Owner: Webmaster

Skill Level: ●●●○○

If you have an external website, meaning it's not built on HubSpot CMS, you'll want to update all of the forms on your site to HubSpot forms. This will ensure that the data contained in every form submission is captured inside your HubSpot CRM. This will grow your marketing contacts and allow you to route leads to the right salesperson, trigger automated follow-ups, and more.

[Click Here For Additional Instructions](#)

11. Import Your Mailing List

Time Required: 10-15 Minutes

Task Owner: Marketer

Skill Level: ●○○○○

If you were using another marketing automation or email marketing tool before HubSpot, you'll want to import your contacts into HubSpot so you can get back to marketing to them.

Before you do, make sure to spend some time cleaning up your data so that you're not bringing bad or dirty data into HubSpot. This will make your life so much easier in the long run.

[Click Here For Additional Instructions](#)

12. Integrate Your CRM

Time Required: 30 minutes to 10 hours, depending on the number of properties, amount of data, and use of CRM

Task Owner: IT Admin with input from stakeholders

Skill Level: ●●●●○

It's perfectly fine if you're not using HubSpot Sales Hub (although we recommend that you do!) and instead using another CRM like Salesforce. However, it's important that certain data from your CRM be brought into HubSpot and vice versa. Integrating your CRM with HubSpot ensures that sales and marketing are working with the same set of data and the data is accurate.

More importantly, it arms your marketing team with important conversion data that allows them to understand what is and isn't working in their marketing strategy to drive revenue.

[Click Here For Additional Instructions](#)

13. Create Custom Properties

Time Required: 15-20 Minutes

Task Owner: HubSpot Admin or Marketer with input from stakeholders

Skill Level: ●●○○○

HubSpot comes equipped with dozens of default properties for each object. For example, first name, last name, email address, and job title are just a few of the many default properties available inside the contact object. As you complete steps 10-12, you may find that HubSpot doesn't include properties that are required to meet your business's unique needs. Fortunately, it's easy to create custom properties in HubSpot.

[Click Here For Additional Instructions](#)

14. Define Deal Stages

Time Required: 2-3 Hours

Task Owner: All Stakeholders

Skill Level: ●●●○○

How many opportunities are your sales team working on at the moment? What's the total value of those opportunities? Where is each one in your sales process? When you have your deal stages defined, and your sales team is using the sales pipeline tool in HubSpot correctly and regularly, it's easy to answer all of these questions and more. This step represents one of the most important yet commonly neglected in your HubSpot setup. Deal stages require you to think about your sales processes and ensure

there's buy-in and compliance. Therefore, deal stages cannot be defined in a silo. Instead, everyone who will be using HubSpot needs to work together to define them to build a process that everyone will agree to follow. In your pre-work, you were encouraged to document your sales process so that each sales rep wasn't doing things his or her own way. This is where that work comes into play.

[Click Here For Additional Instructions](#)

15. Set Up Reporting Dashboards

Time Required: 10-15 Minutes

Task Owner: RevOps, Marketer, or Sales Manager

Skill Level: ●○○○○

It's been said a few times already that the power of HubSpot comes from having all of your data in one place. The reports tool is where you can start to organize that data into actionable insights. When you're just starting out with HubSpot, there's a good chance that you're not sure what reports you need.

Fortunately, HubSpot provides over a dozen dashboard templates for common roles and use cases, like "Sales Rep," "Sales Manager," "Marketing," "Marketing Channel Overview," and "Website Analytics." We recommend starting with a few of these templates and adding new reports and dashboards as new needs come up.

[Create And Manage Your Dashboard](#)

[Create Custom Reports](#)

16. Invite Users To HubSpot

Time Required: 3-5 Minutes

Task Owner: HubSpot Admin or Marketer

Skill Level: ●○○○○

It's natural to want to invite all of your team members to HubSpot as soon as you get access to your portal. This, however, is one of the most common mistakes we see new customers make. Instead, we recommend limiting access to HubSpot to the few people who will be managing the implementation until the majority of steps 1-15 have been completed. This prevents team members from going rogue and setting things up on their own before you're ready.

But once you have the foundations of your HubSpot portal set up, it's time to invite them on in!

[Click Here For Additional Instructions](#)

17. Connect Your Inbox

Time Required: 5-10 Minutes

Task Owner: Each HubSpot user in Sales or Service

Skill Level: ●●○○○

The most basic purpose of a CRM is to have a single place to see all of the interactions a contact has had with your company. You should never have to ask a salesperson what they promised a customer. Similarly, a customer service rep shouldn't have to dig through his or her email to see what the last problem a customer had was. All of this should be documented in your CRM for all to see.

Of course, no one wants to do the data entry to log these conversations. That takes time, and it isn't a whole lot of fun. Fortunately, you can connect your inbox to HubSpot, and all of your customer correspondence will be logged on the contact record automatically.

[Click Here For Additional Instructions](#)

18. Set Up Your Meeting Link

Time Required: 5-10 Minutes

Task Owner: Each HubSpot user

Skill Level: ●○○○○

Are you familiar with the hassle of trying to set up a time to meet with someone? "Can we meet at 2pm?" "Sorry, I'm not available. How does 3pm work?" "No, that doesn't work for me." The back and forth can be a huge waste of time.

HubSpot's meeting tool connects with your calendar, allowing anyone with your meeting link to see all of the days and times you're available and book a meeting with you without any conversation.

This is something each user must set up for themselves, and doing so is easy.

[Click Here For Additional Instructions](#)

Congratulations!

You've completed your HubSpot implementation checklist. By taking these steps, you've set the foundation for success, and here's what you can look forward to:

Seamless HubSpot Integration



Your HubSpot adventure has just begun, and you've seamlessly integrated this powerful tool with your entire tech stack.

Data-Driven Decisions



With HubSpot's tracking and analytics in place, you'll have the data you need to make informed decisions and drive your marketing strategy forward.

Effective Lead Management



Your lead tracking will help you manage leads and make sure no opportunity falls through the cracks.

Streamlined Workflows



By setting up your HubSpot blog, embedding forms, and connecting social media accounts, you've streamlined your marketing efforts for peak efficiency.

Your journey with HubSpot is just beginning, and there's so much more to explore and achieve. Remember that HubSpot is a dynamic platform, and as you continue your adventure, you'll uncover new features and possibilities to propel your sales, marketing, and service efforts to new heights.



Of Course, You Could Always Have Growth Spurt Do It For You

If you read through this guide and found the 18 steps intimidating, have a HubSpot certified partner do them for you. Growth Spurt offers HubSpot implementation services starting at just \$4,500.

[Learn More](#)