

HUBSPOT ONBOARDING SERVICES

HubSpot's Onboarding is designed for new customers using HubSpot software for the first time and guides and educates you through the process.

At Antidote 71, we are well-equipped and certified to help you through this process.

We also offer additional services, depending on your preferences and timeline, that offer a more hands-on approach. Below is a comparison of the services that HubSpot initially provides, along with additional hands-on services and pricing from Antidote 71.



Guided Onboarding

- Demonstrated by your guide
- Your team completes all tasks
- Guide cannot complete tasks for you
- Limited in scope of services



Custom Onboarding

- Broad flexibility
- Can demonstrate and assist or do it for you
- Allowed to complete tasks for you
- Allowed to add on services as needed



HUBSPOT ONBOARDING SERVICES

Sales Hub Professional

Account & Tech Setup

HubSpot

antidote⁷¹

Setting up your account



Connecting subdomains



Installing the HubSpot tracking code



Customization of the CRM for your processes



Team Permissions



Team Invites



Standard Integrations



Adding your branding



Filtering internal IP addresses



Populating address and legal information



Connecting all relevant accounts



Handling domain and subdomain setup



Consulting to migrate/import data from your CRM



Email Signature Setup



HUBSPOT ONBOARDING SERVICES

Sales Hub Professional

Reporting Setup

HubSpot

antidote⁷¹

Baseline reporting setup and review



Custom reporting setup and review



Lead Scoring Setup



Contact Setup

Contact segmenting



Contact lifecycle stages



Creating custom properties for contacts and companies



Importing contacts, companies, deals, tickets and notes



Importing existing marketing contacts from previous CRMs



Template & Sequence Setup

Template education



Setting up sales email templates



Additional design services, if necessary



HUBSPOT ONBOARDING SERVICES

Sales Hub Professional

Sales Tools

HubSpot

antidote⁷¹

Calendar Connection



Email Setup



Standard Sales Automation



Meeting Link Creation



Deal Stage Customization



Email Blacklist



Custom Sales Automation



Deal Stage Automation



Workflow & Lifecycle Setup

Define lifecycle stages



Create your first welcome flow series for a new lead



Sales sequence creation



Snippet Setup



Consulting on the customer lifecycle journey lead stages



Mapping lead stages to deal stages



Pricing

\$1,500

\$1,750



HUBSPOT ONBOARDING SERVICES

Sales Hub Professional

We have broad flexibility to help you throughout the onboarding process.

We understand that you and your staff may not be able to dedicate the time necessary to complete these tasks yourself.

That's why we offer custom onboarding services to reduce your time commitment and level of effort, but still get you onboarded and up and running successfully with HubSpot.

Email us at info@antidote71.com to learn more.

