

# HUBSPOT MARKETING HUB

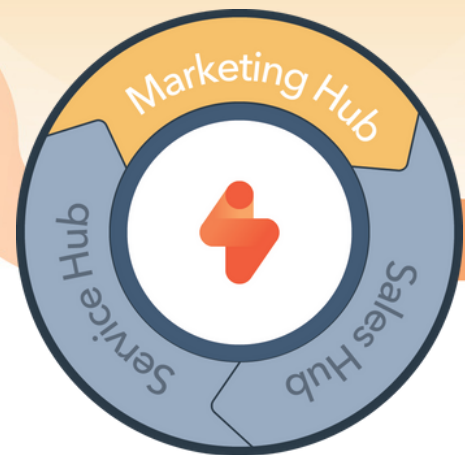
## Professional Onboarding

COST:

**\$2,400**

TIMELINE:

**4 Weeks**



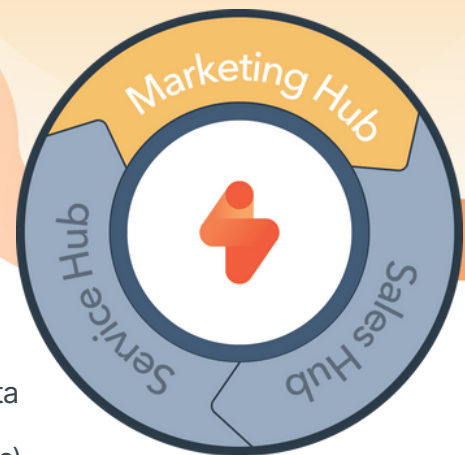
### OFFERS & SERVICES

- ➡ Kick-off / Alignment Call
- ➡ Post Kick-Off Alignment Call
- ➡ Setup Of Users & Associated Permissions
- ➡ HubSpot Account Settings & Tracking Codes Setup
- ➡ Branding Settings Setup For Logo, Fonts, Colors, Etc.
- ➡ Import Of Standard Object Data (Contacts & Companies) Into HubSpot CRM Database
  - Import Ready .Csv Files Must Be Provided. If Additional Assistance Is Needed With Data Strategy, Cleaning Data, Or Manipulating Data Prior To Import There May Be An Additional Fee. [Is My Data Import Ready?](#)
- ➡ Creation Of Custom Properties
- ➡ Import Opt-Out Lists From Previously Used Systems
- ➡ Connect Email Sending Domain
- ➡ Setup Of GDPR Compliance Settings
- ➡ Setup of HubSpot App Marketplace Integrations (Select HubSpot App Partners Only)
  - Excluded Integrations: Netsuite, Magento, ZoomInfo Inbound Enrich, ([Standard ZoomInfo Integration](#) Is Not Excluded)



# HUBSPOT MARKETING HUB

## Professional Onboarding



### OFFERS & SERVICES (CONT.)

- ➔ Configure Marketing Contacts Segmentation For Imported Data
- ➔ Buyer Persona Property Setup For Contacts (Up To 3 Personas)
- ➔ Setup Subdomain For Blog, Landing Page & Email Web Version
- ➔ Configure Marketing Email Sender(s) & Re Subscription Email
- ➔ Setup Of Default Form Settings & Styles
- ➔ Assistance With Social Media Setup And Settings Configuration
- ➔ Creation of Marketing Reporting Dashboards: Lead Generation, Marketing Channel Performance, Website Analytics
- ➔ Project Wrap-Up Call

# HUBSPOT MARKETING HUB

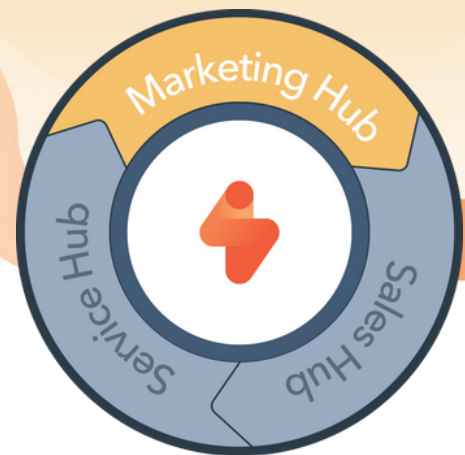
## Enterprise Onboarding

COST:

**\$4,800**

TIMELINE:

**4 Weeks**



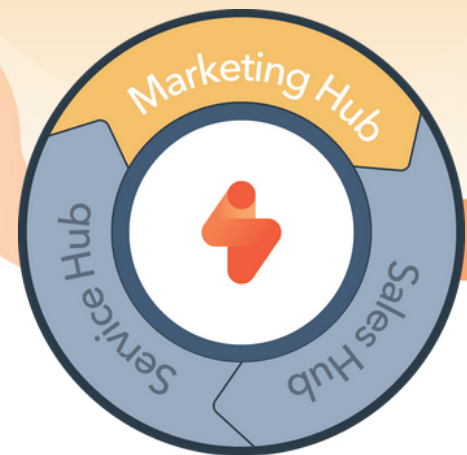
### OFFERS & SERVICES

- ➡ Kick-off / Alignment Call
- ➡ Post Kick-Off Alignment Call
- ➡ Setup Of Users & Associated Permissions
- ➡ HubSpot Account Settings & Tracking Codes Setup
- ➡ Branding Settings Setup For Logo, Fonts, Colors, Etc.
- ➡ Import Of Standard Object Data (Contacts & Companies) Into HubSpot CRM Database
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- ➡ Setup of HubSpot App Marketplace Integrations (Select HubSpot App Partners Only)
  - Excluded Integrations: Netsuite, Magento, ZoomInfo Inbound Enrich, ([Standard ZoomInfo Integration](#) Is Not Excluded)



# HUBSPOT MARKETING HUB

## Enterprise Onboarding



### OFFERS & SERVICES (CONT.)

- ➡ Configure Marketing Contacts Segmentation For Imported Data
- ➡ Buyer Persona Property Setup For Contacts (Up To 3 Personas)
- ➡ Setup Subdomain For Blog, Landing Page & Email Web Version
- ➡ Configure Marketing Email Sender(s) & Re Subscription Email
- ➡ Setup Of Default Form Settings & Styles
- ➡ Assistance With Social Media Setup And Settings Configuration
- ➡ Creation of Marketing Reporting Dashboards: Lead Generation, Marketing Channel Performance, Website Analytics, Revenue Attribution
- ➡ Creation Of Custom HubSpot Marketing Reports (Up To 3 Reports)
- ➡ Creation Of Built-In Email Subscription Types
- ➡ Migration Of Existing Assets To New System (Up To 5 Pop-Ups Or Forms)
- ➡ Segmentation & Creation Of Desired Lists (Up To 5 Active or Static Lists)
- ➡ Project Wrap-Up Call

# HUBSPOT SALES HUB

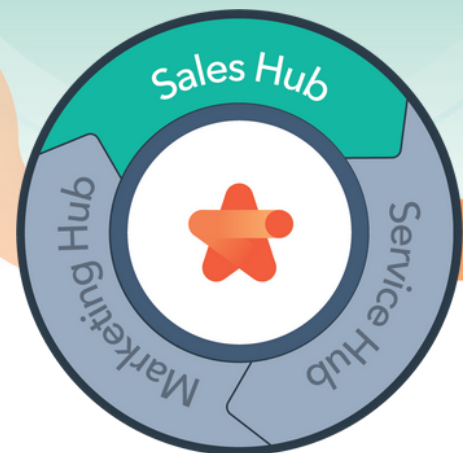
## Professional Onboarding

COST:

**\$1,450**

TIMELINE:

**4 Weeks**



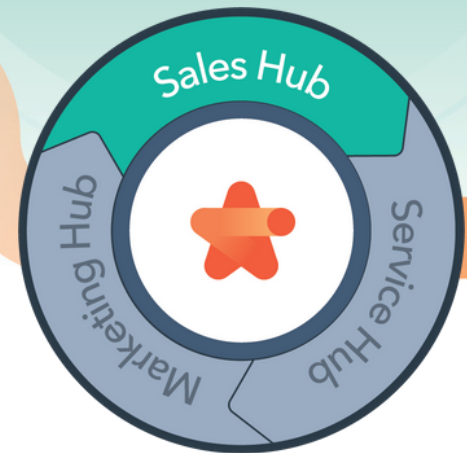
### OFFERS & SERVICES

- ➔ Kick-off/ Alignment Call
- ➔ Post Kick-Off Alignment Call
- ➔ Setup of Users & Associated Permissions
- ➔ HubSpot Account Settings and Tracking Codes Setup
- ➔ Branding Settings Setup for Logo, Fonts, Colors, Etc.
- ➔ Import of Existing Contacts & Companies into HubSpot CRM Database
  - Import Ready .Csv Files Must Be Provided. If Additional Assistance Is Needed With Data Strategy, Cleaning Data, Or Manipulating Data Prior To Import There May Be An Additional Fee. [Is My Data Import Ready?](#)
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- ➔ Connect Email Sending Domain
- ➔ Setup Of GDPR Compliance Settings
- ➔ Setup Of HubSpot App Marketplace Integrations (Select HubSpot App Partners Only)
  - Excluded Integrations: Netsuite, Magento, ZoomInfo Inbound Enrich. ([Standard ZoomInfo Integration](#) Is Not Excluded).



# HUBSPOT SALES HUB

## Professional Onboarding



### OFFERS & SERVICES (CONT.)

- ➔ Build Out Of Deal Pipelines & Stages
- ➔ Assistance With Setting Up Meetings Tool & Email Tracking Through Gmail Or Outlook Integration
- ➔ Creation Of Sales Reporting Dashboards: Sales Opportunity Review, Sales Manager, Sales Rep
- ➔ Project Wrap-Up Call

# HUBSPOT SALES HUB

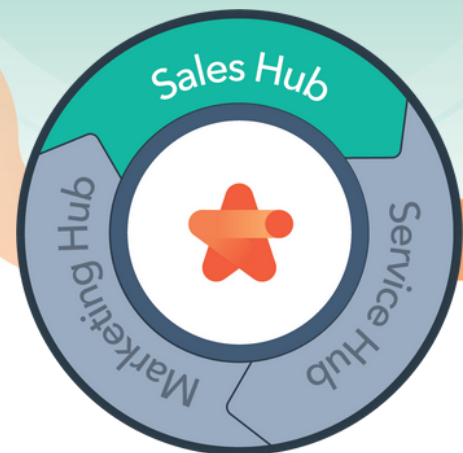
## Enterprise Onboarding

COST:

**\$2,800**

TIMELINE:

**4 Weeks**



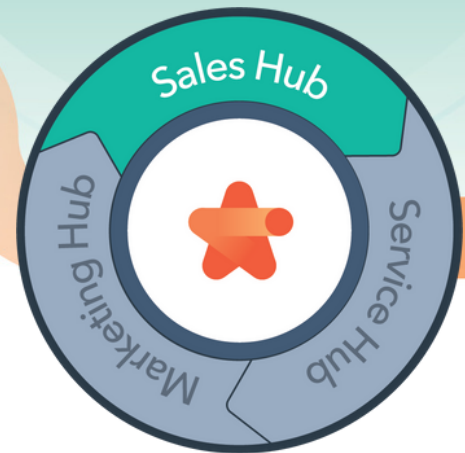
### OFFERS & SERVICES

- ➔ Kick-off/ Alignment Call
- ➔ Post Kick-Off Alignment Call
- ➔ Setup of Users & Associated Permissions
- ➔ HubSpot Account Settings and Tracking Codes Setup
- ➔ Branding Settings Setup for Logo, Fonts, Colors, Etc.
- ➔ Import of Existing Contacts & Companies into HubSpot CRM Database
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- ➔ Creation Of Custom Properties
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- ➔ Connect Email Sending Domain
- ➔ Setup Of GDPR Compliance Settings
- ➔ Setup Of HubSpot App Marketplace Integrations (Select HubSpot App Partners Only)
  - Excluded Integrations: Netsuite, Magento, ZoomInfo Inbound Enrich. ([Standard ZoomInfo Integration](#) Is Not Excluded).



# HUBSPOT SALES HUB

## Enterprise Onboarding



### OFFERS & SERVICES (CONT.)

- ➡ Build Out Of Deal Pipelines & Stages
- ➡ Assistance With Setting Up Meetings Tool & Email Tracking Through Gmail Or Outlook Integration
- ➡ Creation Of Sales Reporting Dashboards: Sales Opportunity Review, Sales Manager, Sales Rep
- ➡ Creation of Custom HubSpot Sales Reports (Up To 3 Reports)
- ➡ Setup Sales Email Templates (Up To 3 Templates)
- ➡ Setup Sales Snippets (Up To 3 Snippets)
- ➡ Project Wrap-Up Call

# HUBSPOT CMS HUB

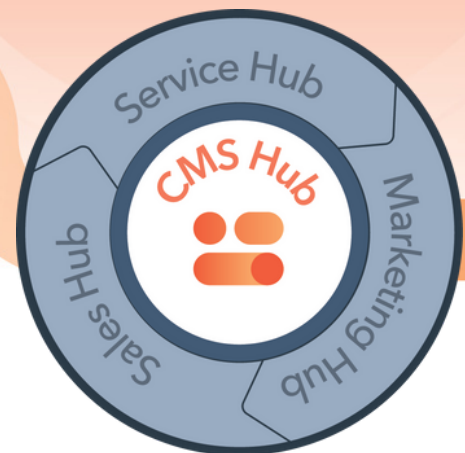
## Professional Onboarding

COST:

**\$1,450**

TIMELINE:

**4 Weeks**



### OFFERS & SERVICES

- ➔ Kick-off/ Alignment Call
- ➔ Setup of Users & Associated Permissions
- ➔ HubSpot Account Settings and Tracking Codes Setup
- ➔ Import of Existing Contacts & Companies into HubSpot CRM Database
- ➔ Creation of Previously Existing Custom Properties in Database
- ➔ Website Settings & Domain Setup
- ➔ Landing Page Settings Configuration
- ➔ Blog Settings Configuration
- ➔ Native Integrations As Per the HubSpot App Marketplace
- ➔ Creation of Essential HubSpot Traffic Reports and Dashboards
- ➔ Project Wrap-up Call

# HUBSPOT CMS HUB

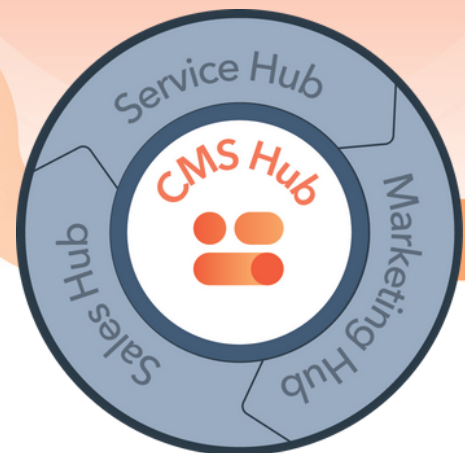
## Enterprise Onboarding

COST:

**\$1,600**

TIMELINE:

**4 Weeks**



### OFFERS & SERVICES

- ➔ Kick-off/ Alignment Call
- ➔ Setup of Users & Associated Permissions
- ➔ HubSpot Account Settings and Tracking Codes Setup
- ➔ Import of Existing Contacts & Companies into HubSpot CRM Database
- ➔ Creation of Previously Existing Custom Properties in Database
- ➔ Website Settings & Domain Setup
- ➔ Landing Page Settings Configuration
- ➔ Blog Settings Configuration
- ➔ Native Integrations As Per the HubSpot App Marketplace
- ➔ Creation of Essential HubSpot Traffic Reports and Dashboards
- ➔ Creation of Custom HubSpot Traffic Reports and Dashboards
- ➔ Rebranded Ultimate Conversion Landing Page
- ➔ Project Wrap-up Call



# HUBSPOT SERVICE HUB

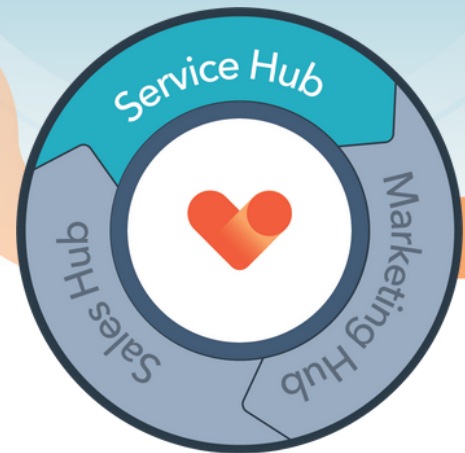
## Professional Onboarding

COST:

**\$1,450**

TIMELINE:

**4 Weeks**



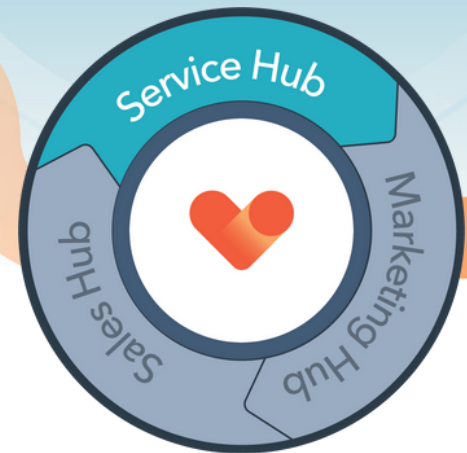
### OFFERS & SERVICES

- ➡ Kick-off/ Alignment Call
- ➡ Post Kick-Off Alignment Call
- ➡ Setup of Users & Associated Permissions
- ➡ HubSpot Account Settings and Tracking Codes Setup
- ➡ Branding Settings Setup for Logo, Fonts, Colors, Etc.
- ➡ Import of Existing Contacts & Companies into HubSpot CRM Database
  - Import Ready .Csv Files Must Be Provided. If Additional Assistance Is Needed With Data Strategy, Cleaning Data, Or Manipulating Data Prior To Import There May Be An Additional Fee. [Is My Data Import Ready?](#)
- ➡ Creation Of Custom Properties
- ➡ Creation of Essential HubSpot Service Reports and Dashboards
- ➡ Import Opt-Out Lists From Previously Used System
- ➡ Connect Email Sending Domain
- ➡ Setup Of GDPR Compliance Settings
- ➡ Setup Of HubSpot App Marketplace Integrations (Select HubSpot App Partners Only)
  - Excluded Integrations: Netsuite, Magento, ZoomInfo Inbound Enrich. ([Standard ZoomInfo Integration](#) Is Not Excluded).



# HUBSPOT SERVICE HUB

## Professional Onboarding



### OFFERS & SERVICES (CONT.)

- ➔ Build Out Of Ticket Pipelines & Statuses
- ➔ Connect Team Inbox For Service Requests (Up To 3 Channels)
- ➔ Turn On Settings To Automatically Update Ticket Status When Someone Replies
- ➔ Creation Of Service Reporting Dashboards: Service Overview, Service Team Performance
- ➔ Project Wrap Up Call

# HUBSPOT SERVICE HUB

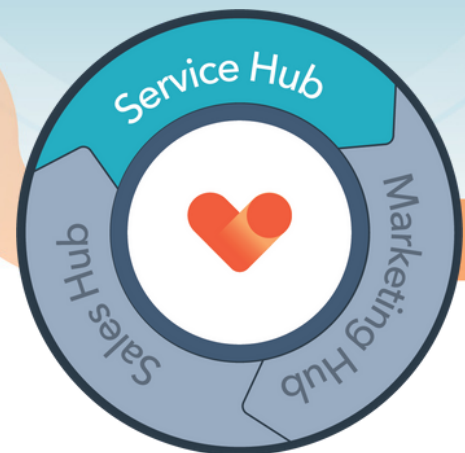
## Enterprise Onboarding

COST:

**\$2,800**

TIMELINE:

**4 Weeks**



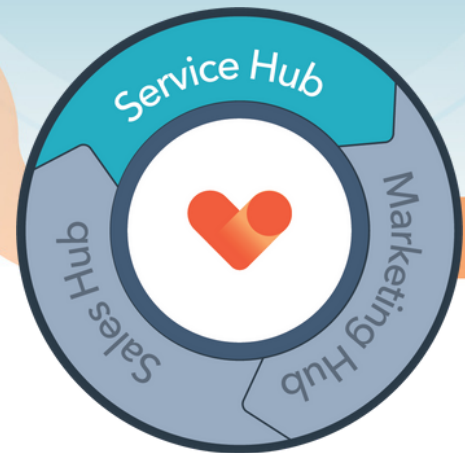
### OFFERS & SERVICES

- ➡ Kick-off/ Alignment Call
- ➡ Post Kick-Off Alignment Call
- ➡ Setup of Users & Associated Permissions
- ➡ HubSpot Account Settings and Tracking Codes Setup
- ➡ Branding Settings Setup for Logo, Fonts, Colors, Etc.
- ➡ Import of Existing Contacts & Companies into HubSpot CRM Database
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- ➡ Creation Of Custom Properties
- ➡ Creation of Essential HubSpot Service Reports and Dashboards
- ➡ Import Opt-Out Lists From Previously Used System
- ➡ Connect Email Sending Domain
- ➡ Setup Of GDPR Compliance Settings
- ➡ Setup Of HubSpot App Marketplace Integrations (Select HubSpot App Partners Only)
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# HUBSPOT SERVICE HUB

## Enterprise Onboarding



### OFFERS & SERVICES (CONT.)

- ➡ Build Out Of Ticket Pipelines & Statuses
- ➡ Connect Team Inbox For Service Requests (Up To 3 Channels)
- ➡ Turn On Settings To Automatically Update Ticket Status When Someone Replies
- ➡ Creation Of Service Reporting Dashboards: Service Overview, Service Team Performance
- ➡ Creation of Custom HubSpot Service Reports (Up To 3 Reports)
- ➡ Setup Service Snippets (Up To 3 Snippets)
- ➡ Creation Of Support Form & Connection To Ticket Pipeline
- ➡ Project Wrap Up Call

# HUBSPOT BUSINESS UNIT

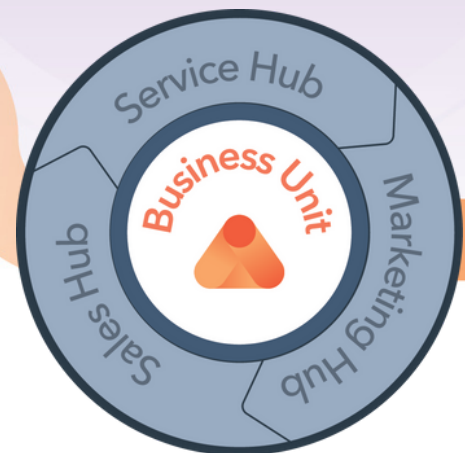
## Onboarding

COST:

**\$2,400**

TIMELINE:

**4 Weeks**



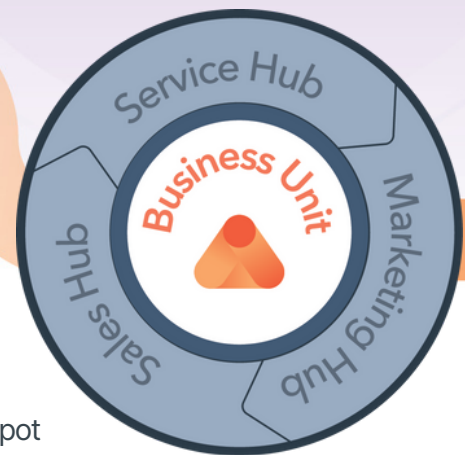
### OFFERS & SERVICES

- ➡ Kick-off / Alignment Call
- ➡ Post Kick-Off Alignment Call
- ➡ Setup Of Users & Associated Permissions
- ➡ HubSpot Account Settings & Tracking Codes Setup
- ➡ Branding Settings Setup For Logo, Fonts, Colors, Etc.
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- ➡ Connect Email Sending Domain
- ➡ Setup Of GDPR Compliance Settings
- ➡ Setup of HubSpot App Marketplace Integrations (Select HubSpot App Partners Only)
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# HUBSPOT BUSINESS UNIT

## Onboarding



### OFFERS & SERVICES (CONT.)

- ➡ Creation of workflow(s) to capture contacts entering into Hubspot from integrations & assign them to the appropriate Business Unit
- ➡ Creation of Custom Website Analytics Views for the BU Website
- ➡ **Marketing Hub:** Assistance with Social Media Setup And Settings Configuration
- ➡ **Marketing Hub:** Enable & Setup Specific Subscription Types per Business Unit
- ➡ **Marketing Hub:** Setup Subdomains For Blog, Landing Page & Email Web Version
- ➡ The following activities may take place based on additional Hub subscriptions purchased:
  - **Sales Hub:** Build Out Of Deal Pipelines & Stages
  - **Sales Hub:** Assistance with Setting Up Meetings Tool & Email Tracking Through Gmail Or Outlook Integration
  - **Service Hub:** Build Out Of Ticket Pipelines & Statuses
  - **Service Hub:** Connect Team Inbox For Service Requests (Up To 3 Channels)
- ➡ Project Wrap-Up Call

**\*\*Note:** If this Business Unit is being added to a pre-existing Hubspot portal, there are additional activities that will need to take place in order to protect the existing assets (for example. Data, Workflows, Lists). Those activities are not included in this setup and may be purchased as an add-on (Asset & Data Siloing).

# HUBSPOT BUSINESS UNIT

## Reassignment

This Hubspot setup supports moving a parent brand into a newly purchased Business Unit.

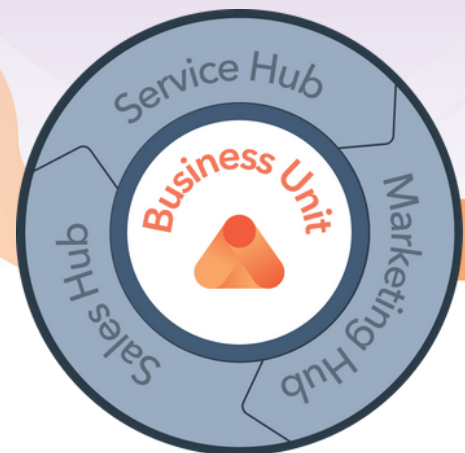
AS ADD ON

COST:

**Varies**

TIMELINE:

**4 Weeks**



### OFFERS & SERVICES

- ➡ Kick-off/ Alignment Call
- ➡ HubSpot Account Settings And Tracking Codes Setup To Associate Data To New Business Unit
- ➡ Branding Settings Setup for Logo, Fonts, Colors, Etc.
- ➡ Reassignment Of Contact Data To The Business Unit
- ➡ Addition Of Business Unit Segmentation Criteria To Other Objects (Companies, Deals, Tickets, etc) If Desired
- ➡ Recreation Of Existing Forms Into Business Unit Or Addition Of Logic To Ensure Form Submissions Are Associated With The Correct Business Unit
- ➡ Addition Of Logic To Workflows To Ensure Contacts From Other Business Units Do Not Get Enrolled
- ➡ Addition Of Logic To Active Lists To Ensure Contacts From Other Business Units Do Not Get Enrolled
- ➡ Creation of workflow(s) to capture contacts entering into Hubspot from integrations & assign them to the appropriate Business Unit
- ➡ **Marketing Hub:** Enable & Setup Business Unit Specific Subscription Types
- ➡ **Marketing Hub:** Reassign Email Sending, Landing Pages, Blogs, And Email Web Version Domains To The Business Unit
- ➡ Project Wrap-Up Call

# HUBSPOT BUSINESS UNIT

COST:

**Varies**

TIMELINE:

**4 Weeks**

## Asset & Data Siloing

This Hubspot setup takes place before setting up an additional Business Unit and helps ensure existing assets are not impacted.

**AS ADD ON**

### OFFERS & SERVICES

- ➔ Addition Of Logic To Workflows To Ensure Contacts From Other Business Units Do Not Get Enrolled
- ➔ Addition Of Logic To Active Lists To Ensure Contacts From Other Business Units Do Not Get Enrolled
- ➔ Review Of Connected HubSpot App Marketplace Integrations And Discussion Of Potential Risks Or Concerns
- ➔ If Using Salesforce: Setup Of Inclusion List To Ensure Other Business Unit Data Does Not Flow Through The Integration
- ➔ Addition of Logic To Pop-Up Forms To Ensure Only The Intended Visitors See Them

