



Top Things a B2B Startup Needs to Get Basic HubSpot Setup Right - A Checklist.

Are you ready to take your business to the next level with HubSpot? Awesome!

But where do you start? Don't worry, we've got you covered.

Our **HubSpot setup checklist** will guide you through the process, from **creating your account** to **setting up your first workflows**. With this checklist in hand, you'll be up and running in no time, taking full advantage of HubSpot's powerful features for marketing, sales, and customer service.

So, let's jump in and get started on your path to SUCCESS!

Set Up Your HubSpot Instance



The first step is to set up your HubSpot instance. This involves reviewing data points and field types of available data, creating custom properties, and property categorization.



Import Existing Records



Once you've set up your instance, you'll want to import your existing records. This involves de-duplication, merging, importing data to HubSpot, and mapping with custom properties.

Set Up Brand-Specific Marketing Assets



To ensure a consistent brand experience for your customers, it's important to set up your brand-specific marketing assets. This includes brand guidelines setup, email domain settings and validation, and email footer and default brand marketing settings.



Set Up Basic Analytics



HubSpot provides powerful analytics capabilities that allow you to track the performance of your marketing efforts. To get started, set up HubSpot Analytics on your website and other tools, and ensure that your tracking is validated.

Connect Social Accounts



This is another key HubSpot setup step. HubSpot allows you to connect your social media accounts to your HubSpot account, enabling you to schedule and publish social media posts from within HubSpot.



Set Up Emails



Email marketing is a critical component of any marketing strategy, and HubSpot provides powerful email marketing capabilities. To get started, add your sender details and create email templates.

Create a Lead Scoring Model



To set up a lead scoring model, start by assigning scores to your contact and company properties. Then, create a list of actions that indicate a lead is moving closer to becoming a customer. Assign scores to each action, and set up a system that automatically adjusts a lead's score as they take these actions.



Create Lead Routing Workflows



To set up lead routing workflows, start by creating a list of criteria that should be used to assign leads to sales representatives. Then, create a series of workflows that will automatically assign leads to the appropriate sales representative, based on these criteria.

Create Other Workflows



HubSpot offers a variety of other workflows that can help you to automate your marketing processes. These workflows can be triggered by custom events, such as a lead filling out a form or clicking on a link.

To set up other workflows, start by identifying the events that should trigger the workflow. Then, create a series of steps that will be executed when the event occurs. This might include sending a follow-up email, updating a contact record, or creating a task for a team member.



Build Initial Landing Pages and Email Templates



Landing pages and email templates are essential to any inbound marketing strategy. You can also create thank you page templates in HubSpot.

Integrate with other Martech Software



Integrating third-party Martech tools with HubSpot can help you streamline your marketing activities and improve your workflows. This will enable you to sync your data across all your platforms, making it easier to manage your marketing campaigns.



Migrate Your Blog



Migrating your existing blog into HubSpot is an important step in ensuring that your content is optimized for inbound marketing. This will allow you to manage your blog within the HubSpot platform, and use the built-in analytics tools to track your content's performance.

Train Your Team on How To Use HubSpot



HubSpot setup isn't complete without training. Once you have integrated your other tools and migrated your blog into HubSpot, it is important to train your team on how to use the platform effectively. This will help you to get the most out of HubSpot's features and capabilities.

