Hubspot

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

Setting up HubSpot right is essential for your B2B startup's success.

This checklist breaks down the must-do steps, including CRM configuration, setting up contact properties, integrating email marketing, and fine-tuning reporting tools.

This would help you build a strong foundation to manage leads and nurture customer relationships effectively.

experience to achieve your growth goals.

Download it now to avoid common setup mistakes and streamline your HubSpot

Instance The first step is to set up your HubSpot instance.

Set Up Your HubSpot

This involves reviewing data points and field types of available data, creating custom properties, and property categorization.





Once you've set up your instance, you'll want

Import Existing Records

to import your existing records. This involves de-duplication, merging, importing data to HubSpot, and mapping with custom properties.

Marketing Assets To ensure a consistent brand experience for your customers, it's important to set up your

Set Up Brand-Specific

brand-specific marketing assets. This includes brand guidelines setup, email domain settings and validation, and email footer and default brand marketing settings.





HubSpot provides powerful analytics capabilities that allow you to track the performance of your

Set Up Basic Analytics

marketing efforts. To get started, set up HubSpot Analytics on your website and other tools, and ensure that your tracking is validated.

allows you to connect your social media accounts

Connect Social Accounts

to your HubSpot account, enabling you to schedule and publish social media posts from within HubSpot.

This is another key HubSpot setup step. HubSpot



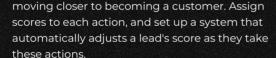


marketing strategy, and HubSpot provides powerful email marketing capabilities. To get started, add your sender details and create

Set Up Emails

email templates. **Create a Lead Scoring Model**

Email marketing is a critical component of any



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

Create Lead Routing Workflows To set up lead routing workflows, start by creating a list of criteria that should be used to assign leads

these criteria.





for a team member.

to sales representatives. Then, create a series of workflows that will automatically assign leads to the appropriate sales representative, based on

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.

create thank you page templates in HubSpot.

Build Initial Landing Pages and Email Templates Landing pages and email templates are essential

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





Integrate with other Martech

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

track your content's performance.

effectively. This will help you to get the most out

of HubSpot's features and capabilities.

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

platform, and use the built-in analytics tools to



