

HubSpot Sales Hub Onboarding *Premier*

Beyond basic onboarding: Our services include hands-on setup to ensure your success!

Services	CETDIGIT Onboarding	HubSpot Onboarding
Kick-off / Alignment Call	✓	✓
Overview of your custom sales process in HubSpot	✓	✓
General setup and customization of HubSpot platform to align with your business needs	✓	Guidance Only
Setup of users and permissions to ensure proper access and security	✓	Guidance Only
Integration with MS Outlook / Gmail to enable seamless communication	✓	Guidance Only
Calendar configuration and setup to manage appointments and tasks	✓	Guidance Only
Call Setup to enable call tracking and analytics	✓	✗
Setup and configuration of deal pipelines and stages	✓	Guidance Only
Creating custom properties to tailor HubSpot to your specific requirements.	✓	✗
Importing companies, contacts, and deals data from your existing system to ensure accuracy in your new platform	✓	✗
Standard sales automation setup	✓	Guidance Only
Creation of dashboards and reports to provide you with data-driven insights	✓	✗
Creation of views/active lists to streamline your workflow and prioritize tasks	✓	Guidance Only
Turning on standard integrations (App Marketplace/native)	✓	Guidance Only
HubSpot Sales Hub Professional Onboarding Rate	\$850	\$1,500
HubSpot Sales Hub Enterprise Onboarding Rate	\$1,700	\$3,500

Notes:

1. Services encompass 8 hours of meetings and offline work, available within 90-days. (16 hours for Ent.)
2. The above checklist serves as a guideline; we tailor your onboarding to your specific business needs.
3. For solution deployment, custom integrations, and post-onboarding support, consider CETDIGIT's [Growth](#) and [Managed Services](#) plans.