HubSpot Service Hub Onboarding *Premier*

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

Services	CETDIGIT Onboarding	HubSpot Onboarding
Kick-off / Alignment Call	✅	✅
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	✅	❌
Creating custom properties to tailor HubSpot to your specific requirements	✅	❌
Importing companies, and contacts data from your existing system to ensure accuracy in your new platform	✅	❌
Setting up intake channels	✅	Guidance Only
Creating a customized ticket pipeline	✅	Guidance Only
Live chat implementation	✅	Guidance Only
Helping customers self-serve through the knowledge base	✅	Guidance Only
Ticket automation	✅	Guidance Only
Measuring customer experience	✅	Guidance Only
Creation of dashboards and reports to provide you with data-driven insights	✅	❌
HubSpot Service Hub Professional Onboarding Rate	**$850**	$1500
HubSpot Service 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.