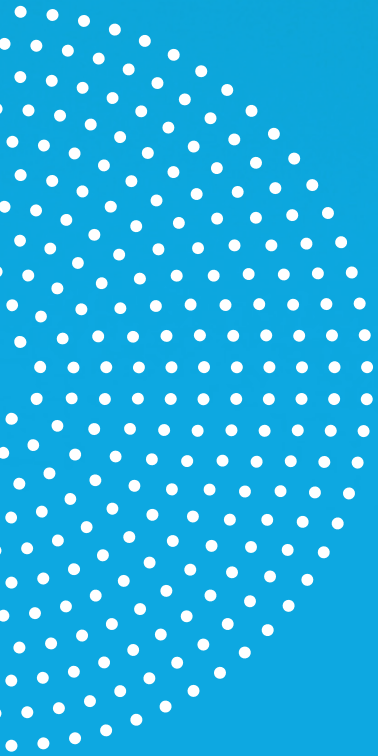




12 steps to successful HubSpot onboarding with ESM Inbound



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How do you know what to expect from your HubSpot onboarding experience? Here's a condensed, jargon-free guide to each step in the process and what should be achieved between you and your onboarding rep along the way.

STEP 1: Before the Kickoff Call

Before you even begin onboarding, your rep will be setting up your HubSpot portal for you. This step focuses on two elements: the sales-service hand-over and technical implementation, aka relationship building, outlining of expected behaviours from both parties, and the practical gathering of logins, accesses and business details.

STEP 2: The Kickoff Call

The exciting part! This is where your HubSpot onboarding officially starts. In this step, we get down to the nitty-gritty details of your HubSpot portal, such as configuring your accounts, setting up your preferences, importing existing content and filtering IP addresses.

STEP 3: CRM and lead handoff

This step is all about building your confidence using the HubSpot CRM (customer relationship management). Through demonstrations and discussion with your rep, you'll be encouraged to get into your portal and start using the tools for yourself, learning more about different kinds of leads.

STEP 4: Personas and tools

Now you're into the swing! Through set tasks and the right tools, you'll be taught how to build useful, accurate buyer personas to help you target your ideal customer more accurately. You can import these 'characters' into HubSpot and use them to segment your marketing efforts.

STEP 5: Goals & campaign planning

Things start to get real! In this step, you'll plan what your first HubSpot campaign will look like. This involves creating ideas for a content offer your buyer persona will love, and planning the supporting promotional materials. You'll set targets about the visits and contacts you hope to generate.

STEP 6: Conversion sequences

This step focuses on planning the follow-up sequence your visitors will use in order to become leads. This is made up of a brilliant CTA, landing page, thank-you page and follow-up email. You'll be shown how to build the sequence in your HubSpot portal – which is easy as pie.

STEP 7: Blog planning and content review

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STEP 8: Campaign launch

And off you go! A very exciting week – this is where your efforts finally go live. But there's no time to sit back: this step focuses on reviewing whether everything launched successfully, promoting the new campaign across social media, using the HubSpot Ads add-on, and analysing your early social activity.

STEP 9: Workflows

The HubSpot workflows tools allow you to create automation to trigger relevant and timely actions – such as emails being sent without you having to do a thing – based on the context of your marketing efforts. If someone has engaged with your campaign, this tool allows you to organise & nurture those leads.

STEP 10: Campaign review

By this point in the onboarding process, you'll be able to see how your first campaign is going, so you'll learn how to analyse it using HubSpot tools, landing page and email tools, and craft an action plan for your next steps, based on your results. It's a chance to look back in order to plan forward.

STEP 11: Portal review

In this step, you'll review data in your HubSpot portal and together explore a wide range of options for improving your performance. It's time to reflect, take on board what the metrics are telling you, and learn from your findings. Bring your ideas for next steps with you as this is an important ideation session.

STEP 12: Onboarding review

The final step! By now, you'll feel confident and capable to go and use your HubSpot portal without your agency or HubSpot rep's help. Then again, you may want to take advantage of ongoing support services: the needs of your team and different options will be discussed in this summary