



WriteVoice.io - Talk, don't type. It's 4x faster.

Hubspot Onboarding Checklist

Free Hubspot Onboarding Checklist with AI customization. Industry-specific guidance for hubspot onboarding checklist. Build your checklist now.

Account Setup & Access

- ☐ Create HubSpot account
- ☐ Set up user accounts
- ☐ Configure user permissions
- ☐ Set up teams
- ☐ Configure account defaults
- ☐ Set timezone and currency
- ☐ Add company information
- ☐ Upload company logo
- ☐ Configure domain settings
- ☐ Set up email sending domain
- ☐ Verify domain ownership
- ☐ Enable security features

CRM Configuration

- ☐ Customize contact properties
- ☐ Set up company properties
- ☐ Configure deal properties
- ☐ Create custom properties
- ☐ Set up pipelines
- ☐ Configure deal stages
- ☐ Create lead statuses
- ☐ Set up lifecycle stages
- ☐ Configure record customization
- ☐ Set up associations
- ☐ Create custom objects
- ☐ Import existing data

Marketing Hub Setup

- ☐ Set up email templates
- ☐ Create email signature
- ☐ Configure subscription types
- ☐ Set up forms
- ☐ Create landing pages
- ☐ Configure CTAs
- ☐ Set up lead scoring
- ☐ Create lists and segments

- ☐ Configure workflows
- ☐ Set up social media accounts
- ☐ Create blog
- ☐ Configure SEO settings

Sales Hub Configuration

- ☐ Set up email tracking
- ☐ Configure email templates
- ☐ Create email sequences
- ☐ Set up meeting scheduler
- ☐ Configure quotes
- ☐ Create playbooks
- ☐ Set up calling features
- ☐ Configure sales automation
- ☐ Create deal templates
- ☐ Set up forecasting
- ☐ Configure commission tracking
- ☐ Enable conversation intelligence

Service Hub Setup

- ☐ Configure ticketing system
- ☐ Set up ticket pipelines
- ☐ Create ticket statuses
- ☐ Set up SLAs
- ☐ Configure knowledge base
- ☐ Create feedback surveys
- ☐ Set up live chat
- ☐ Configure chatbots
- ☐ Create help desk
- ☐ Set up customer portal
- ☐ Configure automation
- ☐ Enable reporting

Integration Setup

- ☐ Connect email (Gmail/Outlook)
- ☐ Integrate calendar
- ☐ Connect social media
- ☐ Set up Zoom/Teams integration
- ☐ Configure Salesforce sync
- ☐ Connect accounting software
- ☐ Integrate with Slack
- ☐ Set up Zapier connections
- ☐ Configure API integrations
- ☐ Connect analytics tools
- ☐ Set up payment processing

- ☐ Enable app marketplace

Data Migration

- ☐ Audit existing data
- ☐ Clean and prepare data
- ☐ Map fields to HubSpot
- ☐ Create import templates
- ☐ Test import process
- ☐ Import contacts
- ☐ Import companies
- ☐ Import deals
- ☐ Import tickets
- ☐ Verify data accuracy
- ☐ Set up data sync
- ☐ Archive old system

Team Training

- ☐ Schedule admin training
- ☐ Train marketing team
- ☐ Train sales team
- ☐ Train service team
- ☐ Create user guides
- ☐ Set up practice portals
- ☐ Conduct role-specific training
- ☐ Teach best practices
- ☐ Review workflows
- ☐ Practice common tasks
- ☐ Test knowledge
- ☐ Provide certification paths

Automation Setup

- ☐ Create marketing workflows
- ☐ Set up lead nurturing
- ☐ Configure sales automation
- ☐ Create service automation
- ☐ Set up internal notifications
- ☐ Configure task creation
- ☐ Build email sequences
- ☐ Set up lead routing
- ☐ Create data management workflows
- ☐ Configure re-engagement campaigns
- ☐ Test all automation
- ☐ Document workflows

Reporting Configuration

- ☐ Set up marketing dashboards
- ☐ Create sales reports
- ☐ Configure service analytics
- ☐ Build custom reports
- ☐ Set up attribution reporting
- ☐ Configure goals
- ☐ Create team dashboards
- ☐ Set up email reporting
- ☐ Schedule automated reports
- ☐ Configure alerts
- ☐ Enable analytics tools
- ☐ Train on reporting

Launch Preparation

- ☐ Complete all setup
- ☐ Test all features
- ☐ Verify integrations
- ☐ Train all users
- ☐ Document processes
- ☐ Create SOPs
- ☐ Set up support system
- ☐ Plan go-live
- ☐ Communicate launch
- ☐ Monitor adoption
- ☐ Gather feedback
- ☐ Optimize setup

By WriteVoice.io - Talk, don't type. It's 4x faster