

ONBOARDING FOR HubSpot SUCCESS



HubSpot is a powerful tool that perfectly aligns with the need to deliver, optimise and transparently report on all marketing activity; and gives incredible visibility of all channels. Whether you've already invested in it or you're currently considering it – unleashing it's full potential is a learning curve – that's where onboarding comes in.

"Poor onboarding is the number 1 reason companies struggle with HubSpot."

WHAT IS ONBOARDING?

Being such an extensive platform with great marketing and sales capabilities and tonnes of features, HubSpot requires you to undergo a training and implementation process to get your business up and running on the platform. It's imperative the fundamentals are set up correctly for your HubSpot journey to flourish. There are two ways of onboarding with HubSpot – either via their platform or via a HubSpot Partner Agency. **Let's look at the difference between the two:**

HUBSPOT ONBOARDING VS PARTNER AGENCY ONBOARDING

HubSpot	roots to market
HUBSPOT ONBOARDING	PARTNER AGENCY ONBOARDING
<ul style="list-style-type: none"> ✓ A HubSpot Implementation Specialist is assigned to your account for the first 90 days of your subscription ✓ Technical setup help ✓ Advice on integrations with your existing systems ✓ Help in developing and executing one inbound campaign ✓ Ongoing support and resources from HubSpot support and customer success teams 	<ul style="list-style-type: none"> ✓ Tailored technical HubSpot setup including time zones, tracking codes, user management, social and software integrations ✓ Designing and developing templates for email campaigns, landing pages and more! ✓ Bespoke CRM customisation including custom fields, reports, dashboards, user views & task automation ✓ Support to import your contacts into HubSpot's CRM or migrate your existing database from your current CRM ✓ Strategic development and consulting tailored to your business needs ✓ Sales enablement advice ✓ HubSpot and marketing training specific to your business

YOUR ONBOARDING PROCESS COULD LOOK SOMETHING LIKE THIS:



5 REASONS

TO CHOOSE ROOTS TO MARKET AS YOUR HUBSPOT AGENCY ONBOARDING PARTNER

- #1** We are experienced **Gold HubSpot Partners** – what we don't know about HubSpot isn't worth knowing!
- #2** **Tailored configuration** in accordance with your business' needs and goals, helping you to utilise the platform and it's features in a way that complements them.
- #3** **Our HubSpot services are priced in accordance with your requirements** – why pay for something you won't use?
- #4** **Results-based strategic development and consultation** – we'll put together an action plan and help you to see it through!
- #5** **Maximise ROI** – save time by employing the experts and focus on getting the results you desire!

WANT TO SEE RESULTS?

Taking the leap to use HubSpot was probably a big decision for your business and now you want to see results – you need your investment to work for you and that's where we come in. After all, a tool is only as good as the processes built around it – and those processes need to make sense to your business.



ARE YOU READY TO TAKE THE MYSTERY OUT OF YOUR SALES AND MARKETING AND MAKE YOUR CRM WORK FOR YOU?

GET IN TOUCH WITH US TODAY

Call **01392 796 702** or email: contact@roots2market.co.uk to discuss your requirements.

