HUBSPOT BUSINESS UNIT
Onboarding

COST:
$2,400

TIMELINE:
4 Weeks

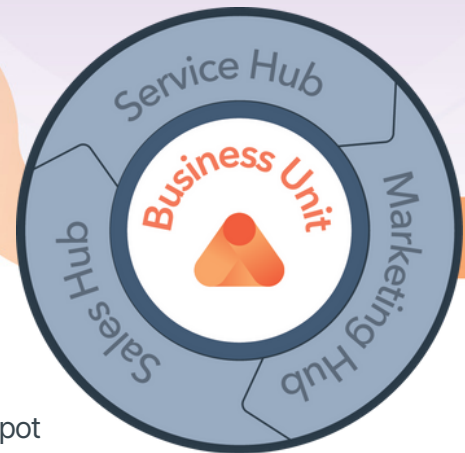## OFFERS & SERVICES

➡ Kick-off / Alignment Call

➡ Post Kick-Off Alignment Call

➡ Setup Of Users & Associated Permissions

➡ HubSpot Account Settings & Tracking Codes Setup

➡ Branding Settings Setup For Logo, Fonts, Colors, Etc.

➡ Import Of Standard Object Data (Contacts & Companies) Into HubSpot CRM Database
- Import Ready .Csv Files Must Be Provided. If Additional Assistance Is Needed With Data Strategy, Cleaning Data, Or Manipulating Data Prior To Import There May Be An Additional Fee. Is My Data Import Ready?

➡ Creation Of Custom Properties

➡ Import Opt-Out Lists From Previously Used Systems

➡ Connect Email Sending Domain

➡ Setup Of GDPR Compliance Settings

➡ Setup of HubSpot App Marketplace Integrations (Select HubSpot App Partners Only)
- Excluded Integrations: Netsuite, Magento, ZoomInfo Inbound Enrich, (Standard ZoomInfo Integration Is Not Excluded)

CAMPAIGN CREATORS

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OFFERS & SERVICES (CONT.)

➡ Creation of workflow(s) to capture contacts entering into Hubspot from integrations & assign them to the appropriate Business Unit

➡ Creation of Custom Website Analytics Views for the BU Website

➡ **Marketing Hub:** Assistance with Social Media Setup And Settings Configuration

➡ **Marketing Hub:** Enable & Setup Specific Subscription Types per Business Unit

➡ **Marketing Hub:** Setup Subdomains For Blog, Landing Page & Email Web Version

➡ The following activities may take place based on additional Hub subscriptions purchased:
   - **Sales Hub:** Build Out Of Deal Pipelines & Stages
   - **Sales Hub:** Assistance with Setting Up Meetings Tool & Email Tracking Through Gmail Or Outlook Integration
   - **Service Hub:** Build Out Of Ticket Pipelines & Statuses
   - **Service Hub:** Connect Team Inbox For Service Requests (Up To 3 Channels)

➡ Project Wrap-Up Call

**Note: If this Business Unit is being added to a pre-existing Hubspot portal, there are additional activities
that will need to take place in order to protect the existing assets (for example. Data, Workflows, Lists). Those activities are not included in this setup and may be purchased as an add-on (Asset & Data Siloing).