



## Process Document: HubSpot Setup

**When to use:** This is for the technical setup of a HubSpot Marketing Portal

*Time estimate: 3-5 hours*

### Add users to portal

- License Type - Basic, Professional, Enterprise
- Team Member - HubSpot Specialist
- Need from Client
  - Team member names and email addresses and the [permission levels](#) they would like for them to have.
    - STRATEGY OPPORTUNITY: Guide the client on how to determine what permission levels are appropriate.

### Install Tracking Code

- License Type - Professional, Enterprise
- Team Member - Developer
- Need from Client
  - Admin access to website

### Connect Domain Name

- License Type - Basic, Professional, Enterprise
- Team Member - Developer (if we are setting up DNS) or HubSpot Specialist (if the client is setting up DNS)
- Need from Client
  - DNS Login Information
    - If they are not comfortable with this, they need to be connected with the appropriate team to [provide instructions](#).
  - What they would like their subdomains to be.
    - STRATEGY OPPORTUNITY: Guide the client on subdomains to select

## ❑ **Set Up Lead Tracking**

- ❑ License Type: Basic, Professional, Enterprise
- ❑ Team Member: HubSpot Specialist
- ❑ Need from Client
  - ❑ Method of Lead Tracking (Landing Pages, Forms, Lead API)
    - ❑ Landing Page: Set up 1
    - ❑ Form: Set up 1
    - ❑ Lead API: REQUIRES MORE INFORMATION
  - ❑ STRATEGY OPPORTUNITY: Guide the client on which is the best option.

## ❑ **Integrate CRM**

- ❑ License Type: Professional, Enterprise
- ❑ Team Member: HubSpot Specialist or Developer
- ❑ Need from Client
  - ❑ Full admin access to CRM
  - ❑ Lists of custom CRM properties that will need to be made within HubSpot.

## ❑ **Import Contacts**

- ❑ License Type: Basic, Professional, Enterprise
- ❑ Team Member: HubSpot Specialist
- ❑ Need from Client
  - ❑ List to Import

## ❑ **Connect Social Media Accounts**

- ❑ License Type: Basic, Professional, Enterprise
- ❑ Team Member: HubSpot Specialist
- ❑ Need from Client
  - ❑ Social Media Account access to connect

## ❑ **Setup Blog (or connect blog)**

- ❑ License Type: Basic, Professional, Enterprise
- ❑ Team Member: HubSpot Specialist
- ❑ Need from Client
  - ❑ Access to current blog
  - ❑ STRATEGY OPPORTUNITY: Guide on the best option

## ❑ **Exclude Internal Traffic from Reporting**

- ❑ License Type - Basic, Professional, Enterprise
- ❑ Team Member: HubSpot Specialist
- ❑ Need from Client
  - ❑ IP Addresses to exclude