



HubSpot

Marketing Hub Onboarding Guide



**Elevate Your
Marketing with
HubSpot**

unclejakemedia.com



Start strong with a customized HubSpot CRM and Marketing Hub setup from Uncle Jake Media, tailored to amplify your marketing efforts and achieve your goals.

This onboarding guide outlines the essential steps we follow to equip our clients with the knowledge and skills needed to fully leverage the potential of their new HubSpot portal.



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Account Configuration

Set up your HubSpot account and align your tools with your specific business needs.



What We Do:

- Workshop your top needs based on your marketing goals.
- Configure settings and integrate tools that mesh with your current business operations.
- Link or integrate your existing business tools, such as, social media, google analytics, or your website.



Expected Outcome:

A HubSpot environment that has all the tools turned on and ready for you to start creating new content.



Best Practice Tip:

Keep your portal clean by establishing naming conventions and folder systems early on.



Data Migration

Ensure a smooth transition of your marketing assets into HubSpot.



What We Do:

- Workshop what data is most important to you.
- Create custom contact and company properties to ensure your records track the most important data for segmenting lists and engaging leads.
- Carefully plan and execute the migration of contact lists, content, and past campaign data.
- Import existing data to ensure a clean database so you can better target leads and automate your marketing efforts.



Common Mistakes:

Overlooking the alignment of data fields can lead to errors after migration. We help with meticulous data review to ensure a smooth import.



Best Practice Tip:

Maintain a backup of your data before migration to prevent any potential loss.



Tool Customization

Develop marketing tools that resonate with your audience.



What We Do:

- Create and customize email templates, landing pages, and call-to-action buttons that embody your brand.
- Develop lead conversion forms to implement on your website.
- Create email templates and automated workflows that help your team communicate and nurture marketing-qualified leads more efficiently.
- Develop your new blog or podcast that can be managed through HubSpot.
- Customize reporting dashboards so you can best understand your marketing performance.



Expected Outcome:

Increased engagement and conversions through highly personalized marketing materials.



Best Practice Tip:

Regularly update your content and designs to stay fresh and engaging.



Team Training

Equip your marketing team with the expertise to fully utilize HubSpot.



What We Do:

- Deliver targeted training sessions that cover basic to advanced functionalities of HubSpot Marketing Hub.
- Answer questions and help guide specific use cases your team needs help with.
- Solve puzzles or problems for your team and begin to use the tools.



Common Problems:

Teams new to HubSpot may struggle to fully utilize all available tools. We address this with in-depth training that goes beyond standard onboarding provided elsewhere.



Best Practice Tip:

Implement a buddy system where less experienced team members can learn from certified HubSpot users. We encourage your team to use the HubSpot academy resources early on. It is proven that teams have more early success and tool buy in when their team members have finished at least one HubSpot academy certification.



Campaign Launch

Launch and monitor your marketing campaigns under expert guidance.



What We Do:

- Workshop the first steps and tactics you can take using HubSpot tools to impact your marketing goals.
- Support the initial setup and fine-tuning of campaigns to ensure optimal performance.



Expected Outcomes:

Robust campaigns that deliver on your marketing objectives and drive growth.



Best Practice Tip:

Monitor key performance indicators closely to gauge campaign success and areas for improvement. Our team can help you beyond just setting up the tools for success, helping you develop and implement ongoing marketing strategies that impact your business goals.



Revolutionize your marketing with HubSpot's powerful tools.

Book a Demo and Discovery Call with Uncle Jake Media today and propel your marketing to new heights!

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