



HubSpot Pre-implementation Prep Checklist

Section 1: Current State Assessment

1. Sales Process:

- Current CRM (if any): _____
- Sales Pipeline Stages:
 1. Lead Source: _____
 2. Qualification: _____
 3. Demo/Sales Call: _____
 4. Proposal/Quote: _____
 5. Closing: _____
- Sales Tools and Software: (e.g., email automation, meeting scheduling)
 - _____
 - _____

2. Marketing Workflow:

- Content Creation and Distribution Channels:
 - Blog: Yes No
 - Social Media: Yes No (specify platforms: _____)
 - Email Newsletter: Yes No
 - Other (please specify): _____
- Lead Generation and Nurturing Strategies:
 - _____
 - _____
- Marketing Automation Tools: (e.g., email marketing software)
 - _____
 - _____

3. Customer Service Operations:

- Current Ticketing System (if any): _____

- Support Channels:
 - Email: Yes No
 - Phone: Yes No
 - Chat: Yes No
 - Social Media: Yes No (specify platforms: _____)
- Knowledge Base and Self-Service Resources:
 - _____
 - _____

Section 2: Pain Points and Goals

1. What are your biggest pain points in each department?

- Sales: _____
- Marketing: _____
- Customer Service: _____

2. What do you hope to achieve with HubSpot? (Select all that apply)

- Increase sales-qualified leads
- Enhance customer satisfaction
- Improve sales and marketing alignment
- Streamline customer support processes
- Other (please specify): _____

Section 3: Team and Resources

1. Identify key team members for HubSpot onboarding:

- Project Sponsor (Executive-Level Support):
 - Name: _____
 - Email: _____
- HubSpot Administrator (Technical Expertise):
 - Name: _____
 - Email: _____

Departmental Representatives:

- Sales:
 - Name: _____
 - Email: _____
- Marketing:
 - Name: _____
 - Email: _____
- Customer Service:
 - Name: _____
 - Email: _____

Section 4: Additional Information

Is there any additional information you'd like to share about your current processes or goals for HubSpot onboarding?

- _____
- _____

Next Steps:

- Review and discuss this assessment with your team to ensure everyone is aligned.
- Use the insights gathered to inform your HubSpot onboarding process and goal setting.
- Share this assessment with your HubSpot onboarding partner or consultant to ensure a tailored experience.