



# HubSpot Pre-Onboarding Assessment Template

## 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.