



# Launch, Training, and Post-Onboarding Checklist with Step-by-Step Instructions

## Launch Preparation (Before Go-Live)

### Schedule a Launch Meeting

Step-by-Step Instructions:

1. Coordinate with stakeholders to schedule a launch meeting
2. Set a specific date and time for the meeting
3. Send out meeting invites and reminders

### Conduct a Final Walkthrough

Step-by-Step Instructions:

1. Review the entire HubSpot setup with your team
2. Test all workflows, automation, and integrations
3. Identify and address any last-minute issues

### Prepare Launch Communications

Step-by-Step Instructions:

1. Craft a launch announcement email for stakeholders
2. Prepare a launch plan document outlining next steps
3. Schedule a follow-up meeting for post-launch review

# **Training and Onboarding (After Go-Live)**

## **Deliver Training Sessions**

Step-by-Step Instructions:

1. Schedule training sessions for end-users
2. Cover key HubSpot features and best practices
3. Encourage questions and feedback

## **Provide Additional Resources**

Step-by-Step Instructions:

1. Share relevant HubSpot documentation and guides
2. Offer access to HubSpot's training platform
3. Assign a dedicated support contact

## **Encourage Adoption and Feedback**

Step-by-Step Instructions:

1. Monitor user adoption and engagement
2. Collect feedback through surveys or meetings
3. Address concerns and implement improvements

# **Post-Onboarding Review and Optimization (After Training)**

## **Schedule a Post-Onboarding Review**

Step-by-Step Instructions:

1. Coordinate with stakeholders to schedule a review meeting
2. Set a specific date and time for the meeting

3. Send out meeting invites and reminders

## **Review Performance and Address Concerns**

Step-by-Step Instructions:

1. Analyze key performance metrics (e.g., user adoption, engagement)
2. Discuss concerns and identify areas for improvement
3. Develop a plan to address issues and optimize the setup

## **Continuously Monitor and Improve**

Step-by-Step Instructions:

1. Regularly review performance metrics and user feedback
2. Identify opportunities for growth and optimization
3. Implement changes and continuously improve the setup