

# Marketing Hub Onboarding Checklist with Step-by-Step Instructions

## Pre-Onboarding (Before Starting Marketing Hub Setup)

### Define Marketing Goals

#### Step-by-Step Instructions:

1. Review company objectives and identify how Marketing Hub contributes to achieving them.
2. Determine key marketing metrics to track (e.g., website traffic, lead generation, conversion rates).
3. Set SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals for each identified metric.

#### Example:

- **Specific:** Increase website traffic by 20%
- **Measurable:** Track website traffic through HubSpot's analytics
- **Achievable:** Based on historical data and market research
- **Relevant:** Aligns with company's overall lead generation objective
- **Time-bound:** Within the next 3 months

### Gather Required Information

#### Step-by-Step Instructions:

1. Collect existing marketing process documentation (if any).
2. Identify key stakeholders and their roles in the marketing process.

3. Document the current marketing process, including any pain points or areas for improvement.

**Example:**

- Existing marketing process documentation:
  - [Insert document links or attachments]
- Key stakeholders and roles:
  - Marketing Managers: John, Jane
  - Content Creators: Bob, Emily

## **Marketing Hub Setup (Configure Marketing Tools and Processes)**

### **Configure Marketing Dashboard**

**Step-by-Step Instructions:**

1. Log in to your HubSpot account and navigate to the Marketing Dashboard.
2. Click on "Customize Dashboard" and select the desired dashboard template.
3. Add dashboard cards for each key marketing metric (e.g., website traffic, lead generation).

**Example:**

- Dashboard Template: "Marketing Performance"
- Dashboard Cards:
  - Website Traffic (WT)
  - Lead Generation (LG)
  - Conversion Rates (CVR)

### **Set Up Blog and Content Management**

**Step-by-Step Instructions:**

1. Navigate to Content > Blog.
2. Click on "Create a Blog" and select the desired blog template.
3. Configure blog settings (e.g., blog title, description, categories).

**Example:**

- Blog Template: "Standard Blog"
- Blog Settings: "Standard Blog Settings"

- Blog Title: "Our Company Blog"
- Description: "Stay up-to-date with the latest industry insights and company news."

## **Marketing Hub Optimization (After Initial Setup)**

### **Set Up Marketing Automation Workflows**

#### **Step-by-Step Instructions:**

1. Navigate to Workflows > Create a Workflow.
2. Select the workflow trigger (e.g., "When a new contact is created").
3. Configure workflow actions (e.g., "Send a follow-up email").
4. Test and enable the workflow.

#### **Example:**

- Workflow Trigger: "When a new contact is created"
- Workflow Actions:
  - Send a follow-up email
  - Assign the contact to a marketing list

### **Enable Marketing Analytics and Reporting**

#### **Step-by-Step Instructions:**

1. Navigate to Analytics > Marketing.
2. Select the desired marketing analytics dashboard.
3. Configure dashboard filters to display relevant data.
4. Schedule regular marketing performance reports.

#### **Example:**

- Marketing Analytics Dashboard: "Marketing Performance"
- Dashboard Filters:
  - By marketing channel
  - By campaign
- Report Schedule: Weekly, every Wednesday