Modgility

Sales Hub Onboarding Checklist (With Step-by-Step Instructions)

Pre-Onboarding
(Before Starting Sales Hub Setup)

☐ Define Sales Goals:

Step-by-Step Instructions:

1. Review your company's overall objectives and identify how the Sales Hub will contribute to achieving them.
2. Determine the key sales metrics to track (e.g., sales-qualified leads, conversion rates, sales revenue).
3. Set SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals for each identified metric.
4. Document your sales goals and share them with your sales team and relevant stakeholders.

Example:

- Specific: Increase sales-qualified leads by 20%
- Measurable: Track lead generation through HubSpot's analytics
- Achievable: Based on historical data and market research
- Relevant: Aligns with company's overall revenue growth objective
- Time-bound: Within the next 6 months

☐ Gather Required Information:

Step-by-Step Instructions

1. Collect any existing sales process documentation (e.g., flowcharts, diagrams, written descriptions).
2. Identify key stakeholders and their roles in the sales process (e.g., sales reps, sales managers, customer success managers).

3. Document the current sales process, including any pain points or areas for improvement.
4. Share the gathered information with your implementation team or HubSpot consultant.

Example:

- Existing sales process documentation:
  - [Insert document links or attachments]
- Key stakeholders and roles:
  - Sales Reps: John, Jane, Bob
  - Sales Managers: Mike, Emily
  - Customer Success Managers: David, Sophia

Sales Hub Setup (Configure Sales Tools and Processes)

☐ Configure Sales Dashboard:

Step-by-Step Instructions:

1. Log in to your HubSpot account and navigate to the Sales Dashboard.
2. Click on "Customize Dashboard" and select the desired dashboard template.
3. Add dashboard cards for each key sales metric (e.g., sales-qualified leads, conversion rates).
4. Configure dashboard filters to display relevant data (e.g., by sales rep, by region).

Example:

- Dashboard Template: "Sales Performance"
- Dashboard Cards:
- Sales-Qualified Leads (SQLs)
- Conversion Rates (CVRs)
- Sales Revenue (SR)

☐ Set Up Sales Pipeline:

Step-by-Step Instructions:

1. Navigate to Settings > Sales > Pipeline.
2. Click on "Create a Pipeline" and select the desired pipeline template.
3. Define and configure pipeline stages (e.g., Prospecting, Qualification, Demo).
4. Establish clear pipeline stage descriptions and criteria.

Example:

- Pipeline Template: "Standard Sales Pipeline"
- Pipeline Stages:
- Prospecting
- Qualification
- Demo
- Proposal
- Closed Won

☐ Configure Sales Meeting and Calling Tools:

Step-by-Step Instructions:

1. Navigate to Settings > Sales > Meetings.
2. Connect your meeting scheduling tool (e.g., Calendly).
3. Configure meeting settings (e.g., meeting duration, buffer time).
4. Set up calling tool (e.g., HubSpot's built-in calling feature).

Example:

- Meeting Scheduling Tool: Calendly
- Meeting Settings:
    - Meeting Duration: 30 minutes
    - Buffer Time: 15 minutes

Sales Hub Optimization (After Initial Setup)

☐ Set Up Sales 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:

1. Workflow Trigger: "When a new contact is created"
2. Workflow Actions:
3. Send a follow-up email

4. Assign the contact to a sales rep

☐ Enable Sales Analytics and Reporting:

Step-by-Step Instructions:

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

Example:

- Sales Analytics Dashboard: "Sales Performance"
- Dashboard Filters:
- By sales rep
- By region
- Report Schedule: Weekly, every Monday

☐ Conduct Sales Team Training:

Step-by-Step Instructions:

1. Schedule training sessions for sales team members.
2. Cover key Sales Hub features (e.g., pipeline management, meeting scheduling).
3. Provide best practices for using the Sales Hub.
4. Encourage questions and feedback.

Example:

- Training Sessions: 1 hour, twice a week
- Key Sales Hub Features:
- Pipeline Management
- Meeting Scheduling
- Sales Analytics