HubSpot

A Guide to Partner Services
for
HubSpot's CRM Platform

PARTNER SERVICES WITH HubSpot SOFTWARE

As a HubSpot Solutions Partner you have the opportunity to offer not only marketing services, but also sales, customer experience, operations, technical implementation, web development services and much much more. Firms typically have a standard set of inbound services that they offer their clients. As you begin thinking about expanding your services, we've created this guide to the various services you might offer and the products and resources to help deliver these services. Note: these are general services and encourage you to customize and create services unique to what you offer.

Table of Contents:

Marketing Services

Sales Services

Customer Experience Services

CMS Web Services

Marketing Services

Inbound marketing is about creating valuable experiences that have a positive impact on people and your business. There are four core categories of marketing services that agencies typically offer. These consist of: foundational services, traffic generation services, lead conversion services and lead nurturing services. Below we outline each service offering and the tools and resources that help you deliver them to your clients.

Foundational Marketing Services

Inbound Strategy:
This service is the foundation for all other marketing services. Inbound marketing strategy is a plan of action designed to achieve the goal of attracting, engaging and delighting people to grow a business that provides value and builds trust. This typically includes a one-day on-site strategy session with the goal of creating a clear action plan on how to improve an inbound strategy. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:
- ❏ [Marketing Hub](#)

- ❏ HubSpot CRM

HubSpot Resources:

- ❏ What is inbound marketing?
- ❏ Free inbound strategy tools

Buyer Persona and Profile Development

This service is the creation of core buyer personas. Buyer personas are fictional, generalized representations of your ideal customers. Personas help us all - in marketing, sales, product and services - internalize the ideal customer we're trying to attract. (This is typically a one-time service that averages 3-4 hours/profile).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ Make my persona tool
- ❏ Free buyer persona resources
- ❏ Buyer persona templates

Content Strategy

Content strategy refers to the management of pretty much any tangible media that you create and own: written, visual, downloadable ... you name it. It is the piece of your marketing plan that continuously demonstrates who you are and the expertise you bring to your industry. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub
- ❏ HubSpot CRM

Product Features:

- ❏ HubSpot SEO and Content Strategy Tools

HubSpot Resources:

- ❏ How to position and sell content strategy

Technical Implementation

This service is the setup of the HubSpot platform. This consists of adding users, installing tracking codes, connecting domain names, integrating a CRM and more. (This is typically a one-time service that averages 3-4 hours).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ Getting started and setup on Marketing Hub

Sales and Marketing Alignment

This service offer is for setting the groundwork that will set your client up for marketing success. Marketing efforts depend on seeing the outcomes of those efforts and the only way is through sales and marketing alignment. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ How to deliver a sales and marketing alignment meeting
- ❏ How we used HubSpot to achieve sales and marketing alignment [customer story]

Reporting Setup

This service offer is for setting up the default reporting dashboards that you and/or your client will use to analyze marketing efforts. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub

❏ HubSpot CRM

HubSpot Resources:

❏ Getting started with reports

Traffic Generation Services

Blogging

This service is for increasing traffic to your client's website. Blogging is one of the keys to a successful content strategy and helps build thought leadership within an industry, which will help build your client's brand as the go-to subject matter source. (This is a recurring service that averages 3-4 hours/blog post).

HubSpot Products to Deliver Service:

❏ Marketing Hub Professional and Enterprise

❏ HubSpot CMS

❏ HubSpot CRM

Product Features:

❏ Blogging Tools

❏ SEO Tools

HubSpot Resources:

❏ Getting started with the blogging tool

SEO

This service is for increasing inbound traffic to your client's website. SEO focuses on nothing else but expanding a company's visibility in the organic search results. It helps businesses rank more pages higher in SERPs. And in turn, drive more visitors to the site, increasing changes for more conversions. (This is a recurring service that averages 3-4 hours).

HubSpot Products to Deliver Service:

❏ Marketing Hub Professional and Enterprise

❏ HubSpot CRM

Product Features:

- ❏ SEO Tools
- ❏ Blogging Tools

HubSpot Resources:

- ❏ Content marketing certification course
- ❏ Inbound certification course
- ❏ How to position and sell content strategy

Social Publishing

This service is for creating, scheduling, publishing, and monitoring social posts that build awareness and/or drive conversions from an audience on a social network. (This is a recurring service that averages 1-2 hours/week).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Social Media Tools

HubSpot Resources:

- ❏ Social media certification course
- ❏ How to position and sell social media tools

Ad Development and Management

This service is for creating, publishing and managing ad campaigns that drive quality traffic and leads for your clients. (This is a recurring service that averages 3-5 hours/week).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Ads Tools

HubSpot Resources:

- ❏ [How to create ads in HubSpot](#)
- ❏ [Facebook Ads training: How to build great ads and audiences course](#)

Video Marketing

This service offering provides your clients with the power of video across marketing to provide actionable, personalized content to leads and customers. Video is one service that can differentiate you and can all be delivered from the HubSpot platform. (This is a recurring service that averages 8 hours).

HubSpot Products to Deliver Service:

- ❏ [Marketing Hub Professional](#)
- ❏ [HubSpot CRM](#)

Product Features:

- ❏ [Video Hosting / HubSpot Video](#)

HubSpot Resources:

- ❏ [How to position and sell HubSpot Video Hosting](#)
- ❏ [HubSpot Video overview deck](#)
- ❏ [HubSpot Video and Vidyard upgrades overview deck](#)

Lead Conversion Services

Conversion Path Creation

This service is where you create the process by which an anonymous website visitor becomes a known lead. A conversion path is comprised of a remarkable content offer, call-to-action, landing page, and thank you page. (This is a recurring service that averages 3-4 hours).

HubSpot Products to Deliver Service:

- ❏ [Marketing Hub Professional and Enterprise](#)
- ❏ [HubSpot CRM](#)

Product Features:

- ❏ Content Strategy
- ❏ Landing Pages
- ❏ Calls-to-Action
- ❏ Forms

HubSpot Resources:

- ❏ How do conversion paths work?
- ❏ How to create a conversion path in HubSpot that generates leads [customer story]

Social Selling Enablement

This service is all about keeping track of what prospects and customers are saying about your client in social media and engaging with prospects as needed with the end goal of nurturing them into becoming a customer. (This is a recurring service that averages 1-2 hours/week).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Social Tools

HubSpot Resources:

- ❏ How to position and sell social tools

A/B Testing

This service is for optimizing your client's conversion path to ensure that conversion rates stay steady or continually increase. Elements you can test include; CTA copy, CTA graphics, landing page copy, form length, and much more. (This is a recurring service that averages 1 hour/week)

HubSpot Products to Deliver Service:

- ❏ Marketing Hub Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

❏ A/B Testing

HubSpot Resources:

  ❏ [How to A/B test your page](#)
  ❏ [How to do A/B testing](#)

Lead Nurturing Services

Lead Nurturing and Automation
This service is for nurturing leads through your funnel by providing relevant content and offers along the buyer's journey. (This is a recurring service that averages 1-2 hours configuration).

HubSpot Products to Deliver Service:

  ❏ [Marketing Hub Professional and Enterprise](#)
  ❏ [HubSpot CRM](#)

Product Features:

  ❏ [Workflows](#)
  ❏ [Marketing Automation](#)

HubSpot Resources:

  ❏ [Understanding lead nurturing course](#)
  ❏ [Workflow FAQs](#)
  ❏ [Workflow actions](#)

Email Marketing
This service is for engaging existing contacts through email. (This is a recurring service that averages 1-2 hours).

HubSpot Products to Deliver Service:

  ❏ [Marketing Hub Starter, Professional and Enterprise](#)
  ❏ [HubSpot CRM](#)

Product Features:

  ❏ [Email Marketing Tools](#)

HubSpot Resources:

- ❏ How to create marketing emails in HubSpot
- ❏ How to analyze email performance

Offer Creation

This service is for creating the offers that will generate quality leads for your clients. You can create content offers for each stage of the buyer's journey to help them progress to becoming a customer. (This is a recurring service that averages 15+ hours).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub Starter, Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Landing Pages
- ❏ Forms
- ❏ Lead Flows

HubSpot Resources:

- ❏ Free content creation tools
- ❏ How to get started with calls-to-action in HubSpot

Personalized Content

This service is for creating a personalized website experience for users who engage with your website and content. Optimize sites to display only relevant information and offers to repeat visitors and customers. (This is a recurring service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

❏ Smart Content

HubSpot Resources:

❏ How to use personalization with content

Lead Scoring

This service is the construction of a lead scoring system to help your client qualify and assess leads. This is most useful for clients with good lead flow. For smaller clients, coach them on identifying and applying prospect fit criteria through the sales team. (This is typically a one-time service that averages 4-6 hours).

HubSpot Products to Deliver Service:

❏ Marketing Hub Professional and Enterprise

❏ HubSpot CRM

Product Features:

❏ Lead Scoring

❏ Likelihood to Close Contact Property

HubSpot Resources:

❏ How to set up lead score properties

❏ Understanding HubSpot lead scoring course

CRM Integration / Closed Loop Reporting

This service is for aligning the HubSpot CRM (or an integration) to setup and monitor closed loop reporting - ie: how inbound activities are resulting in new customers and how it can be continuously improved. (This is typically a one-time service that varies in time).

HubSpot Products to Deliver Service:

❏ Marketing Hub

❏ HubSpot CRM

Product Features:

- ❏ Integrations
- ❏ Reporting

HubSpot Resources:

- ❏ Closed loop reporting in HubSpot

Sales Services

Inbound sales is a personalized, helpful, modern sales methodology. Inbound salespeople focus on their prospect's pain points, act as trusted advisors, and adapt their sales process to the buyer journey. There are services you can offer both within inbound sales as well as other sales services that will be supporting the inbound motion and growth of your clients. These consist of: foundational services, CRM implementation services, sales enablement services, and sales coaching services. Below we outline each service offering and the tools and resources that help you deliver them to your clients.

Foundational Sales Services

Sales Audit and Strategy
This service is where you review the sales process and strategy of your client in order to find optimization opportunities. (This is a one-time service averaging 15+ hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ Sales strategy examples and templates
- ❏ Inbound sales certification course
- ❏ Defining your sales process in HubSpot course
- ❏ Implementing your sales process with HubSpot course

HubSpot CRM Setup

This service is where you implement the HubSpot CRM to help manage and analyze customer interactions and data throughout the customer lifecycle. (This is a one-time service averaging 15+ hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ Guide to CRM implementation
- ❏ Getting started with HubSpot CRM

Install HubSpot Sales Hub

This service is where you get your client setup with HubSpot Sales Hub which will be the platform used to deliver many of the other sales services that we will outline. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ Guide to getting started with Sales Hub
- ❏ CRM and sales walkthrough course

Sales and Marketing Alignment

This service is where you integrate communications and operations between client sales and marketing teams. This carries over from your marketing services, where you will now close the loop. (This is a one-time service that varies in time).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ How to deliver a sales and marketing alignment meeting

❏ How we used HubSpot to achieve sales and marketing alignment [customer story]

Reporting Setup

This service is where you setup dashboards and reports for your client so they can keep track of progress and performance. (This is a one-time service that varies in time).

HubSpot Products to Deliver Service:

❏ Sales Hub

❏ HubSpot CRM

❏ Reports

HubSpot Resources:

❏ How to report on revenue in HubSpot

CRM Implementation Services

Custom Fields and View Creation

This service is where you would setup custom fields and views tailored to your client. In HubSpot, properties store information about a contact, company, deal, or ticket. However, you may need additional properties to gather information your clients' business needs. (This is a one-time service averaging 5 hours).

HubSpot Products to Deliver Service:

❏ Sales Hub Free, Starter, Professional and Enterprise

❏ HubSpot CRM

HubSpot Resources:

❏ How to create custom fields in HubSpot

Deal Stage Setup

This service is where you would set up deal stages for your client so they have the proper process in place to move prospects further along the buyer journey to becoming a customer. (This is a one-time service averaging 8 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub Free, Starter, Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Deals and Pipeline Management

HubSpot Resources:

- ❏ How many deal stages do you need? [blog]
- ❏ How to set up and customize your deal pipelines and stages

---

Data Import and Cleansing

This service is where you would import your client's data to the HubSpot CRM. You'll export all current records from their current system and import into HubSpot with just a few clicks. (This is a one-time service that averages 4-25 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ How to import data into HubSpot CRM
- ❏ Importing data into HubSpot academy course

Integrations Setup

This service is for agencies that want to use integrations or develop them. If you're not comfortable developing integrations for your client, HubSpot offers a directory with certified agencies who can help you. (This is a one-time service that varies in time).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ [HubSpot CRM integrations guide](#)
- ❏ [HubSpot Connect](#)
- ❏ [How to install the HubSpot-Salesforce integration](#)

CRM Ongoing Optimization

This service is where you will continually be optimizing your clients CRM to ensure that records are accurate and updated. (This is a recurring service averaging 5 hours/month).

HubSpot Products to Deliver Service:

- ❏ [Sales Hub](#)
- ❏ [HubSpot CRM](#)

Sales Enablement Services

Setup Conversations

This service is where you would setup the Conversations feature within HubSpot. You can use the conversations inbox to manage your team's email inbox and targeted messages all in one place. Connect live chat, bots and team inbox. (This is a one-time service averaging 1 hour).

HubSpot Products to Deliver Service:

- ❏ [Sales Hub](#)
- ❏ [HubSpot CRM](#)

Product Features:

- ❏ [Conversations](#)

HubSpot Resources:

- ❏ [How to position and sell Conversations](#)
- ❏ [Guide to getting started with Conversations](#)

Setup Calling

This service is where you would setup the Calling feature within HubSpot. Your clients can use this feature to make and record prospecting and sales calls through HubSpot software. (This is a one-time service averaging 1 hour).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

Product Features:

- ❏ Calling Tools

HubSpot Resources:

- ❏ Guide to using the calling tool in HubSpot
- ❏ Technical requirements for the calling tool in HubSpot

Setup Workflows and Automation

This service is where you would set up workflows and automation, which relies on triggering relevant and timely actions based on context. (This is a one-time service averaging 4 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub Starter, Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Workflows
- ❏ Sales Automation

HubSpot Resources:

- ❏ How to create sequences
- ❏ How to create templates

Setup Messages Round-Robin (Lead Rotation)

This service is where you would set up messages round-robin (lead rotation) for your client, so that all chat messages get rotated to reps on the sales team. (This is a one-time service averaging 1 hour).

HubSpot Products to Deliver Service:

- ❏ Sales Hub Starter, Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Workflows

HubSpot Resources:

- ❏ How to set up lead rotation

Reporting Dashboard Setup

This service is where you would set up the reporting dashboards for you client so they can visualize marketing, sales and services initiatives. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

Product Features:

- ❏ Reporting

HubSpot Resources:

- ❏ Guide to sales reporting
- ❏ Default sales dashboard reports

Sales and Marketing Funnel Analysis

This service is where you would analyze your client's sales and marketing performance and look for opportunities to optimize each section of the funnel. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

Product Features:

- ❏ Reporting

HubSpot Resources:

❏ Differences between funnel report types

Email Template Creation

This service is where you would create the email templates that your client's sales team would use for various stages of the sales process. This will allow them to spend less time re-creating the same email over and over, saving them time. (This is a recurring service averaging 2 hours/email).

HubSpot Products to Deliver Service:

❏ Marketing Hub Professional and Enterprise

❏ HubSpot CRM

Product Features:

❏ Templates

HubSpot Resources:

❏ How to create and send templates

❏ Create templates for increased efficiency academy course

Sales Document Creation

This service is where you would build a library of helpful sales content for your entire team. Your client will have the ability to share documents right from GMail or Outlook inboxes and see which content closes deals. (This is a recurring service varying in time).

HubSpot Products to Deliver Service:

❏ Sales Hub

❏ HubSpot CRM

Product Features:

❏ Documents

HubSpot Resources:

❏ How to upload and share documents

❏ The power of content in sales enablement academy course

Sequence Creation and Optimization

This service is where you would build out email sequences for your client's sales team to use. They will be able to automate follow-up emails, saving them time and personalizing their prospecting at scale. (This is a recurring service averaging 1.5 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub Starter, Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Sequences and Automation

HubSpot Resources:

- ❏ How to create and edit sequences

Build Rep-Specific Landing Pages with Meetings Tool

This service is where you would rep-specific landing pages with the Meetings Tool. This will allow your client's sales team to book meetings faster without annoying back-and-forth emails. (This is a one-time service averaging 1 hour/page).

HubSpot Products to Deliver Service:

- ❏ Sales Hub Starter, Professional and Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Meetings

HubSpot Resources:

- ❏ How to set up the meetings tool

Create Customer Case Studies

This service is where you would create customer case studies for your client to use at various stages of their sales process to show proven-value. You'll want to create these

often and build a library that encompasses the right use-cases, industries and products. (This is a recurring service averaging 10 hours/case study).

HubSpot Resources:

- ❏ How to write a case study

Sales and Marketing Alignment Services

Sales and Marketing Alignment Workshop
This service is where you would hold workshop trainings to align expectations between sales and marketing. (This is a one-time service averaging 6 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ Aligning marketing and sales academy course
- ❏ How to deliver a sales and marketing alignment meeting

MQL and SQL Definition
This service is where you would define what constitutes as an MQL (marketing qualified lead) versus an SQL (sales qualified lead). This service is critical to sales success, since it's the handoff point between marketing and sales. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❏ HubSpot CRM

Product Features:

- ❏ Lifecycle Stages

HubSpot Resources:

- ❏ How to set the lifecycle stage of your contacts

Sales and Marketing Goaling

This service is where you would collaborate with your client to align around SMART goals for sales and marketing that you will eventually track against. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

Product Features:

- ❏ Goals

HubSpot Resources:

- ❏ How to create goals in HubSpot

SLA Development

This service is where you would align and set service level agreements that sales and marketing will adhere to. Service level agreements align expectations and keep everyone on track. (This is a one-time service averaging 16 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

Product Features:

- ❏ Reporting

HubSpot Resources:

- ❏ How to create an effective SLA
- ❏ The ultimate guide to service level agreements

Sales Content Assessment and Optimization

This service is where you would audit the sales content being used by your client. Is the content up to date? What needs to be optimized? What needs to be created? Asking these questions will help you identify the gaps in your sales enablement strategy. (This is a one-time service averaging 5 hours).

HubSpot Products to Deliver Service:

- ❏ Sales Hub
- ❏ HubSpot CRM

HubSpot Resources:

- ❏ The power of sales enablement content academy course

Sales Coaching Services

Sales Rep Coaching

This service is where you would be coaching sales reps for your client to make sure that they're able to sell 'the inbound way' and are trained on the tools and resources you enable them with. (This is a recurring service averaging 1 hour/rep/week).

HubSpot Resources:

- ❏ The ultimate guide to sales coaching
- ❏ Sales coaching training for managers academy course
- ❏ Sales training techniques and ideas academy course

Sales Leadership Training

This service is where you would be training the sales leadership team for your client. You'll want to make sure that they know exactly how to become an efficient leader and believer in your methodology and process. (This is a recurring service averaging 2 hours/week).

HubSpot Resources:

- ❏ The ultimate guide to sales coaching
- ❏ Sales coaching training for managers academy course
- ❏ Sales training techniques and ideas academy course

Create Sales Playbooks

This service is where you would be creating sales playbooks to equip your client's team with. Build sales enablement content for anything your client needs to win a sale. This could include product one-sheets, pricing guides, and competitive battlecards. All playbooks will live within HubSpot and be easily accessible by their sales team. (This is a recurring service varying in time).

HubSpot Products to Deliver Service:

- ❏ Sales Hub Enterprise
- ❏ HubSpot CRM

Product Features:

- ❏ Playbooks

HubSpot Resources:

- ❏ How to use playbooks

Customer Experience Services

Customer experience is the product of interaction between an organization and a customer over the duration of their relationship. Tie this into the HubSpot methodology, where you're delighting customers in order to turn them into loyal advocates for your clients' business. By solving your customers' problems, you can delight and turn them into a growth engine for clients.These consist of: foundational services, help desk services, knowledge base services, and customer feedback services. Below we outline each service offering and the tools and resources that help you deliver them to your clients.

Foundational Customer Experience Services

Develop a Customer Journey Map
This service is where you help your client get a sense of their customers' motivations, needs and pain points. A customer journey map is a visual representation of the process a customer or prospect goes through to achieve a goal with your company. (This is a one-time service averaging 8 hours).

HubSpot Products to Deliver Service:

- ❏ Marketing Hub Professional and Enterprise

HubSpot Resources:

- ❏ How to create an effective customer journey map

❏ [Mapping the customer journey whitepaper](#)

Install HubSpot Service Hub

This service is where you help your client get set up on HubSpot Service Hub, which will have the tools their team needs to delight customers and turn them into promoters. (This is a one-time service averaging 3 hours).

HubSpot Products to Deliver Service:

❏ [Service Hub](#)

HubSpot Resources:

❏ [Guide to setting up Service Hub](#)

❏ [Guide to getting started with Service Hub academy course](#)

Reporting Setup

This service is where you will set up service team reporting. (This is a one-time service varying in time).

HubSpot Products to Deliver Service:

❏ [Service Hub](#)

HubSpot Resources:

❏ [How to get started with reports](#)

Help Desk Services

Add Communication Channels

This service is where you add all relevant communication channels within the Conversations feature in Service Hub. This will help your clients manage, scale and leverage one-to-one communication across their site pages, Facebook, Slack and other messaging channels. (This is a one-time service averaging 3 hours/channel).

HubSpot Products to Deliver Service:

❏ [Service Hub](#)

Product Features:

- ❏ [Conversations](#)

HubSpot Resources:

- ❏ [Selecting conversation channels academy course](#)
- ❏ [Guide to Conversations](#)

Single Inbox Setup and Training

This service is where you would set up the single inbox feature (Conversations). (This is a one-time service averaging 4 hours).

HubSpot Products to Deliver Service:

- ❏ [Service Hub](#)

Product Features:

- ❏ [Conversations](#)

HubSpot Resources:

- ❏ [Setting up Conversations academy course](#)
- ❏ [Guide to Conversations](#)
- ❏ [How to position and sell Conversations](#)

Ticket System Setup and Training

This service is where you would set up a service ticket system using HubSpot's Ticket and Help Desk features. This will enable your client's to provide an exceptional customer experience. (This is a one-time service averaging 4 hours).

HubSpot Products to Deliver Service:

- ❏ [Service Hub Professional and Enterprise](#)

Product Features:

- ❏ [Tickets and Helpdesk](#)

HubSpot Resources:

- ❏ [Setting up tickets academy course](#)

Live Chat and Chat Bot Setup and Training

This service is where you would set up live chat and chat bots across your client's webpages. You'll want to train them on why they should be incorporating live chat as part of their customer service strategy. (This is a one-time service averaging 4 hours).

HubSpot Products to Deliver Service:

- ❏ Service Hub

Product Features:

- ❏ Live Chat
- ❏ Chatbots

HubSpot Resources:

- ❏ How to add Live Chat
- ❏ Guide to bot actions

Knowledge Base Services

Knowledge Base Design and Setup

This service is where you would design and setup a knowledge base on your client's website to help their customers help themselves. This saves their team time and let's them focus on more complex issues. (This is a one-time service averaging 10 hours).

HubSpot Products to Deliver Service:

- ❏ Service Hub Professional and Enterprise

Product Features:

- ❏ Knowledge Base

HubSpot Resources:

- ❏ How to design and setup knowledge base
- ❏ How to customize knowledge base in HubSpot
- ❏ How to set up knowledge base in HubSpot academy course

Create and Maintain Self-Service Content

This service is where you would create the self-service content that you would add to your knowledge base. (This is a recurring service averaging 2.5 hours/post).

HubSpot Products to Deliver Service:

❏ Service Hub Professional and Enterprise

Product Features:

❏ Knowledge Base

HubSpot Resources:

❏ How to create knowledge base articles

❏ Self-service content [customer story]

Customer Feedback Services

Setup Customer Feedback (NPS, CES, 3 Point Surveys)

This service is where you would set up customer feedback surveys that align around your client's goals and the strategy you've outlined for them. (This is a one-time service averaging 10 hours).

HubSpot Products to Deliver Service:

❏ Service Hub Professional

Product Features:

❏ Customer Feedback

HubSpot Resources:

❏ Setting up customer loyalty surveys

❏ Setting up customer satisfaction surveys

❏ Setting up customer support surveys

Analyze and Share Findings

This service is where you would analyze and report on customer survey findings with your client and decide on actionable next steps. (This is a recurring service varying in time).

HubSpot Products to Deliver Service:

❏ Service Hub Starter, Professional and Enterprise

Product Features:

- ❏ [Customer Feedback](#)
- ❏ [Reporting](#)

HubSpot Resources:

- ❏ [How to analyze customer feedback](#)

Develop Promoter Advocacy Programs

This service is where you would develop customer promoter advocacy programs that can support your marketing initiatives. Once you develop these programs, you'll continue the flywheel motion into marketing where you'll promote these programs to drive net new customers. (This is a recurring service varying in time).

HubSpot Products to Deliver Service:

- ❏ [Service Hub Starter, Professional and Enterprise](#)

Product Features:

- ❏ [Customer Feedback](#)
- ❏ [Email Marketing](#)

HubSpot Resources:

- ❏ [How to create a customer advocacy program](#)
- ❏ [Why your marketing needs more social proof](#)

CMS - Web Services

Creating remarkable web experiences with HubSpot's CMS Hub can open up new opportunities for your business, while helping your customer achieve better results by having all of their marketing, sales and service teams on the same platform while being able to leverage website insights to drive better actions across each team. There are five core categories of web services that partners typically offer. These consist of: research & strategy services, UX design services, web content services, website development, and continuous optimization and maintenance. Below we outline each service offering and the tools and resources that help you deliver them to your clients.

Research & Strategy Services

Kickoff Workshop

This service is the first step in ensuring a proper rollout of CMS Hub. This typically includes a one-day, on-site strategy session with the goal of creating a clear action plan on how to improve their website strategy. (This is typically a one-time service that varies in time to complete).

HubSpot Products to Deliver Service:

- ❏ HubSpot CRM
- ❏ HubSpot CMS Hub

HubSpot Resources:

- ❏ Academy - CMS Hub for Marketers
- ❏ Getting started with CMS Hub for developers

General Research & Strategy Services:

This includes multiple services, such as: user experience research, company research, goals and personas, website auditing, global page strategy, and brainstorm wishlisting.

HubSpot Products to Deliver Service:

- ❏ HubSpot CRM
- ❏ HubSpot CMS Hub

HubSpot Resources:

- ❏ Ultimate Guide to UX
- ❏ Make my Persona tool
- ❏ How to do a website audit

UX Design Services

Design Workshop

With this service, you're leading a workshop with the client's team to understand what they're seeking in a website solution, understanding their brand, tone and overall style guide (which might need to be updated based on your audit and suggestions).

General UX Services

These include:

- Wireframing a client's proposed site
- Creating prototypes of their site
- Executing user testing
- Designing pages
- Setting up proper reporting to track performance improvements

---

Web Content Services

Content Workshop

This service is meant to gain an understanding of the client's goals and objectives when it comes to their inbound marketing strategy that will help inform what content your team can propose. From there, you'll also be able to charge for SEO & Copy writing, along with photo, images, icon and video development.

HubSpot Products to Deliver Service:

- ❏ HubSpot CRM
- ❏ HubSpot CMS Hub
- ❏ HubSpot Marketing Hub

HubSpot Resources:

- ❏ Academy - content marketing

Web Development Services

Front-End Development

The process of creating and maintaining your website's client-side architecture is known as front-end development. In frontend development, data sent by your website's backend in response to a client request is displayed using HTML, CSS, and JavaScript.

HubSpot Products to Deliver Service:
- ❏ HubSpot CRM
- ❏ HubSpot CMS Hub

HubSpot Resources:
- ❏ Academy - CMS Developers

Custom Integrations

Whether the client requires custom API development, an integration with CRM, inventory, email service provider, ERPs, payment solutions or more, you can offer more technical custom work to create remarkable web experiences.

HubSpot Products to Deliver Service:
- ❏ HubSpot CRM
- ❏ HubSpot CMS Hub
- ❏ HubSpot Developer Tools

HubSpot Resources:
- ❏ HubSpot APIs

App Development

Web application development is the creation of application programs that reside on remote servers and are delivered to the user's device over the Internet. A web application (web app) does not need to be downloaded and is instead accessed through a network.

HubSpot Resources:
- ❏ Building apps with HubSpot

Operations Hub Services

As a new hub, Operations Hub offers opportunities for HubSpot solutions partners to package up services along with this new hub. Considering the new features in Operations Hub and your unique skills and competencies as a solutions partner, you may be able to offer the following services linked to Operations Hub.

Building Data Management Workflows

Data formatting workflows can be built once off at a standard fee or added to monthly retainers. You can also sell a scoping session linked to determining exactly how data should be transformed in an organisation before you build any workflows. Setting up data cleaning workflows without proper scoping is not recommended, so clearly explain that while the functionality is easy to use, understanding how each element interacts with the rest of their CRM data along with scoping this out is important for proper implementation success.

HubSpot Products to Deliver Service:

- ❏ HubSpot CRM
- ❏ Operations Hub

HubSpot Resources:

- ❏ Guide to Operations Hub for Partners
- ❏ Academy - intro to operations hub

Data Management & Cleaning Services

While data formatting and programmable automations will cut the time it takes to manage a database shorter, selling this as a retainer service where you scope, set up, and manage the workflows over a period is a great opportunity for partners.

HubSpot Products to Deliver Service:

- ❏ [HubSpot CRM](#)
- ❏ [Operations Hub](#)

HubSpot Resources:

- ❏ [Guide to Operations Hub for Partners](#)
- ❏ [Academy - intro to operations hub](#)
- ❏ [Data cleaning with HubSpot](#)

Building Webhooks with 3rd Party Apps

Building webhooks that send data from 3rd party tools into HubSpot, correctly. These webhooks require initial setup but they may also require maintenance as systems change, and as business needs are added.

While we know partners all choose their own pricing models, consider the following when pricing these support retainers. Consider the total cost of development or building your integration and then consider that maintenance of these integrations needs to be inline with the cost of the build. So, a support retainer for an integration build shouldn't exceed 60% of the build cost per year. Also consider the systems you have integrated and the rate at which these systems change over time. If the integrated system is likely to change significantly over time, consider how this will impact the integration you need to decide if you will plan to cover changes within your maintenance contract or expressly exclude these builds from your support contract. Making these Ts & Cs clear will really help ensure your projects are clearly defined and remain profitable.

While data sync can be set up quite easily and it is possible for a marketer to set these up without any support, we do recommend that any data syncs should be scoped out and mapped before being built. HubSpot solutions partners can provide insight into the kind of data needed to support business processes, whether a sync should be single direction or bi-direction, and what kinds of custom properties need to be mapped for each tool. Offering data sync setup as a service can be positioned as more of data architecting and

mapping vs simply setting up the sync. Incorrect data flows can negatively impact the client, and should be a key selling point during the sale.

HubSpot solutions partners should consider costing for scoping workshops as a one-off cost. Remember to include the cost of the time to prepare for your workshop, the time for your team to attend, the actions to deliver the outcomes of this, and include all of these in the cost for your scoping session. We also advise building in some time for client management and reverts or questions as these activities will take time along with your workshop.

HubSpot Products to Deliver Service:
❏ HubSpot CRM
❏ Operations Hub

HubSpot Resources:
❏ Using webhooks

Building And Managing Programmable Automations

While HubSpot has created a library of programmable automations, this doesn't mean that any marketer can just implement these workflows without any development skills. As HubSpot solutions partners you will be able to build your own automations for clients, customise the available automation examples, and implement them. These automations could include complex service date reminders, lead rotation, as well as advanced data manipulation calculations.

HubSpot Products to Deliver Service:
❏ Programmable Automation
❏ Operations Hub

HubSpot Resources:
❏ Guide to Operations Hub for Partners
❏ Academy - intro to operations hub

❏ [Academy - Enrich data with programmable automation](#)

Lead Enrichment

Use Operations Hub to enrich HubSpot records with third-party data. For instance, when a lead fills out a form, query another database and append that data to the HubSpot record, then create a task if the data is worth following up on.

This kind of service could be included as a one-off set up fee where you build out the integration and create the rules or packages for a small monthly fee over a period of 6 - 12 months. This allows clients to see value for the service while paying off the build cost.

HubSpot Products to Deliver Service:

❏ [Programmable Automation](#)

❏ [Operations Hub](#)

HubSpot Resources:

❏ [Guide to Operations Hub for Partners](#)

❏ [What is lead enrichment?](#)

❏ [Apps for lead enrichment](#)

Advanced Reporting and Data Analysis

With the power of datasets, additional calculated properties, advanced data calculations and prep, partners can now assist clients with advanced report building. Being able to manipulate the data and transform it to produce insightful reports will allow you as solutions partners to build strong advisory relationships with your clients. Use the expanded reporting capabilities to build custom reports and dashboards that can be sent to stakeholders at relevant times so that departments remain aligned around the data. This can also be a key selling point when trying to sell leadership on the value and power of HubSpot.

HubSpot Products to Deliver Service:

❏ [Data sets](#)

❏ [Operations Hub](#)

HubSpot Resources:

❏ [Guide to Operations Hub for Partners](#)
❏ [Data sets](#)
❏ [Data set formula library](#)

Complex Lead Scoring Calculations

Create complex calculated lead score properties. You can manipulate and transform property values in any way you choose and create a lead score using data from HubSpot and inputs from a dozen other systems, and then populate that value in a custom HubSpot property. This complex lead scoring could be included in retainer work for clients or packaged as a one-off service.

HubSpot Products to Deliver Service:

❏ [Operations Hub](#)

HubSpot Resources:

❏ [Advanced lead scoring with HubSpot](#)

Snowflake Data Management

The integration with Snowflake data warehouse allows HubSpot solutions partners to add services that include setting up the integration and supporting the data management, data transformation, and visualisation beyond HubSpot data to include various sources. Analyse data and use this to provide deep insights to clients. Offering data analysis and data visualisation for businesses who don't have the internal resources opens up a different avenue for solutions partners to provide expertise and assistance.

HubSpot Products to Deliver Service:

❏ [Snowflake data share](#)

For help in defining, pricing and packaging your services, reach out to your Channel Account Manager. We have a team dedicated to supporting you as we grow better together.