HubSpot Portal Audit

An Inbound Consultant will audit your portal and make recommendations. Your will have a clear understanding of your Hubs, current portal usage, and areas that can be improved.

Our approach to achieving your outcome

Phase 1: Discovery

Week 1

- Discuss your current usage of the HubSpot CRM
- Review issues you are currently facing in the CRM
- Understand how you are currently managing Properties, Deal Pipelines, and Workflows
- Understand how you are currently using Lists

Phase 2: Configuration

Weeks 2-5

- Your consultant will review your portal and prepare a presentation of the results and recommendations

Phase 3: Readiness & Deployment

Weeks 6-8

- Your consultant will present and share the results
- Your consultant will explain how to implement the recommendations to maximize current subscriptions

Phase 4: Close-out

Week 9

- Review Portal Audit and additional resources shared
- Your consultant will share recommended next steps

HubSpot

Do you struggle with getting the most out of your HubSpot CRM?

If the following apply, this service is a great fit

Typical fit:

- You have at least one person in charge of CRM administration internally

- You are having trouble finding the right information in your HubSpot CRM and would like to organize it more efficiently

- You would like to reset your HubSpot CRM set-up following best practices from a HubSpot expert

Requirements for service delivery:

- You have already completed the core technical set up for your portal

- You have a basic understanding of HubSpot

- You are responsible for implementing any recommendations

- You are already using HubSpot as your CRM for at least one of your teams

What to expect from us

Your Inbound Consultant will provide guidance and recommendations to produce the service outcome.

In delivering the outcome we may provide:

- A project plan

- Planning templates

- Recordings of consulting calls

- One service-specific deliverable

What we expect from you

Your team will act on the guidance and recommendations of your Consultant, leveraging our Customer Support team for any "how to" questions.

Your team's stakeholders will be available to complete the service within 90 days.

You have sufficient resources to commit to at least 2 hours per week to execute on assigned tasks throughout the project.

| Duration: | USD: $4,500 | GBP: £3,690 | SGD: S$6,300 | COP: 13,500,000 |
| Up to 12 hours | EUR: €4,140 | AUD: $6,480 | JPY: ¥540,000 | CAD: $5,900 |

HubSpot