

HubSpot Systems Administrator Learning Path

SAVE this checklist on your computer so your progress is saved as you complete each step.

In this learning path, you will learn everything you need to know in order to take over a HubSpot account as an admin. Whether you are an admin for a new HubSpot account, or you're taking over an existing account, you'll learn how to audit your Marketing Hub or Sales Hub accounts, clean up your database, organize workflows, improve email deliverability, and much more.

Learning Path Details

Estimated time to complete: 6 hours

Experience Level: Beginner

For those who want to:

- Audit their HubSpot Marketing and Sales Hub accounts and clean up their CRM database
- Understand lead segmentation, workflows, and email deliverability in HubSpot
- Optimize and manage their HubSpot account in the role of admin

Learning Path Curriculum

Our expertly picked curation of education to help you become an effective HubSpot Admin.

Step	Training	Details
Step 1 	How to smoothly take over an existing HubSpot account This article from the HubSpot Community will walk you through the step-by-step process to smoothly take over an existing HubSpot account as a new systems administrator.	Article 3 Min read
Step 2 	Setting Up Your CRM Whether you're getting started with the HubSpot CRM, migrating from another CRM, or even if you're already using the HubSpot CRM and want to gain insight into effective setup, this lesson will walk you through the initial setup tasks for your CRM. You'll learn why a CRM is important and how the HubSpot CRM is configured.	Lesson 4 videos (19 mins)

Step	Training	Details
Step 3 	Auditing Your HubSpot Account In this lesson, you will learn how to conduct a comprehensive audit of your HubSpot Marketing Hub and Sales Hub accounts. Following the provided worksheets, you'll audit your content and data, and clean up your database so your team can perform at their best. This lesson is intended for new HubSpot admins or admins looking to improve their account health.	Lesson 3 videos (15 mins)
Step 4 	Getting Started With the Salesforce Integration in HubSpot Sync HubSpot with Salesforce for a fast, reliable, and powerful integration between your two databases. With this app, you'll empower your sales team with valuable data to help them prioritize their outreach, save time, build more meaningful relationships, and close more deals.	Lesson 6 videos (16 mins)
Step 5 	Understanding Email Deliverability In this lesson you hear from the assistant postmaster at HubSpot and learn how to identify trends in your email deliverability metrics and what the next steps you can take from them. You will learn how your email deliverability strategy will continue to help you build trust with your contacts and create long-lasting relationships with them.	Lesson 3 videos (36 mins)
Step 6 	Improve your email sending reputation with a repair plan This article from the HubSpot Knowledge Base will help you improve your account's email sending reputation by putting a repair plan in place.	Article 2 min read

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Step 7 ☐	Monitor your email sending reputation with the email health tool This article from the HubSpot Knowledge Base will show you how you can monitor your account's email sending reputation by using the HubSpot email health tool.	Article 2 min read
Step 8 ☐	De-duplicating Your Data in HubSpot Duplicate data leads to bad experiences for both your team and your customers. See how HubSpot uses machine learning to identify and merge duplicate records, and learn how to use this tool to keep your database clean and tidy.	Lesson 1 video (2 mins)
Step 9 ☐	Understanding Segmentation in HubSpot Creating a segmentation and contact management strategy can help you create and organize the relationships your business is developing with people. In this lesson, you'll learn why segmentation is important and how to set up segmentation in HubSpot using the lists tool.	Lesson 5 videos (18 mins)
Step 10 ☐	Understanding Workflows in HubSpot Marketing automation technology can make tasks simpler and easier and help you deliver content to your leads and customers at the right time. In this lesson, you'll learn about the importance of automation and how to get started using workflows, the automation tool in HubSpot.	Lesson 7 videos (27 mins)

Step	Training	Details
Step 11 ☐	Organizing and Streamlining Workflows in HubSpot As your business grows, the number of people creating and editing workflows will likely increase. Learn how to use workflow features, like folders, revisions, the go to action, and more to stay organized and streamline workflows so that you maintain workflow efficiency.	Lesson 5 videos (16 mins)
Step 12 ☐	How to Audit and Cleanup Your Workflows in HubSpot This blog article will walk you through the steps to audit and cleanup your HubSpot workflows so your account can operate smoothly.	Article 3 min read
Step 13 ☐	Managing Your HubSpot Account as an Admin This course covers the basics of being a HubSpot admin.	Course 10 lessons (3 hours)

Next Steps

Here are your suggested next steps depending on which HubSpot products you have:

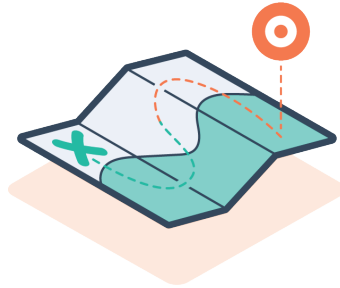
For Marketing Hub customers:

- [HubSpot Marketing Software Certification](#)

For Sales Hub customers

- [HubSpot Sales Software Certification](#)

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Congratulations from HubSpot Academy on
completing the HubSpot
Systems Administrator Learning Path!

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