HubSpot CRM Set-Up Checklist

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DIGITAL

☐ **Create a free account** here. You'll need your email address, company name, and website domain.

☐ **Upload your contacts** by using the instructions and spreadsheet templates found here.

☐ **Customize your deal pipeline** with the deal stages that make sense for your business. Instructions on how to do that can be found here.

☐ **Create tasks** to follow up and check in with your prospects and referral partners regularly. Here's how.

☐ **Integrate with Gmail and/or Outlook** to track your personal emails within HubSpot contact records and create new contacts when applicable.

☐ **Upload documents** that you regularly use like your pricing sheet or consulting agreement by following these instructions.

☐ **Set up your meetings tool**, add the link to your marketing materials, and embed the meeting booking tool to your 'contact' page. Here's how to adjust the settings.

☐ **Create custom properties** (like this) for outside-of-the-box items you want to track for your contacts, deals, and companies.

☐ **Check out the app marketplace** and integrate any marketing, sales, or operations apps you are already using.