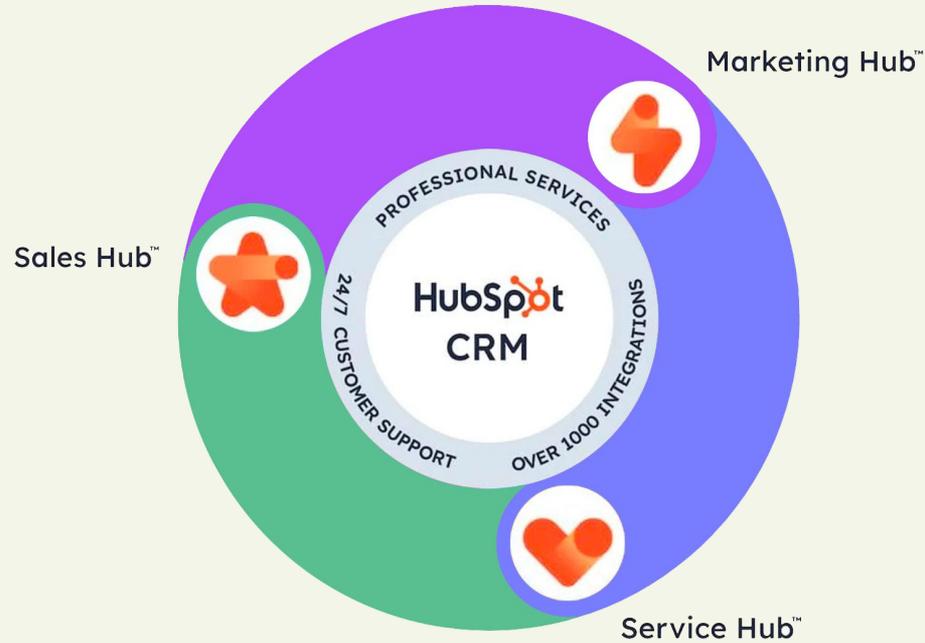


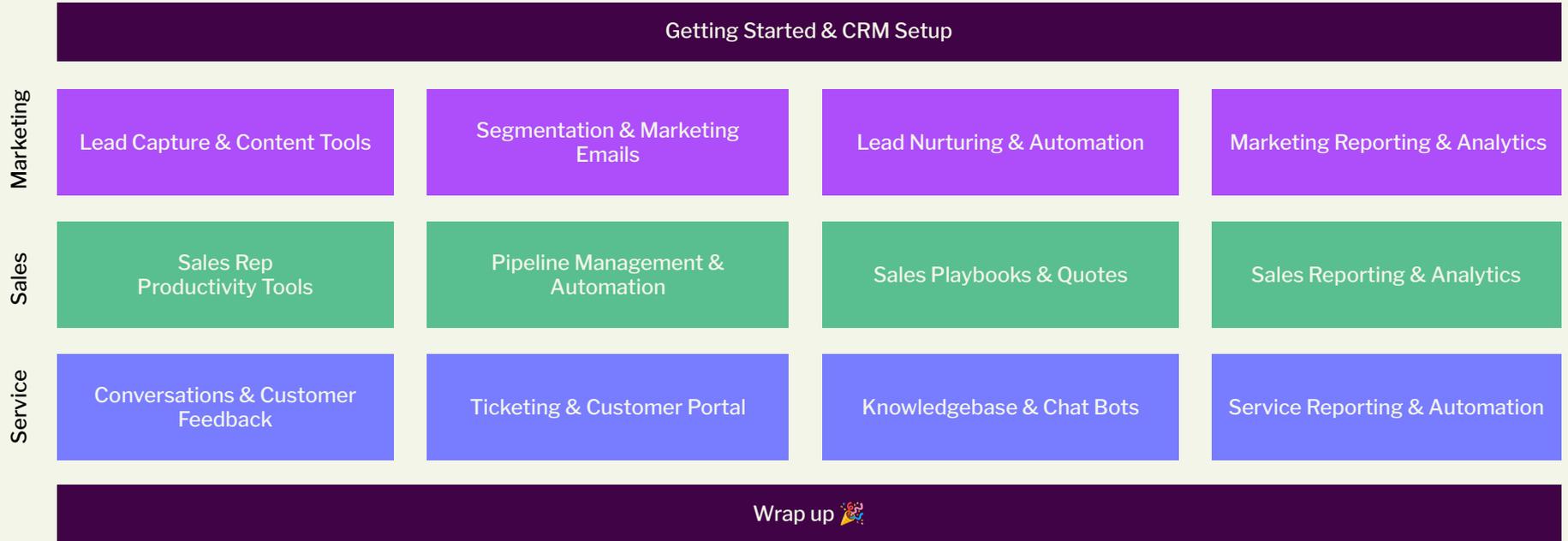
Onboarding Catalogue

Helion HubSpot CRM Suite *Onboarding*

HubSpot CRM Suite



Helion HubSpot Academy



Lesson overview

- ✓ **Duration:** One onboarding lesson is 2 hours
- ✓ **Location:** Virtual on Google Meet (other platforms can be used if needed)
- ✓ **Frequency:** One lesson per week equals one full Hub onboarding a month
- ✓ **Agenda:**
 1. **Questions:** 15 mins of questions that have come up since last session
 2. **Showcase:** 30 mins of demoing your home work from last session
 3. **Training:** 60 mins of class room training according to onboarding plan
 4. **Homework:** 15 min walkthrough of homework for next session

Getting Started & CRM Set up (1 hour)

✓ Required to be done before attending your first Hub Onboarding

1. Set up & authenticate your account
2. Set up your analytics tools
3. Set up your content, email & brand tools
4. Set up your integrations from HubSpot Marketplace (e.g. Slack)
5. Set up your contacts tools

Helion HubSpot Marketing Onboarding

Lead Capture & Content Tools

- Domain setup
- Lead capture
- Properties
- Blog setup
- Social media (organic)
- Ads integrations
- Campaign structure
- File manager

[Build lead capture flow](#)

Segmentation & Marketing Emails

- CRM Segmentation
- Lists and filters
- Email audiences
- Email Subscription Types
- Templates
- Newsletter
- Marketing Automation

[Publish Newsletter](#)

Lead Nurturing & Automation

- Basic lead nurturing
- Advanced flows
- Data management
- Lead handling

[Build an automation flow](#)

Marketing Reporting & Analytics

- Standard reports
- Custom reports
- Dashboards
- Traffic analytics
- Campaign analytics
- Form analytics

[Build marketing dashboard](#)

Helion HubSpot Sales Onboarding

Sales Rep Productivity Tools

Sales Extension
Meeting Links
Snippets
Tasks
Templates
Documents
Logging
Sales teams
HubSpot app
Target Accounts

Log sales activities

Pipeline Management & Sales Automation

Deal dashboard
Deal properties
Line items (products)
Pipeline automation
Sequences
Lead rotation/passing
Lead notifications

Create product library

Sales Playbooks & Quotes

Custom meeting and call types
Plan playbooks based on meeting types
Quote templates
Quote snippets

Create playbook(s)

Sales Reporting & Analytics

Types of reports
Dashboards
Custom reports
Sales analytics
Forecasting

Build sales dashboard

Helion HubSpot Service Onboarding

Conversations & Customer Feedback

Shared inboxes
Live chat
Types of surveys
Survey automation
Service playbooks

Set up inboxes & live chat

Ticketing & Customer Portal

Ticket pipeline
Ticket properties
Ticket form
Ticket templates and branding
Customer portal
SLA's

Set up SLAs

Knowledge Base & Chat Flows

Knowledge Base domain
Create knowledge base article
Tagging
Article feedback
Chat flow types

Build a chat flow

Service Reporting & Automation

Types of reports
Dashboards
Service analytics [beta]
Ticket automation

Build service dashboard

Wrap up (1 hour) 🎉

- ✓ Wrap up of onboarding
- ✓ Last round of questions
- ✓ Next steps (how to succeed post onboarding)
- ✓ Feedback on process to Helion B2B
- ✓ Review on HubSpot Partner Directory

Helion HubSpot Enterprise Onboarding add-on

General Enterprise Features

Hierarchical teams

Advanced permission settings

Custom objects

Calculated properties

Marketing

- Advanced testing
- Multi-touch revenue attribution
- Behavioral events
- Predictive lead scoring

Sales

- Advanced sales analytics
- Revenue analytics
- Conversation intelligence
- Predictive lead scoring

Service

- Conversational intelligence
- Service Goals