THE Digital Dragons
SET YOUR GOALS ON FIRE

OnBoarding Checklist

Foundational Setup
☐ Invite your team members
☐ Connect your subdomains and configure your settings
☐ Install the HubSpot tracking code and filter out your internal traffic
☐ Set up your email sending domain and CAN-SPAM
☐ Import your contacts, companies, deals, tickets, and notes
☐ Import your marketing opt-out lists
☐ Configure email types and connect your calendar
☐ Connect your social accounts
☐ Consider integrations

Marketing Lead Capture Setup
☐ Create buyer journey properties
☐ Define Lifecycle stage
☐ Establish goals in HubSpot
☐ Create custom reports
☐ Create personas
☐ Build forms pop-ups and meetings calendar and/or scheduling page
☐ Add custom properties
☐ Establish lead scoring

Nurture Your Leads Setup
☐ Build follow-up touchpoints for leads
☐ Build automations
☐ Identify segments
☐ Program workflows

Optimize and Personalize Setup
☐ Customize messaging for each segment
☐ Create playbooks for each segment
☐ Delpoy smart content
☐ Identify steps in lead capture and nurture processes to automate
☐ Identify MQL and SQL effectiveness