

HubSpot Marketing Hub Implementation Checklist

Quick guide: steps to follow when implementing a new HubSpot Marketing Hub Subscription

Getting Started

- Review HubSpot Glossary
- Join the HubSpot Community

Define Project Objectives and KPIs

- Define and Document: Marketing Hub Implementation Objectives
- Determine Key Performance Indicators (KPIs) of Objectives

Data Strategy

- Data Cleanup and Migration

Account Configuration and Setup

- Account Setup
- Domain Setup
- Automation/Workflows
- Marketing Tool Configuration
- Scoring
- Segmentation/Lists
- Reports

Training and User Enablement

- Marketing Hub Certification
- Configure training area in HubSpot Instance