

# HubSpot Setup Guide for Small Business

## Get Started with HubSpot CRM

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### 1 Account Creation

- ☐ Create your free HubSpot account
- ☐ Verify your email address
- ☐ Complete your company profile
- ☐ Set your time zone and currency
- ☐ Invite team members

### 2 Contact Import

- ☐ Export contacts from current system \(\CSV\)
- ☐ Clean up data \(\remove duplicates, fix formatting\)
- ☐ Map fields to HubSpot properties
- ☐ Import contacts via CSV upload
- ☐ Verify import accuracy

### 3 Property Customization

- ☐ Review default contact properties
- ☐ Create custom properties for your business
- ☐ Set up dropdown options for key fields
- ☐ Configure required fields

### 4 Sales Pipeline Setup

- ☐ Define your sales stages
- ☐ Create deal pipeline in HubSpot
- ☐ Set probability percentages per stage
- ☐ Configure deal properties
- ☐ Set up deal automation

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## HubSpot Setup Guide for Small Business - Continued

### 5 Marketing Tools

- ☐ Connect your email domain
- ☐ Set up email templates
- ☐ Create your first landing page
- ☐ Install tracking code on website
- ☐ Set up forms for lead capture

### 6 Integrations

- ☐ Connect email \ (Gmail/Outlook\)
- ☐ Install browser extension
- ☐ Connect calendar for meetings
- ☐ Set up Slack notifications \ (optional\)
- ☐ Connect other tools as needed

# Need Help With Your Project?

Schedule a free consultation with our experts.

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