

HubSpot Setup Guide for Small Business

Get Started with HubSpot CRM

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 \(\text{CSV}\)
- Clean up data \(\text{remove duplicates, fix formatting}\)
- 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

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?

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