

HubSpot Onboarding & Implementation Questionnaire

Purpose

This questionnaire helps us understand your objectives, technical environment, and priorities so we can recommend the right onboarding and implementation approach, timeline, and investment range. Your responses allow us to prepare a detailed scope and a fixed-price proposal based on documented assumptions. In most cases, we still recommend a short validation call (15–30 minutes) to confirm priorities and de-risk scope before finalizing pricing.

We understand you may not have all the answers yet—high-level responses are completely fine.

Terminology (Quick Definitions)

Onboarding: Foundational setup and enablement so your team can operate HubSpot correctly (core configuration + training).

Implementation: Deeper buildout that aligns HubSpot to your processes (data migration, automations, integrations, custom objects, advanced reporting).

Part 1: Business Overview & Strategic Goals

1. **Company Profile:** Briefly describe your company, your primary products or services, and your target audience.
 2. **Strategic Imperative:** What key business challenge or opportunity prompted you to invest in HubSpot at this time?
 3. **Success Outcomes:** What are the top 3-5 measurable outcomes you aim to achieve with HubSpot in the first 6-12 months? (e.g., increase lead-to-customer conversion rate by 15%, reduce sales cycle length by 10 days, improve customer retention by 5%).
 4. **Project Success Definition:** How will you and your leadership team personally define a successful HubSpot implementation?
-

Part 2: HubSpot Scope & Licensing

1. **HubSpot Hubs:** Please select all the HubSpot Hubs you plan to use. If you are unsure, please indicate that.

- Marketing Hub
- Sales Hub
- Service Hub
- CMS Hub (Website)
- Operations Hub
- Unsure

2. **Subscription Tier:** Please indicate your intended HubSpot subscription tier, if known.

- Starter
- Professional
- Enterprise
- To Be Determined

3. **Portal Status:** Is this a brand-new HubSpot portal, or are you migrating/improving an existing one?

- Net-New Portal
 - Existing Portal
-

Part 3: Current Systems & Data Migration

1. **Current Technology Stack:** Please list the primary tools you are currently using for the following functions:

- **CRM:**
- **Email Marketing:**
- **Sales Engagement/Automation:**
- **Customer Support/Help Desk:**
- **Website & Analytics:**
- **Other (e.g., Billing, ERP, Project Management):**

2. **Data Migration Scope:** Do you require data to be migrated into HubSpot? Please select all that apply.

- Contacts
- Companies
- Deals/Opportunities
- Tickets/Cases
- Products
- Attachments/Files
- Historical Activities (e.g., emails, notes, tasks)

2. **Data Volume:** Please provide an approximate size of your database for the following objects:

- **Number of Contacts:**
- **Number of Companies:**
- **Number of Deals (per year):**

2. **Data Quality & Complexity:** Please assess the quality and complexity of your current data.

- **Data Sources:** How many different systems will data be migrated from?
 - **Data Condition:** Are there known issues with your data, such as duplicates, inconsistent fields, or outdated records? (Yes/No/Unsure)
 - **Data Transformation:** Will data require significant cleaning, reformatting, or transformation before being imported into HubSpot? (Yes/No/Unsure)
-

Part 4: Sales & Marketing Alignment

1. **Sales Process:** Do you have a formally documented sales process with defined stages?

- Yes, and it's actively used.
- Yes, but it's not consistently followed.
- No, our process is informal.
- We are currently developing one.

2. **Sales Team:** How many sales users will be actively working in HubSpot?

3. **Lead Management:** Please describe your current lead management process.

- **Lifecycle Stages:** Do you use defined lifecycle stages (e.g., Subscriber, Lead, MQL, SQL, Opportunity)?
- **Lead Scoring:** Do you have a lead scoring model in place to prioritize leads? (Yes/No)
- **Lead Routing:** How are leads assigned to sales representatives today? (e.g., round-robin, territory-based, manual)

2. **Marketing Activities:** What marketing activities do you plan to manage within HubSpot?

- Email Marketing Campaigns
- Landing Pages & Forms
- Automated Lead Nurturing Workflows
- Social Media Management
- SEO & Content Strategy
- Marketing Analytics & Reporting
- Other:

Part 5: Customization, Automation & Integrations

2. **Customization Needs:** Do you anticipate needing any of the following customizations?

- Custom Properties (beyond standard fields)
- Custom Objects (to model business-specific data)
- Custom Deal or Ticket Pipelines

3. **Automation Requirements:** Please describe any key business processes you want to automate.

- **Workflows:** Do you have specific automated workflows in mind for lead nurturing, internal notifications, or task creation? (Yes/No/Unsure)
- **Business Rules:** Are there specific business rules or logic that must be enforced within the system (e.g., deal creation rules, required fields for stage progression)?

2. **Integration Complexity:** Please provide details about your integration requirements. For each system you need to integrate with HubSpot, please specify the type of integration.

System to Integrate	Integration Type	Brief Description of Data to be Synced
e.g., Salesforce	Native Integration	Sync Contacts, Companies, Deals, and Activities bi-directionally.
e.g., NetSuite	Custom API	Sync new customers and paid invoices from NetSuite to HubSpot.
	<input type="checkbox"/> Native <input type="checkbox"/> Middleware (e.g., Zapier) <input type="checkbox"/> Custom API	
	<input type="checkbox"/> Native <input type="checkbox"/> Middleware (e.g., Zapier) <input type="checkbox"/> Custom API	
	<input type="checkbox"/> Native <input type="checkbox"/> Middleware (e.g., Zapier) <input type="checkbox"/> Custom API	

Part 6: Reporting & Analytics

1. **Critical Reporting:** What reports are most critical to have available at launch?

- Marketing Campaign Performance
- Sales Pipeline & Forecasting
- Revenue Attribution (First-touch, Last-touch, Multi-touch)
- Sales Team Activity & Performance
- Customer Service Ticket Volume & Resolution Time

2. **Reporting Stakeholders:** Who are the primary consumers of HubSpot reports and dashboards in your organization?

- C-Level Leadership
- Marketing Team
- Sales Team
- Customer Service Team

RevOps/SalesOps

3. **Key Performance Indicators (KPIs):** Do you have defined KPIs that you will use to measure the success of your sales, marketing, and service efforts? (Yes/No/Partially)
-

Part 7: Training & Team Enablement

1. **Training Audience:** Which teams or roles will require training on HubSpot?

- Marketing Team
- Sales Team
- Customer Service Team
- Leadership/Management
- System Administrators

2. **Training Level:** What level of training is required for your teams?

- Platform Fundamentals & Navigation
- Role-Specific Daily Workflows & Best Practices
- Reporting & Dashboard Creation
- Advanced Administrative Training

3. **Preferred Training Format:** Please select your preferred training format.

- Live, interactive virtual sessions
 - On-demand, recorded video walkthroughs
 - Written documentation and user guides
 - A combination of the above
-

Part 8: Timeline & Project Management

1. **Target Go-Live Date:** Is there a specific target date by which you need the HubSpot implementation to be complete?
2. **Key Milestones:** Are there any upcoming business milestones, campaigns, or events that we should be aware of and plan around (e.g., product launches, sales kickoffs, contract renewals)?

3. **Internal Resources:** Who will be the primary point of contact and project owner for this implementation from your team? What is their availability to dedicate to this project?
-

Part 9: Technical, Security & Governance

1. **Technical Ownership:** Who on your team will be responsible for managing DNS changes required for email sending domain authentication (DKIM/SPF/DMARC) and connecting subdomains?
 2. **Security Requirements:** Are there any specific security protocols we need to accommodate?
 - Single Sign-On (SSO) required for user login.
 - IP-based restrictions for accessing HubSpot.
 - Other specific compliance or security standards (please specify):
 3. **User Permissions & Governance:** How do you plan to structure user permissions and governance?
 - **User Roles:** Do you have defined user roles with different levels of access required? (Yes/No/Unsure)
 - **Teams:** Will you need to structure users into teams to segment access to data and assets? (Yes/No/Unsure)
 - **Sandbox Environment:** For Enterprise customers, do you plan to use a sandbox for development and testing before deploying to your live production portal? (Yes/No/Not Applicable)
-

Part 10: Investment & Service Tiers

The Partner Advantage: Waive HubSpot's Onboarding Fee

As a certified HubSpot Solutions Partner, we provide a significant advantage: when you purchase onboarding or implementation services from us, **we are able to waive the standard, mandatory onboarding fee that HubSpot charges for Professional and Enterprise subscriptions.**

Our goal is to provide a more personalized, hands-on, and value-driven experience than HubSpot's direct onboarding, ensuring you not only get set up correctly but are also positioned for long-term success. By choosing to work with us, you invest in a dedicated team that understands your unique business context, and you avoid a mandatory fee that provides less tailored support.

Partner-Led Implementation Packages

Based on the complexity of your requirements, we will recommend one of the following implementation packages. All packages make you eligible for the HubSpot onboarding fee waiver.

Service Tier	Ideal For	Scope of Services	Estimated Timeline	Investment Range
Partner-Led Onboarding	Companies new to HubSpot (Pro/Ent) looking for a superior alternative to HubSpot's direct onboarding.	Foundational setup, technical configuration, best-practice guidance, and personalized training for one Hub. More hands-on and tailored than HubSpot's direct service.	4-6 Weeks	\$3,000 - \$7,500
Professional Implementation	Companies with multiple Hubs (Pro), moderate data migration needs, and some custom workflow/automation requirements.	Everything in Partner-Led Onboarding, plus data migration (up to 2 sources), 5-10 custom workflows, 1-2 native integrations, and role-based team training.	8-12 Weeks	\$15,000 - \$30,000
Enterprise Implementation	Companies with complex	Everything in Professional,	12-16+ Weeks	\$30,000 - \$60,000+

Service Tier	Ideal For	Scope of Services	Estimated Timeline	Investment Range
	requirements, multiple Hubs (Enterprise), extensive data migration, custom integrations, and advanced reporting.	plus advanced data migration, custom object setup, 10+ complex workflows, custom API integrations, and advanced reporting/dashboard configuration.		

Special Offer: Clients who select a Professional or Enterprise Implementation package are eligible for a discount on their first six months of a HubBase ongoing support retainer.

Budget Alignment (Optional but Helpful):

- We have a budget allocated in the range of: _____
- We are seeking a recommendation based on our needs.

Part 10: Final Notes

Please use this space to share any additional context, specific concerns, or absolute "must-haves" that we should be aware of as we prepare your implementation plan and quote.

Thank you for taking the time to complete this questionnaire. We will review your responses and be in touch shortly with a detailed proposal and a fixed-price quote for your HubSpot implementation.