

HUBSPOT CRM SET-UP CHECKLIST

Discover the steps to set up a CRM system and increase productivity.

- ✓ Complete a Sales Audit and Sales Strategy to Find Opportunities.
- ✓ Define Deal Stages and Tie them to a Trackable Action.
- ✓ Establish Rules Dictating Ownership of Leads and Accounts.
- ✓ Remove Dirty Data before Migration to avoid confusing Your Sales Team.
- ✓ Move Your Data In Sections to easily identify any issues during the migration.
- ✓ Build lead routing automation to assign high-quality leads to the right sales rep.
- ✓ Set up email notifications to help reps circle back and stay on top of all leads.
- ✓ Create Lead Views to Organize and Prioritize Reaching out to leads in their name.
- ✓ Measure individual and team productivity to track progress against quota with reports.
- ✓ Monitor Your CRM Data for Duplicates & Clean Up Your Data.

Looking for expert help getting started with a CRM?

DaBrian Marketing a HubSpot Partner will help you surpass your biggest growth goals with the free HubSpot CRM.

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