



Get Started with HubSpot

Knowing where to start can be hard, but we're here to help.

Let's keep it simple.

We know embarking on a new journey can be daunting. But not to worry, we've got you covered.

Follow the step-by-step guide below to get the best out of HubSpot. The guide helps you navigate directly into where you want to be in HubSpot, while also providing specific resources that will help you each step of the way. For your ease of reference, you can download the guide (it's free!).



[Download the guide](#)

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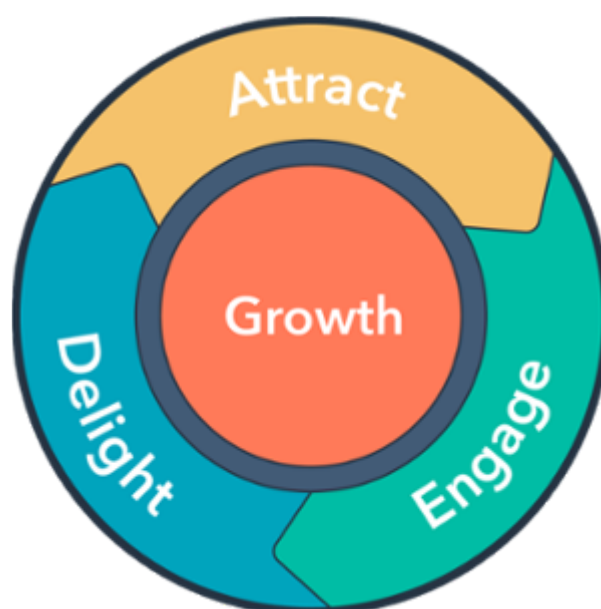
Tip: If you need help at any point, you can search our [Knowledge Base](#) or [Ask the Community](#).

Step 1: Before you dive in... The Big Picture.

We want to help you embark on a journey to **Grow Better**.

At HubSpot, we're here to help businesses gain visibility and insight into marketing efforts, manage sales processes, and support ongoing needs of your customers to help delight them. It's an all-in-one platform that provides organizations like yours the tools and data you need to make strategic decisions in marketing, sales, and customer service processes to **Grow Better**.

How does HubSpot help organizations **Grow Better**? The Inbound Methodology.

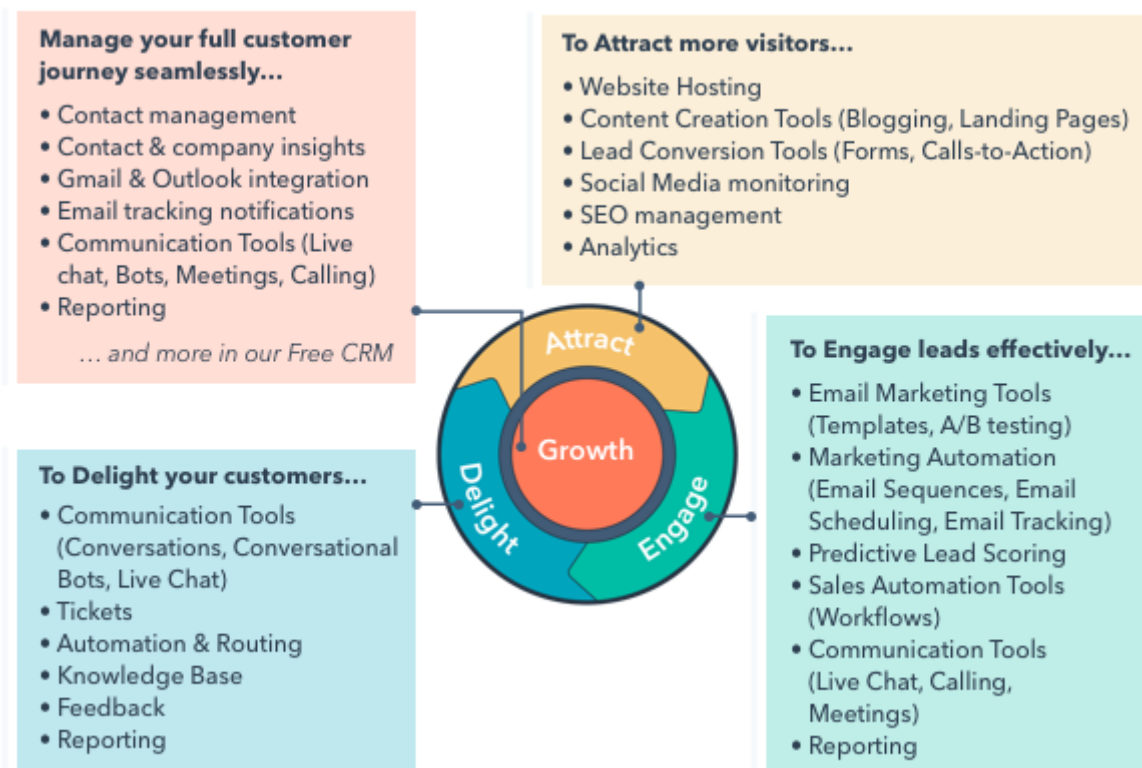


What is Inbound?



The **Inbound Methodology** is composed of three stages: attract, engage, and delight. **HubSpot's Flywheel** (the rotating wheel above) encapsulates these three stages. At HubSpot, we believe that organizations thrive by building trust, credibility, and momentum with its customers each step of the way. It's about adding value at every stage in your customer's journey with you. To create relationships that last and customers that stay, every customer-facing team needs to focus on how they can contextually attract, engage, and delight your prospects and customers and continue to build trust in your brand. We're here to help you accomplish this.

To help you achieve this, we offer a range of tools. Here's a glimpse. [Click the image to expand](#), or have a look at the [comprehensive list of features](#).



Want to know how our customers use HubSpot? View our [case studies](#).

Step 2: Set up the plumbing

Let's get you set up for success.

Now that you've got The Big Picture, hopefully we've convinced you that data is very, very important to nurture deeper relationships with your customers.



It's time to set up the plumbing to make sure your existing and new customer data is collected properly in HubSpot's CRM. It may feel tedious, but we promise it's worth the effort.

Connect your inbox. Hook your email client up to the HubSpot CRM for the magic to happen.

- [Connect inbox \(in-app\)](#)
- [Learn how](#)



Install the HubSpot email extension. HubSpot can start logging contacts for you. And you'll see when leads open your emails.

- [Go to extensions \(in-app\)](#)
- [Learn how](#)

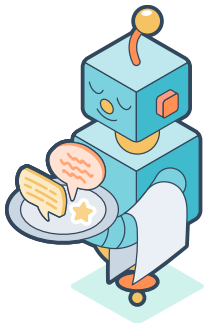


Import your contacts. Save time. Follow this simple, step-by-step process to import multiple contacts at once from a spreadsheet.

- [Go to imports \(in-app\)](#)
- [Learn how](#)



You're almost there...! Send a test email. Email Cool Robot, our sample contact. You'll get a reply, and Cool Robot's contact record and a timeline of events will appear in your CRM.



Step 3: Make HubSpot Yours

Now you're in the driver's seat.

Make these few adjustments to HubSpot to make it the best it can be for you and your team.

Organize your deals. Keep track of your pipeline by customizing your deal stages.

- [Open deal stages \(in-app\)](#)
- [Learn how](#)



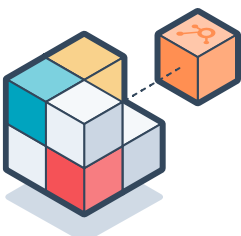
Customize your dashboard. Get visibility and insight on you and your team's performance.

- [Open dashboard \(in-app\)](#)
- [Learn how](#)



Set up integrations. Connect with your existing tools at ease. Find integrations to your favorite apps and web services you use every day.

- [Explore integrations](#)



Step 4: Never Miss a Beat

Keep a pulse on your new leads, engaged visitors, and happy customers.



Follow opportunities. Stay in the loop on updates about contacts, companies, deal or ticket record by following them. [Learn how](#)



Stay on top of your game. Automagically compile to-do lists and reminders by creating tasks. [Learn how](#)



Step 5: Invite your team to join the party

The more the merrier – for you and your customers.

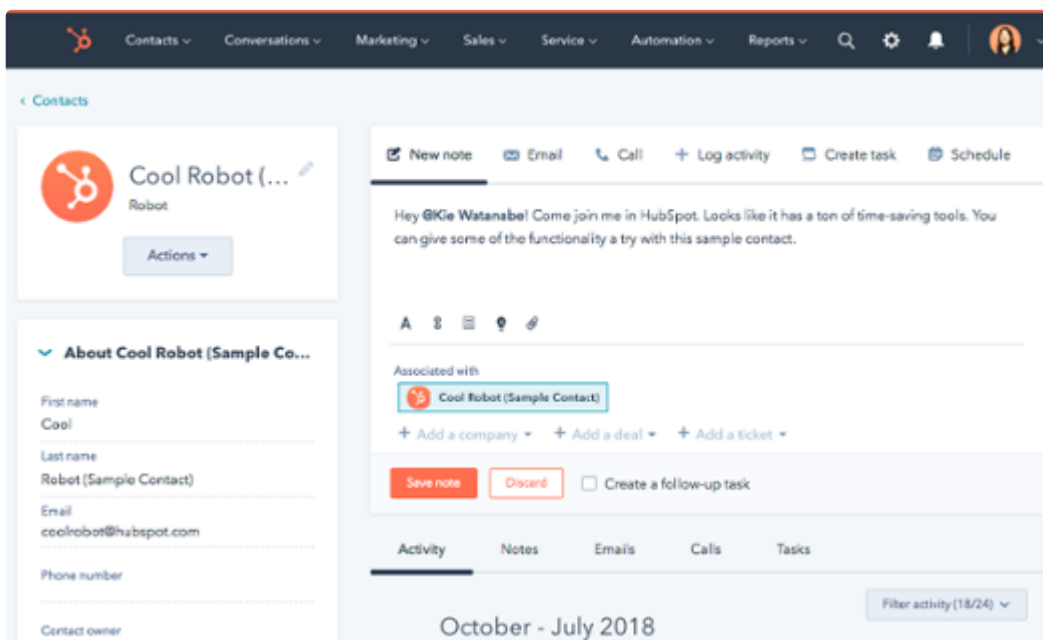
Add your team. Attracting, nurturing and delighting customers is a team effort. Let's divide and conquer!

- [Invite users \(in-app\)](#)
- [Learn how](#)



Tag or @mention your team. Collaborate with your team by @mentioning them, just like you would in your favorite apps.

- [Give it a try \(in-app\)](#)
- [Learn more](#)



Congrats! You're off to the races.





Thirsty to learn more?

Here are our Top 5 recommended resources to jump start using the CRM

- Getting Started with the CRM [Video](#) | [Article](#)
- How to Import Your Contacts Into HubSpot CRM [Video](#) | [Article](#)
- Designing your Sales Process in HubSpot CRM [Video](#) | [Article](#)
- Providing Leads to Your Team [Video](#) | [Article](#)
- Creating Saved Filters for Your Team [Video](#) | [Article](#)

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