Set Up Your Team for Success

All the tools and tips you need to lead the way for your team.

Team Setup Guide

Ready to bring the team along the journey to Grow Better? Follow the step-by-step guide below to get your team onboard and help them achieve their goals.

For easy reference, download the guide.

Download the guide

Go to a section

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

Need more help? Talk to an Expert.

We're cheering for you! Get a free consultation with one of our experts in Team Change Management.

Book a Meeting

Step 1: Get Buy in From Your Team.

Before we help get your team up and running, let's make sure they know what HubSpot and the Inbound Methodology is about.

Need help to convey the value of HubSpot to your team? Here's a free guide and presentation.

Go to the guide

Step 2: Develop a team strategy

We know it's not easy to get teams oriented around using a new product. Lay the foundation for how HubSpot will work for you and your team by devising a clear plan. Here are two resources to get you started:

- **Growth Stack Team Strategy.** Will you be collaborating across Marketing, Sales and Services functions? What will your communication, collaboration and creation strategy be? This guide will help you develop a team strategy to align your Growth Stack teams. View Article
- **Sales Team Strategy.** Transitioning a sales team to new tools and processes is hard. Make the transition successful by building your sales process in HubSpot CRM. View Tutorial

Step 3: Host a kick-off meeting

Now that you've laid the foundation, it's time to hold a kick-off meeting. It's important to hold a kick-off meeting so your team understands how HubSpot is a game changer and what's in it for them.

Below is an example agenda for an hour long kick-off meeting, followed by a description for each agenda item.

Agenda

- Explain "Why HubSpot"? (15 min)
- HubSpot Demo (10 min)
- My Approach to HubSpot (5 min)
- Team Strategy (10 min)
- Resources (5 min)
- Next steps (5 min)

- Q&A (10 min)

Description

- **Explain "Why HubSpot"?** - The goal of this section is to convey the challenges your organization is facing, and build a sense of urgency. What are the pain points you and your team are experiencing? How can HubSpot help address them? You may find the presentation in **Step 1: Get buy-in from your team** to be a helpful resource as you think through these questions.
- **HubSpot Demo** - Showcase features that are most relevant to your audience. The key here is to convey not only *How* the tool works, but also tie the functionality to *Why* it is helpful to you and your team.
- **My Approach to HubSpot** - Share how you get value from HubSpot. How do you use it? What are your favorite features? How have you integrated it into your routines and workflow?
- **Team Strategy** - What is your game plan for how your team will use HubSpot (refer to **Step 2: Develop a Team Strategy**)? What are your team's goals? How are you planning to set up HubSpot to meet your team's objectives? Are there any new processes you are spinning up to make sure everyone is on the same page?
- **Resources** - As you might have also experienced, learning a new tool can be difficult. Let your team know that they are not on their own. There are several resources to help them along the way, such as HubSpot Academy which includes everything from video tutorials to articles and technical documentation.

  We've found that it's helpful to point your team to the right resources for them before they dive head-first into HubSpot. Here are our favorite hits:

  For **Sales**: Inbound Sales Fundamentals
  For **Marketing**: Inbound Marketing Fundamentals
  For **Services**: Inbound Service Fundamentals
  For **CRM**: Getting Started with the HubSpot CRM

- **Next steps -** Give your team a heads up on what to expect next. Let them know when they should expect to receive and email invitation to join HubSpot. Share a timeline that shows when and how the team is transitioning to HubSpot. Ask them to put aside time dedicated to becoming acquainted with HubSpot. Don't forget to celebrate the beginning of a new journey to Grow Better!

- **Q&A** - Make sure there's plenty of time at the end to field questions. This is a great opportunity to address your team's concerns and help address them. If you are not sure about the answer to a question, not to worry. Encourage them to discover more about HubSpot by searching the Knowledge Base or Asking the Community. We're always here to help!

Step 4: Invite your team

Before you invite your team, review the initial setup steps in Get Started with HubSpot. The more heavy-lifting you do for the team upfront to get set up in HubSpot, the easier it will be for the team to get up and running!

When you're ready, refer to this quick guide on how to add users.

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

- Invite users (in-app)
- Learn how

Give them a heads up. We've put together a couple email templates to make it easier for you to give your team and organization a heads up on what HubSpot is.

- View Email Templates

Step 5: Get your team involved

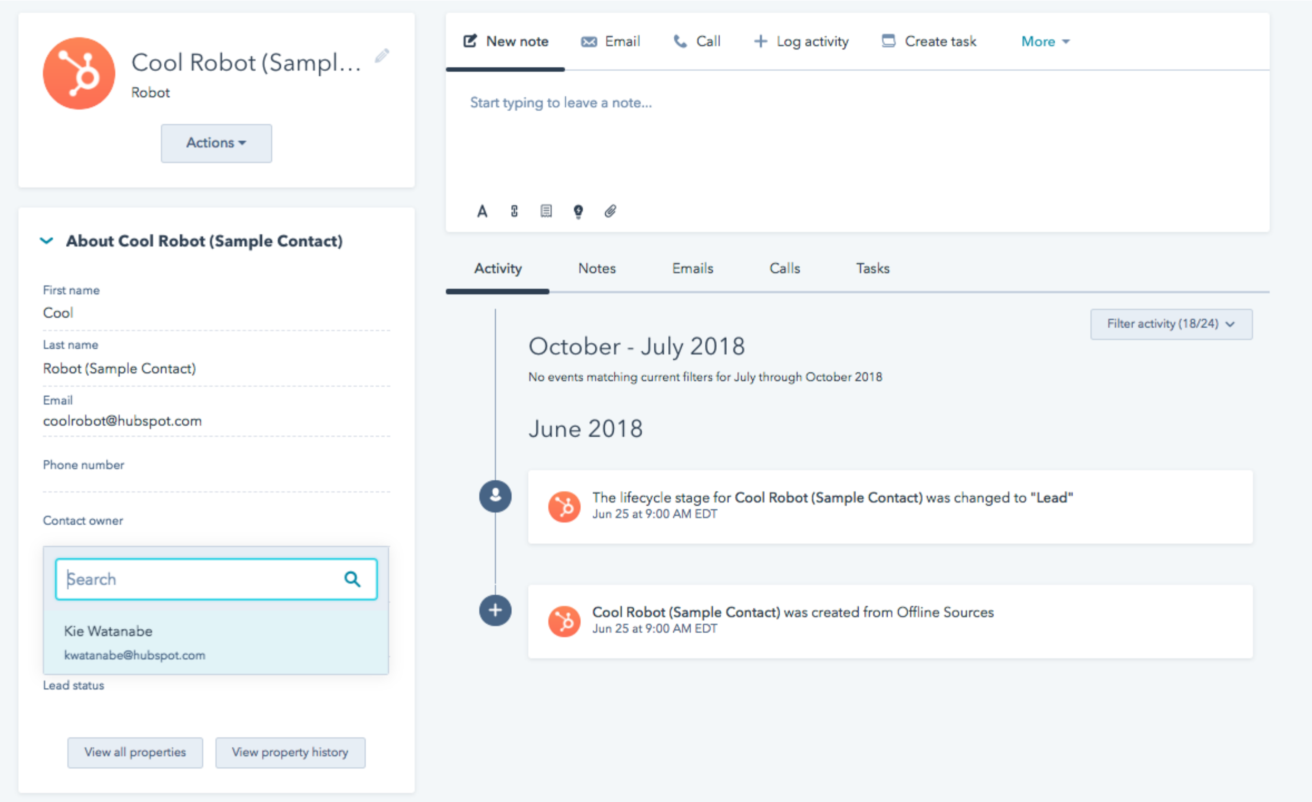
The best way to get your team in the habit of using HubSpot is to collaborate and involve them in your customer interactions in HubSpot.

Here are three features that will empower you and your team!

Owners

Hold your team accountable by assigning owners. Owners can be assigned to contacts, companies, deals, and tickets. By assigning owners, you can make certain your team can keep track on progress and follow-up proactively.

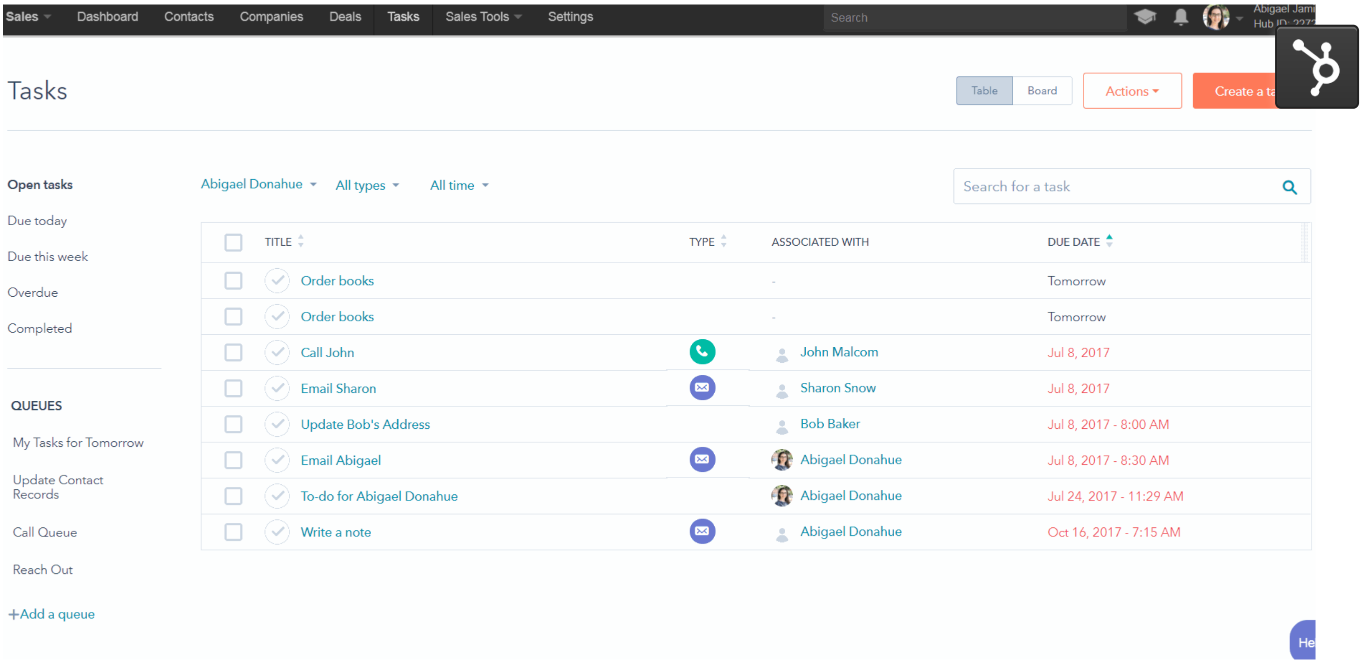
- Give it a try (in-app)
- Learn how



Tasks

Keep your team informed about their priorities by assigning tasks. Tasks can be created to help keep track of follow-up items related to contacts, deals, tasks or tickets. By creating and assigning tasks to your team, you can help your team members manage their to-do lists and help improve their productivity.

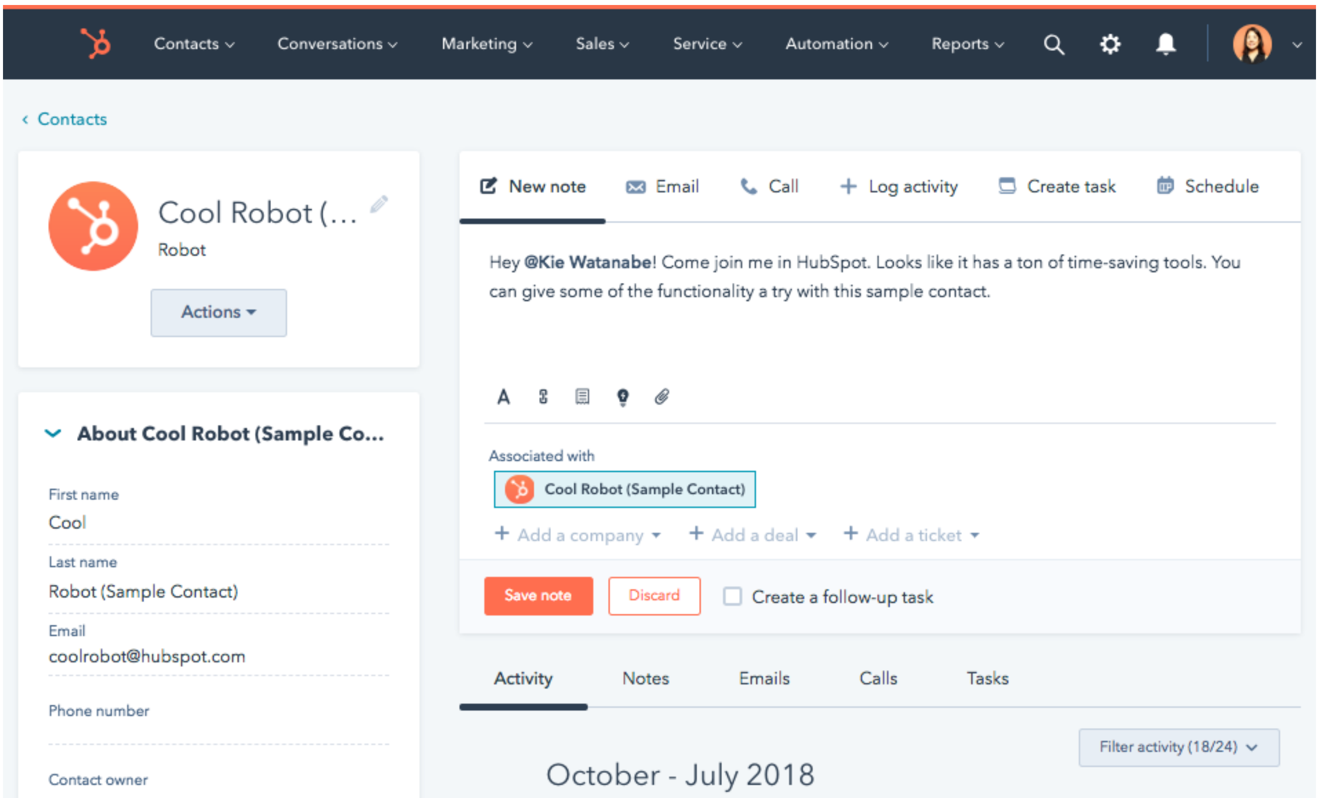
- Give it a try (in-app)
- Learn how



Tag or @mention

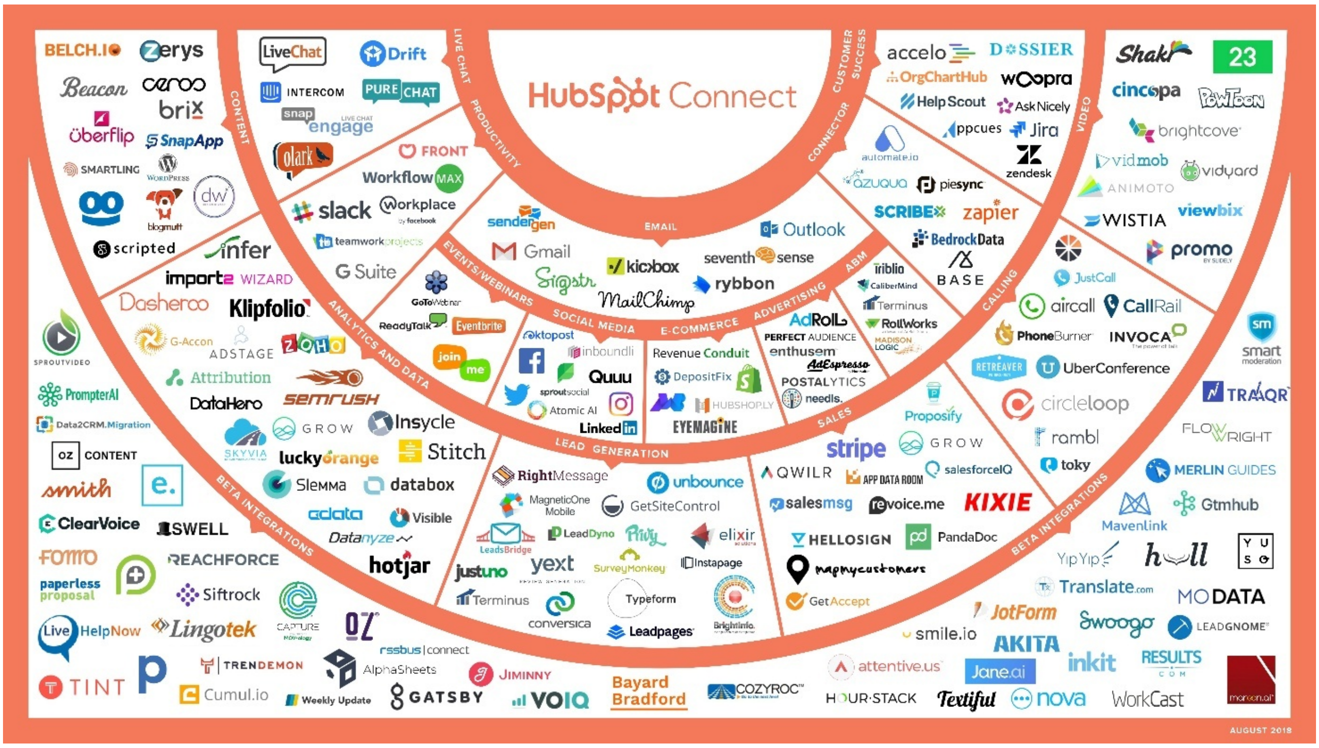
Bring team members into the loop, with a tag or @mention. You can tag or mention members in any notes fields in HubSpot (on contacts, deals, tasks, or tickets), just like you would in your favorite apps.

- Give it a try (in-app)
- Learn how



Step 6: Create a seamless experience

Your team may be wondering how they can incorporate HubSpot into their existing tools and processes. Explore HubSpot's integrations here.



Congrats! You've achieved liftoff!

We Have a Team of Change Management Experts at HubSpot.

Want to speak to one?

Book a meeting

Increase Your Traffic

Connect With Leads

Close and Manage Leads

Support and Tools

Contact HubSpot Support