

The Complete Guide to

# Setting Up HubSpot



The technical implementation guide that will let you start getting leads sooner.

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# How Should You Use This Document?

This document provides an overview of the most critical setup tasks required for a successful HubSpot implementation.

You can complete your HubSpot setup in one of three ways:

1. Complete the setup tasks yourself with the help of this document
2. Email this document to your webmaster or IT Admin
3. Schedule a Technical Setup call with a HubSpot Support Engineer\*
  - o Available to Professional and Enterprise customers only; Contact your Inbound Marketing Consultant or Account Manager to schedule this for you.

## When Should You Use This Document?

You should complete these steps immediately after purchasing HubSpot, or even while you're still in your free trial mode. Completing these steps quickly means that you'll get to start building out your marketing campaigns sooner, so you can get more leads in the door faster. If you feel more comfortable having your webmaster or IT Admin complete these steps, just email them this document and meet with them soon to discuss which steps listed below you'll need help with.

If you run into any issues as you go through these setup tasks, our Support team will be happy to help. You can [file a support ticket here](#) or call them directly at 1-888-HUBSPOT X3.

## HubSpot Technical Setup Checklist

These are the setup tasks covered in this document:

1. [Add users](#) | page 3
  - a. Skill level: Easy (*3 minutes*)
  - b. Required of: Basic, Professional, and Enterprise
  - c. Who should complete: Marketer
2. [Install JavaScript tracking code](#) | page 4
  - a. Skill level: Medium (*10 minutes*)
  - b. Required of: Professional and Enterprise
  - c. Who should complete: Webmaster
3. [Connect domain name or subdomain](#) | page 5
  - a. Skill level: Medium (*20 minutes*)
  - b. Required of: Basic, Professional, and Enterprise
  - c. Who should complete: Webmaster or IT Admin
4. [Set up lead tracking](#) | page 7
  - a. Skill level: Easy, medium, or hard, depending on method chosen (*30-60 minutes*)
  - b. Required of: Basic, Professional, and Enterprise



- c. Who should complete: Depends on method chosen
- 5. [Integrate your CRM](#) | page 11
  - a. Skill level: Medium or hard, depending on CRM (*30-60 minutes*)
  - b. Required of: Professional and Enterprise
  - c. Who should complete: IT Admin or CRM Admin
- 6. [Import your contacts and leads](#) | page 14
  - a. Skill level: Easy (*15-30 minutes*)
  - b. Required of: Basic, Professional, and Enterprise
  - c. Who should complete: Marketer
- 7. [Connect social media accounts](#) | page 15
  - a. Skill level: Easy (*10 minutes*)
  - b. Required of: Basic, Professional, and Enterprise
  - c. Who should complete: Marketer
- 8. [Set up your HubSpot blog \(or link external blog\)](#) | page 16
  - a. Skill level: Easy (*15-30 minutes*)
  - b. Required of: Basic, Professional, and Enterprise
  - c. Who should complete: Marketer
- 9. [Exclude your own traffic from analytics](#) | page 18
  - a. Skill level: Easy (*5 minutes*)
  - b. Required of: Basic, Professional, and Enterprise
  - c. Who should complete: Marketer (with help of IT admin if necessary)

\*Technical Setup calls do not cover CRM integration unless you have Salesforce. If you do not have a CRM admin, you can [hire a HubSpot Certified Partner](#) to do this for you. These calls also do not cover Advanced Landing Page setup or [API lead tracking](#) integration.



# 1. Add Users

**Skill level:** Easy (3 minutes)  
**Required of:** Basic, Professional, Enterprise  
**Who should complete:** Marketer

## What You Will Need

- The name and email address of each person you'd like to make a user in HubSpot

## Overview

As a purchaser of HubSpot, you have a number of user logins at your disposal. Most customers use one for themselves and set up additional accounts for colleagues, be that a marketing assistant, IT resource, fellow blogger, or salesperson.

There are three different user roles:

- **HubSpot User** - user has access to all HubSpot tools
- **Blog Author** - user has access to the Blog tool only and can save articles as drafts, but cannot publish them
- **Blog Publisher** - user has access to the Blog tool only and can save and publish articles

The following stakeholders may be involved in the implementation process:

Stakeholder	Involvement
Marketing Team	Responsible for content on website pages, landing pages and associated content offers, blog posts, email marketing and automation campaigns
Webmaster	Responsible for placing JavaScript tracking code on website pages, adding HubSpot form code to website pages (if not using HubSpot landing pages)
IT Admin	Responsible for connecting domain name or subdomain, managing CRM integration if you don't have a dedicated CRM Admin (see below)
Sales Team	Responsible for using lead intelligence to have more productive sales calls, working with marketing to set lead assignment flows
CRM Admin	Responsible for integrating your CRM with HubSpot, including initial integration, setting up custom fields, setting up lead assignment flows, managing lead tracking via API

## Instructions



[Read instructions on how to add users in HubSpot >](#)



## 2. Install Tracking Code

**Skill level:** Medium (10 minutes)  
**Required of:** Professional and Enterprise  
**Who should complete:** Webmaster

*Note: If you are a HubSpot Basic customer, or are hosting your website with HubSpot, the tracking code is automatically installed on your HubSpot site and you can skip this step.*

### What You Will Need

- Your Webmaster (if necessary)
- Access to the HTML of your website, or the footer HTML in your CMS

### Overview

The HubSpot tracking code is what makes the HubSpot software work. It's a bit of JavaScript that you or your webmaster must install on every page on your website in the <body> section above the closed </body> tag.

If you don't install this tracking code, you will not be able to take advantage of all of HubSpot's most valuable features:

- **Analytics reports:** Allows HubSpot to tell you where your traffic, leads, and customers found your website.
- **Contacts intelligence:** Lets HubSpot provide you with sophisticated lead intelligence that enables you to turn more website leads into customers.
- **Pages:** Lets HubSpot crawl your site to tell you which SEO elements need further optimization to improve your website traffic.

Unless you install the HubSpot tracking code, none of this will work. The sooner you get your JavaScript installed on your site, the sooner you'll be able to start getting value out of HubSpot.

### Instructions



Read instructions on how to install the JavaScript tracking code:

- [Professional instructions >](#)
- [Enterprise instructions >](#)



## 3. Connect Domain or Subdomain

**Skill level:** Medium (20 minutes)

**Required of:** Basic, Professional, Enterprise

**Who should complete:** Webmaster or IT Admin

### What You Will Need

- Your IT Admin (if necessary)
- Access to your DNS settings on your registrar
- Access to your hosting provider (subdomain only, if nameserver on registrar is pointing to hosting provider)

If you are having your entire website migrated to HubSpot, you must have received your "Migration Complete" notification email before connecting your domain name. To check on the status of your migration, [contact HubSpot support](#).

### Overview

If you are using any of HubSpot's CMS pages, you will need to take those pages live. This includes any:

- Website pages
- Landing pages
- Blogs

#### Basic Customers - Domain Name

If you are a HubSpot Basic customer, you will be hosting your entire website with HubSpot, and will need to connect your domain name to HubSpot. This means that when someone types in your domain name, they will see your HubSpot-hosted website, rather than your current, externally-hosted website.

#### Professional or Enterprise Customers - Domain Name or Subdomain

If you are a HubSpot Professional or Enterprise customer, you have the option of hosting your entire website with HubSpot OR continuing to host your site externally, and only using HubSpot's landing page and blog CMS pages. If you choose to host your site externally, you will need to connect a subdomain to your HubSpot-hosted pages.

Examples of possible subdomains include:

- <http://info.yoursite.com>
- <http://blog.yoursite.com>
- <http://go.yoursite.com>
- <http://www2.yoursite.com>

This means that when someone clicks through to a blog post or landing page of yours, the URL of the page will be (for example): <http://info.yoursite.com/blog-post-or-landing-page-url>. If you do not take these pages live on a subdomain, you will not be able to launch your marketing campaigns.



## Instructions



Your instructions will depend on your product level and whether or not you'll be hosting your entire website with HubSpot:

Product Level	Hosting Entire Website	Hosting Website Externally
Basic	<a href="#">Read Instructions</a>	n/a
Professional	<a href="#">Read Instructions</a>	<a href="#">Read Instructions</a>
Enterprise	<a href="#">Read Instructions</a>	<a href="#">Read Instructions</a>



## 4. Set Up Lead Tracking

**Skill level:** Depends on method  
**Required of:** Basic, Professional, Enterprise  
**Who should complete:** Depends on method

*Note: If you are a HubSpot Basic customer, or are hosting your website with HubSpot, you will be using HubSpot landing pages so you only need to read Option #1.*

### Overview

HubSpot's lead intelligence tracks your lead sources, shows you what your leads are interested in, and alerts you when leads are revisiting your site. In order to use HubSpot's lead intelligence, you'll need to set up HubSpot lead tracking. This simply means that any form that someone fills out on your site needs to be connected to HubSpot.

There are three ways to set up lead tracking, easiest presented first:

1. Use HubSpot Landing Pages
  - a. Basic Landing Pages (Basic and Professional products)
  - b. Advanced Landing Pages (Enterprise product)
2. Use Exported HubSpot Forms
3. Use HubSpot's Leads API

### Lead Tracking Options Quick-Reference

Possible Scenario	Use HubSpot Landing Pages	Export HubSpot Forms	Use HubSpot Leads API
You don't want to rely on a Webmaster or IT Admin to create a new landing page	X		
You want to one-click copy to create a new landing page	X		
You want to manage form creation in HubSpot, and not deal with APIs	X	X	
You want to continue using your own website pages for your landing pages		X	X
Your current forms use dynamic logs, kick off creation of user accounts, or submit data to other software like shopping carts, ESPs, or non-Salesforce.com CRM systems			X



## Option #1 - Use HubSpot Landing Pages

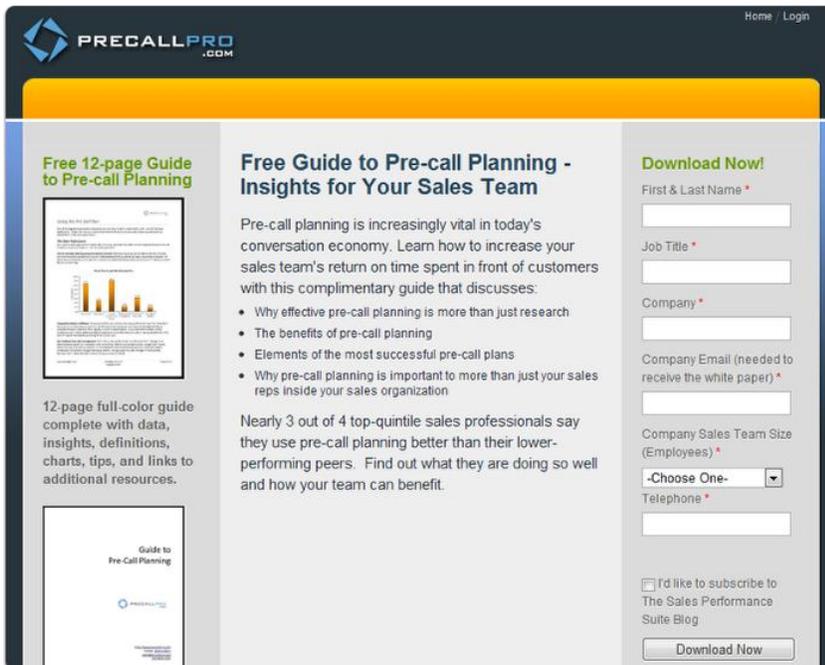
**Skill level: Easy**

In this type of lead tracking, you will be using a HubSpot form hosted on a HubSpot landing page.

You can simply replace your current forms with HubSpot landing pages to get lead tracking set up. You link to a landing page from a call to action on your website or elsewhere (in an email, banner ad, PPC ad, etc.). This option is the easiest option of the three ways to implement Lead Tracking.

### Basic and Professional Products - Basic Landing Pages

If you are a Basic or Professional customer, you will be using HubSpot's Basic Landing Pages. Here is an example of a HubSpot Landing Page:



The screenshot shows a HubSpot landing page for a free guide. The page has a dark blue header with the PRECALLPRO.COM logo and 'Home / Login' links. The main content is divided into three columns. The left column features a thumbnail of the 12-page guide and a description: '12-page full-color guide complete with data, insights, definitions, charts, tips, and links to additional resources.' The middle column is titled 'Free Guide to Pre-call Planning - Insights for Your Sales Team' and contains introductory text and a bulleted list of topics. The right column is titled 'Download Now!' and contains a form with fields for 'First & Last Name', 'Job Title', 'Company', 'Company Email (needed to receive the white paper)', 'Company Sales Team Size (Employees)', and 'Telephone'. There is also a checkbox for 'I'd like to subscribe to The Sales Performance Suite Blog' and a 'Download Now' button.

When you create your Basic Landing Page, make sure you complete the following steps:

- Edit the form on your landing page to include form fields that your sales team would need to make an educated sales call
- Configure the following form actions:
  - Enter a "Redirect URL" to send new leads to a "Thank You" page or a "Thank You" message. Creating a page rather than just an email message is best.
  - Enter an email address in the "Send form results to" field so someone is notified each time you get a new lead through this form.



[Read instructions on how to create Basic Landing Pages >](#)



## Enterprise Product - Advanced Landing Pages

If you are a HubSpot Enterprise customer, you will be using HubSpot's Advanced Landing Pages. Advanced Landing Pages offer A/B testing capabilities, so you can easily test variations of your landing pages and turn off the lowest-performing version, without having to set up redirects. These Advanced Landing Pages also lay the foundation for advanced analysis and behavior-based lead nurturing.



[Read instructions on how to create Advanced Landing Pages >](#)

## Option #2 - Use Exported HubSpot Forms

**Skill level: Medium (may need help of Webmaster)**

In this type of lead tracking, you will be using a HubSpot form, hosted on one of your own (non-HubSpot) website pages.

You can build the lead form in HubSpot, then export the HTML code for it and put it where you'd like it to be on your own site. If you or someone on your staff can write CSS, you can customize the appearance of your exported HubSpot forms. Here is an example of a landing page with a HubSpot form embedded in it:

The screenshot shows a website for Blue Link with a navigation menu (Home, Company, Products, Services, Why Us?, Support, Resources, Contact) and a phone number (1-877-BLU-LINK). The main content area features a testimonial from Pat Chown, Owner of Foundation Distributing, and a 'REQUEST DEMO' button. The central focus is the 'Blue Link Quote & Demo Form', which contains the following fields and options:

- Your Name \*
- Email address \*
- Company \*
- Phone Number \*
- We carry or track inventory \* (radio buttons for Yes and No)
- Number of Employees \* (dropdown menu with '-Choose One-')
- Any comments or other questions? (text area)

A 'Submit' button is located at the bottom of the form. A note at the bottom of the form states '\* - mandatory fields'. An orange arrow points to the 'Your Name' input field.



[Read instructions on how to export HubSpot forms for your website >](#)

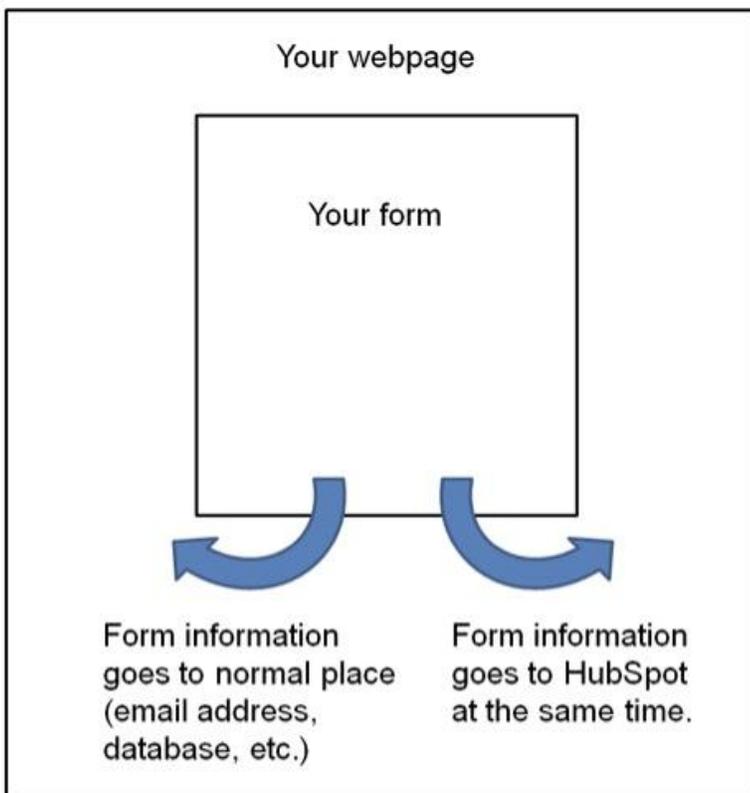


### Option #3 - Use HubSpot's Lead API

**Skill level: Hard (may need help of IT Admin and/or CRM Admin)**

In this type of lead tracking, you use a non-HubSpot form, hosted on your own non-HubSpot website page, and use the HubSpot API to send the data submitted in that form to your HubSpot Lead Intelligence application.

Hooking up HubSpot's Lead API allows you to keep using your existing lead forms, but through a bit of coding puts the lead information into HubSpot in addition to where it currently goes (whether it's a CRM or homegrown database). Implementing the API requires the skill of someone who's deeply familiar with coding – usually a web developer or IT resource. If you don't have this skill yourself or in-house, you can [hire a HubSpot Partner to hook up the API for you](#).



[Read instructions on how to implement the HubSpot API on HubSpot's Developer website >](#)

Still not sure which type of Lead Tracking you should implement? Talk to your consultant or Account Manager to determine which method is right for you.

## 5. Integrate your CRM

**Skill level:** Medium or Medium (30-60 minutes)

**Required of:** Professional and Enterprise

**Who should complete:** IT Admin or CRM Admin

*Note: If you are a HubSpot Basic customer, you will not be able to integrate your CRM. Please speak with your Account Manager if you are interested in upgrading.*

### What You Will Need

- Administrator access to your CRM and API knowledge (if you don't use SFDC), OR
- An in-house CRM admin, OR
- A budget to hire a [HubSpot Service Provider](#) to do the integration for you

### Overview

HubSpot's lead intelligence application integrates seamlessly with many of the most widely used types of Customer Relationship Manager (CRM) software. Integrating your CRM with HubSpot is important because:

- **Salespeople** in your organization will be able to access and use HubSpot's lead intelligence on leads within your CRM environment, without having to log in to HubSpot.
- **Marketers** in your organization can analyze which marketing campaigns are most effective at generating customers, so that you can measure which campaigns have a positive ROI and which don't. This method of tracing success back to campaign sources is known as "closed loop" marketing analytics, and is unique to HubSpot.

### How Does CRM Integration Flow Work?

- 1. Conversion:** Leads convert by filling out a form on your website, which can be either HubSpot landing pages, exported HubSpot forms, or your own forms where the lead data is passed in to HubSpot via our API. You can also import the leads into HubSpot.
- 2. CRM Transfer:** Once the leads are in HubSpot, they are transferred to your CRM with the lead intelligence that HubSpot provides. The leads will be de-duplicated from those already in your CRM system by the lead's HubSpot ID and email address.
- 3. Sales Rep Assignment:** Leads will then be routed to the appropriate sales reps on your team based on your lead assignment rules in your CRM system.
- 4. Closed Won:** After your sales team converts the lead to an opportunity and then closes that opportunity, the lead record in HubSpot is marked "Closed Won." This will be represented in HubSpot's analytics as a customer.
- 5. Closed-Loop Analytics:** The marketing team will then be able to analyze which sources, campaigns, keywords, etc. are the best at driving customers, in addition to traffic and leads.



## CRM Integration Features

Specific details about each lead will be transferred from the HubSpot system to the lead and contact records on your CRM system, including:

- **All Standard Fields:** first name, last name, email, phone numbers, company name, etc.
- **Found Website Via:** the source by which the lead initially found the website, such as “organic search” or “twitter”
- **First Visit Date**
- **First Conversion Event & Date**
- **Last Conversion Event & Date**
- **Lead Grade:** a proprietary score that HubSpot assigns to each lead
- **Link to Lead’s Twitter Account:** if available from HubSpot form submission
- **Link to Lead Data on HubSpot:** a link to the lead data that individuals within your organization can access without logging in to HubSpot
- **Customer form data:** any other custom form data submitted
- **Number of Conversion Events:** number of times the lead has converted

Your closed loop analytics are automated; that is, closed opportunities from your CRM system are reported back into your HubSpot lead intelligence application and are then represented as customers in your HubSpot Sources analytics.

## Instructions



[If you are using Salesforce as your CRM, you can read the integration instructions here.](#) (Need help? Call HubSpot Support at 1-888-HUBSPOT ext. 3)

We also offer apps in the app marketplace for several other popular CRMs. Click on your CRM to learn more or to download the app now:

- [Sugar CRM](#)
- [Highrise CRM](#)
- [Netsuite CRM](#)
- [Microsoft Dynamics CRM](#)
- [Infusionsoft CRM](#)
- [Nimble Social CRM](#)

If you have another CRM not listed above, or a homegrown CRM, and are unsure how to move forward, just contact your consultant to discuss your integration plan, or [hire a HubSpot Certified Partner](#) to do the integration for you.



## How to Work with Your Own Developer to Implement CRM Integration

If you have adequate developer resources to implement your CRM integration yourself, you can discuss the details with your consultant before beginning work. You can also visit [developers.hubspot.com](https://developers.hubspot.com) to get [Leads API information](#).

## How to Work with a HubSpot Partner to Implement CRM Integration

Working with a HubSpot partner to implement HubSpot CRM integration is fairly simple and straightforward. Once the details of the integration are agreed upon and work has begun, your integration should be completed in as little as one to two weeks, depending on the complexity of your integration. Once completed, you'll receive one additional 30-minute consulting and training session, specifically focused on using your new CRM integration. In this session you will learn how the integrated system will work, what the HubSpot lead intelligence fields represent, and will ensure that your lead assignment rules are working correctly.

[Click here to hire a HubSpot Service Marketplace Provider to do the integration for you >](#)

[Click here to download a CRM integration app from our App Marketplace >](#)



## 6. Import Your Contacts & Leads

**Skill level:** Easy (15-30 minutes)

**Required of:** Basic, Professional, Enterprise

**Who should complete:** Marketer

### What You Will Need

- A .CSV file containing a your contacts' information

### Overview

If you already have a database of leads acquired before purchasing HubSpot, it's important to get these leads into HubSpot as soon as possible. Doing so will allow you to:

- **Re-engage your leads** - segment your leads so you can send them targeted communications via email and lead nurturing campaigns, automating the process of turning leads into customers
- **Get lead intelligence** - receive lead revisit alerts, see when your imported leads view your site, and get social media information so you can make more effective sales calls
- **Clean up your list** - HubSpot will automatically de-dupe your list, and then you can use lead nurturing campaigns to determine which of your leads are most qualified to become customers

Importing your database of leads will equip your sales team with unique lead intelligence, and help you automate the process of driving leads further along the sales cycle. This will result in a faster ROI from HubSpot than if you delay importing your leads.

### Instructions



[Read instructions on how to import your contacts and leads database into HubSpot's Contacts app >](#)

*Note: After you import your contacts database, be sure to upload your Do Not Email, or Opt Out list. This is a list of people who have unsubscribed from your email communications. [Learn how to do this here.](#)*



# 7. Connect Your Social Media Accounts

**Skill level:** Easy (10 minutes)  
**Required of:** Basic, Professional, Enterprise  
**Who should complete:** Marketer

## What You Will Need

- To be logged in to Facebook, and be an admin of your Facebook Page
- To be logged in to Twitter as your business account
- To be logged in to LinkedIn
- Your YouTube URL
- Your Google+ ID (just the #, not the https://plus.google.com/ URL)
- Your Pinterest page URL

## Overview

If you have accounts on social media sites already (such as Twitter or Facebook), you should integrate them with HubSpot. Adding your social media accounts to HubSpot allows you to do a few things:

- Automatically share your blog posts on Facebook and Twitter
- Easily share stories and conversations you find through our Social Media tool on your profiles from within HubSpot, so there's no jumping back and forth
- Display a dynamic "Follow Me" module on each of your website pages
- View your "reach," or overall number of followers, over time in the **Analyze > Reach** report

## Important Note About Connecting to your Facebook Page

We must connect with your Facebook personal profile in order to detect which Facebook Page you're an administrator of. Once you connect with your personal profile, you will be able to connect with your Facebook Page. We will not publish anything to your personal profile unless you specifically opt in. [For more details, click here.](#)

## Important Note about Connecting to your LinkedIn Business Page

We must connect with your personal LinkedIn profile in order to detect which businesses you've listed on your profile as your current and previous positions. LinkedIn's API does not allow you to publish updates from a 3rd party application directly to your business page, but you can still link to your business page in the Follow Me module.

## Instructions



[Read instructions on how to set up your social media tool and link to your social media accounts >](#)



## 8. Set up your HubSpot Blog (or Link External Blog)

**Skill level:** Easy (15-30 minutes)  
**Required of:** Basic, Professional, Enterprise  
**Who should complete:** Marketer

### What You Will Need

- Administrator access to your existing blog (if applicable)

### Overview

Each blog entry you add to your site is an opportunity to get a new page indexed in Google, rank for a new keyword, and start generating qualified traffic to your site.

When choosing where to blog, you will have two options:

1. Use the HubSpot Blog application
2. Link your External Blog to HubSpot

### Blogging Options Quick Reference

Possible Scenario	Use HubSpot Blog App	Use External Blog Platform
You want to get SEO suggestions while creating each post	X	
You want to quickly create a blog post from a target keyword you find using HubSpot's Keywords tool	X	
You want to be able to easily schedule Facebook, Twitter, and LinkedIn updates about each blog post within HubSpot	X	
You want to turn each blog post into a conversion opportunity by quickly adding a Call to Action using HubSpot's CTA tool	X	X*
You don't want to have to worry about hosting your own blog or managing tons of complicated plugins	X	
You want to make use of advanced plugins that use PHP, JavaScript, jquery, etc.		X

\*Calls to Action from HubSpot's CTA tool can be used in an external blog by exporting HTML code



## Option #1 - Use the HubSpot Blog Application

If you would like to create a blog using the HubSpot blog application, you should configure your blog settings before you start blogging. This will entail:

- Naming your blog
- Importing posts from your old blog
- Edit your publishing options



[Read instructions on how set up your blog and configure your blog settings >](#)

## Option #2 - Link your External Blog to HubSpot

If you already have an existing and established blog, you may want to keep that blog hosted on your external blogging platform. In this case, you will need to link this blog up to your HubSpot analytics. This will entail:

- Setting up a Feedburner account
- Linking that Feedburner account to your HubSpot Blog Analytics
- Installing the HubSpot Wordpress plugin (if Wordpress is your blogging platform)
- Installing the HubSpot JavaScript tracking code (if Wordpress is not your blogging platform)



[Read instructions on how to link your external blog to HubSpot >](#)

## 9. Exclude Your Own Traffic From Analytics

**Skill level:** Easy (5 minutes)

**Required of:** Basic, Professional, Enterprise

**Who should complete:** Marketer (with help of IT Admin if necessary)

### What You Will Need

- Your IP Address. There are a few options for you to find out what your IP address is:
  - Go to <http://whatismyip.com>. Your IP address will display at the top of the screen.
  - Ask your IT department; they'll know
  - Call your internet provider and ask them what your IP range is

### Overview

To make sure that your HubSpot Analytics reports are accurate, you should exclude your own web traffic, so that you don't skew your data by visiting your own site. We exclude traffic based on IP addresses, the string of numbers that identifies your computer.

Your IP address may be a:

- **Static IP address** - one IP address that always stays the same
- **Dynamic IP address** - a range of IP addresses that change each time you access the internet

### Instructions



[Read instructions on how to exclude your own IP address from HubSpot's analytics tools >](#)

Congratulations! If you've completed everything in this guide, you're ready to set up your first inbound marketing campaigns in HubSpot, and it's time to begin your consulting sessions.

