

HubSpot CRM Setup Checklist

The complete step-by-step configuration guide for RevOps and sales teams going live on HubSpot — from account setup through pipeline activation.

Your HubSpot Go-Live Roadmap

Work through each phase in order. Most teams complete a full HubSpot setup in 2–4 weeks. Each checkbox represents a discrete, testable action — don't move to the next phase until the current one is fully checked off.



Time Estimates

Each phase includes an estimated time budget. Track actuals to benchmark your next implementation.



Owner Column

Write the responsible person's initials next to each section header to assign ownership before kickoff.



Blockers

Mark any item with  if it's blocked. Surface blockers in your weekly standup — don't let them silently delay go-live.



Phase Sign-Off

Get stakeholder sign-off at the end of each phase before proceeding. Prevents costly rework later.

Before You Begin

Confirm your HubSpot plan (Starter / Professional / Enterprise) — some features in this checklist require Professional or above. Items marked [PRO] require HubSpot Professional. Items marked [ENT] require Enterprise.

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PHASE 1 — EST. 2-4 HRS

Account & Portal Setup

- ☐ **Create your HubSpot account** and select the correct subscription tier for your team size and feature needs
- ☐ **Set your portal time zone** — Settings → Account Defaults → Time Zone
- ☐ **Add your company name, logo, and brand colors** — Settings → Account Defaults → Branding
- ☐ **Configure currency** — Settings → Account Defaults → Currency (set to USD as primary)
- ☐ **Set fiscal year start month** — aligns reporting to your financial calendar
- ☐ **Invite all users** — Settings → Users & Teams → Invite User
- ☐ **Create user roles** (Sales Rep, Sales Manager, RevOps Admin, Marketing) and assign permissions to each
- ☐ **Create teams** matching your org structure (e.g., East Sales, West Sales, Enterprise)
- ☐ **Connect your company domain** for email sending — Settings → Marketing → Email → Sending Domains
- ☐ **Verify SPF and DKIM records** in DNS to ensure deliverability
- ☐ **Set up two-factor authentication** for all admin users

✓ **Phase 1 Sign-Off:** All users added, roles assigned, domain verified, branding complete.

Sign-off by: _____ Date: _____

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PHASE 2 — EST. 3-6 HRS

CRM Data Structure

- ☐ **Audit your existing contact fields** — list every data point your team needs to capture
- ☐ **Create custom contact properties** — Settings → Properties → Create Property

- ☐ **Create custom company properties** (industry segment, tier, annual revenue, tech stack)
- ☐ **Create custom deal properties** (deal source, close quarter, contract length, products purchased)
- ☐ **Define lifecycle stages** that match your funnel (Subscriber → Lead → MQL → SQL → Opportunity → Customer)
- ☐ **Define lead statuses** within the lead lifecycle stage (New, Attempting, Connected, Open Deal, Unqualified)
- ☐ **Set required fields** for Contacts, Companies, and Deals so reps can't save incomplete records
- ☐ **Configure contact deduplication settings** — Settings → Data Management → Duplicates
- ☐ **Set up association labels** between Contacts and Companies (e.g., "Decision Maker," "Champion," "Blocker") [PRO]

✓ **Phase 2 Sign-Off:** All custom properties created, lifecycle stages defined, deduplication on.

Sign-off by: _____ Date: _____

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PHASE 3 — EST. 2-4 HRS

Pipeline & Deal Stages

- ☐ **Create your sales pipeline(s)** — Settings → Sales → Deals → Pipelines
- ☐ **Define deal stages** with probability % for each (e.g., Qualified 20%, Demo Scheduled 40%, Proposal Sent 60%, Negotiation 80%, Closed Won 100%)
- ☐ **Set required deal properties per stage** — prevents reps from advancing deals without key data
- ☐ **Configure deal stage automation** — auto-create tasks when a deal moves to a new stage [PRO]

- ☐ **Set up deal rotation rules** if using round-robin assignment [PRO]
- ☐ **Create a separate pipeline** for renewals or upsells if applicable
- ☐ **Test pipeline by creating 2–3 dummy deals** and moving them through all stages

✓ **Phase 3 Sign-Off:** Pipeline stages defined, probabilities set, stage automation active, tested.

Sign-off by: _____ Date: _____

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PHASE 4 — EST. 3–5 HRS

Email & Sequences

- ☐ **Connect individual rep email accounts** — Settings → General → Email → Connect Personal Email
- ☐ **Create email templates** for prospecting, follow-up, demo confirmation, and proposal delivery
- ☐ **Build outbound sequences** — at minimum: initial outreach, 2 follow-ups, breakup email [PRO]
- ☐ **Set sequence sending windows** (business hours only, exclude weekends)
- ☐ **Enable email open and click tracking**
- ☐ **Configure meeting scheduling links** for each rep — Settings → Sales → Meetings
- ☐ **Sync rep calendars** (Google or Outlook) with HubSpot meetings

✓ **Phase 4 Sign-Off:** All email accounts connected, templates live, sequences built and tested.

Sign-off by: _____ Date: _____

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PHASE 5 — EST. 2–4 HRS

Data Import

- ☐ **Export existing contacts** from your previous CRM or spreadsheet
- ☐ **Clean the import file** — remove duplicates, standardize fields, verify email formats
- ☐ **Map columns** to HubSpot properties before import
- ☐ **Import contacts** via Contacts → Import → File from Computer
- ☐ **Import companies** and associate with contacts post-import
- ☐ **Import open deals** into the correct pipeline stages
- ☐ **Run deduplication pass** post-import — Data Management → Duplicates
- ☐ **Spot-check 20 records** to verify data integrity

✓ **Phase 5 Sign-Off:** All contacts, companies, and deals imported, de-duped, and spot-checked.

Sign-off by: _____ Date: _____

6 PHASE 6 — EST. 3-5 HRS **Integrations**

- ☐ **Install HubSpot Chrome extension** on all rep browsers for Gmail/Outlook tracking
- ☐ **Connect Slack** for deal stage notifications and task reminders
- ☐ **Connect Zoom or Google Meet** for automatic meeting logging
- ☐ **Connect LinkedIn Sales Navigator** if licensed [PRO]
- ☐ **Configure Stripe or billing integration** if applicable
- ☐ **Set up Zapier or native integrations** for any other tools in your stack
- ☐ **Test each integration** by creating a test record and confirming sync in both systems

7 PHASE 7 — EST. 2-3 HRS **Reporting & Dashboards**

- ☐ **Create a Sales Manager dashboard** — pipeline coverage, stage distribution, activity metrics
- ☐ **Create a Rep dashboard** — my deals, my tasks, sequence performance, meetings booked
- ☐ **Set up deal velocity report** — average days to close by stage
- ☐ **Build win/loss report** by rep, product, and deal source
- ☐ **Configure forecast summary report** [PRO]
- ☐ **Schedule weekly report emails** to sales leadership

8 PHASE 8 — EST. 2 HRS **Training & Go-Live**

- ☐ **Run rep training session** — pipeline navigation, logging activities, using sequences
- ☐ **Share HubSpot Academy links** for self-guided learning (free with all plans)
- ☐ **Create a CRM usage guide** specific to your team's agreed workflows
- ☐ **Set go-live date** and communicate to all stakeholders
- ☐ **Schedule 30-day post-launch check-in** to review adoption and data quality
- ☐ **Establish CRM hygiene rules** (weekly task cleanup, deal stage review cadence)



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