

HubSpot Portal Setup Checklist

26 setup steps for a clear data model, controlled access and tested operations.

01 Portal foundations

Suggested owner: Portal owner

Project / owner

Due

☐ 01 Confirm account ownership

Record the portal ID, commercial owner, technical owner and backup administrator. Make sure access uses company-controlled accounts.

Evidence / initials

☐ 02 Check subscriptions and planned features

Record the contracted hubs, editions, seats and usage limits. Mark any planned feature that needs an upgrade or a different implementation.

Evidence / initials

☐ 03 Set business defaults

Confirm account time zone, language, fiscal settings and base currency. Document how reporting will handle additional currencies.

Evidence / initials

☐ 04 Configure security and permissions

Require appropriate authentication and least-privilege access. Test a seller, marketer and manager rather than relying on admin visibility.

Evidence / initials

☐ 05 Document naming and change ownership

Agree names for properties, segments, workflows and campaigns. Assign the person who approves structural changes and maintains documentation.

Evidence / initials

Open issue / exception

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02 CRM data model

Suggested owner: CRM admin

Project / owner

Due

☐ 06 Choose the objects you need

Map people to contacts, organisations to companies and opportunities to deals. Add other objects only for a clear process and reporting need.

Evidence / initials

☐ 07 Define record identifiers

Choose contact and company matching keys plus a source-system ID. Distinguish HubSpot Record ID from an external identifier.

Evidence / initials

☐ 08 Create a property dictionary

For each property, document its object, internal name, type, allowed values, purpose, source and owner. Reuse suitable defaults.

Evidence / initials

☐ 09 Design associations

Map the company hierarchy and deal stakeholders. Test contact-company matching and handle shared domains or subsidiaries explicitly.

Evidence / initials

☐ 10 Define lifecycle and working status

Agree lifecycle criteria separately from contact Lead status and Leads object stages. Decide which field owns each operational decision.

Evidence / initials

Open issue / exception

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03 Permissions and data quality

Suggested owner: CRM admin + data owners

Project / owner

Due

☐ 11 Assign ownership and territory rules

Specify assignment logic, queue coverage and a fallback owner. Test an unrecognised market and an inactive user.

Evidence / initials

☐ 12 Prepare the initial data import

Keep an untouched export, clean in a working copy and preserve associations. Run a pilot and reconcile counts before the full import.

Evidence / initials

☐ 13 Review duplicate handling

Test every creation route you use. Company domain deduplication in imports is not a guarantee that an API integration will prevent duplicates.

Evidence / initials

☐ 14 Set consent and retention rules

Record the purpose and source of contact data, email subscription status and retention owner. Keep suppression evidence when cleaning inactive records.

Evidence / initials

☐ 15 Configure record views

Show the properties, associations and activities each team needs. Remove redundant sections and test the layout with real users.

Evidence / initials

Open issue / exception

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04 Tracking and connected tools

Suggested owner: Marketing operations + technical owner

Project / owner

Due

☐ 16 Connect website domains and tracking

Verify tracking on external pages and the relevant cross-domain journey. Exclude staff traffic and test consent choices.

Evidence / initials

☐ 17 Authenticate marketing email

Use the sending-domain records provided by HubSpot. Test a send, reply, unsubscribe and subscription preferences.

Evidence / initials

☐ 18 Connect personal email and calendars

Check logging defaults, excluded domains and meeting availability. Confirm sensitive messages do not log unintentionally.

Evidence / initials

☐ 19 Configure integrations deliberately

Document system of record, field mapping, sync direction, conflict rules and deletion behaviour for each connection.

Evidence / initials

☐ 20 Create an integration exception queue

Name the person who reviews failed syncs, duplicates and missing associations. Store a reproducible test and a recovery procedure.

Evidence / initials

Open issue / exception

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05 Process and release

Suggested owner: Business process owners

Project / owner Due

☐ 21 Configure pipelines and stage criteria

Document buyer evidence, required fields and closed outcomes. Verify the automation and integrations that also move stages.

Evidence / initials

☐ 22 Build the first forms and segments

Use a small set of reusable forms and clearly named active or static segments. Test exclusions and existing-record updates.

Evidence / initials

☐ 23 Build workflows with removal rules

Document triggers, actions, branches and re-enrollment. Test with controlled records and confirm ownership of failures.

Evidence / initials

☐ 24 Create the baseline reports

Agree amount definitions, date fields and cohort rules. Reconcile a small record sample to each headline number.

Evidence / initials

☐ 25 Train users and rehearse the journey

Run a lead-to-customer example, lost opportunity and recycle case. Each team confirms its next action and evidence requirements.

Evidence / initials

☐ 26 Sign off and assign maintenance

Record launch approval, open issues, review dates and the change log. Plan recurring access, data quality and automation reviews.

Evidence / initials