

# HubSpot Sales Hub Onboarding Checklist

18 checks to complete before your reps start working in the portal.

## 01 Process and records

Suggested owner: Sales manager + CRM admin

Project / owner

Due

### ☐ 01 Define qualification and deal creation

Agree what evidence makes a lead sales-qualified and when a revenue opportunity deserves a deal. Avoid creating deals for every contact.

Evidence / initials

### ☐ 02 Design pipelines around the buying process

Use distinct pipelines only for materially different processes. Name stages, required buyer evidence and who can approve an exception.

Evidence / initials

### ☐ 03 Configure stage probabilities and closed stages

Set Closed Won to 100% and Closed Lost to 0%. Treat initial open-stage probabilities as assumptions until you can calibrate them.

Evidence / initials

### ☐ 04 Create the core deal properties

Include amount, currency, close date, next step, owner, source, qualification evidence and lost reason. Define ACV versus total contract value.

Evidence / initials

### ☐ 05 Review ownership and associations

Associate the right company and buying contacts. Reassign records from inactive users and document territory and fallback rules.

Evidence / initials

### ☐ 06 Set access and seat permissions

Test as a representative seller and manager. Check record visibility, export access and the seats needed for sequences or other paid tools.

Evidence / initials

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## 02 Rep tools and follow-up

Suggested owner: Sales operations + each rep

Project / owner

Due

### ☐ 07 Connect each rep mailbox and calendar

Verify email logging, exclusions and calendar availability. Send a test email and check which records receive the activity.

Evidence / initials

### ☐ 08 Configure meeting links

Set time zone, buffers, notice periods and video links. Complete a booking, reschedule and cancellation using an external test address.

Evidence / initials

### ☐ 09 Set lead work queues

If using the Leads object, configure its pipeline and ownership. Otherwise document the contact Lead status values used by the team.

Evidence / initials

### ☐ 10 Create approved templates and snippets

Use specific copy, genuine proof and useful questions. Replace sample placeholders and test missing personalization before enrolling contacts.

Evidence / initials

### ☐ 11 Build and test one sequence

Add emails and manual tasks, business-day delays and sending windows. Verify reply and booked-meeting removal in your account.

Evidence / initials

### ☐ 12 Create discovery and qualification guidance

Put questions, evidence fields and the next-step checklist on the deal or playbook. Confirm which playbook features your subscription supports.

Evidence / initials

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### 03 Controls and adoption

Suggested owner: Sales manager + enablement owner

Project / owner

Due

#### ☐ 13 Add stage requirements

Ask for the evidence needed at each stage. Test manual moves and connected tools separately because integrations can behave differently.

Evidence / initials

#### ☐ 14 Create follow-up and handoff automation

Create owner tasks for overdue next steps and won-deal delivery handoff. Include an exception queue and a named person to review failures.

Evidence / initials

#### ☐ 15 Publish the sales dashboard

Show stage value, aging, next steps, wins, losses and close-date slippage. Use the same amount definition across pipeline and targets.

Evidence / initials

#### ☐ 16 Test real sales scenarios

Run a new lead through qualification, a won deal, a lost deal and a recycled lead. Verify associations, permissions and reporting totals.

Evidence / initials

#### ☐ 17 Train reps using one real opportunity

Have each rep create or update a record, log activity, book a meeting and set a next step. Record the gaps they encounter.

Evidence / initials

#### ☐ 18 Approve the first operating week

Name a support owner, schedule the pipeline review and agree required record hygiene. Review adoption after seven days and adjust the process.

Evidence / initials