



HubSpot Basic Onboarding Guide

 Sales Hub

 Marketing Hub



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Welcome to Nidish LLC

At Nidish, we specialize in smart CRM and marketing automation solutions for growing businesses. As a certified HubSpot Solutions Partner, we help you get up and running quickly with best practices, minimal setup time, and ongoing support. Our mission is to make HubSpot simple, accessible, and tailored to your goals — without the overwhelm.

What This Onboarding Includes

This onboarding guide is designed for companies using HubSpot Sales Hub or Marketing Hub, especially those on Professional, or Enterprise plans. It covers all the essentials to help your team begin using HubSpot confidently.

- ✓ 100% Free Basic Onboarding
- ✓ Free Support & Training Hours for Professional and Enterprise plans

For Professional (Max upto 4 hours), and Enterprise plans (Max upto 8 hours)

We do not include advanced setup, custom workflows, integrations, or reporting in this onboarding.

HubSpot Sales Hub - Basic Onboarding

What's Included:

- User Setup & Permissions
- Connecting Email and Calendar
- Deal Pipeline (Default Stages)
- Activity Tracking Setup (Email, Calls, Tasks)
- Chat Widget Setup
- Intro to Lead Capture (Forms, Chat)
- Mobile App Setup
- Social Media Account Setup
- Training & Support

HubSpot Marketing Hub - Basic Onboarding

What's Included:

- Domain Setup
- Email Marketing Basics (Lists & Campaigns)
- Subscription Types & Email Settings
- 3 HubSpot Forms
- Campaigns Overview
- HubSpot Tracking Code Installation
- Introduction to List Segmentation
- 1 Native Integration
- Social Media Account Setup
- Chat Widget Setup
- Training & Support

Note: Custom workflows, smart content, paid ads, and integrations are not included in basic onboarding.

Our Onboarding Process



Why Choose Nidish?

- HubSpot Solutions Partner
- Real onboarding, not sales demos
- Specialized in Sales & Marketing alignment
- Trusted by B2B, SaaS, and service companies worldwide