# HubSpot

## Implementation Levels - Service Hub

| Level 1 (20 hours) | Estimated Hours |
|---|---:|
| **Initial Setup and Configuration** | |
| HubSpot Discovery Call | 1 |
| Users, Roles, Teams | 1 |
| Setup Account Defaults | 1 |
| Connect Knowledge Base subdomain | 1 |
| Install HubSpot Tracking Code | 0.5 |
| Integrations | 2 |
| **Record Customization** | |
| Create Custom Properties | 1 |
| Customize "Create a Ticket" Form | 0.5 |
| Setup Record Sidebars | 0.5 |
| **Conversation Setup** | |
| Connect team shared inbox | 0.5 |
| Live chat setup | 2 |
| **Ticket Pipeline Setup** | |
| Set up Ticket Stages | 1 |
| Form creation | 1 |
| SLA limits Setup | 1 |
| **Data** | |
| Import Contacts and Companies | 2 |
| Import Opt-Out Lists | 0.5 |
| **Reporting & Automation** | |
| Service Dashboard | 3 |
| Create Feedback Surveys | 1 |
| **Training** | |
| Live HubSpot Overview Training | 2 |
| **Total Hours** | **19** |

| Level 2 (35 hours) | Estimated Hours |
|---|---|
| **Initial Setup and Configuration** | |
| **HubSpot Discovery Call** | 1 |
| **Users, Roles, Teams** | 1 |
| **Setup Account Defaults** | 1 |
| **Install HubSpot Tracking Code** | 0.5 |
| **Integrations** | 3 |
| **ChatSpot Setup** | 1 |
| **Record Customization** | |
| **Create Custom Properties** | 1 |
| **Customize "Create a Ticket" Form** | 0.5 |
| **Setup Record Sidebars** | 0.5 |
| **Conversation Setup** | |
| **Connect team shared inbox** | 0.5 |
| **Live chat setup** | 2 |
| **Service Library Setup** | |
| **Create email templates** | 3 |
| **Create snippets** | 1 |
| **Ticket Pipeline Setup** | |
| **Set up Ticket Stages** | 1 |
| **Form creation** | 1 |
| **SLA limits Setup** | 1 |
| **Reporting & Automation** | |
| **Service Dashboard** | 3 |
| **Ticket creation workflow** | 1.5 |
| **Create Feedback Surveys** | 1 |
| **Workflows based on surveys** | 2 |
| **Knowledge Base Setup** | |
| **Connect Knowledge Base Subdomain** | 1 |
| **Create Knowledge Base Articles** | 4 |
| **Training** | |
| **Live HubSpot Overview Training** | 1 |
| **User Training (Profile setup, Inbox & Calendar connection, Install Chrome Extension)** | 1 |
| **HubSpot Process Documentation** | 2 |
| **Total Hours** | **34.5** |

| Level 3 (35+ hours) | Estimated Hours |
|---|---|
| **Initial Setup and Configuration** | |
| **HubSpot Discovery Call** | 1 |
| **Users, Roles, Teams** | 1 |
| **Setup Account Defaults** | 1 |
| **Install HubSpot Tracking Code** | 0.5 |
| **Integrations** | 4 |
| **ChatSpot Setup** | 1 |
| **Record Customization** | |
| **Create Custom Properties** | 1 |
| **Customize "Create a Ticket" Form** | 0.5 |
| **Setup Record Sidebars** | 0.5 |
| **Conversation Setup** | |
| **Connect team shared inbox** | 0.5 |
| **Live chat setup** | 2 |
| **Service Library Setup** | |
| **Create email templates** | 3 |
| **Create snippets** | 1 |
| **Ticket Pipeline Setup** | |
| **Set up Ticket Stages** | 1 |
| **Form creation** | 2 |
| **Customize Ticket Tags** | 2 |
| **SLA limits Setup** | 1 |
| **Reporting & Automation** | |
| **Service Dashboards** | 6 |
| **Ticket Notification Workflows** | 1 |
| **Ticket Movement Workflows** | 2 |
| **Ticket creation workflow** | 1.5 |
| **Create Feedback Surveys** | 1 |
| **Workflows based on surveys** | 2 |
| **Knowledge Base Setup** | |
| **Connect Knowledge Base subdomain** | 1 |
| **Create Knowledge Base Articles** | 4 |

| Level 3 (35+ hours) | Estimated Hours |
|---|---|
| **Training** | |
| **Live HubSpot Overview Training** | **1** |
| **User Training (Profile setup, Inbox & Calendar connection, Install Chrome Extension)** | **1** |
| **HubSpot Process Documentation & Videos** | **5** |
| **Total Hours** | **47.5** |