

# HUBSPOT CRM: ONGOING SUPPORT



# Trujay's Ongoing Support for Your Unique Business

So, you've just migrated your data into HubSpot,  
and you've got a general sense for how the CRM  
works. **Now what?**

Now, it's time to make HubSpot really work for **you**.

So what're we talking about, **exactly?**







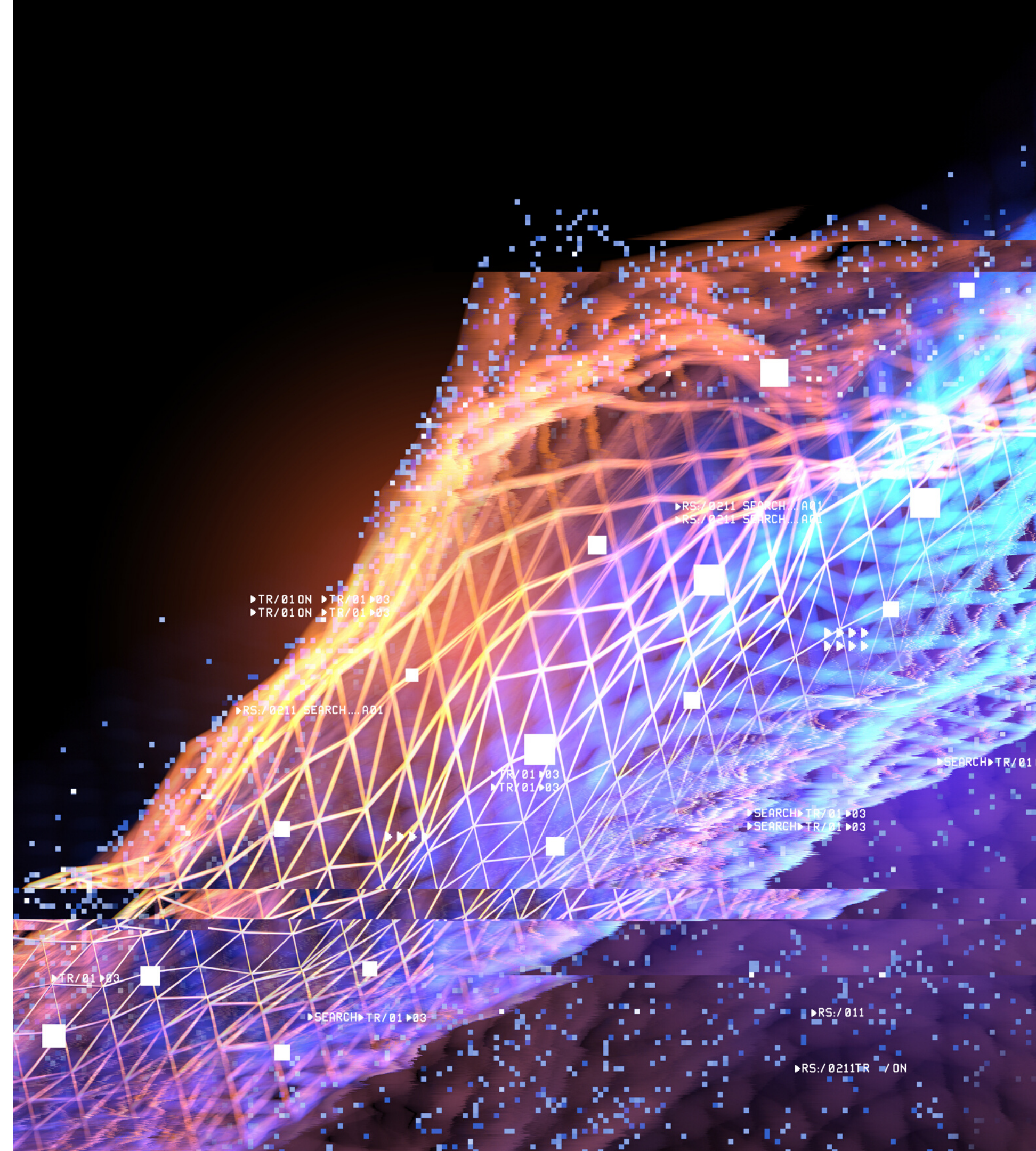
# Trujay's Ongoing Support



# General Onboarding

The process of onboarding a new customer to a solution can be rigid and overly broad. **Typically, it's taught to customers in a fixed-method**, as if every business were the exact same.

We've heard from many clients that general onboardings **lack in-depth descriptions of its custom usage**. Once clients start using a new system on their own, **they still have a lot of questions**.





## So let's get specific...

We position ourselves to be your personal HubSpot consultant. We know your data, we know your stages, we know your processes.

Our tailored-to-you approach gives you advanced and deeply customizable support, so **you can ask or discuss things that a regular onboarding service simply won't achieve.**

Plus, **we have the time to 'Ongoingly Support' you**, from building workflows you specifically need and may not have time to do yourself, or guidance on a feature you'd like to learn more about.



**Example-questions you  
will have that General  
Onboardings might not  
answer...**





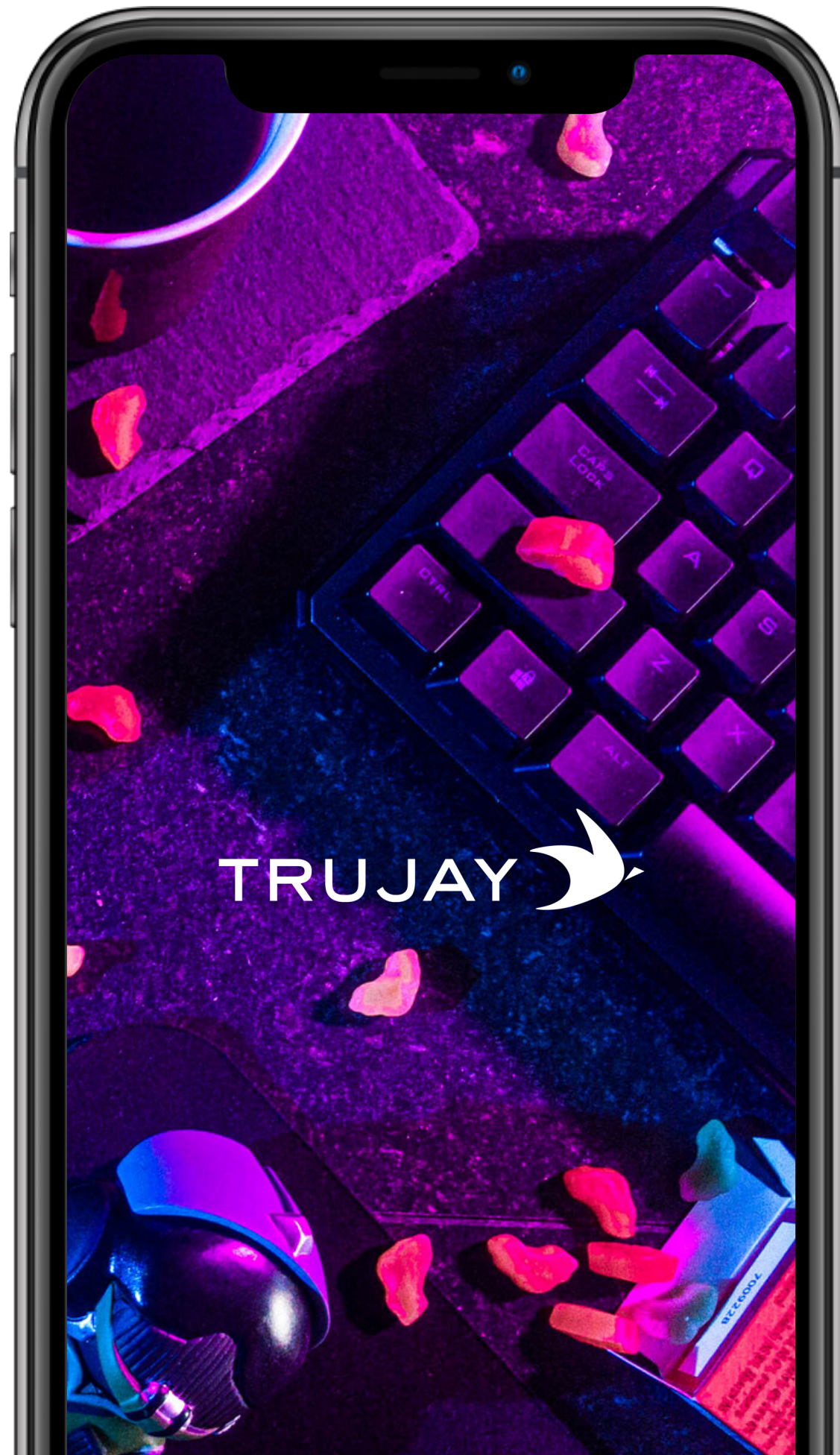
## "I need to create an advanced workflow, can you help me design it?"

A general onboarding can show you how to use workflows, but not how to design one for your particular industry or business process.

Anyone can show you workflows in HubSpot, but let's say you need to set up 15 of them so management can receive certain notifications. **In short, you need something super-specific to be built.**

Trujay can help you design specific workflows that aren't general but exactly the kind of flows you need for a particular process.





**"I want to send emails through HubSpot,  
but I want them to look like regular  
Gmail/Outlook emails. How can I do that?"**

This is **the epitome of a super-specific question that is aimed at helping your unique business.** HubSpot could answer this question, but it's something that is greatly geared towards you and your needs, and something we can help with swiftly.



**Didn't Get Enough  
Training with  
Onboarding?**

**We can help with that.**







25 Things That  
Will Make You  
Say, "Oh, yeah. I'll  
need help with  
that."





- **Salesforce-HubSpot Integration Setup & Support:** we have access to both systems and will set up mapping and troubleshooting for sync errors
- **Deal Pipeline Setup & Lifecycle Stage Automation:** every sales process is unique and has its own definitions of each funnel stage, different from that of HubSpot's
- **Campaign Automation:** more than just an umbrella of assets- we can re-create structures through automated emails and sequences that mirror previous campaigns
- **Data Cleaning:** we'll get rid of duplicates or records that are no longer of use to you by conducting maintenance on your database(s)
- **User Management:** login, permissions, on-off boarding
- **Connecting & Maintaining Social Media:** LinkedIn, Twitter, Facebook, and others
- **CRM Administration:** contact/company data clean up
- **Upload Resource Documents for Sales Pursuits:** assemble a "toolkit" for sales outreach
- **Design/Run Marketing Campaigns:** social media through HubSpot
- **Setup Individual Alerts:** as needed per client requests
- **Teach Advanced Hubspot Skills:** set up lists, personas, lead score, extensions, app integrations, and other advanced technologies to marketing & sales teams and other relevant users







# What Else?





- Design and help execute **sequences** for individual users
- **Customized Analytics** and Advanced Reporting/Dashboards
- **Event-specific** campaign strategies
- Sales Cycle **Optimization**
- Create HubSpot **operations manual** that's specific to you
- Advise on **teams/roles setup**
- Advise on **naming conventions/folder structure**
- Report and **dashboard setup**
- Best practices with **advanced workflows**
- **Best integration platforms** for other marketing needs
- **Landing** page templates
- **Website** page templates
- **Email** templates
- Marketing email **personalization hacks**
- Guide on how to best implement and **execute marketing campaigns**







## Missing anything?

If there is something you need that's missing from that list, **we'll still have the guidance to get you there.**

Won't believe it till you see it? We understand that.

**How could Trujay possibly know HubSpot just as well as HubSpotters know HubSpot?**



Because we are the HubSpot CRM data experts who have exceptional knowledge and expertise in using this system.

We don't just focus on where your data goes, we get you familiarized on every level so that HubSpot fits the needs of your unique business.

**CRMs should work for you, not the other way around.**

We show you the ins-and-outs of HubSpot, its secrets, its stories, its hacks - all based around your business model and its processes - something you can't get with a general onboarding.





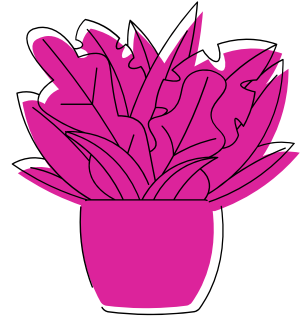


Contact your Trujay Account Manager if you haven't already, or let them touch base with you about our Ongoing Support service.

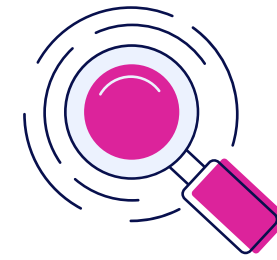
We can't wait to show you how to make the most out of your new CRM.



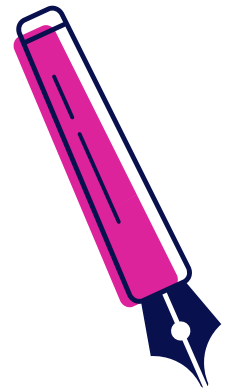
# Other Resources



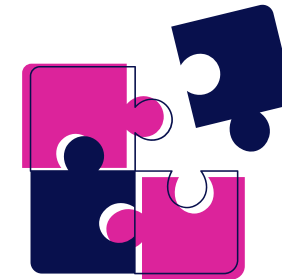
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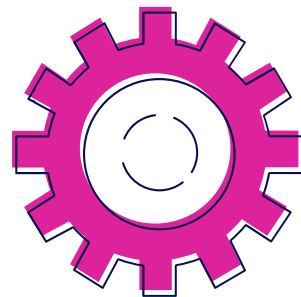
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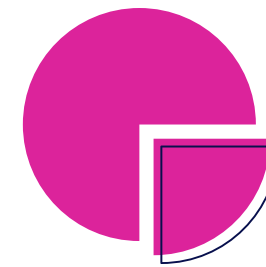
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