bigleap

+

Peargon

HubSpot Sales Hub Setup 5-day Series: Day 1

TABLE OF CONTENTS

3 ABOUT BIG LEAP

10 HOW TO ADD TEAM MEMBERS

16 HOW TO SET UP ACCOUNT DEFAULTS

19 HOW TO CUSTOMIZE BRANDING

23 HOW TO ADD SIGNATURES

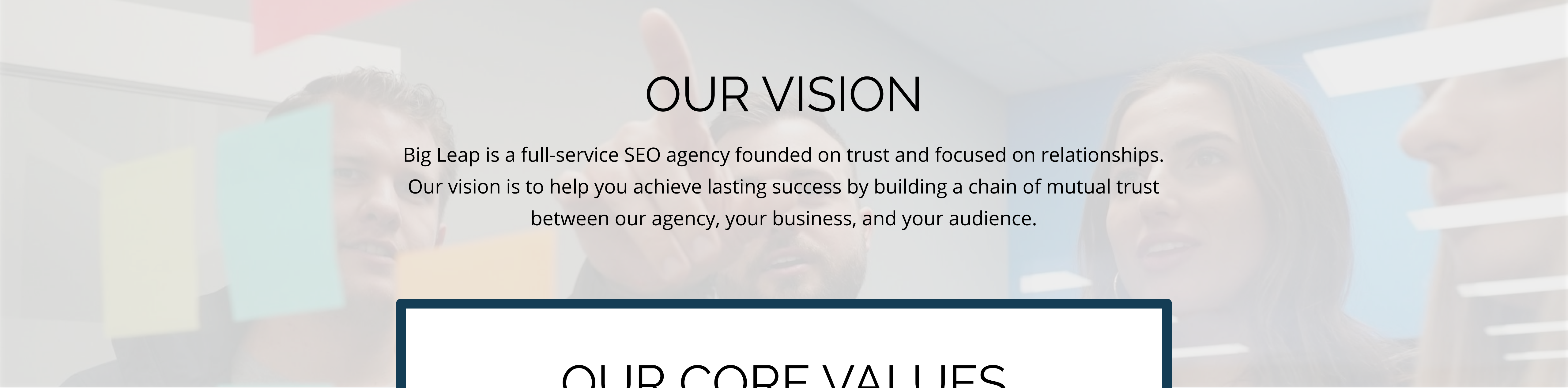
ABOUT BIG LEAP

OUR STORY

Our CEO and founder, Bryan Phelps, first developed an interest in SEO during college. In the years that followed, that interest became the passion that guided his career. As his experience grew, so did his awareness and discomfort for the lack of integrity and transparency that seemed to plague the industry. He witnessed empty promises, obscured data, and shortcut methods resulting in Google penalties and future complications.

It wasn’t long before Bryan decided to break away from the corrupted standard and do things differently. In 2008, he founded Big Leap with the sole intention of providing brands with a trustworthy source of organic, sustainable growth. What began as a small one-man startup flourished into the agency we are today -- built on trust, focused on relationships, and motivated by the long term success of every client we work with.

To this day, trust stands at the center of everything we do. As a result, we have been able to secure long-term relationships with our clients and achieve great success for not only their businesses, but ours as well.



OUR VISION

Big Leap is a full-service SEO agency founded on trust and focused on relationships. Our vision is to help you achieve lasting success by building a chain of mutual trust between our agency, your business, and your audience.

OUR CORE VALUES

1. COMPETENCE

In the world of digital marketing, competence is key. Big Leap provides ample opportunities for employees to master their craft, stay up to date with the frequent changes in our industry, and work closely with others to learn, share, and inspire confidence.

2. CHARACTER

As a digital marketing agency founded on trust and focused on relationships, we believe that character is just as important as expertise. At Big Leap, we check our egos at the door, we do what we say, and we always try to be candid but caring.

3. COMMUNITY

At Big Leap, we strive to cultivate a community wherein every employee feels comfortable in sharing new ideas and offering feedback. We believe in giving first, enjoying the journey, and investing in relationships.

OUR SERVICES

While we specialize in SEO, Big Leap takes a holistic approach to online success by offering additional digital marketing services to take your results to the next level.

Organic SEO

Content Marketing

Reputation Management

Social Media Marketing

CRO Marketing

Marketing Automation

MARKETING AUTOMATION

Engage and Nurture More Leads in Less Time.

ENABLE

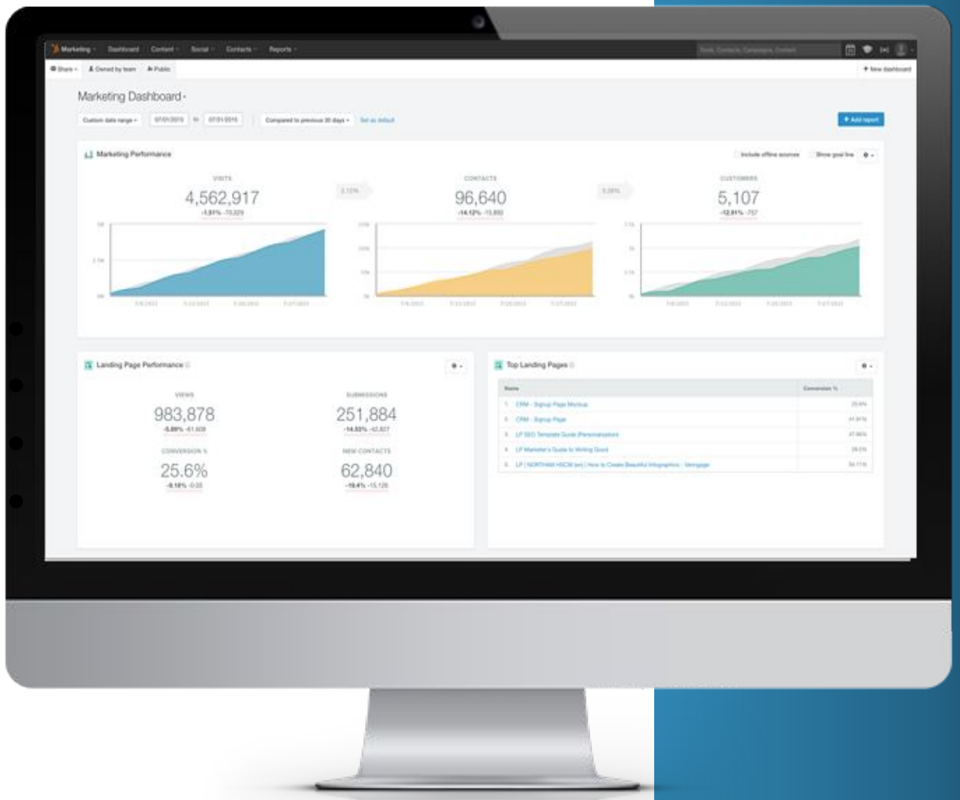
Database audits, custom dashboards, team training, strategy, and consultation.

AUTOMATE

Workflow automation, A/B testing, custom segmentation, and templates & sequences.

NURTURE

Email marketing, lead scoring, workflow optimization, and robust reporting.



[Learn more about our Marketing Automation Services >>]

OUR AWARDS

CLUTCH TOP 1000 COMPANIES GLOBAL 2018

TOP B2B COMPANIES Clutch

THE SAMY A SALES & MARKETER OF T

THE STEVIES

UVEF Utah Venture Entrepreneur Forum TOP 25 UNDER 5

UB

Utah Business BEST COMPANIES

Inc. 5000 2016 2017 2018 2019

UTAH ONE HUNDRED MW MountainWest Capital Network 2017 - 2018 - 2019

2018 Best Company for WOMEN

Gold HubSpot SOLUTIONS PARTNER PROGRAM

UV50 #GOALS 2016 2017 2018 2019

ANALYTICS AUTHORIZED CONSULTANT Google

CLIENTS WE'VE WORKED WITH

bambooHR™

AVIS®

NU SKIN® DISCOVER THE BEST YOU™

purple

VENAFI®

workfront™

alphagraphics®

NOMATIC

PLURALSIGHT

Visionworks®

CareerStep™ ONLINE TRAINING SOLUTIONS

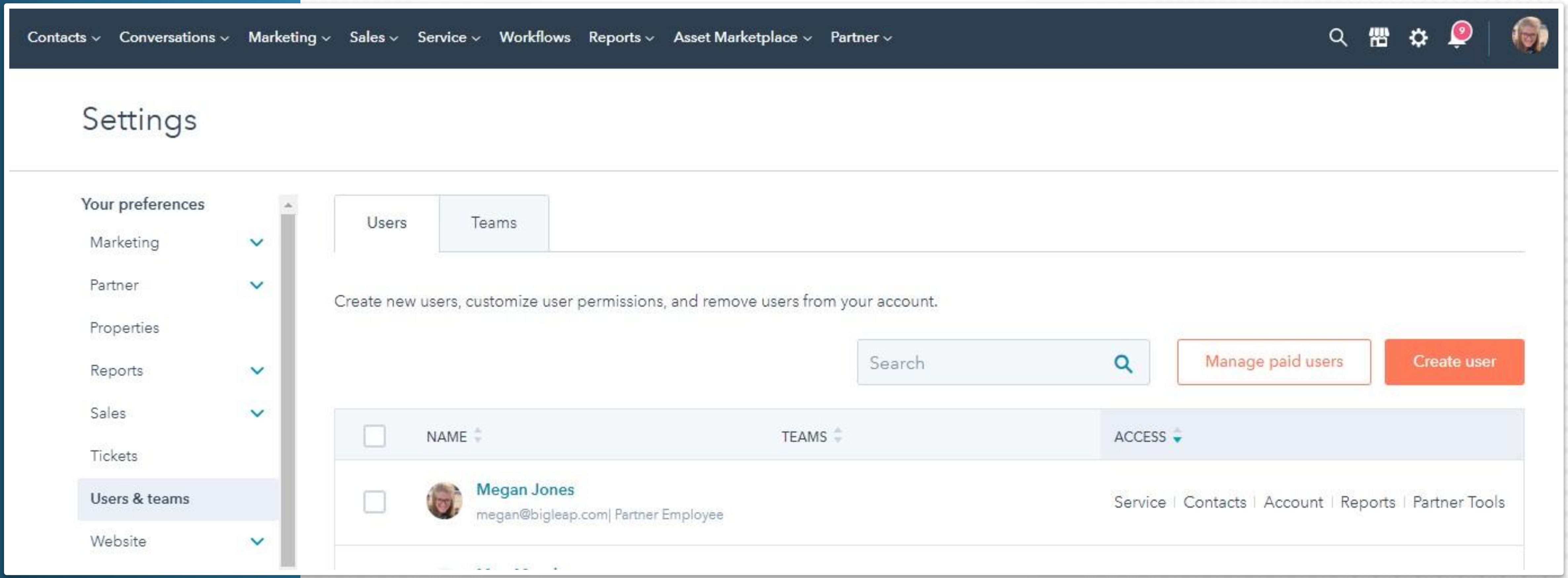
inmoment

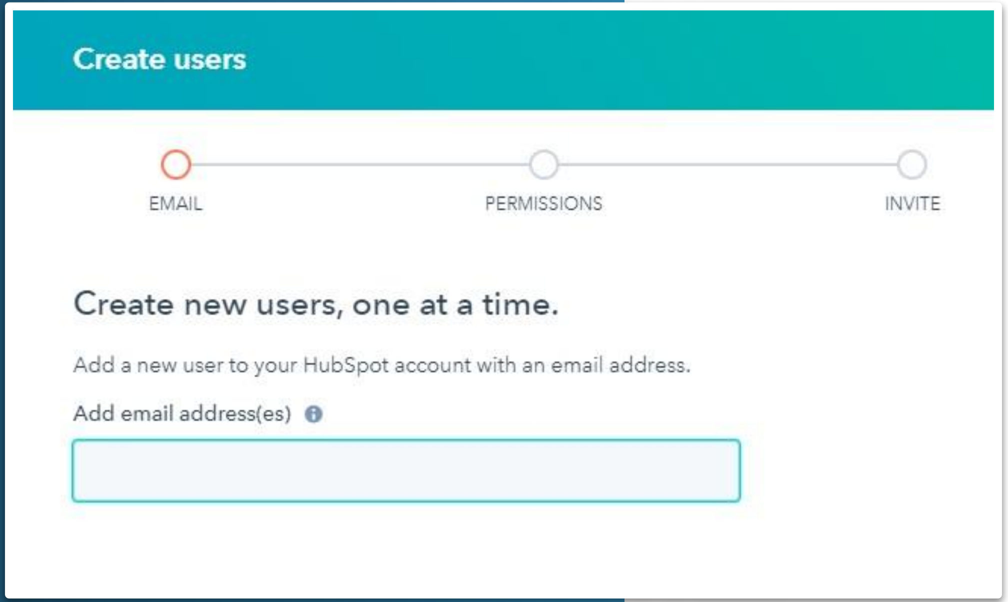
PODIUM

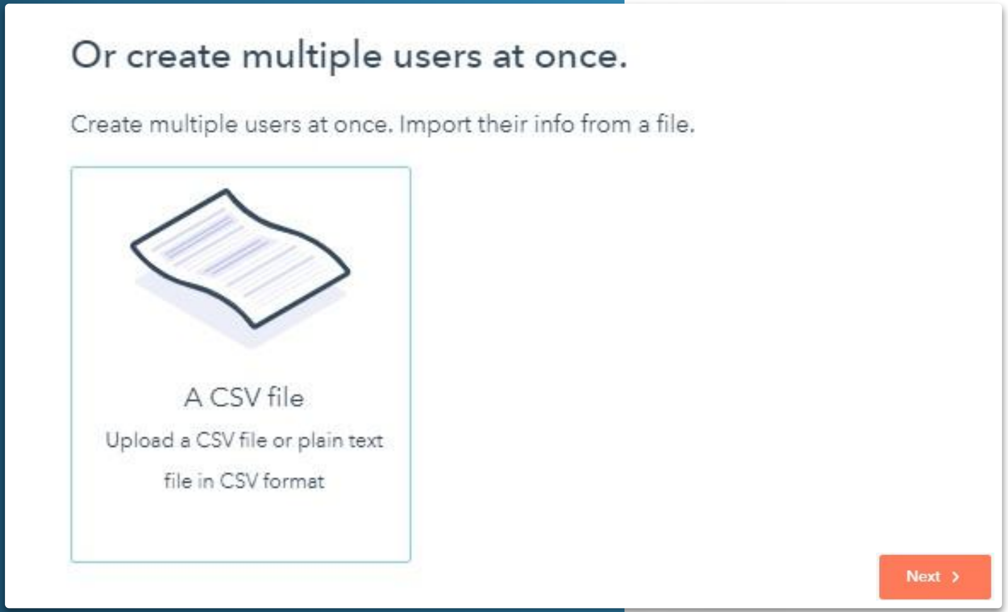
HOW TO
ADD TEAM MEMBERS

ADD YOUR TEAM MEMBERS

Settings Gear Icon >> Users & Teams >> Users tab >> Create User







ADD YOUR TEAM MEMBERS

OPTION 01

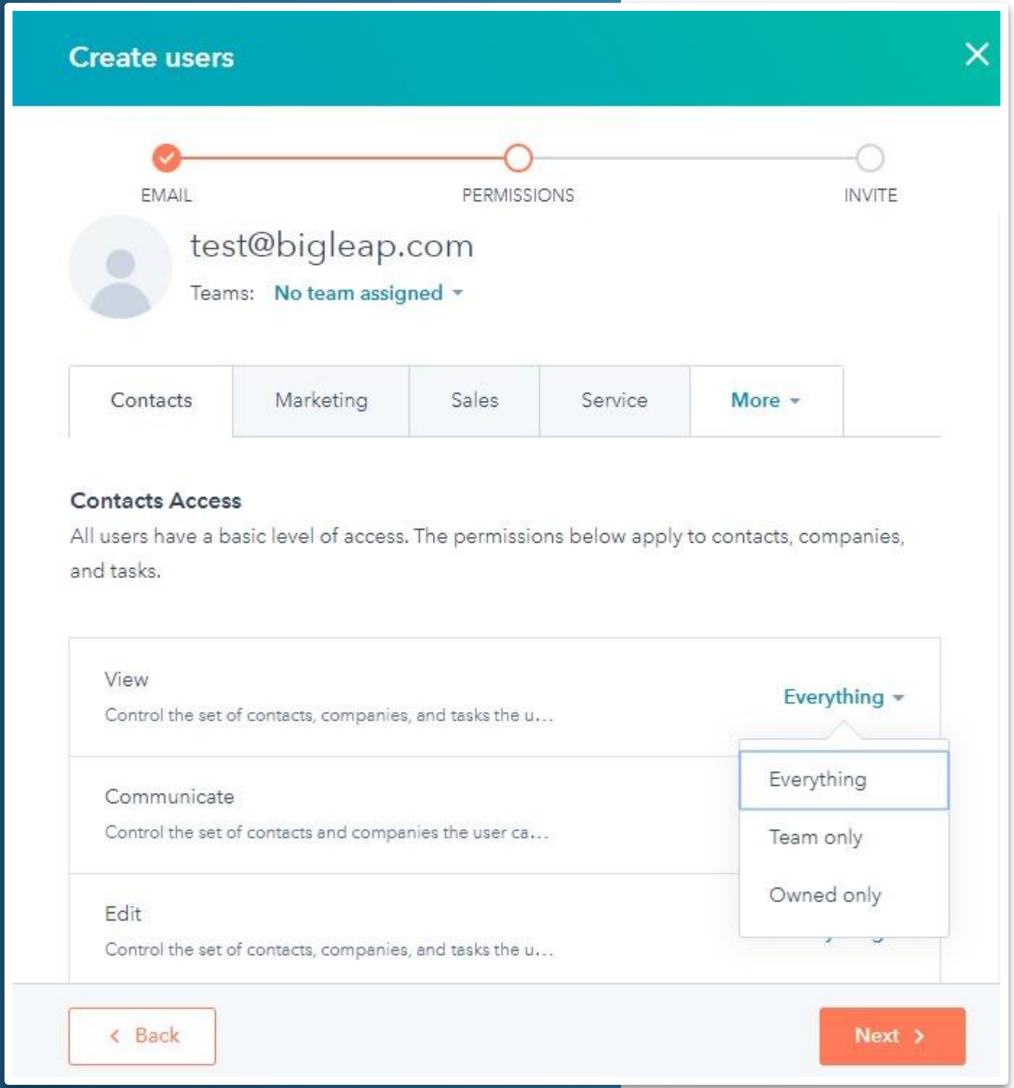
Enter the email address(es) into the text box. If you are adding multiple users at the same time, separate email addresses with a space.

OPTION 02

In Excel (or Google Sheets), add an **Email** column with the email addresses of your users. Save the file in a **CSV format**.

Click “A CSV file”, then drag and drop, or click choose file to browse files on your computer.

More Information About Adding/Removing Team Members



For **Sales Access**, toggle the switch under *Sales.* This grants access to templates, documents, calling, and email integrations.

ADD YOUR TEAM MEMBERS

Brief Overview of Permissions

01. EVERYTHING

With these permissions, the team member has access to all contacts, companies, and deals in the database.

02. TEAM ONLY

These permissions will allow the team member access the contacts, companies, and deals that are assigned their team.

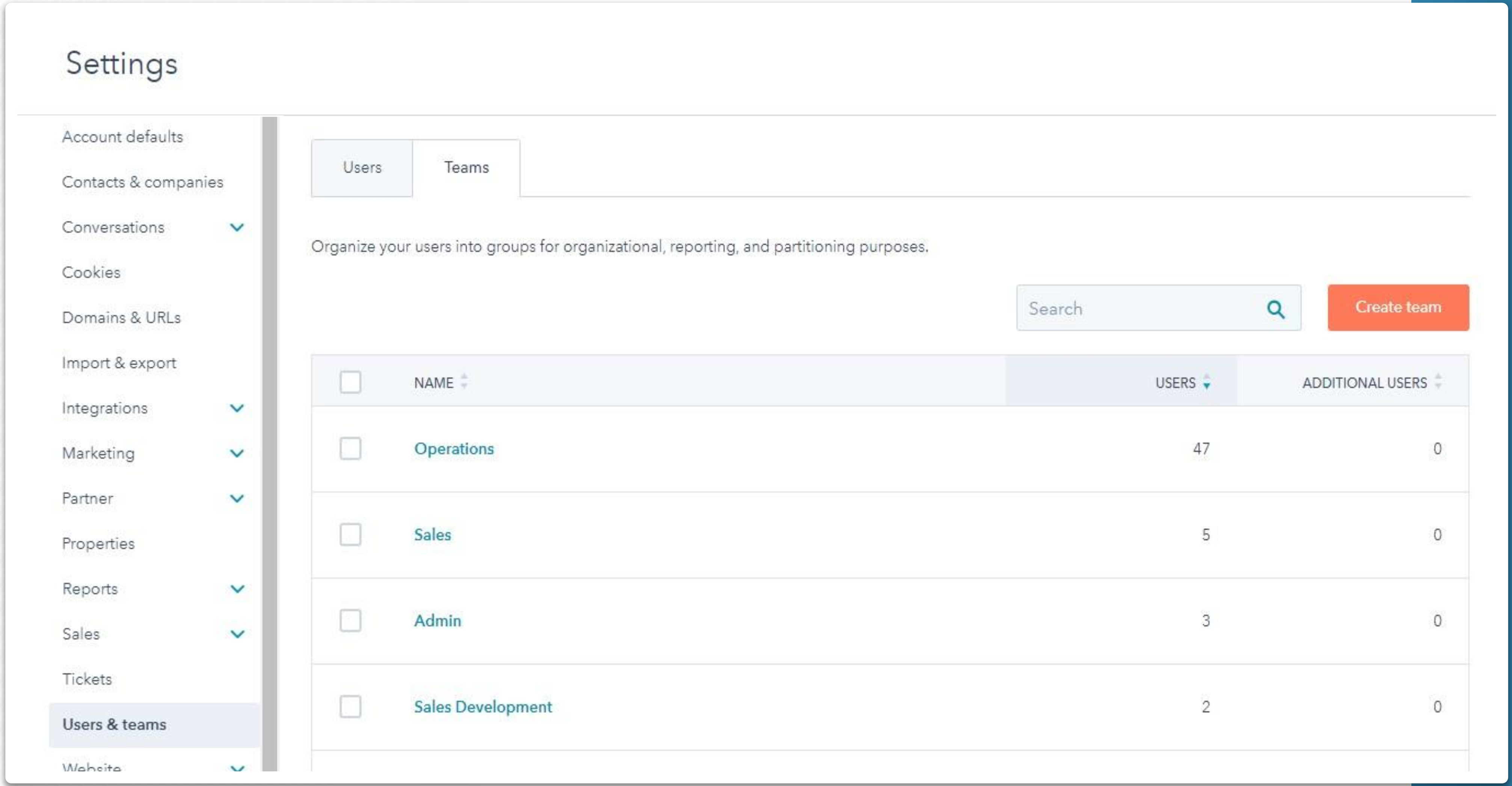
03. OWNED ONLY

Owned only permissions will only allow the team member access to their owned contacts, companies, and deals.

Hubspot User Permissions Guide

CREATE YOUR TEAMS

Settings Gear Icon >> Users & Teams >> Teams tab >> Create Team



CREATE YOUR TEAMS

Settings Gear Icon >> Users & Teams >> Teams tab >> Create Team

01. NAME YOUR TEAM

02. ADD PRIMARY TEAM MEMBERS

NOTE: Users can be set as primary team members for only one team. Primary team members will see any custom records views set up for the team.

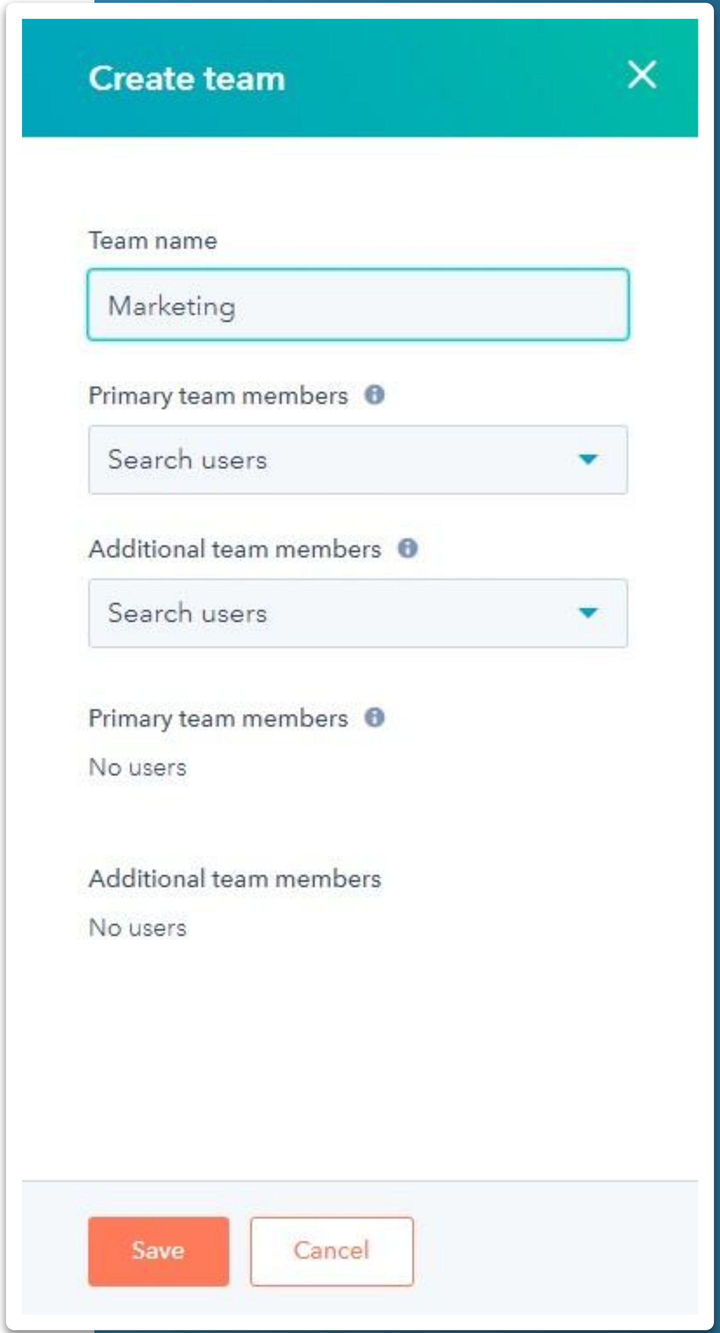
03. ADD ANY ADDITIONAL TEAM MEMBERS

NOTE: Only allows the user access to the team's records and content. These users will not be included in team reports, team notifications, or workflow rotation actions. They will also not be able to view any custom records views set up for the team.

04. SAVE

05. REPEAT UNTIL TEAMS ARE ADDED

NOTE: Number of teams that can be created is dependent on your Hubspot subscription. E.g. Sales Hub Professional is up to 10 teams.

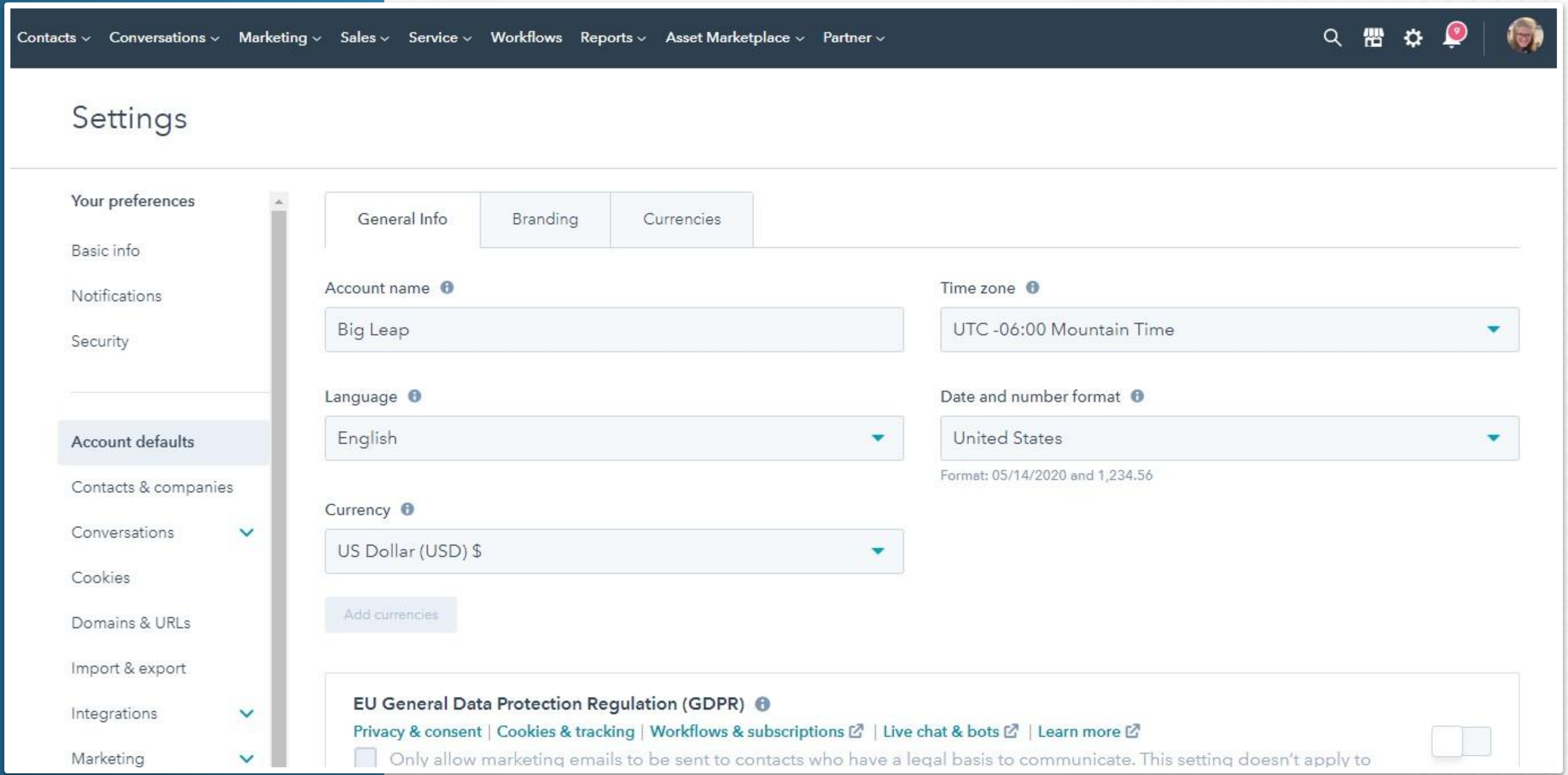


[More Information About Creating Teams]

HOW TO
SET UP ACCOUNT
DEFAULTS

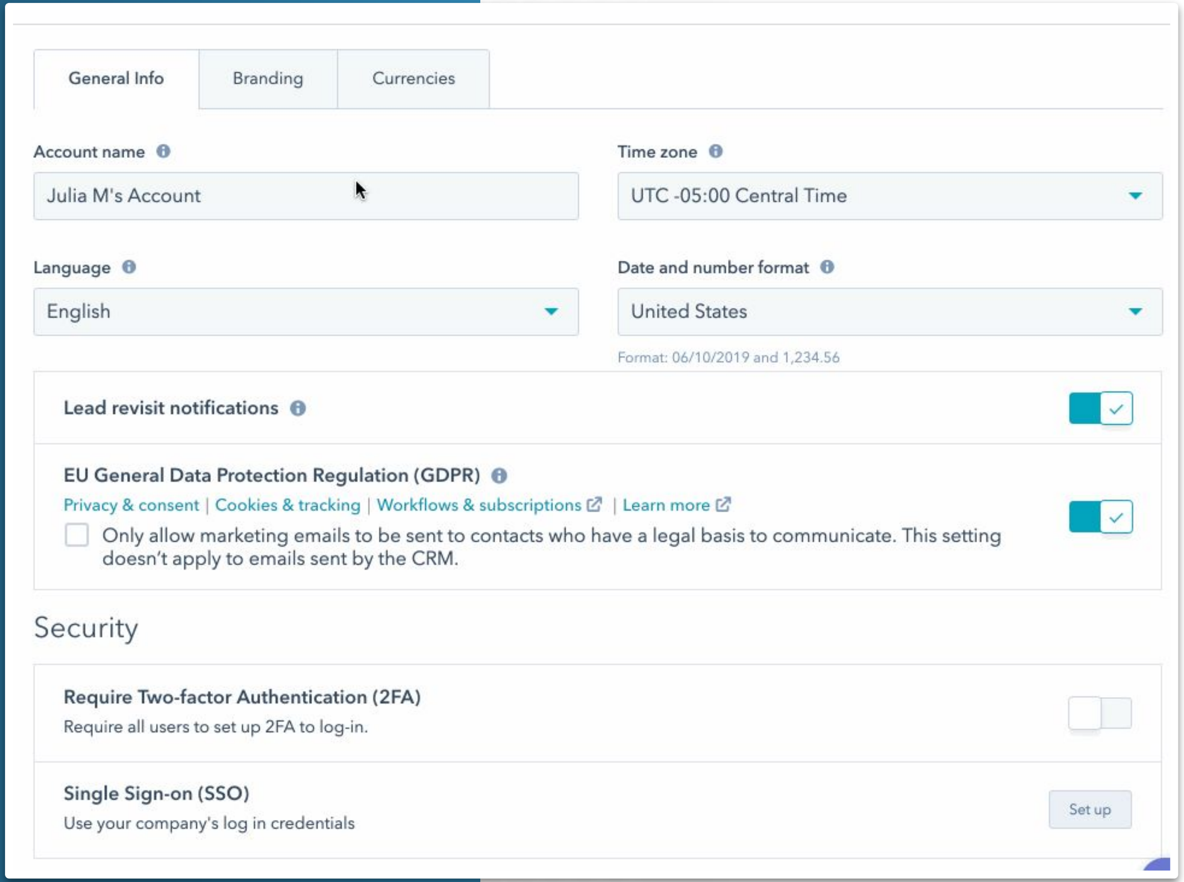
SET UP ACCOUNT DEFAULTS

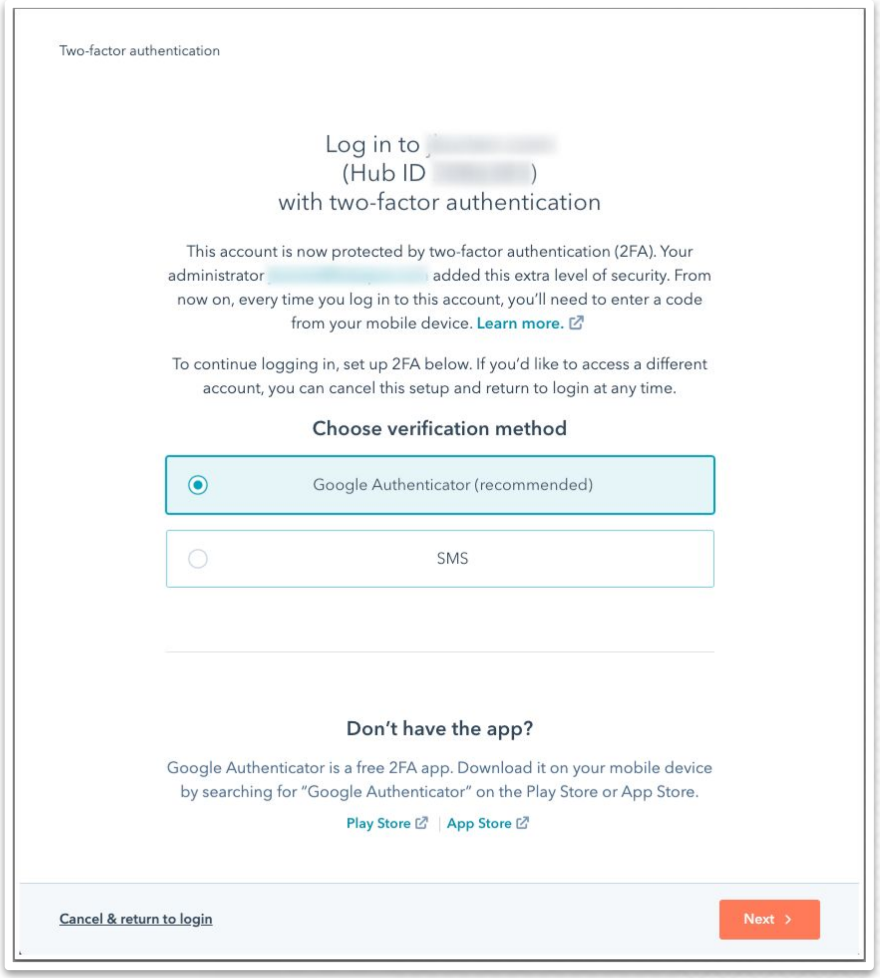
Settings Gear Icon >> Account Defaults >> General Info tab



SET UP ACCOUNT DEFAULTS

Two-Factor Authentication (2FA)



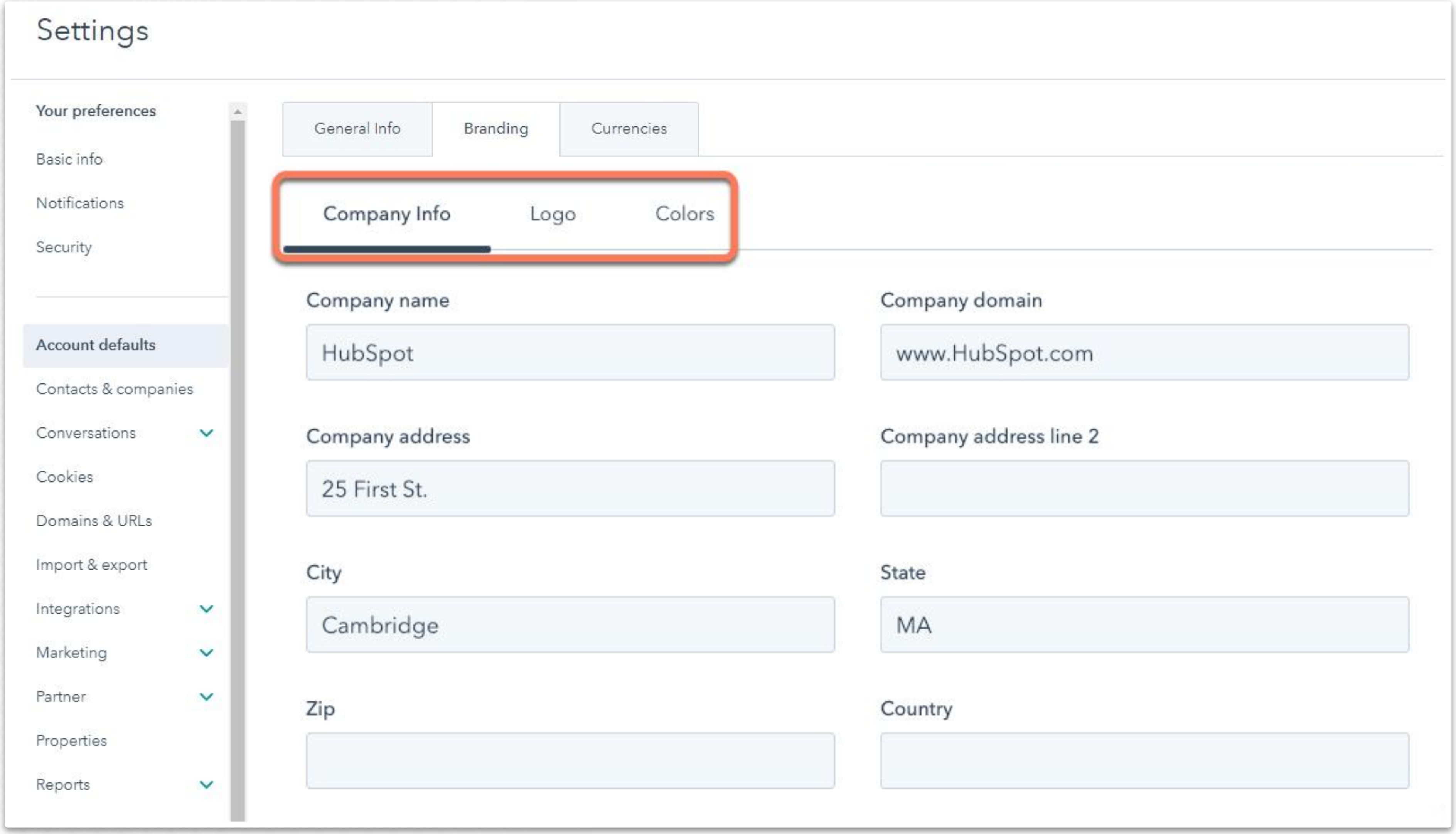


[More Information about 2FA]

HOW TO
CUSTOMIZE BRANDING

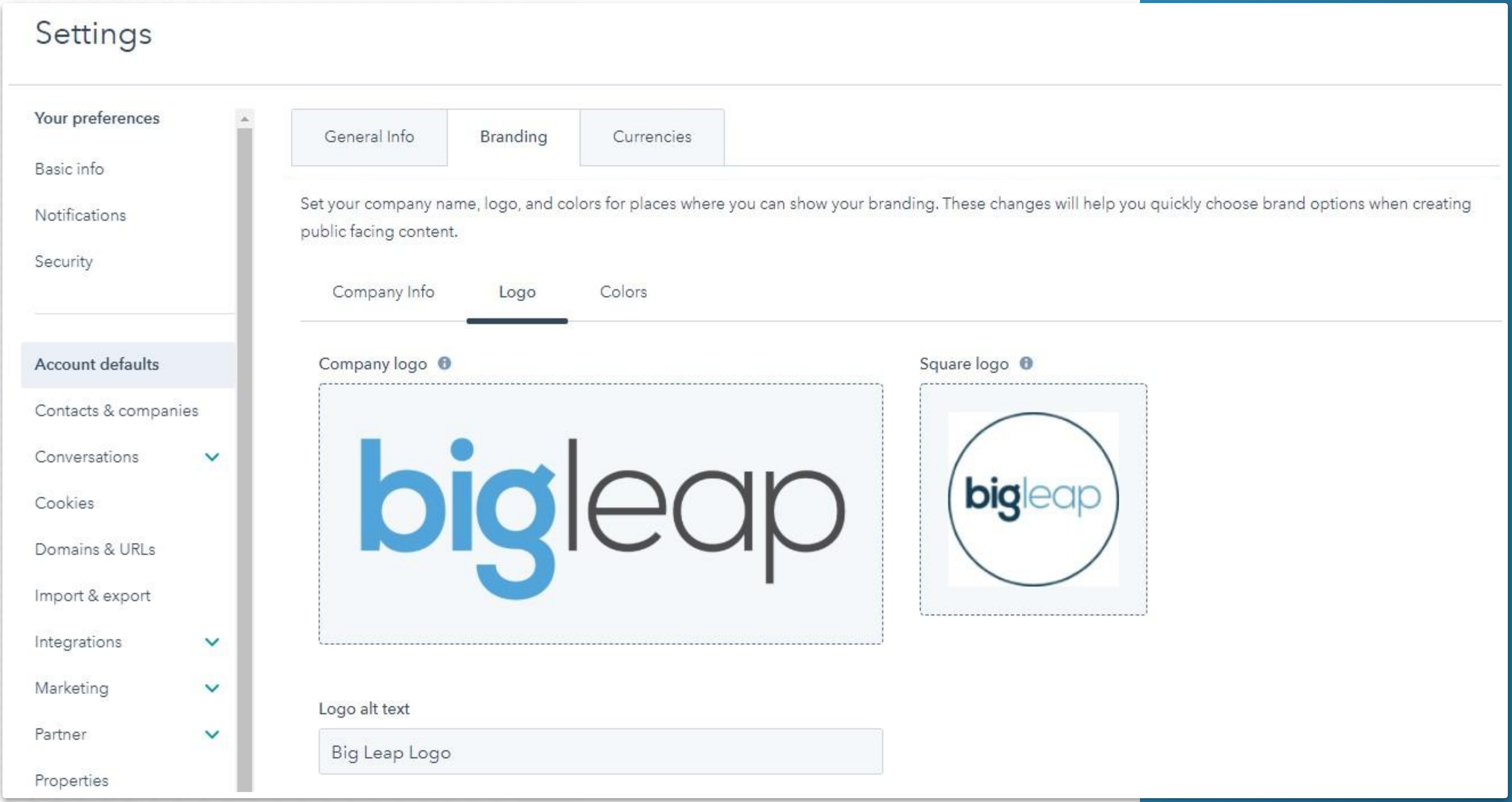
CUSTOMIZE BRANDING: COMPANY INFO

Settings Gear Icon >> Account Defaults >> Branding tab >> Company Info sub-tab



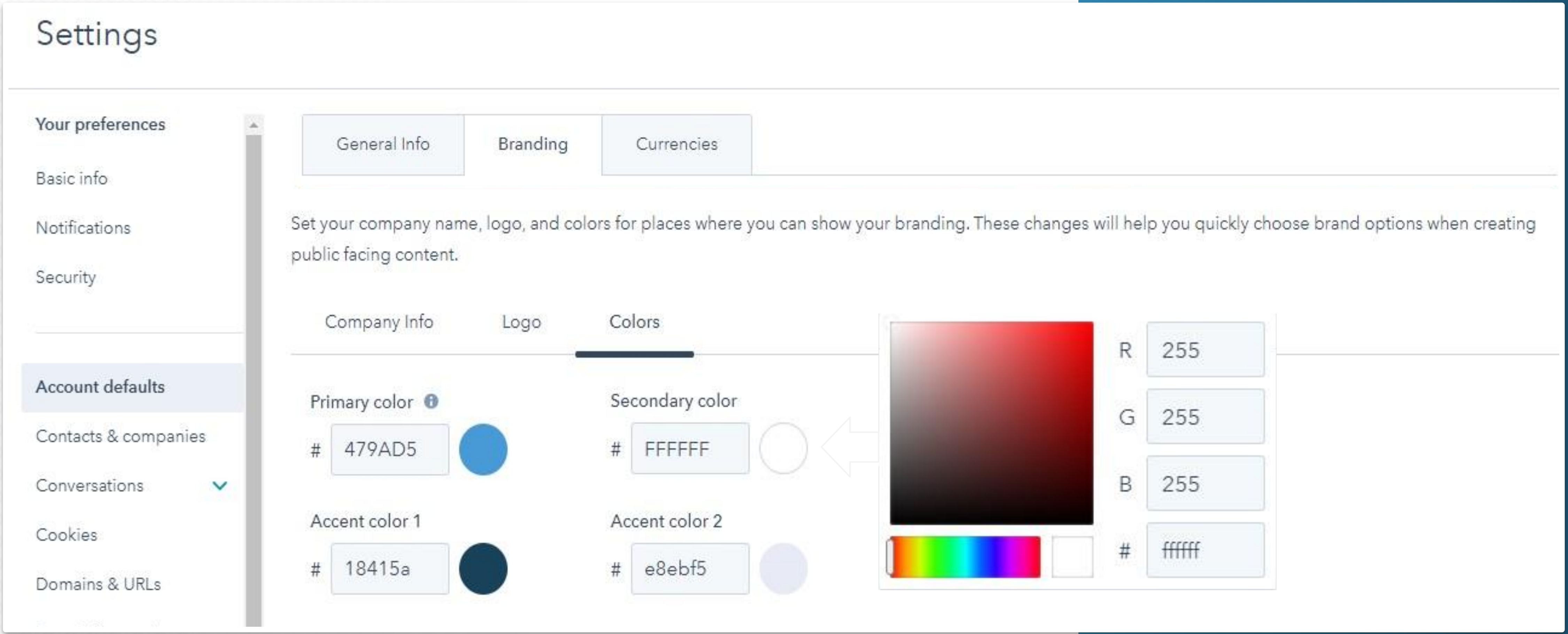
CUSTOMIZE BRANDING: LOGO

Settings Gear Icon >> Account Defaults >> Branding tab >> Logo sub-tab



CUSTOMIZE BRANDING: COLORS

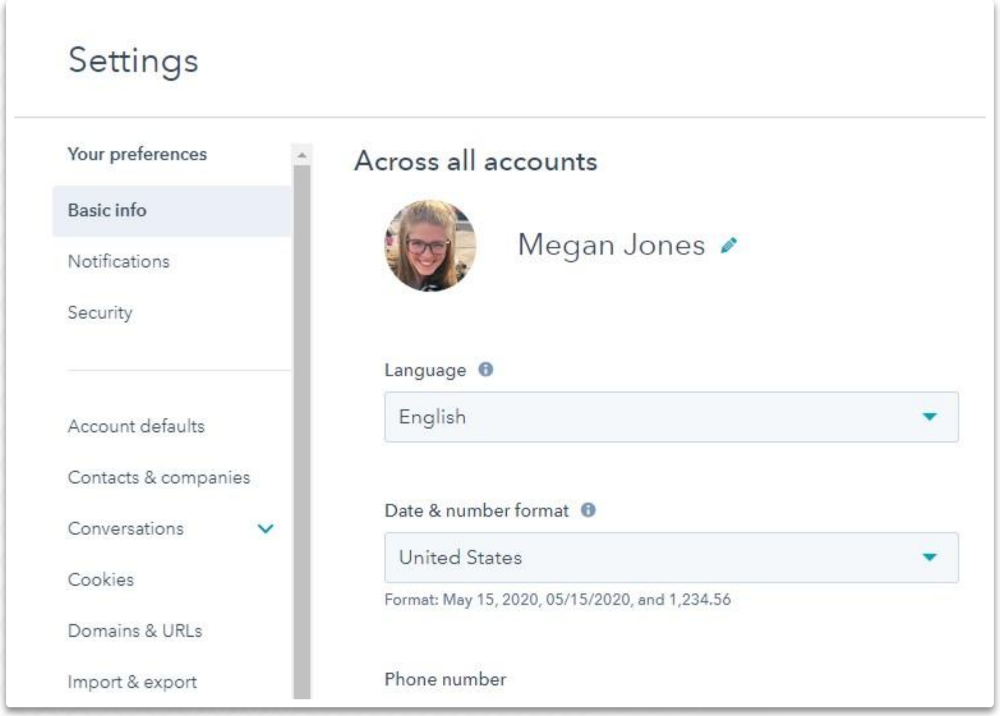
Settings Gear Icon >> Account Defaults >> Branding tab >> Colors sub-tab

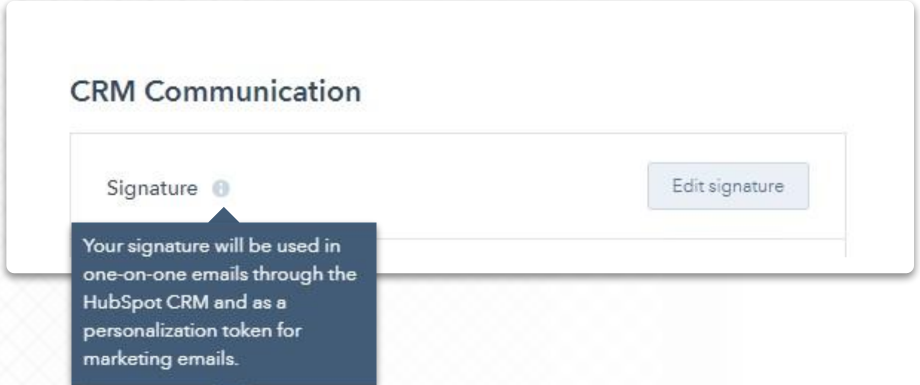


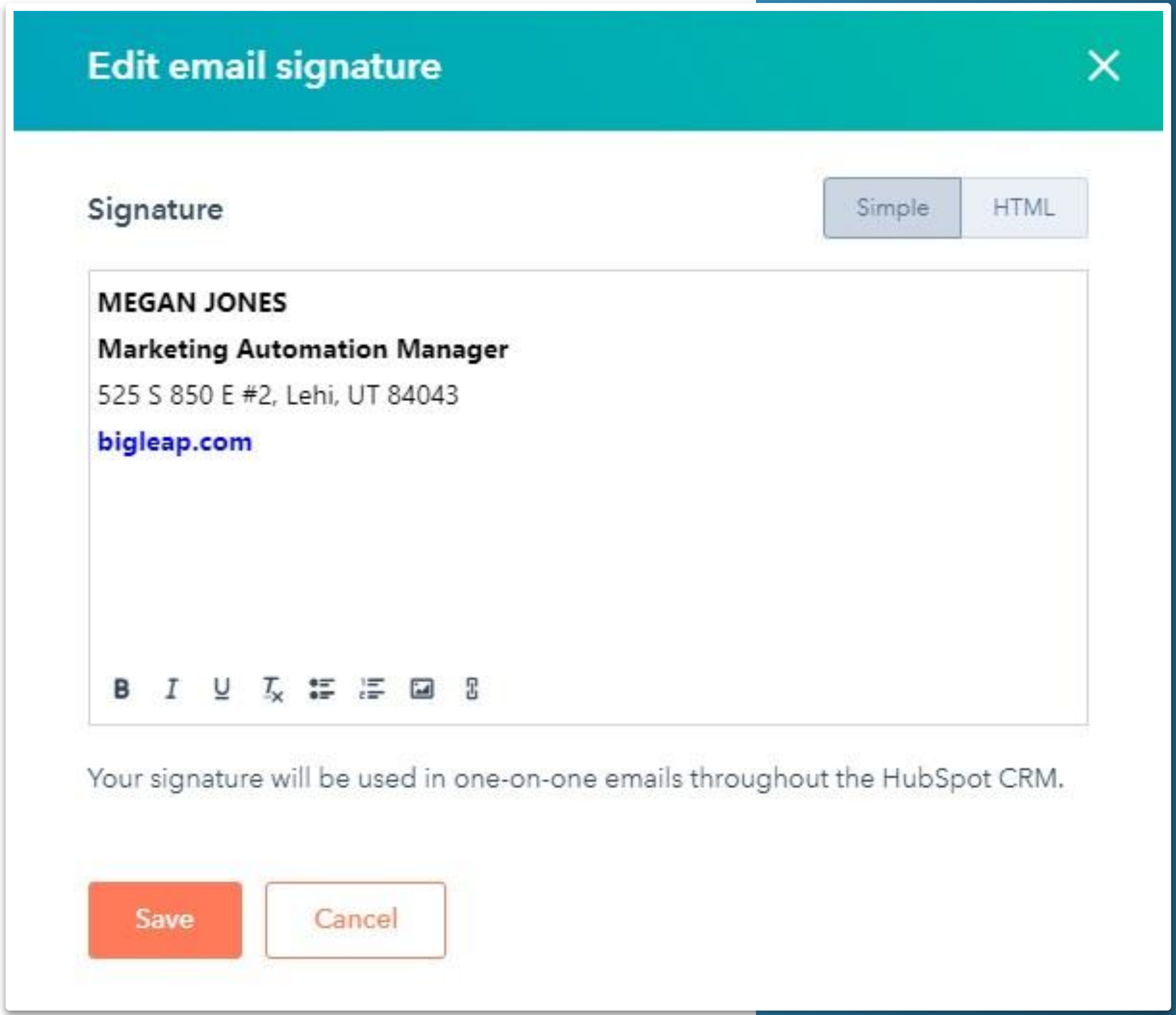
HOW TO
ADD SIGNATURES

ADD YOUR SIGNATURE

Settings Gear Icon >> Basic Info >> scroll down to CRM Communication >> click Edit Signature







ADD YOUR SIGNATURE

Hubspot's email signature creator tool >> quick & easy to use.

[Hubspot Signature Generator](#)
[Hubspot Signature Generator FAQ](#)

QUESTIONS?

bigleap

THANK YOU

525 S 850 E SUITE 2

LEHI, UT 84043 (801) 876-5272

bigleap