

bigleap

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Pearagon



HubSpot Sales Hub Setup 5-day Series: Day 1

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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.



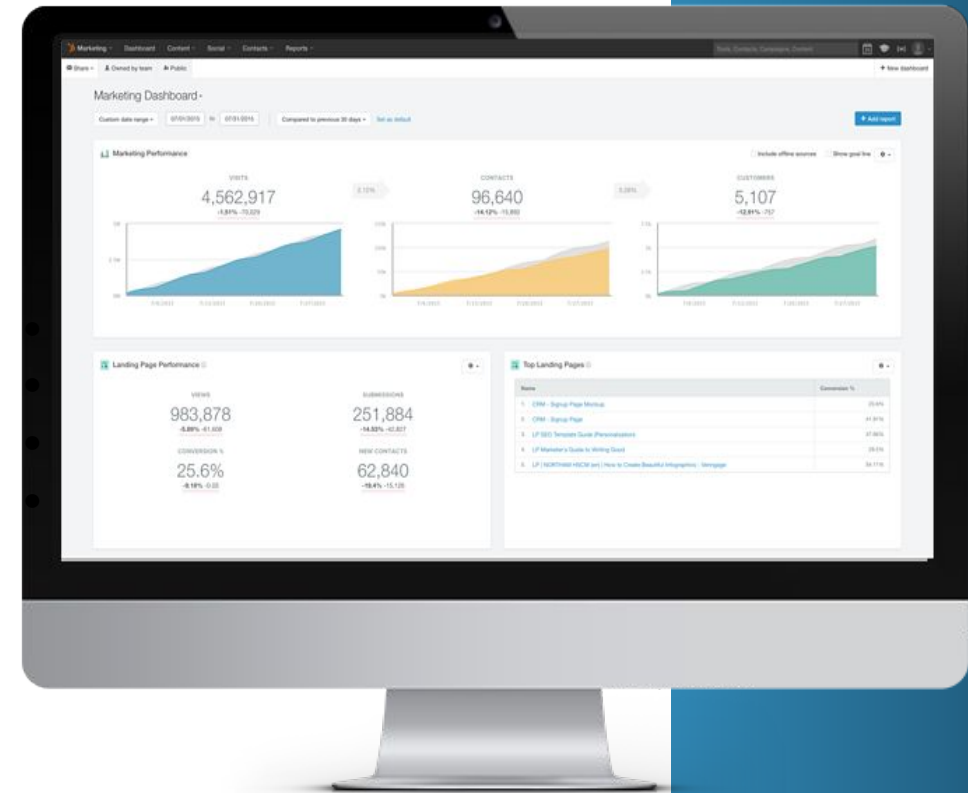
AUTOMATE

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



NURTURE

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



OUR AWARDS



CLIENTS WE'VE WORKED WITH

bambooHR™

AVIS®

NU SKIN®
DISCOVER THE BEST YOU™

purple

VENAFI®

workfront™

alphaGraphics®


PLURALSIGHT

NOMATIC

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

The screenshot displays the Big Leap user management interface. At the top, a dark navigation bar contains links for Contacts, Conversations, Marketing, Sales, Service, Workflows, Reports, Asset Marketplace, and Partner. On the right of this bar are icons for search, a storefront, settings, a notification bell with a red '9', and a user profile picture. Below the navigation bar, the 'Settings' page is shown with a left sidebar and a main content area. The sidebar lists 'Your preferences' with expandable sections for Marketing, Partner, Properties, Reports, Sales, Tickets, 'Users & teams' (which is selected and highlighted), and Website. The main content area has two tabs: 'Users' (active) and 'Teams'. Below the tabs is the instruction: 'Create new users, customize user permissions, and remove users from your account.' To the right of this text is a search bar and two buttons: 'Manage paid users' and 'Create user'. Below these elements is a table with columns for a checkbox, 'NAME', 'TEAMS', and 'ACCESS'. One user is listed: Megan Jones, with email megan@bigleap.com and role Partner Employee. Her access permissions are listed as Service, Contacts, Account, Reports, and Partner Tools.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Workflows Reports ▾ Asset Marketplace ▾ Partner ▾

Settings

Your preferences

- Marketing ▾
- Partner ▾
- Properties
- Reports ▾
- Sales ▾
- Tickets
- Users & teams**
- Website ▾

Users Teams

Create new users, customize user permissions, and remove users from your account.

Search

Manage paid users Create user

<input type="checkbox"/>	NAME ▾	TEAMS ▾	ACCESS ▾
<input type="checkbox"/>	Megan Jones megan@bigleap.com Partner Employee		Service Contacts Account Reports Partner Tools

Create users



Create new users, one at a time.

Add a new user to your HubSpot account with an email address.

Add email address(es) ⓘ

Or create multiple users at once.

Create multiple users at once. Import their info from a file.



A CSV file

Upload a CSV file or plain text
file in CSV format

Next >

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.

Create users

EMAIL PERMISSIONS INVITE

test@bigleap.com

Teams: No team assigned

Contacts Marketing Sales Service More

Contacts Access

All users have a basic level of access. The permissions below apply to contacts, companies, and tasks.

View
Control the set of contacts, companies, and tasks the u...

Communicate
Control the set of contacts and companies the user ca...

Edit
Control the set of contacts, companies, and tasks the u...

Everything Team only Owned only

< Back Next >

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.

CREATE YOUR TEAMS

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

Settings

- Account defaults
- Contacts & companies
- Conversations
- Cookies
- Domains & URLs
- Import & export
- Integrations
- Marketing
- Partner
- Properties
- Reports
- Sales
- Tickets
- Users & teams**
- Websites

Users

Teams

Organize your users into groups for organizational, reporting, and partitioning purposes.

Search

Create team

<input type="checkbox"/>	NAME	USERS	ADDITIONAL USERS
<input type="checkbox"/>	Operations	47	0
<input type="checkbox"/>	Sales	5	0
<input type="checkbox"/>	Admin	3	0
<input type="checkbox"/>	Sales Development	2	0

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.

Create team

Team name

Marketing

Primary team members ⓘ

Search users

Additional team members ⓘ

Search users

Primary team members ⓘ

No users

Additional team members

No users

Save

Cancel

HOW TO SET UP ACCOUNT DEFAULTS

SET UP ACCOUNT DEFAULTS

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

The screenshot shows the 'Settings' page of a CRM system. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Workflows, Reports, Asset Marketplace, and Partner. The main content area is titled 'Settings' and features a sidebar with 'Your preferences' and 'Account defaults' (selected). The 'Account defaults' section has three tabs: 'General Info', 'Branding', and 'Currencies'. The 'General Info' tab is active, showing fields for 'Account name' (Big Leap), 'Time zone' (UTC -06:00 Mountain Time), 'Language' (English), 'Date and number format' (United States), and 'Currency' (US Dollar (USD) \$). A 'Format: 05/14/2020 and 1,234.56' note is visible below the date format field. At the bottom, there is a section for 'EU General Data Protection Regulation (GDPR)' with links for Privacy & consent, Cookies & tracking, Workflows & subscriptions, Live chat & bots, and Learn more. A checkbox for 'Only allow marketing emails to be sent to contacts who have a legal basis to communicate' is present, with a note that this setting doesn't apply to certain contacts.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Workflows Reports ▾ Asset Marketplace ▾ Partner ▾

Settings

Your preferences

Basic info

Notifications

Security

Account defaults

Contacts & companies

Conversations ▾

Cookies

Domains & URLs

Import & export

Integrations ▾

Marketing ▾

General Info Branding Currencies

Account name ⓘ

Big Leap

Time zone ⓘ

UTC -06:00 Mountain Time

Language ⓘ

English

Date and number format ⓘ

United States

Format: 05/14/2020 and 1,234.56

Currency ⓘ

US Dollar (USD) \$

Add currencies

EU General Data Protection Regulation (GDPR) ⓘ

[Privacy & consent](#) | [Cookies & tracking](#) | [Workflows & subscriptions](#) | [Live chat & bots](#) | [Learn more](#)

☐ Only allow marketing emails to be sent to contacts who have a legal basis to communicate. This setting doesn't apply to

SET UP ACCOUNT DEFAULTS

Two-Factor Authentication (2FA)

General Info

Branding

Currencies

Account name ⓘ

Julia M's Account

Time zone ⓘ

UTC -05:00 Central Time

Language ⓘ

English

Date and number format ⓘ

United States

Format: 06/10/2019 and 1,234.56

Lead revisit notifications ⓘ

☒

EU General Data Protection Regulation (GDPR) ⓘ

[Privacy & consent](#) | [Cookies & tracking](#) | [Workflows & subscriptions](#) | [Learn more](#)

☐ Only allow marketing emails to be sent to contacts who have a legal basis to communicate. This setting doesn't apply to emails sent by the CRM.

☒

Security

Require Two-factor Authentication (2FA)

Require all users to set up 2FA to log-in.

☐

Single Sign-on (SSO)

Use your company's log in credentials

Set up

Two-factor authentication

Log in to [redacted]
(Hub ID [redacted])
with two-factor authentication

This account is now protected by two-factor authentication (2FA). Your administrator [redacted] added this extra level of security. From now on, every time you log in to this account, you'll need to enter a code from your mobile device. [Learn more](#).

To continue logging in, set up 2FA below. If you'd like to access a different account, you can cancel this setup and return to login at any time.

Choose verification method

☒ Google Authenticator (recommended)

☐ SMS

Don't have the app?

Google Authenticator is a free 2FA app. Download it on your mobile device by searching for "Google Authenticator" on the Play Store or App Store.

[Play Store](#) | [App Store](#)

Cancel & return to login

Next >

[More Information about 2FA](#)

HOW TO CUSTOMIZE BRANDING

CUSTOMIZE BRANDING: COMPANY INFO

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

Settings

Your preferences

Basic info

Notifications

Security

Account defaults

Contacts & companies

Conversations

Cookies

Domains & URLs

Import & export

Integrations

Marketing

Partner

Properties

Reports

General Info

Branding

Currencies

Company Info

Logo

Colors

Company name

HubSpot

Company domain

www.HubSpot.com

Company address

25 First St.

Company address line 2

City

Cambridge

State

MA

Zip

Country

CUSTOMIZE BRANDING: LOGO

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

Settings

Your preferences

Basic info

Notifications

Security

Account defaults

Contacts & companies

Conversations

Cookies

Domains & URLs

Import & export

Integrations

Marketing

Partner

Properties

General Info

Branding

Currencies


Set your company name, logo, and colors for places where you can show your branding. These changes will help you quickly choose brand options when creating public facing content.

Company Info


Logo

Colors

Company logo



Square logo



Logo alt text

Big Leap Logo

CUSTOMIZE BRANDING: COLORS

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

Settings

Your preferences

Basic info

Notifications

Security

Account defaults

Contacts & companies

Conversations

Cookies

Domains & URLs

General Info

Branding

Currencies

Set your company name, logo, and colors for places where you can show your branding. These changes will help you quickly choose brand options when creating public facing content.

Company Info

Logo

Colors

Primary color ⓘ

479AD5

Secondary color

FFFFFFFF

Accent color 1

18415a

Accent color 2

e8ebf5

R 255

G 255

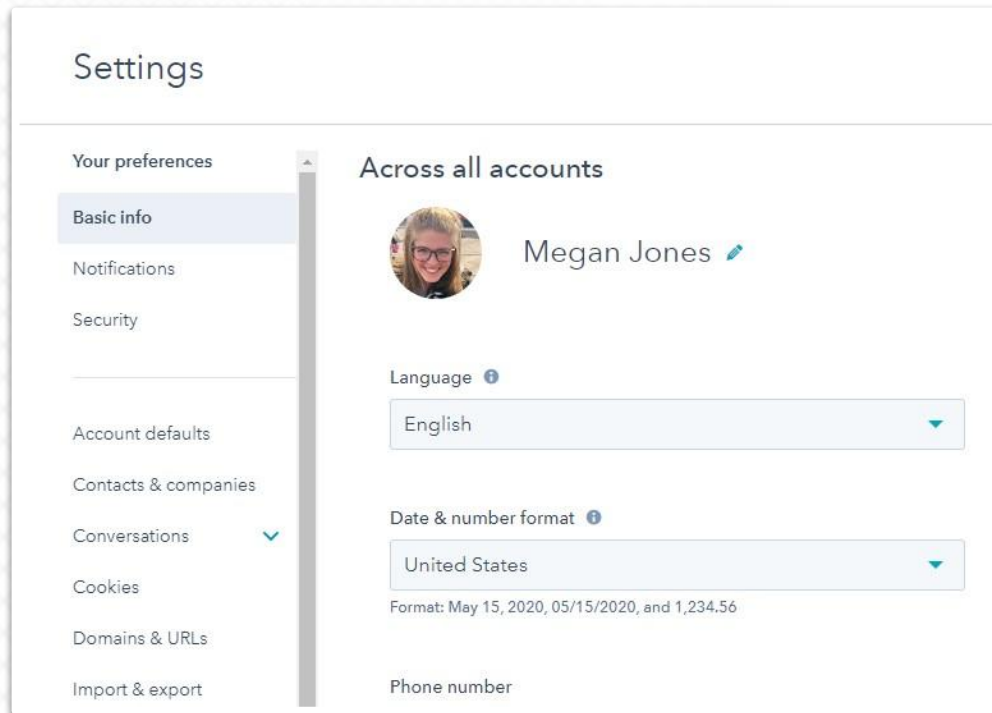
B 255

ffffff

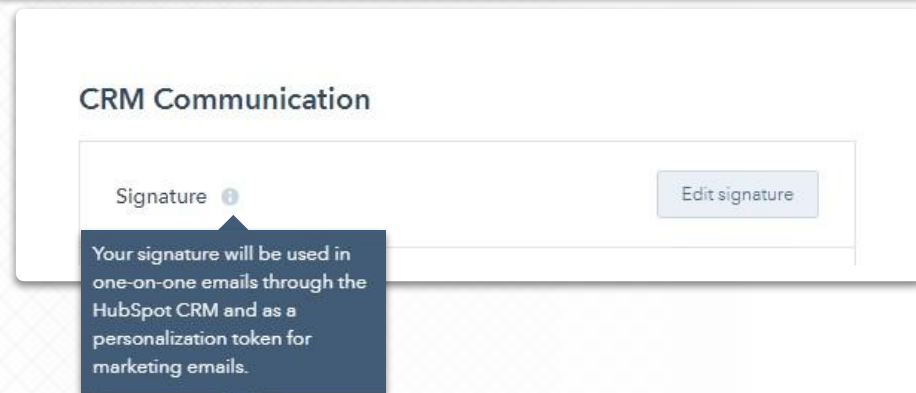
HOW TO ADD SIGNATURES

ADD YOUR SIGNATURE

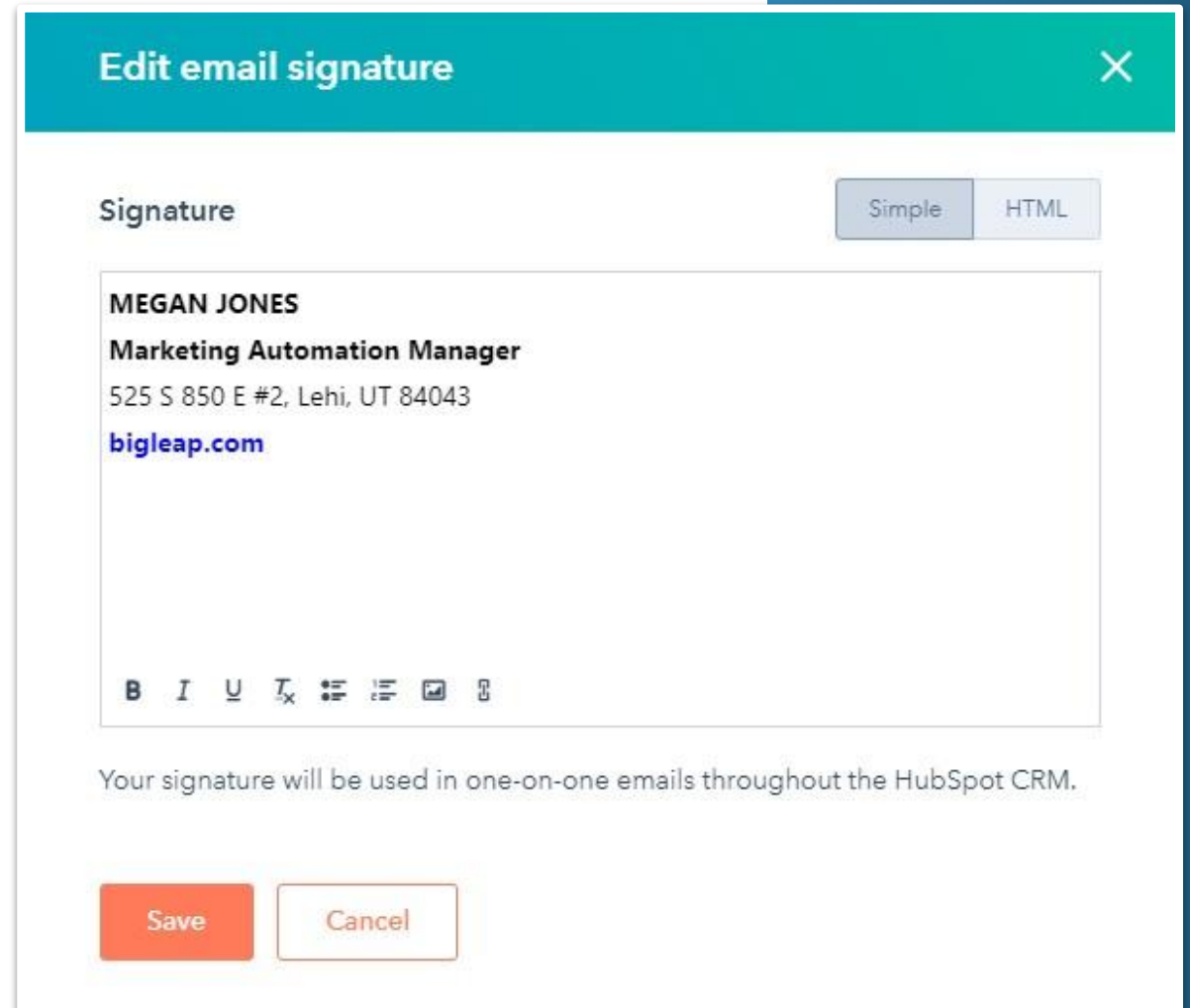
Settings Gear Icon >> Basic Info >> scroll down to CRM Communication >> click Edit Signature



The screenshot shows the HubSpot Settings page. On the left is a sidebar with 'Your preferences' expanded, containing links for 'Basic info', 'Notifications', 'Security', 'Account defaults', 'Contacts & companies', 'Conversations', 'Cookies', 'Domains & URLs', and 'Import & export'. The main area is titled 'Across all accounts' and shows a profile for 'Megan Jones' with a profile picture and an edit icon. Below this are settings for 'Language' (English), 'Date & number format' (United States), and 'Phone number'. The 'Date & number format' dropdown shows a preview: 'Format: May 15, 2020, 05/15/2020, and 1,234.56'.



This screenshot shows the 'CRM Communication' section. It features a 'Signature' label with an information icon and an 'Edit signature' button. A tooltip points to the 'Signature' label with the text: 'Your signature will be used in one-on-one emails through the HubSpot CRM and as a personalization token for marketing emails.'



The 'Edit email signature' modal window has a teal header with a close button. It contains two tabs: 'Simple' (selected) and 'HTML'. The signature text area displays: 'MEGAN JONES', 'Marketing Automation Manager', '525 S 850 E #2, Lehi, UT 84043', and 'bingleap.com'. Below the text area is a rich text toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink. A note at the bottom states: 'Your signature will be used in one-on-one emails throughout the HubSpot CRM.' At the bottom are 'Save' and 'Cancel' buttons.

ADD YOUR SIGNATURE

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

The image shows a promotional graphic for the HubSpot Email Signature Template Generator. It features a dark blue background with abstract orange and blue shapes. In the top left, the HubSpot logo is followed by the word 'TOOLS' in a white box. The main heading 'Email Signature Template Generator' is in large, bold, white text. Below it, a smaller line of text says 'Create your free email signature with our easy-to-use signature generator'. On the right side, there is a tilted white card representing an email signature. The card includes a circular profile picture of a man, the name 'Gregory Fridley', his title 'Global Operations Executive' and company 'Gerhold Group'. Below the name are social media icons for Facebook, Twitter, LinkedIn, and Instagram, preceded by a crown icon and the word 'GERHOLD'. At the bottom of the card, contact information is listed: a phone number '111 222 3333', an email 'gfridley@ggroup.com', a website 'www.ggroup.com', and an address '4621 Cedar Lane, Cambridge, MA 02141'.

QUESTIONS?

THANK YOU

525 S 850 E SUITE 2

LEHI, UT 84043 [\(801\) 876-5272](tel:8018765272)

