Welcome!

We're excited to get started!
Here's what happens next

XEN

XEN
Getting Started

Let’s Get Started

Hi there,

Thanks for the opportunity to work with you on the HubSpot strategy and execution for your business. This is a quick guide to introduce the XEN engagement process and let you know what happens next.

Key items:

- Who do I talk to if I need something?
- Account Permissions
- Getting Started
- Billing details
- FAQs
- HubSpot tips and strategies

We're looking forward to working with you.

Regards,
Craig Bailey
CEO

P.S. Our name 'XEN' is pronounced 'zen'. I get this question a lot :-)

Contacting Us

The quickest way to talk to the team is by emailing:

team@xen.com.au

You can share this email with anyone in your business who needs help with HubSpot.

They can email us with any questions, requests or work items.

All XEN staff will see your email and the most appropriate person will respond to you quickly.

*(You can also **view the XEN Knowledge Base** for further details.)*

Below are a few of our senior HubSpot specialists:

Craig

Roselen

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Account Premissions

We'll need access to your HubSpot Account

Usually, when providing support via our **HubSpot On-Demand** and **Virtual HubSpot Manager** services, our key team require Super Admin privileges in your portal. We will then create Permission Sets and Teams as required for others on our team.

Please provide Super Admin access to the following emails
(copy these emails and you can paste them into HubSpot as shown in the video below):

- **craig@xen.com.au**
- **roselen@xen.com.au**

How to provide access to your Hubspot Portal:

Find written step-by-step instructions here

What Happens Next?

Getting Started

We tailor each engagement to your needs, but here's some typical items we work through with you initially:

1 HubSpot Review

As soon as we get access to your portal, we'll start with a review of your HubSpot account, following the stages of the **HubShots Framework.** We get to know your portal and highlight any major issues and opportunities.

2 Kickoff Call

We all get to know each other. You get to meet the XEN team members you'll be working with.

It's good to put faces to names, so you feel like you are working with a team, and not a support ticket number...

3 Service Agreement & Billing Details

Yes, there's usually a bunch of boring legal stuff to work out - we aim to be as flexible as possible.

For most engagements, our **standard XEN Master Service Agreement** (MSA) covers and protects all parties involved.

But we're happy to tweak as required - and any updated agreement between us will supersede our standard MSA.

We'll ask you to let us know your preferred billing details, by filling out **the Billing details form on this page.**

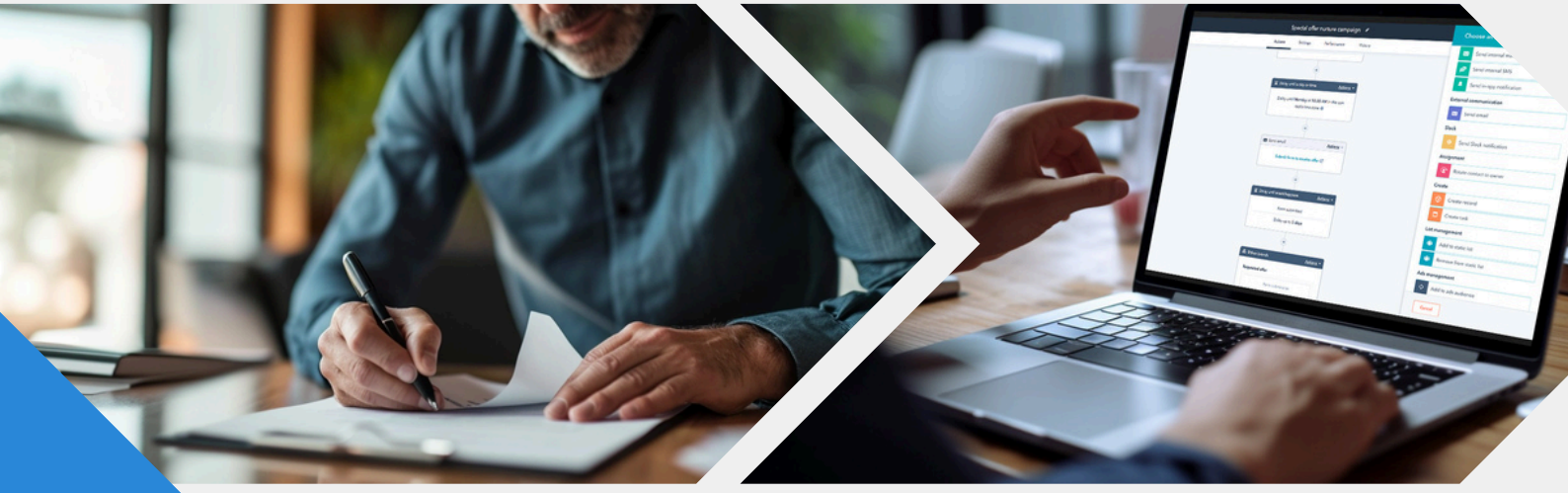
4 Change Management Procedures

We'll need to chat with you about your change management procedures to ensure we fit in with your existing processes.

This includes confirming things like:

- What we can update into production based on simple conversations with you (eg updating marketing emails, or edits in landing pages are good examples)
- What needs to be reviewed internally (eg turning on workflows and automation items are good examples)
- What needs to go through a staging process (eg new pages, styling changes, anything that affects brand, etc are good examples)

Also, what level of documentation you need (if any) for the above.



Frequently Asked Questions:

How quickly do you respond?

We aim to (and usually) reply to emails sent to our **team@xen.com.au** inbox within 4 hours on business days.

Occasionally we're totally swamped, or have a company wide training session that delays things, or there's a public holiday in our location (but not yours) - in which case it might take a little longer.

In the rare case something is incredibly super urgent we also provide you with our CEO's phone number - text him and let him know it's urgent.

Do you have SLAs for response times?

We don't currently have any SLAs in place or available.

To be frank, here's why:

- We're a small firm (12 people as I write this) and just don't have the resources to provide round the clock (ie 24x7) responses
- You'll probably be (pleasantly) surprised at how quickly we respond during business hours - likely better than any SLA would cover anyway

When do you invoice me?

For **HubSpot On-Demand** engagements we invoice you in advance for blocks of four (4) or more hours. Discounts apply for purchases of 20+ hours.

For **Virtual HubSpot Manager** subscriptions we invoice you on the day we commence working with you (usually the same day as the kick off call) and each month on that day of the month.

Frequently Asked Questions:

Is there a minimum number of On-Demand hours each month?

For **HubSpot On-Demand** engagements there is no minimum use of hours each month. If only one hour of support is required we just consume this from your prepaid On-Demand hours.

Where do I send my requests?

Once we've completed the kickoff call, feel free to start sending any questions to: **team@xen.com.au**

Everyone in the team sees your email and the most appropriate person will quickly respond.

Is this a long term option?

You can use either of our HubSpot On-Demand or Virtual HubSpot Manager services for as long as you need.

What is the difference between Virtual HubSpot Manager and On-Demand options?

The Virtual HubSpot Manager engagement is usually longer term in outlook, as well as being proactive and strategic.

The On-Demand products are ideal for either:

- ad-hoc, short term pieces. They are - by design - reactive and short term, OR
- custom, project based pieces. These can be quite involved (eg 100s of hours), but don't fit our Virtual HubSpot Manager service.

Simply choose the engagement that is appropriate for your company at this time. You can easily switch between products as appropriate.

Frequently Asked Questions:

How quickly can you get started?

It will depend on your requirements, but potentially we can start working on your item within a week.

Here's the typical process:

- Introductory Meet/Teams/Zoom call with the XEN team
- If appropriate (ie we are a good fit for each other), then
- Plan out your requirements
- Set priorities
- Grant access to your platforms (CRM, marketing automation, ad accounts, etc as required)
- XEN starts

It's not unreasonable for this to all happen within 3-5 business days. Simple example:

- A request for help preparing an email campaign in your email system
- Plan out the email campaign
- XEN gets access
- We setup new email template
- We prepare email draft and send to you for checking
- Email sent

All in a week.

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Stay up-to-date on the latest **HubSpot strategies**

HubShots

The Unofficial HubSpot Down Under Podcast

Do you listen to podcasts?

XEN founder and Technical Director, Craig Bailey, co-hosts **the HubShots Podcast** with Ian Jacob, founder and CEO of Search and Be Found. New episodes every week.

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