

# Setting Up HubSpot for Solar Companies

While most solar companies agree that investing time and money into HubSpot is a great investment, their biggest fear lies around implementation. Full onboarding, setup and optimisation of your new HubSpot portal can be overwhelming if you're not sure where to start.

Our team is **HubSpot certified** with **solar industry experience**. It really doesn't get better than that. Here are just some of the settings we implement in the HubSpot Ignition service.

## SETTINGS

### Domains

- ☐ Domains: Check Email sending domain settings
- ☐ Sitemap: XML Sitemap created for landing pages & website pages

### Integrations

- ☐ Installed: Google Search Console connected

### Marketing

- ☐ Ads: Check ad accounts connected
- ☐ Ads: Check lead sync enabled
- ☐ Ads: Check pixel insertion (compared to GTM)
- ☐ Email: Check contact property defaults
- ☐ Email: Check Email re-subscription enabled
- ☐ Email: Unengaged contacts turned off
- ☐ Email: Subscription types in place
- ☐ Email: Source tracking enabled
- ☐ Email: Send frequency (Enterprise only)
- ☐ Forms: Check if Collected Forms should be enabled
- ☐ Social: Accounts connected

### Properties

- ☐ Contact: Custom contact properties in place
- ☐ Company: Custom company properties in place
- ☐ Deal: Custom deal properties in place

### Tracking Code

- ☐ Tracking code: Bot filtering enabled
- ☐ Tracking code: Exclude traffic IPs in place

### Website

- ☐ Pages: Check site headers (eg for GTM)
- ☐ Pages: Check if GA integration conflict with GTM
- ☐ Pages: Check System pages

## GENERAL

### Google (this is separate from HubSpot)

- ☐ Google Tag Manager setup and embedded on site
- ☐ Google Analytics in place
- ☐ Google Analytics goals added
- ☐ Google Search Console profile verified
- ☐ Google Search Console connected to Google Analytics
- ☐ Google Search Console connected to HubSpot

## CONTACTS

### Contacts

- ☐ Import opt-out list
- ☐ Filters in place for each Form Submit
- ☐ Favourite Filters added

### Lists

- ☐ Active Lists in place for each Form Submit
- ☐ Active Lists in place for each month
- ☐ Folders setup for Lists
- ☐ Naming convention being used for Lists
- ☐ Lists based on other Active Lists where possible
- ☐ Global Suppression Lists - Active and Static - in place
- ☐ Global Testing List in place

## CONVERSATIONS

### Inbox

- ☐ Check notification destinations
- ☐ Check Slack connection

### Snippets

- ☐ Check length of snippet text

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## MARKETING

### Ads

- ☐ Campaigns showing in dashboard
- ☐ Audiences being synced to each platform
- ☐ Lookalike Audiences created

### Social

- ☐ Social accounts connected (for reporting)

### Landing Pages

- ☐ Landing pages folders setup
- ☐ Default Landing page in place at root
- ☐ Landing pages have Thank You pages
- ☐ Thank you pages are blocked from Google
- ☐ Landing pages are mobile friendly
- ☐ Landing page have SSL enforced
- ☐ Landing pages checked for images sizes
- ☐ Landing pages link to Privacy Policy

### Emails

- ☐ Internal notification email prepared
- ☐ Email folders setup
- ☐ Email spam report rate check

### Files

- ☐ Folder structure in place
- ☐ Folders avoid spaces in names
- ☐ Minimal files in root folder

### Forms

- ☐ Popup form (Lead Flow) created for each key asset
- ☐ Popup forms added to specific pages (not sitewide)
- ☐ Popup forms

### CTAs

- ☐ CTAs used for most global buttons and links
- ☐ CTAs using multivariate test
- ☐ CTAs using smart versions (if appropriate)

### Campaigns

- ☐ Campaign used and linked to emails, workflows, pages, CTAs
- ☐ Campaigns avoid using spaces

### SEO

- ☐ Topics added for at least 5 key areas
- ☐ SEO topic Country set appropriately
- ☐ Google Search Console metrics available from Switch Columns

## AUTOMATION

### Workflows

- ☐ Folders added
  - ☐ Internal Notifications
  - ☐ Nurtures
  - ☐ Assets (TYs)
- ☐ Naming convention in place
- ☐ Workflows use Go command to avoid excessive branching
- ☐ Workflows have Goals in place
- ☐ Workflows have Global Suppression list in place
- ☐ Workflows have Descriptions
- ☐ Internal Notification Workflow(s) in place
- ☐ Thank you workflows have Re-enrollment criteria in place

## SALES

### Deals

- ☐ Deal pipelines in place
- ☐ Favourites Filters set

### Tasks

- ☐ Queues in place

### Documents

- ☐ Folders in place
- ☐ Folders avoid using spaces in their names

### Meetings

- ☐ Separate Meeting options in place for different types

## REPORTS

### Analytics Tools

- ☐ Traffic Analytics - check that all key Sources are showing
- ☐ Competitors added
- ☐ Prospects tool is active - check for any unusual referrers
- ☐ Review Links list

### Dashboards

- ☐ Dashboard report scheduled for weekly send

### Reports

- ☐ Check Custom reports naming