Assignment: Importing Data and Setting up Your Team in HubSpot

Description

Most teams come to HubSpot with an initial set of data they want to import, whether it's from an existing CRM system, spreadsheets, homegrown tools, a networking event, or some other source. There are several ways to get data into HubSpot.

For example, maybe your company has hosted an event and uses Eventbrite to organize attendees. With HubSpot's Eventbrite integration, you can add all attendees to the CRM and reach out to them specifically. Or, maybe you had a booth at a conference and got someone's information on a stick note. Sure, it's a little old-school - but you can import these contacts into our CRM, too!

Basically, all companies that deal with clients need to ask themselves: "How will I store my data moving forward, and how will I get it all into HubSpot?"

What you need in advance

This task involves importing a CSV file to populate a starting set of your data in HubSpot. Prior to performing this task, collect information from 8 of your closest friends and save this all in a CSV file. Retrieve their

- First Name
- Last Name
- Company (that they aspire to work for)

E-mail Address (for half of your friends, use their actual e-mail address. For the other half, create an e-mail address based on their aspirational company. For example, if your friend Emily Maple wanted to work at Chiquita Banana, enter emaple@chiquita.com.

You'll also need the names and email addresses of any team members or classmates you want to add.

Task Details	Assignment Goals and Objectives
A simple run-through of this task can be done in 20-30 minutes	In doing this task, you'll get an introduction to HubSpot's data model, creating custom fields, conducting an import. You'll also get an introduction to user management, permissions, and team structures in HubSpot. The purpose of this is to review, at a high-level, how HubSpot's CRM is structured and to give you all the information you'll need to move your data into it.

Instructions for Importing Data into HubSpot

First, prepare your CSV file for import. Review this rundown of how to set up an import file for HubSpot for instructions on how to set up your spreadsheet.

HubSpot comes with dozens of standard fields for basic pieces of data like email address, company name, and others. For custom details, you'll want to set up custom properties.

Once your data is ready to go, you can actually carry out your import.

After your import is complete, take a minute to familiarize yourself with the data you imported by visiting Contacts, Companies, or Deals.

Instructions for Setting Up Your Team In HubSpot

Giving the right members of your team the right access to HubSpot is an important step toward understanding and using HubSpot effectively. During this task, you'll take a few minutes to set up users, organize them into teams, and understand how HubSpot handles details like permissions.

First, you'll want to add members of your team who will need access to HubSpot as users. Users can be added manually or imported via CSV file.

Once you've set up your users, you'll need to select who you want to have access to the trial features, which you can do from Users & Settings.

In HubSpot, users can be organized into "Teams" that allow you to control which records in HubSpot individual users have access to. Learn about organizing users into teams here.

Once your users are in HubSpot, you'll be able to set their permissions which control what they can and can't do and access inside HubSpot. Learn more about permissions.