



# HubSpot

SOLUTIONS PARTNER PROGRAM



## COMPLETE GUIDE TO WORKING WITH A HUBSPOT PLATINUM PARTNER

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# WHY STRATUS?

With a team of 60+ consultants, developers, support specialists, and business analysts, Stratus Consulting Group brings decades of experience helping over 1,000 mid-market businesses streamline their operations, optimise systems, and drive scalable growth. We're more than just implementers. We're strategic thinkers, operational specialists, and above all, champions of the tools we believe in—and HubSpot is a key platform.

In fact, our HubSpot journey started internally. Like many businesses, we needed a better way to manage marketing campaigns and customer engagement. After implementing HubSpot in our own business, we saw a dramatic difference—not just in results, but in usability. Our team loved it. So much so that we consolidated our internal ticketing systems and now run our entire service desk on HubSpot.


That experience made one thing clear:  
HubSpot works—and it works brilliantly.

It's intuitive, easy to adopt across departments, and powerful enough to support complex business needs. The internal uptake in our business was rapid—and that sparked something. We decided to become a HubSpot Partner so we could bring the same simplicity, structure, and clarity to our clients.

Today, as a HubSpot Platinum Solutions Partner, we help mid-market businesses unlock the full value of HubSpot across marketing, sales, service, and operations. What makes us different is we don't just recommend HubSpot—we live it, breathe it, and use it every day. Our clients love that we bring more than software configuration. We bring a business process lens, technical integration know-how, and a passion for making great tools truly effective.

We've seen the value. We've experienced the transformation. And now, we deliver that for every client we work with.

Interested?  
Keep Reading



**WE'LL HELP YOU COME UP WITH  
AND EXECUTE A STRATEGY TO  
GENERATE MORE LEADS, INCREASE  
SALES, AND SCALE REVENUE.**





# MAKING HUBSPOT WORK FOR YOUR BUSINESS

HubSpot is a powerful tool, but out of the box, it's just that—a tool. To really make use of it, most businesses need help tailoring it to fit their processes, data, and structure. At Stratus Consulting Group, we focus on the technical setup of HubSpot so that your teams—across marketing, sales, service, and operations—can actually use it the way it's intended.

We're not a full-service marketing agency. We don't run your campaigns or write your content. Instead, we make sure the platform is set up properly, integrates with your existing systems, and gives you the visibility and structure to execute effectively.

## What We Typically Help With

- Initial HubSpot Configuration

Customising your portal to suit your business—setting up pipelines, lifecycle stages, properties, workflows, and automation that reflect how your team works.

- Integration with ERP and Other Systems

Connecting HubSpot to platforms like MYOB Acumatica, Wiise, and Epicor. We make sure data flows properly between systems, reducing manual work and keeping teams aligned.

- Reporting and Dashboards

Building useful, real-time dashboards that help your teams track the metrics that matter—whether that's marketing performance, deal progression, or service requests.

- Service Hub Setup

For teams managing support tickets or internal queries, we help centralise these processes in HubSpot's Service Hub—removing the need for multiple disconnected tools.

- Data Migration and Hygiene

Assisting with data imports and ensuring legacy systems are cleaned up and transitioned properly into HubSpot.

HubSpot can play a key role in how your business generates leads, manages relationships, and delivers service. But getting to that point requires thoughtful planning and setup. That's where we come in—not to run your strategy, but to give you a solid, scalable system that supports it.

**HUBSPOT'S MARKETING, SALES, SERVICE,  
CMS AND OPERATIONS SUITE MEANS YOU  
HAVE EVERYTHING YOU NEED TO BECOME A  
LEAD GENERATING MACHINE.**



# UNDERSTANDING

## HUBSPOT'S STRUCTURE

A flexible platform built for growth—when configured the right way

HubSpot can be a great starting point for businesses looking to centralise their customer operations. You can start using its free CRM to track deals, manage contacts, and get a basic view of your sales pipeline—without needing to pay anything upfront.

But HubSpot really comes into its own through its five core Hubs:

- Marketing Hub – for campaign automation, lead capture, and nurturing
- Sales Hub – for pipeline management, forecasting, and task tracking
- Service Hub – for handling customer support and ticketing workflows
- CMS Hub – for managing website content, landing pages, and forms
- Operations Hub – for data management, syncing, and automation across tools

You can adopt one Hub to solve a specific challenge—or combine several to create an integrated system that supports multiple teams.

At Stratus, we often work with businesses who are already using an ERP or finance system and want to layer in HubSpot without creating duplication. That's where our role begins: helping you choose the right mix of tools, configure them to suit your structure, and ensure that everything works together.



**Michael  
Pendred**

MANAGING DIRECTOR  
STRATUS CONSULTING GROUP

"HUBSPOT IS DESIGNED FROM THE GROUND UP TO GROW AND ADAPT NATURALLY, ALIGNING WITH YOUR NEEDS AS YOUR BUSINESS EVOLVES."





# OUR HUBSPOT ONBOARDING

## METHODOLOGY



Every business is different. But over the years, we've learned that a clear onboarding framework—grounded in best practices and adapted to each client's needs—leads to faster adoption, smoother handover, and better long-term outcomes.



### Step 1: Discovery & Solution Design

We begin by learning how your business works today—and where you want to improve. Through structured workshops and interviews, we document:

- Your current customer journey
- Team roles and responsibilities
- Existing tools and processes
- Key metrics and reporting needs

This step ensures we're not guessing—we're designing a solution that fits your reality.

### Step 2: System Architecture & Configuration

Next, we build out your HubSpot portal based on what we've uncovered. This includes:

- Pipelines for sales, onboarding, or service
- Lifecycle stages and lead statuses
- Custom properties and segmentation logic
- Workflow automation tailored to your processes
- User permissions and team structures

Everything is designed to match how your business already operates—just with better structure and visibility.

### Step 3: Data Migration & Hygiene

We help you bring your data into HubSpot in a clean, usable format. That includes:

- Contact, company, deal, and ticket migration
- Field mapping and deduplication
- Normalising legacy data for reporting
- We also provide support with cleaning existing CRM data before importing, so you start fresh with reliable information.

### Step 4: ERP & Systems Integration

Stratus has deep experience working with systems like MYOB Acumatica, Wiise, and Epicor. We ensure HubSpot connects to your wider tech stack so data flows between:

- CRM and ERP
- Sales and finance
- Marketing and operational tools

This avoids manual re-entry, aligns reporting, and gives teams a complete picture of each customer or project.



# OUR HUBSPOT ONBOARDING

## METHODOLOGY

### Step 5: Reporting & Dashboards

We design role-specific dashboards that turn your HubSpot data into actionable insight. These may include:

- Marketing funnel and attribution
- Deal pipeline tracking
- Service ticket resolution
- Sales rep performance
- End-of-month summary dashboards for leadership

Each dashboard is built to support decision-making, not just display metrics.

### Step 6: Training & Change Management

No matter how well the system is set up, adoption depends on people. We run tailored training sessions for:

- Marketing teams
- Sales teams
- Support and service teams
- Admin and reporting users

We also provide change management support and identify internal champions to drive uptake.

### Step 7: Go-Live & Post-Onboarding Support

We launch in a controlled, phased approach—making sure your team is comfortable and confident using HubSpot from day one. After go-live, we offer:

- 30/60/90-day check-ins
- Refinements based on feedback
- Help desk access and support escalation if needed

We see onboarding not as the finish line, but the start of a longer journey with your system in place.



**Mark Belkin**  
DIRECTOR  
STRATUS CONSULTING GROUP

"HubSpot is only as effective as the structure behind it. We make sure that structure is built to last."

# CONNECTING HUBSPOT TO THE REST OF YOUR BUSINESS

HubSpot is a powerful platform on its own, but its true potential is unlocked when it works as part of a larger, connected system. For many mid-market businesses, that means integrating HubSpot with tools like ERP platforms, finance systems, marketing tools, and support software.

At Stratus, we approach HubSpot onboarding with integration in mind from the start.

## Why Integration Matters

Disconnected systems create friction:

- Data gets duplicated—or lost
- Teams operate in silos
- Reporting becomes inconsistent
- Customer experiences break down

When systems talk to each other, you gain a complete, real-time picture of your operations. That leads to better decisions, less manual work, and a more cohesive experience for your customers.

## What We Commonly Integrate With

We work with businesses running platforms such as:

- MYOB Acumatica
- Wiise
- Epicor
- Xero
- Custom legacy tools or vertical-specific software

Whether your business relies on a central ERP, standalone finance platform, or operational databases, we help bring the right data into HubSpot—and ensure it flows smoothly in both directions.



# WHAT HUBSPOT LOOKS LIKE IN THE REAL WORLD

HubSpot isn't just a marketing tool or a CRM—it's a central part of how many teams operate. Once it's properly onboarded and integrated into your systems, it starts to quietly (and powerfully) change how people work across the business.

## Use Case 1: Sales Teams Working in Silos

### **The Challenge:**

Sales reps were managing pipelines in spreadsheets. There was no shared view of the pipeline, and managers had limited visibility on performance or forecasting.

### **What We Did:**

We set up HubSpot's Sales Hub to reflect their actual sales process—custom deal stages, automated follow-ups, reminders, and visibility for leadership. We also integrated it with their ERP, so account and invoice status could be seen directly in the deal record.

### **The Outcome:**

Sales leaders gained real-time forecasting dashboards, while reps saved time on admin and had clearer follow-up tasks.

## Use Case 2: Marketing Generating Leads—But No Follow-Through

### **The Challenge:**

Marketing was generating contacts through web forms, events, and ads, but leads weren't being followed up consistently. Some were missed entirely. Sales and marketing had no shared system.

### **What We Did:**

We built lifecycle stage automation and lead handover workflows that moved qualified contacts directly into the sales pipeline—automatically assigning owners, triggering alerts, and logging interactions.

### **The Outcome:**

Lead-to-opportunity conversion improved immediately. Marketing had better visibility into what happened after a lead came in, and sales stopped working in the dark.

# WHAT HUBSPOT LOOKS LIKE IN THE REAL WORLD

## Use Case 3: Disconnected Service Tools

### **The Challenge:**

Customer service was being managed across several systems—some in email inboxes, others in spreadsheets or third-party apps. No centralised record existed.

### **What We Did:**

We implemented HubSpot's Service Hub, migrated historical ticket data, and built a unified support inbox. Ticket statuses, SLAs, and response workflows were all mapped into dashboards.

### **The Outcome:**

The business gained one central view of all customer issues, with reporting that highlighted resolution time, repeat problems, and satisfaction levels.

## Use Case 4: Leadership Struggling with Reporting

### **The Challenge:**

Executives were spending hours each month chasing data from multiple systems to build board reports. Marketing had one version of performance, sales had another, and finance had different numbers again.

### **What We Did:**

We worked with each department to identify their key metrics and built cross-functional dashboards directly in HubSpot. We also connected HubSpot to their ERP (MYOB Acumatica), so financial data like invoice status and revenue could be included alongside CRM data.

### **The Outcome:**

Leadership now has access to real-time dashboards with unified data. No more back-and-forth across spreadsheets—just one place to view performance across the customer journey.





# Stratus Consulting Group

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