



FREE GUIDE FOR UK SMALL BUSINESSES

HubSpot for UK Small Businesses

A plain-English guide to setting up a CRM your team will actually use

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Written by the team that sets up HubSpot for UK service businesses every week, with no jargon and no sales pitch until the last page.

Do you need a CRM yet?

If enquiries live in inboxes, notebooks and people's heads, you're already paying for not having one.

A CRM (customer relationship management system) is one place where every enquiry, customer, conversation and quote lives. It reminds you who to follow up, shows you what's in the pipeline and tells you where your best customers come from.

Five signs it's time

- ✗ Enquiries arrive by form, phone, email and social messages, and nobody owns all of them.
- ✗ Follow-up depends on someone remembering, so quotes go quiet.
- ✗ You can't say how many open quotes you have, or what they're worth.
- ✗ When someone is off sick or leaves, their customer history goes with them.
- ✗ You can't tell which marketing actually brings in customers.

What slow follow-up costs

Say you miss or slow-reply **3 enquiries a month**, your average customer is worth **£1,500** and you normally win **3 in 10**. That's around **£1,350 a month**, or **£16,200 a year**, in work going to whoever replied first.

Try it with your own figures on any Webxxs product page.

What HubSpot does, and what's free

HubSpot is a family of tools ("hubs") built around one shared CRM. Most small businesses only need the CRM and, later, the Sales or Marketing Hub. You don't need to buy everything on day one.

You want to...	Free CRM	Starter plans	Professional plans
Keep every contact, company and deal in one place	Yes	Yes	Yes
Capture website enquiries with forms	Yes	Yes, without HubSpot branding	Yes, with more options
Log emails and book meetings	Yes, with limits	Higher limits	Highest limits
Track deals in a pipeline	One pipeline	More pipelines	Many pipelines
Automate follow-up	Very limited	Simple automation	Full workflows
Report on leads, sales and sources	Basic reports	More reports	Custom reporting

Our honest advice: start on the free CRM, set it up properly, and only pay for features once you know they'll pay for themselves. Plans and limits change, so check current details on HubSpot's website before you buy. Licence fees are always paid to HubSpot directly.

Free, but not "set up"

The free CRM is powerful, but out of the box it's a blank database. The value comes from how it's configured around the way *you* win customers. That's what the next page is about.

The seven building blocks of a good set-up

Every HubSpot account that pays for itself has these seven things in place. Miss one and the others work harder than they should.

01 Lead capture

Every website form, chat and ad feeds HubSpot, with the page and source recorded.

02 Clean contact data

A short list of fields you actually use, and lifecycle stages from subscriber to customer.

03 A pipeline that matches how you sell

Five to seven deal stages that mirror your real process, not HubSpot's demo.

04 Follow-up that happens

Tasks, templates and (on paid plans) sequences, so every enquiry gets a fast reply.

05 Email and calendar connected

Conversations and meetings logged automatically, so history isn't lost.

06 Reporting you trust

One dashboard: enquiries by source, pipeline value, and conversion rate.

07 Team habits

Training, simple rules and a weekly pipeline review, so it gets used after week one.

✓ Score yourself

Tick the blocks you already have. Fewer than five? Start with the lowest number you haven't ticked: the order matters.

A 30-day HubSpot set-up plan

Doing it yourself? Work through one week at a time. Most small teams can do this in a few hours a week.

Week 1

Foundations

- Create your account and add your team as users.
- Connect your email and calendar.
- Decide your lifecycle stages and the 10–15 contact fields you really need.
- Import your contacts from one cleaned-up spreadsheet.

Week 2

Capture

- Add the HubSpot tracking code to your website.
- Replace or connect your website forms so every enquiry lands in HubSpot.
- Record the source of every enquiry: website, phone, referral, ads.
- Set up a meetings link for booking calls.

Week 3

Pipeline and follow-up

- Build one pipeline with stages that match how you sell.
- Write three email templates: first reply, quote follow-up, “still interested?”.
- Create a rule: every new enquiry gets a task to call within one working day.
- Move every live quote into the pipeline.

Week 4

Reporting and habits

- Build one dashboard: new enquiries, sources, pipeline value, won and lost.
- Train the team for an hour, on your own data.
- Agree three rules, such as “no deal without a next step and a date”.
- Book a 15-minute weekly pipeline review.

QUICK WIN FOR TODAY

Connect your inbox and calendar. It takes ten minutes and starts building your customer history straight away.

Ten mistakes that stop HubSpot paying for itself

We see the same problems again and again when businesses ask us to look at their HubSpot. Avoid these and you're ahead of most.

- ☐ **Importing everything.** Old, messy lists clog the CRM. Clean and import only what you'll use.
- ☐ **Too many fields.** If nobody fills it in, delete it. Fewer fields means better data.
- ☐ **Copying the demo pipeline.** Your stages should mirror how you sell, not a generic template.
- ☐ **No owner for new enquiries.** Every enquiry needs a named person and a next step.
- ☐ **Forms that don't connect.** Website forms emailing an inbox, not feeding HubSpot.
- ☐ **No source tracking.** Without it you can't tell which marketing is worth paying for.
- ☐ **Buying the biggest plan first.** Start free or Starter, then upgrade when a feature will pay for itself.
- ☐ **Skipping training.** An hour of training on your own data is the difference between used and ignored.
- ☐ **Automating a broken process.** Fix the process on paper first, then automate it.
- ☐ **Set up once, never reviewed.** A quick monthly review keeps data clean and reports honest.

ALREADY USING HUBSPOT?

Tick any of these that sound familiar. Two or more? Our free [HubSpot Health Check](#) reviews your account and sends you the five fixes that would make the biggest difference.

CASE STUDY

CS Clean Team: HubSpot and Xero working as one

CS Clean Team is a specialist cleaning business in Nottingham, handling biohazard, trauma and sharps clearance. Customer records and job admin were being handled by hand, taking time away from customers.

What we did

- ✓ HubSpot CRM set up around how they win and deliver jobs
- ✓ Website enquiries feeding HubSpot automatically, with the source recorded
- ✓ HubSpot connected to Xero, so customer and job details flow between the two
- ✓ Training, so the team could run it themselves

No double entry

customer and job records stay in sync between HubSpot and Xero

Admin in the background

so the team spends its time on customers and jobs

Do it yourself, or get help?

Option	Best for	Price
Do it yourself	Owners with a few hours a week and a simple sales process. Use the 30-day plan.	Your time
HubSpot Starter Setup	Small teams: one pipeline, one form, one automation, import and training. Live within days.	£795 fixed
HubSpot Implementation	One hub built around your whole sales process, with reporting and training.	From £2,995
Wix & HubSpot Integration	Keep your Wix website and connect it to HubSpot.	From £795

Fixed prices, agreed before we start, with no VAT to add. HubSpot licences, if needed, are paid to HubSpot.



YOUR NEXT STEP

Get a free HubSpot Health Check

Already on HubSpot? We'll review how your account is set up and send you a short, plain-English report.

- ✓ Lead capture, data, pipeline, follow-up and reporting checked
- ✓ Your five most valuable fixes, ranked by impact
- ✓ What you can fix yourself, and what's worth getting help with
- ✓ Free, with no obligation and no hard sell



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Rather talk it through? **Book a free 30-minute Growth Audit**, call **+44 115 647 3819** or email **contact@webxxs.com**

Not on HubSpot yet? **See HubSpot Starter Setup** or **take the 2-minute package quiz**.