

Service Definition Document

HubSpot Subscription, Support and Consultancy

Supplier: Discover Digital Solutions Limited

Website: discoverdigital.com

Framework: G-Cloud 15

Lot: 2b - Software as a Service (SaaS)

1. Service Overview

HubSpot SaaS subscription support and consultancy, covering onboarding, configuration, integrations, data migration, training and ongoing optimisation. Helps buyers implement and improve CRM, marketing and customer service workflows, reporting and automation. Subscription purchase can be arranged in line with buyer preference, alongside managed support and consultancy.

Service Features:

- HubSpot subscription management and renewal support
- Onboarding, configuration and portal set-up
- CRM implementation across Marketing, Sales and Service Hubs
- Data migration planning and execution
- Integration with third-party systems via APIs and iPaaS
- User training, enablement and role-based guidance
- Workflow automation, pipelines, routing and SLAs configuration
- Reporting dashboards, attribution and analytics setup
- Ongoing optimisation, governance and adoption monitoring
- Support desk for incidents, requests and admin tasks

Service Benefits:

- Faster HubSpot go-live with minimal disruption
- Higher CRM adoption and better data quality
- Clearer customer journeys across marketing, sales and service
- Reduced manual work through automated workflows
- Improved pipeline visibility and forecasting accuracy
- Better reporting on campaigns, activity and outcomes
- Consistent support, reducing downtime and admin burden
- Integrations reduce duplicate entry and errors
- Subscription procurement aligned to buyer preference
- Ongoing optimisation keeps HubSpot aligned to changing needs

2. Service Scope and Constraints

Supplier Type: Reseller providing extra support (reselling HubSpot)

Cloud Deployment Model: Public cloud

Service Constraints: HubSpot is a third-party SaaS; vendor terms and packaging apply. Service delivery requires buyer admin access and data/integration availability. Support is remote, with hours and SLAs agreed at call-off.

System Requirements:

- HubSpot account with appropriate user licences
- Supported browser: Chrome, Edge, Firefox, Safari, Opera
- Allow cookies and pop-ups for HubSpot domains
- Reliable internet connection for web-based access
- Email access for invitations, alerts and notifications
- Admin permissions to configure users, integrations and security

3. Onboarding and Getting Started

We offer comprehensive onboarding support to help users start using HubSpot effectively.

Guided Onboarding: Every project begins with a structured discovery and solution design phase where we understand requirements and configure HubSpot accordingly.

Training Options: We provide flexible training including virtual sessions via video conference, onsite workshops at client premises (at additional cost), recorded training materials for future reference, and access to HubSpot Academy's extensive free online learning resources.

User Documentation: Clients receive project-specific documentation including solution design documents, process guides, and user manuals tailored to their configuration. HubSpot also provides comprehensive product documentation through their Knowledge Base.

Ongoing Support: Our support desk is available for questions and guidance. Account managers ensure best practice service standards throughout the engagement.

4. Offboarding and End of Contract

At contract end, we agree an offboarding plan with the buyer and confirm required outcomes, access arrangements, and timings. We support closure of open requests and ensure the buyer retains appropriate HubSpot administrator access.

Data Extraction: At the end of the contract, buyers can extract their data directly from HubSpot using HubSpot's standard export tools and administrative features. Data can be exported in common formats (e.g. CSV/XLSX), including CRM records and related configuration where supported. Data can also be extracted using HubSpot's APIs and export endpoints, subject to the buyer's HubSpot permissions and security controls.

Included in the contract price:

- Standard offboarding and handover planning
- Service wrap-up call
- Closing or transitioning support tickets
- Confirmation of key contacts and admin access

- Guidance on standard HubSpot data export routes

Additional cost (if required):

- Bespoke data extraction or transformation
- Complex migration to another system
- Support for third-party integrations and handover
- Extended support beyond contract end
- Additional consultancy, training, or documentation packs

5. Support Levels

Delivery is provided by named HubSpot consultants, led by a Delivery Lead. Buyers are assigned an Account Manager (acting as a Technical Account Manager) to coordinate onboarding, support and service reviews.

Support Channels:

- Email and online ticketing (via Jira Service Management)
- Phone support available for triage during UK business hours (9am-5pm, Mon-Fri)
- Onsite support available at extra cost

Response Times:

- Support requests acknowledged within 1 business day
- Urgent incidents: response within 4 business hours
- Weekend and out-of-hours support can be agreed in advance where required

Standard Support (included within agreed package) covers incident triage, guidance, minor configuration, and best-practice advice.

Enhanced Support is available where buyers require additional capacity, proactive governance, or tighter response commitments. Enhanced support is priced as an agreed retainer and/or at published day rates.

6. Availability and Resilience

Consultancy Services: Discover Digital Solutions provides consultancy and support services during standard UK business hours, Monday to Friday, 9am-5pm. We are closed on weekends and UK bank holidays. Extended availability beyond these hours is available at additional cost by prior arrangement.

HubSpot Platform: HubSpot maintains a 99.99% uptime SLA for its enterprise products. Real-time platform status is available at status.hubspot.com. HubSpot's infrastructure is designed for high availability with redundancy across multiple data centres.

Resilience: The HubSpot platform is hosted on enterprise-grade cloud infrastructure with automated failover capabilities, redundant infrastructure components, automated backup systems with regular recovery testing, load balancing across multiple servers, and real-time monitoring with automated alerting.

Outage Reporting: HubSpot provides a public status dashboard at status.hubspot.com displaying real-time system status, scheduled maintenance, and incident history. Users can subscribe to receive automatic email and SMS alerts.

7. Data and Security

Data Storage Location: European Economic Area (EEA)

Data Protection in Transit: TLS (Version 1.2 or above)

Data Protection at Rest: Encryption of all physical media using AES-256 encryption. Access to encryption keys is strictly controlled and regularly audited.

HubSpot Security Standards:

- SOC 2 Type II certification
- Annual penetration testing by external organisation
- Data sanitisation: Deleted data cannot be directly accessed (Cryptographic Erasure)
- Equipment disposal via third-party destruction service

Discover Digital Security:

- Cyber Essentials certification
- Named board-level person responsible for service security
- Staff screening performed (DBS checks)
- Government security clearance: Up to BPSS
- We do not store customer data separately; all data remains within the client's HubSpot portal

8. Identity, Authentication and Access

User Authentication Methods:

- Multi-Factor Authentication (MFA)
- Identity federation with existing provider (e.g. Google apps)
- Username and password

Access to management interfaces within HubSpot is controlled through the portal's built-in permissions system with role-based access controls. For our internal systems, access to client portals is restricted to authorised project team members only, operating on the principle of least privilege. Access permissions are reviewed at least once a year and revoked promptly when no longer needed.

9. API and Customisation

API: HubSpot provides a comprehensive open API enabling configuration and integration capabilities. Users can manage contacts, companies, deals, tickets, and custom objects programmatically. The API supports data migration, webhook subscriptions, analytics data retrieval, and content management. API documentation is available in Open API (Swagger) and HTML formats. A sandbox/test environment is available.

Customisation: Our consultancy services can be customised to meet specific project requirements, commercial models, and delivery preferences. The HubSpot platform itself is highly customisable including custom properties, objects, pipelines, workflows, dashboards, reports, email templates, landing pages, forms, branding, and user permissions.

10. Analytics and Reporting

We provide service usage metrics from HubSpot reporting and dashboards, including:

- Seat utilisation and user activity

- CRM volumes and engagement (calls, emails, meetings)
- Web traffic analytics
- Marketing performance (email engagement, form submissions, campaign attribution)
- Sales pipeline metrics (deal stages, velocity)
- Service metrics (ticket volumes, response times, SLA compliance)

Data can be viewed in real-time dashboards, exported, and accessed via HubSpot APIs. Regular performance reports are available on request.

11. Pricing

Detailed pricing information is provided in the separate Pricing Document. Services can be delivered on a time and materials basis or as fixed-price packages depending on project requirements.

Discounts are available for educational organisations.

Free Trial: Free initial consultation including requirements scoping, HubSpot demonstrations, and solution architecture advice. For existing HubSpot users, we offer a complimentary portal health check audit. No time limit on pre-sales engagement.

12. Contact Information

Discover Digital Solutions Limited

Website: discoverdigital.com

Free consultation: discoverdigital.com/contact