HubSpot Setup Playbook for Founders

For: Founders with a new HubSpot account and no marketing team
Founder Playbook step: 4
As of October 26, 2026

What You Need

You've opened a HubSpot account and you don't have a marketing team. This guide takes you from an empty account to a working lead system in five steps. Plan two to three hours for each. It supports step 4 of the Founder Playbook: choose the system of record and name the handoffs. Every contact gets an owner, a source and a stage.

Before you start

- A HubSpot account, with you as the one owner.
- Access to your DNS, the settings at your domain registrar. If someone else holds them, ask them now.
- A Gmail or Outlook inbox to connect, and a personal Gmail address for the test email.
- Your website, so you can install the tracking code.
- A contact list with one row per person and one email per row.

Check your plan

Your HubSpot plan decides what you can automate, and the limits change. Open Settings, then Account & Billing, and write down three things: whether your plan includes workflows, whether it includes sequences, and how many of each. A **workflow** is an automation HubSpot runs for you, such as sending an email when someone fills in a form. A **sequence** is a series of emails and tasks a seller sends from their own inbox. If your plan can't run the follow-up as a workflow, Step 4 shows a task-list route that works on any plan. Check HubSpot's pricing page before you commit to an upgrade.

By the end you'll have

- A sending domain that reaches the inbox, not spam.
- A contact list with an owner, a source and a stage on every record.
- One form and one page that capture leads and record where they came from.
- A four-email follow-up that runs without you, or runs from a task list.
- A weekly scorecard of five numbers.

Build one thing, test it, then move on. Ten half-finished workflows won't bring in a single lead.

Research

These are the sources behind the steps. Each one is a public page you can open and check.

Finding	Source
Google and Yahoo require SPF, DKIM and DMARC on any domain that sends bulk email, and they bounce mail that fails.	Google, Email sender guidelines (support.google.com/a/answer/81126)
How to set up DKIM, SPF and DMARC for your sending domain in HubSpot.	HubSpot, Email authentication overview (knowledge.hubspot.com/email/overview-of-email-authentication)
US rules for commercial email: honest headers and subject lines, a postal address and an easy opt-out. If you sell outside the United States, other rules apply. Ask a lawyer before you send.	FTC, CAN-SPAM Act compliance guide (ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business)
Workflows and the automation built into forms, emails and pipeline stages.	HubSpot, Automate your processes (knowledge.hubspot.com/get-started/automate-your-processes)
Personalizing emails with smart content, smart rules and personalization tokens.	HubSpot Academy, Email Marketing Software (academy.hubspot.com/courses/email-marketing-software)
What each HubSpot plan includes.	HubSpot pricing (hubspot.com/pricing/suite/starter)

Sources checked October 26, 2026.

Step by Step

Step 1. Connect Your Email and Your Domain

Set up the account so HubSpot sees everything you send, and inbox providers trust it.

1. **Fill in the company profile.** Set your time zone, currency and company name. A wrong time zone breaks send times and due dates later.
2. **Connect your inbox.** Link Gmail or Outlook from the Home screen. Until you do, HubSpot can't log the emails you send yourself.
3. **Connect your sending domain first, because it takes the longest.** HubSpot won't send from your own domain until you add a DKIM record, a digital signature that proves the mail came from you. Add HubSpot's SPF record too, a list of the servers allowed to send for your domain. Then add a DMARC record, which tells inbox providers what to do with mail that fails those two checks. These records live in your DNS, the settings at your domain registrar. If someone else holds them, ask now.
4. **Remove any null MX record** from a domain you use only for sending. Some inbox providers reject mail from a domain that has one.
5. **Install the tracking code** on your website, so HubSpot can tie visits to contacts.
6. **Pick one owner** for the account and one shared address for notifications.

Google and Yahoo require SPF, DKIM and DMARC on any domain that sends bulk email, and they bounce mail that fails. DNS changes can take hours, so start with the domain and do the rest while you wait.

> **Ready when:** a test email to a personal Gmail address shows SPF, DKIM and DMARC all marked PASS under Show original.

Step 2. Clean and Label Your Contacts

Automation is only as good as your data, so label first and automate second.

1. **Choose your lifecycle stages.** A lifecycle stage is the HubSpot field that says where a contact stands, from Subscriber to Customer. Keep to six: Subscriber, Lead, Marketing qualified lead, Sales qualified lead, Opportunity and Customer. Write one sentence for each that says what must be true to enter it.
2. **Add only the properties you need.** Start with lead source, industry and company size. Every extra field is one more thing to keep clean.
3. **Clean the list before you import it.** Keep one row per person and one email per row. Remove duplicates, role addresses like info@ and anyone who never agreed to hear from you. Skip purchased lists. One bad send can land your whole domain in spam.
4. **Import 20 rows first.** Check them, then load the rest. Map each column on purpose and don't accept HubSpot's guesses.
5. **Set an owner on every import.** A contact with no owner gets no follow-up.
6. **Turn on your unsubscribe and consent settings.** Every marketing email needs a working unsubscribe link and your postal address. Honor opt-outs the day you get them.

> **Ready when:** five random contacts each show an owner, a source and a lifecycle stage.

Step 3. Build One Form and One Page

Give a visitor one thing to ask for, and record where they came from.

1. **Build one form.** Ask for email, first name and one qualifying question. Every extra field costs you sign-ups.
2. **Build one landing page** with one offer, one form and no menu. Offer something specific: a checklist, a short audit or a call.
3. **Write a thank-you page** that delivers what you promised and names the next step, such as booking a call.
4. **Track the source.** Add UTM tags, short codes at the end of a link that record which campaign sent the click, to every link you share. Use hidden form fields, which store those codes on the contact without the visitor seeing them.
5. **Turn on a notification** for every new submission.
6. **Test it end to end.** Submit the form with a fresh email address and watch the contact appear.

If the test contact has no source, fix that before you send any traffic. You can't recover a source after the fact.

> **Ready when:** a test submission appears on a contact record within a minute, with its source, owner and stage filled in.

Step 4. Write the Four-Email Follow-Up

Give every new lead a short, useful follow-up without remembering to send it.

Call this a **nurture**: a run of emails that follows a sign-up.

Day	Email	What it does
0	Welcome	Delivers what they asked for, with one link.
3	Useful Tip	Shares one idea that solves a real problem.
7	Short Story	Tells a client result with a concrete outcome.
14	Direct Ask	Offers a call in one sentence.

Write each email in plain words, from a real person, with a single link. Aim for under 120 words.

Build the exit rule first. A lead who replies, books a meeting or unsubscribes should leave the follow-up at once. The most common mistake is a lead who keeps getting emails after they've answered.

If your plan includes workflows, trigger this one when someone submits the form, add a wait between emails, and add the exit rule. **If it doesn't,** save the four emails as templates, create a task for each follow-up due on day 0, 3, 7 and 14, and work the tasks due today each morning.

> **Ready when:** you run a fake lead through the whole path and each step fires on the right day.

Step 5. Hand Off to Sales

Get a warm lead to a person fast, so nobody has to guess who owns it.

1. **Define a qualified lead in one sentence.** For example: someone who opened two emails and visited your pricing page, or asked for a call.
2. **Pick one owner per lead.** If you're alone, that's you. With a team, assign by turns (round-robin) or by territory, and write the rule down.
3. **Create a task the moment a lead qualifies.** Title it with the action, such as "Call Jane Smith," and make it due the same day.
4. **Set a response time you can keep,** such as one business day, and measure it.
5. **Move the stage on purpose.** A person who books a meeting becomes a Sales qualified lead, a contact worth a sales call. A person who signs becomes a Customer.
6. **Review the list every week.** Anyone untouched for 14 days gets a decision: re-engage or close out.

Start with a number of leads you can actually call. Tasks nobody works are worse than no automation.

> **Ready when:** a test lead qualifies and a task appears for the right owner with a due date.

Measure It: The Weekly Scorecard

Check five numbers every Monday and write them in the same place. A trend tells you more than any single week. Build one dashboard with all five and open it first thing.

Number	It answers	Where to find it
New Leads	Is capture working?	Contacts, filtered by create date
Qualified Leads	Is the traffic any good?	Contacts, filtered by lifecycle stage
Meetings Booked	Is the handoff working?	Meetings or Activities
Pipeline Created	Is it worth the effort?	Deals, filtered by create date, in dollars
Hours to First Touch	Are leads going cold?	Contact create date to first activity

Troubleshooting

Problem	Likely cause	Fix
The test email doesn't show PASS for SPF, DKIM and DMARC.	The DNS records aren't added yet, someone else holds them, or the change is still spreading. DNS changes can take hours.	Add the DKIM, SPF and DMARC records. Ask the person who holds your DNS. Test again later.
Mail from your sending domain is rejected.	A null MX record sits on a domain you use only for sending.	Remove the null MX record.
Mail lands in spam.	A purchased list, duplicates, role addresses, or people who never agreed to hear from you.	Clean the list first. Skip purchased lists. Import 20 rows and check them before you load the rest.
A contact has no follow-up.	The contact has no owner.	Set an owner on every import.
The test contact has no source.	The UTM tags or hidden form fields are missing.	Add UTM tags to every link and hidden form fields to the form. Fix this before you send traffic, because you can't recover a source later.
A lead keeps getting emails after they replied.	The exit rule is missing.	Build the exit rule first: replies, booked meetings and unsubscribes leave the follow-up at once.
Your plan can't run the follow-up as a workflow.	The plan doesn't include workflows.	Use the task-list route: four email templates, one task per follow-up on day 0, 3, 7 and 14, worked each morning.
Tasks pile up and nobody works them.	More leads than you can call.	Start with a number of leads you can call. Review the list weekly, and decide on anyone untouched for 14 days.
Qualified leads wait for days.	No response time, or no owner rule.	Set a response time you can keep, such as one business day, and measure hours to first touch on the scorecard.

Doug can set this up with you. Book a discovery call at mayberryadvisory.com.