ENTERPRISE ON-BOARDING

Account Manager User Guide

Managing Intake Tickets & On-Boarding Projects in HubSpot

Logical Position | *Paid Media Operations*
Last Updated: February 2026

Introduction

This guide walks Enterprise Account Managers through the complete on-boarding process in HubSpot — from the moment Sales submits an Intake Ticket to the final campaign launch. The Enterprise on-boarding workflow is managed across two interconnected record types: the Intake Ticket and the On-Boarding Project.

Understanding how these two records relate to each other is the key to managing your accounts efficiently. As an AM, your role spans both systems throughout the entire on-boarding lifecycle.

How the Two Records Work Together

The Intake Ticket tracks everything from the initial sales handoff through the end of the post-intake period. It is where you manage pre-call preparation, conduct the intake call, and complete post-intake actions before build can begin.

The On-Boarding Project is the build record that gets activated once the Intake Ticket moves to "Begin Build." This is where the Specialist works through campaign construction and where you track build milestones, review campaigns, and execute launches.

These two records are linked to the same Service record, which ties them to the Company and is where launch status is ultimately recorded.

Part 1: Managing the Enterprise Intake Ticket

The Intake Ticket is created by Sales and moves through a series of automated stages. Each stage transition generates new tasks for the AM. Your job is to complete those tasks and, at key moments, manually advance the ticket status to trigger the next phase.

1.1 The Intake Ticket Lifecycle at a Glance

Stage	What Happens	AM Action Required
Intake Scheduled	Sales submits ticket with date, time block, product mix, and client email.	None — awaiting assignment.
Awaiting AM Assignment	Leadership assigns ENT division; Team Lead is assigned. Team Lead gets a task to assign to the AM.	None — wait to be assigned.
AM Assigned	Team Lead updates assignee to you and marks task complete. You are notified by email and task notification.	Send Welcome Email, confirm Zoom meeting, check in with Specialist.
Pre-Intake Preparation	Triggered when you complete the Welcome Email task. New prep tasks are generated.	Complete all pre-intake prep tasks (3 business day window).
Intake Call	Automatically triggered 1 day before the intake date.	Complete the Intake Call playbook, link GMC/Meta Business if applicable, move ticket status when complete.
Intake Call Completed	Triggered manually by you after the call is finished.	Complete all post-intake tasks.
Begin Build	Triggered manually by you once all post-intake work is done. Activates the On-Boarding Project.	Mark final task complete to hand off to Specialist.

1.2 Getting Assigned to an Intake

You will receive two notifications when a new Intake Ticket is assigned to you:

- A HubSpot task notification for the tasks generated at the AM Assigned stage.
- An email notification from HubSpot confirming your assignment to the ticket.

When you open the ticket, you will see three tasks waiting in the Activity feed under Upcoming:

#	Task	Notes
1	**Send Welcome Email to Client**	Complete immediately. Triggers Pre-Intake Preparation stage.

2	**Ensure Zoom Meeting Details Are Shared With Client & Confirm Contact Method**	Complete alongside or immediately after the welcome email.
3	**Check-In With Specialist**	1 business day lead time — connect with the PSS before the intake call.

Important: Email Template

Use the HubSpot Welcome Email template when sending your initial outreach. The template includes an intake questionnaire link for the client to pre-fill before the call.

To access: Open the Email action on the Ticket record and type "welcome" in the template search bar. The template will auto-populate contact and company fields.

You can also use the HubSpot Outlook plugin to access templates from your inbox.

After sending the Welcome Email, mark that task complete. This is the action that moves the ticket forward to Pre-Intake Preparation and generates your next set of tasks.

1.3 Pre-Intake Preparation

Once you mark the Welcome Email task complete, the ticket advances to Pre-Intake Preparation and generates several new tasks. These tasks have a 3 business day completion window and do not necessarily align with the exact date of the intake call — they are meant to ensure you are fully prepared before you get on that call.

#	Task	Notes
1	**Review Sales Activity Feed**	Go to the Company record and review all Sales communications, notes, and recorded calls.
2	**Pre-Fill Intake Playbook Using HubSpot Assistance**	Open the Intake Playbook from the Playbooks card on the Ticket record and fill it out as thoroughly as possible using sales notes and questionnaire responses.
3	**Update Quickbase Account Numbers**	Log any CIDs or other Quickbase account identifiers that have been made available.
4	**Review Client Website & Audit Attribution Points**	Audit the client website for forms, phone numbers, tracking pixels, and other attribution points.
5	**Review Returned Client Questionnaire, If Possible**	Check for a form submission from the client via the Activity Feed (filter for

		Form Activity) or via Marketing > Forms > search "Intake".
6	**Review Google Ads Platform Performance, If Possible**	Review historical performance data from the platform if accessible prior to the intake.

Reviewing the Client Questionnaire

Clients receive an intake questionnaire link in the welcome email. If they fill it out, their responses can be found in two ways:

Option 1 — Via the Activity Feed:

1. On the Ticket record, go to the Activities tab.
2. Click Filter Activity.
3. Check Form Activity and apply the filter.
4. If the client submitted the form, a form submission card will appear in the feed.

Option 2 — Via Marketing > Forms:

5. Navigate to Marketing in the left sidebar.
6. Select Forms from the dropdown.
7. Search for "Intake" in the search bar.
8. Select the form matching the client's product mix (e.g., Paid Search Intake Questionnaire, Paid Social Intake Questionnaire).
9. Find the client's contact in the submissions list and click to view their responses.

Pre-Filling the Intake Playbook

The Intake Playbook is a structured record for capturing client information that the Specialist will use during the build. Filling it out before the call — and updating it during the call — ensures nothing is lost.

10. On the Ticket record, scroll to the Playbooks card in the right column.
11. Search for the playbook matching the client's product mix (e.g., "Intake Record – PPC/PS Ecomm").
12. The playbook opens in a pop-up window.
13. Fill out as many fields as possible using the sales activity feed, questionnaire responses, and your own research.
14. The playbook auto-saves as you fill it out — no need to manually save.
15. Once complete, return to the Ticket record and mark the Pre-Fill Intake Playbook task as complete.

Tip: Using HubSpot AI to Pre-Fill

Task descriptions on the Ticket record include a tip about using HubSpot's AI Assistant to speed up playbook pre-filling. You can copy sections of the Intake Questionnaire into the Assistant to generate suggested responses. Results will vary based on note quality.

1.4 Intake Call

When the Intake Date on the ticket reaches 1 day out, HubSpot automatically moves the ticket status to Intake Call. This generates three tasks for you to complete on or immediately after the call:

#	Task	Notes
1	**Fill Out Remaining Intake Playbook Questions During Intake Call**	Complete any fields not pre-filled. Use the call to gather information directly from the client.
2	**Link Client GMC to LP Merchant Center Account**	Required for Ecommerce clients only.
3	**Link Meta Business to LP Account**	Required for Paid Social clients only.

The final intake call task is to move the ticket status forward. This is done as a task action, not a manual status change:

- Move Ticket Status to "Intake Completed" Once Intake Call Is Finished — mark this task complete when the call ends.

Note: Using Zoom for Your Intake Call

We strongly recommend scheduling the intake call through HubSpot's Zoom meeting scheduler so the call is automatically logged, transcribed, and summarized via ZRA. If you use a different scheduler, you will not receive automatic transcription — which you are likely accustomed to if you have been using Zoom regularly.

You can schedule the meeting directly from the Ticket record using the Meeting action at the top of the Activity panel.

1.5 Post-Intake Tasks

After you manually move the ticket status to Intake Call Completed, a new set of post-intake tasks is generated. These are familiar actions that mirror what you have historically done in Quickbase after an intake.

#	Task	Notes

1	**Create Search Operation in Quickbase**	Create the Quickbase record for the new account.
2	**Update Intake Notes in Quickbase & Mark Intake As Complete**	Finalize the intake notes in Quickbase.
3	**Schedule Post-Intake Meeting with Specialist**	Set up time to debrief with your PSS and hand off build details.
4	**Schedule Staged Launch Calls With Client & Send Summary Email**	Confirm launch call dates and send the client a post-intake summary.
5	**Submit Support Requests, If Necessary**	Submit any Code Install, Data Feed, or other support requests needed before the build can begin.

As you complete each post-intake task, mark it complete on the Ticket record. Once all post-intake work is done, you will see the final task:

- Move Ticket Status to "Begin Build" Once Post-Intake Call Work Is Finished — completing this task is what activates the On-Boarding Project and hands the build off to the Specialist.

What Happens When You Move to Begin Build

Manually moving the Ticket Status to "Begin Build" triggers the corresponding On-Boarding Project to advance from its holding stage into Build In Progress. The Specialist receives their first set of build tasks and work begins. From this point forward, the On-Boarding Project becomes your primary tracking record.

Part 2: Managing the On-Boarding Project

Once the Ticket moves to Begin Build, the On-Boarding Project is in Build In Progress. This is where you will track the Specialist's progress, complete your own build-period tasks, review campaigns pre-launch, and mark each campaign set as launched. For Enterprise clients, the build is structured as a staged process with multiple campaign sets.

2.1 On-Boarding Project Stages at a Glance

Stage	What Happens	AM Action Required
Build In Progress	Specialist begins constructing campaigns. Staged Build Status field shows which Build Stage they are in (Stage 1, 2, or 3).	Complete AM build-period tasks (product mix dependent).
Build Review	Specialist submits their campaign set for Team Lead review using the Build Review Status field.	None — await Team Lead approval.
Build Completed	Team Lead sets Build Review Status to Approved. You receive an email notification.	Review the build and submit any changes to the Specialist.
Launch	AM reviews campaigns, coordinates any revisions, and marks campaigns as launched via the Service record.	Complete the two launch tasks: Review Build & Mark Campaigns As Launched.
Back to Build In Progress	Specialist begins the next campaign set. Cycle repeats for each staged build.	Repeat review and launch process for each campaign set.
On-Boarding Completed	All campaign sets are launched and the final Staged Launch property is updated on the Service.	Confirm Optimization Project has been generated.

2.2 Your Tasks During the Build Period

When the On-Boarding Project enters Build In Progress and the Staged Build Status moves to Build Stage 1, HubSpot generates a set of tasks for you as the AM. The number and type of tasks vary based on product mix, but may include:

- **Task:** Send Data Feed Audit to Client
- **Task:** Ensure Outstanding PPC Action Items For Launch Are Complete
- Other product-specific tasks depending on the services being built

Complete these tasks as they apply and mark them complete on the On-Boarding Project record.

2.3 Build Review & Email Notification

When the Specialist finishes a campaign set, they submit it for review by updating the Build Review Status field to "Build Submitted For Review." The Project Stage moves to Build Review. The Team Lead then reviews the build and, if approved, sets the Build Review Status to "No Further Changes Or Suggestions (Approved)." This moves the Project Stage to Build Completed.

When the Project reaches Build Completed, you will receive an automated email notification from HubSpot that reads:

> **Paid Media Build Completed**
> *A Paid Media Build for [Client Name] has been Completed. Please review the Campaigns and schedule the Launch Call with the Client.*

This email is your trigger to action. Open the On-Boarding Project and complete your two post-build launch tasks.

2.4 Reviewing the Build & Launching Campaigns

After the build is approved and you receive the email notification, two tasks are generated for you on the On-Boarding Project:

#	Task	Notes
1	**Review PPC Build & Submit Necessary Changes**	Review the campaign set the Specialist built. Coordinate with them on any revisions needed before launch.
2	**Mark Campaigns As Launched**	After the launch call with the client is complete, mark this task to initiate the launch steps on the Service record.

Step-by-Step: Marking the Launch as Complete

After completing your scheduled launch call with the client, follow these steps to officially record the launch:

16. On the On-Boarding Project record, locate the Mark Campaigns As Launched task and open it.
17. Navigate to the associated Service record. You can find it in the Services section of the Project's right-column sidebar.
18. On the Service record, locate the Enterprise Launch section in the left column.
19. Click the Enterprise Staged Launch dropdown and select the appropriate launch stage (Staged Launch 1 for the first campaign set, Staged Launch 2 for the second, and so on).
20. Save the change.

What This Action Triggers

Updating the Enterprise Staged Launch property from null to Staged Launch 1 (or 2, or 3) tells HubSpot to automatically generate a new Optimization Project for the Specialist. This is the equivalent of marking Week 0 complete in Quickbase. The Optimization Project is where the Specialist will perform all ongoing weekly optimizations for that campaign set going forward.

2.5 Repeating the Cycle for Each Campaign Set

Enterprise builds are staged — meaning the Specialist builds one campaign set at a time, each going through its own Build Review and Launch cycle. Once you update the Staged Launch property for the first campaign set, the On-Boarding Project automatically moves back to Build In Progress as the Specialist begins the next set.

You will continue to receive email notifications each time a campaign set is completed and reviewed. For each subsequent launch, the same two tasks will be generated: Review Build and Mark Campaigns As Launched. The process repeats until all campaign sets are built and launched.

The Staged Build Status field on the Project tracks where the Specialist is in the build process. The possible values are:

- Build Stage 1 — First campaign set under construction
- Build Stage 2 — Second campaign set under construction
- Build Stage 3 — Third campaign set under construction
- Staged Build Completed — All campaign sets have been built

Part 3: Navigation & Quick Reference

3.1 Finding Your Intake Tickets

To find your active Intake Tickets:

21. In HubSpot, navigate to Service in the left sidebar.
22. Select Tickets from the dropdown.
23. Use the Index View filters to filter by Assignee = You and Pipeline = Paid Media Intake Ticket.
24. Your active tickets will display with their current pipeline stage visible.

3.2 Finding Your On-Boarding Projects

To find active On-Boarding Projects assigned to your accounts:

25. Navigate to CRM > Projects in the left sidebar.
26. Filter the view by Pipeline = Paid Media Operations - On-Boarding.
27. Filter by Assigned To = You or use your team's designated Index View.

You can also navigate to an On-Boarding Project directly from the Intake Ticket or the Service record by clicking on the associated Project in the Projects section of the right-column sidebar.

3.3 Navigating Between Records

All three key record types — the Intake Ticket, the On-Boarding Project, and the Service — are linked to each other through HubSpot associations. The Service record is the central hub:

- From the Ticket: The associated Service is shown in the Services panel on the right column.
- From the Project: The associated Service is shown in the Services panel on the right column.
- From the Service: Both the Intake Ticket and the On-Boarding Project appear in the Projects panel, and the Company appears in the Companies panel.

3.4 Key Automations to Know

HubSpot handles a significant amount of stage progression and task generation automatically. The table below summarizes the most important automation triggers and what they produce:

Trigger (Who Does It)	Stage Change	What Is Generated
Complete "Send Welcome Email" task (AM)	AM Assigned → Pre-Intake Preparation	Pre-intake prep tasks for AM
1 day before Intake Date (Automatic)	Pre-Intake Preparation → Intake Call	Intake call tasks for AM
Complete "Move Ticket to Intake Completed" task (AM)	Intake Call → Intake Call Completed	Post-intake tasks for AM
Complete "Move Ticket to Begin Build" task (AM)	Intake Call Completed → Begin Build → activates On-Boarding Project	Activates the On-Boarding Project; Specialist gets build tasks
PSS marks "Meet With AM" task complete (PSS)	On-Boarding Project → Build In Progress	AM build-period tasks; Staged Build Status set to Build Stage 1
PSS updates Build Review Status to "Build Submitted for Review" (PSS)	On-Boarding Project → Build Review	None — Team Lead reviews
Team Lead sets Build Review Status to Approved (Team Lead)	Build Review → Build Completed	AM email notification; AM gets two launch tasks
AM updates Enterprise Staged Launch on the Service (AM)	Build Completed → Back to Build In Progress (for next set)	Optimization Project generated; cycle repeats

Part 4: Common Questions & Troubleshooting

My ticket was not automatically associated with the right Service or Company. What do I do?

HubSpot automations handle these associations, but they can occasionally fail. If the Service or Company is missing from your Intake Ticket's right-column sidebar, contact your Team Lead. If the issue cannot be resolved quickly, you can also reach out to Tristan Storr directly for assistance.

My tasks have not generated after I completed the previous stage's task. What do I do?

Give HubSpot a few seconds and refresh the page — automations sometimes have a short delay. If tasks still have not appeared after refreshing, reach out to your Team Lead or to support in the HubSpot Teams channel.

The Specialist is not in HubSpot yet. Where is the On-Boarding Project?

The On-Boarding Project is not activated until the Intake Ticket reaches Begin Build. If the Specialist has not started receiving tasks, confirm that you have completed the final post-intake task to move the ticket to Begin Build.

I cannot find the right Intake Questionnaire form. Which one do I use?

Select the form that matches the client's product mix: use the Paid Search Intake Questionnaire for PPC clients, the Paid Social Intake Questionnaire for Social clients, and the Paid Search & Paid Social Intake Questionnaire for multi-product clients. If you are uncertain, check the Paid Media Intake Products field on the ticket.

The client did not fill out the questionnaire. What should I do?

That is okay — use the available sales activity, recorded calls, and notes on the Company record to pre-fill the Intake Playbook as thoroughly as possible. Complete the review task and note in the playbook that the client did not return the questionnaire.

I launched the first campaign set. When does the Optimization Project appear?

The Optimization Project is generated automatically when you update the Enterprise Staged Launch property on the Service record from null to Staged Launch 1 (or the next applicable stage). If the project does not appear within a few minutes of saving that change, contact your Team Lead.

Additional Resources

The following resources are linked in the auto-generated resource note pinned to every Intake Ticket:

- Legacy PMOS Resources — Reference documents for legacy Quickbase processes
- Paid Media Intakes Workflow Guide — Overview of the intake workflow
- Managing Intakes - What's Next? — Post-intake actions and handoff guidance
- Paid Media Intake Demo Slides — Training slides and process overview

For support during the transition, contact your Team Lead or reach out in the dedicated HubSpot Support channel in Microsoft Teams.

This document is for internal use only. For questions or updates, contact Tristan Storr.