



Accelerate Your Digital Transformation with a Financial Services-Tailored HubSpot Solution

At GK3 Capital, we empower financial services firms to leverage HubSpot to transform their client acquisition and engagement strategies.

Our expertise ensures that each Hub is not only configured to meet industry-specific needs but also optimizes efficiency, drives growth, and enhances customer relationships. Go live in weeks, not months with our turnkey HubSpot solution designed for financial services.

Why Leading Firms Choose GK3



Financial services expertise built into every implementation



Certified HubSpot Partner with deep platform expertise



Fast, compliant implementation built for performance

The Core Hubs That Power Growth

Each Hub is implemented using the **GK3 Blueprint**—a proven checklist of 200+ configuration steps tailored specifically for financial services.

Sales Hub

Sales Hub: Streamline Sales. Drive Growth.

Equip your team to spend less time on admin and more time selling.



Marketing Hub

Attract & Convert Leads

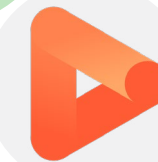
Drive qualified leads with compliant campaigns, automation, and analytics.



Content Hub

Power Smarter Content That Converts

Create, manage, and personalize high-impact content across your site.



Marketing Hub: Attract & Convert More Leads

Your Challenge

Marketing efforts often lack structure, leading to ineffective campaigns, poor lead tracking, and compliance risks in the financial sector.

How Marketing Hub Solves This

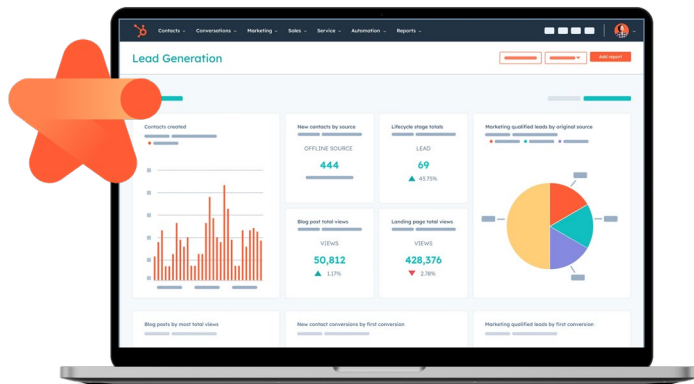
The **Marketing Hub** provides a centralized system for inbound marketing, lead nurturing, and analytics. It ensures financial firms comply with industry regulations while maximizing outreach and engagement.

The Benefits

Generate high-quality leads through targeted campaigns.

Improve compliance with industry marketing regulations.

Gain real-time insights to optimize marketing performance.



GK3 Blueprint Highlights

80+
Steps to
Marketing
Hub Success

Strategy & Access Setup

- ✓ HubSpot, CMS, and analytics access
- ✓ Domain, GA4, and Search Console integration

Platform Configuration

- ✓ User roles, branding, and file structure
- ✓ Social and company default setup

Website & Analytics

- ✓ Tracking code installation
- ✓ Internal traffic filtering

Content Tools

- ✓ Blog, email, and landing page setup
- ✓ Google Ads integration

Custom Templates

- ✓ Compliant, branded templates for emails, blogs, and LPs
- ✓ Design aligned to your firm's visual identity

Content Tools

- ✓ Blog, email, and landing page setup
- ✓ Google Ads integration

Automation & Reporting

- ✓ Lead scoring, segmentation, workflows
- ✓ Dashboards and email health monitoring

Sales Alignment & Data Migration

- ✓ Contact import
- ✓ Sales Hub tools setup and integration

Our Implementation Process



Initial Setup



Portal
Configuration



Website
Integration



Content
Tools Setup



Template
Creation



Automation
& Reporting



Data Migration
& Sales Integration

Sales Hub: Streamline Sales. Drive Growth.

Your Challenge

Sales teams waste time on admin tasks, lack pipeline visibility, and struggle with manual follow-ups. These inefficiencies limit conversions and revenue growth.

How Sales Hub Solves This

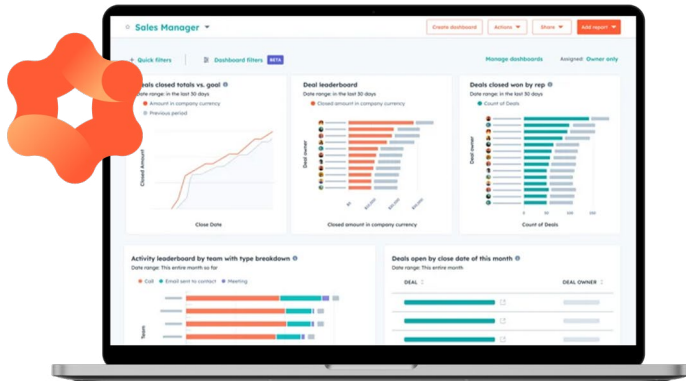
Sales Hub transform your sales process — integrating pipeline tracking, task automation, CRM optimization, and sales enablement tools designed for financial firms.

The Benefits

Enhance alignment between marketing and sales teams.

Gain complete pipeline visibility to make data-driven decisions.

Equip reps with better tools for outreach and follow-up.



GK3 Blueprint Highlights

70+
Sales Hub
Checklist
Steps

Pipeline & CRM Setup

- ✓ Custom pipeline stages
- ✓ Lifecycle tracking and lead scoring

Sales Tools

- ✓ Email templates and sequences
- ✓ Meeting links and scheduling setup

Email & Calendar Integration

- ✓ Sync with Microsoft 365 or Google Workspace
- ✓ Email tracking enabled

Sales Collateral

- ✓ Centralized document library
- ✓ Easy access to proposals and brochures

Automation & Tasks

- ✓ Lead assignment workflows
- ✓ Task automation for follow-ups

Reporting & Forecasting

- ✓ Sales dashboards and pipeline tracking
- ✓ Forecasting tools built-in

Contact Views

- ✓ Custom contact layouts for sales teams
- ✓ Key property fields highlighted

Team Training

- ✓ Three live training sessions
- ✓ Hands-on support for adoption

Our Implementation Process



Sales Pipeline
Configuration



CRM
Property
Setup



Email &
Meeting
Scheduler
Integration



Custom
Sales
Tools



Document
Library
Setup

Automation
& Task
Management



Reporting &
Forecasting

Contact
Record
& View
Configuration



Sales
Team
Training

Content Hub: Power Smarter Content That Converts

Your Challenge

Creating, managing, and personalizing content at scale is challenging, especially for financial services firms navigating compliance and SEO best practices.

How Sales Hub Solves This

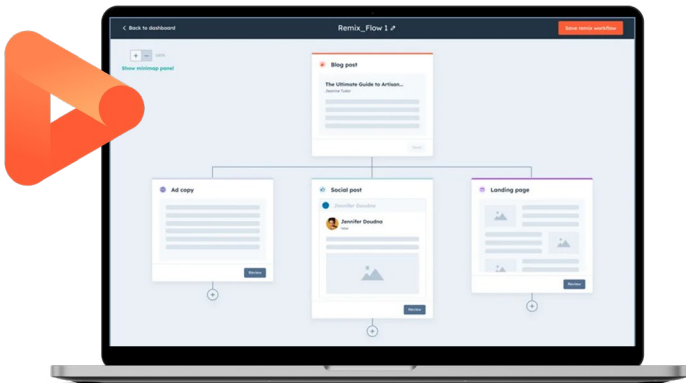
The **Content Hub** (formerly CMS Hub) empowers financial firms with a scalable, secure, and SEO-optimized content platform.

The Benefits

Build a high-performing, secure, and scalable website within HubSpot.

Deliver personalized content that engages and converts leads.

Improve SEO to drive organic traffic and visibility.



GK3 Blueprint Highlights

60+
Steps to
Smarter
Content

Website & Blog Setup

- ✓ CMS tools configured for publishing
- ✓ Navigation, structure, and branding applied

SEO & Personalization

- ✓ SEO settings and search optimization
- ✓ Smart content rules for personalization

Template Development

- ✓ Branded templates for pages and emails
- ✓ Financial-compliant design standards

Dynamic Content

- ✓ Smart modules and dynamic page creation
- ✓ Content tailored by user behavior

Workflow & Publishing

- ✓ Role-based publishing workflows
- ✓ Approvals and content scheduling tools

Analytics & Reporting

- ✓ Dashboards for engagement and SEO
- ✓ Performance tracking by content type

Our Implementation Process



Website &
Blog Setup



SEO &
Personalization

Template
& Branding
Customization



Smart Content &
Dynamic Pages

Content Strategy
& Workflow
Automation

Analytics &
Performance
Tracking



Why Choose GK3 Capital?

Benefits

Financial Services Expertise

Deep understanding of industry regulations and client acquisition strategies.

Proven Process

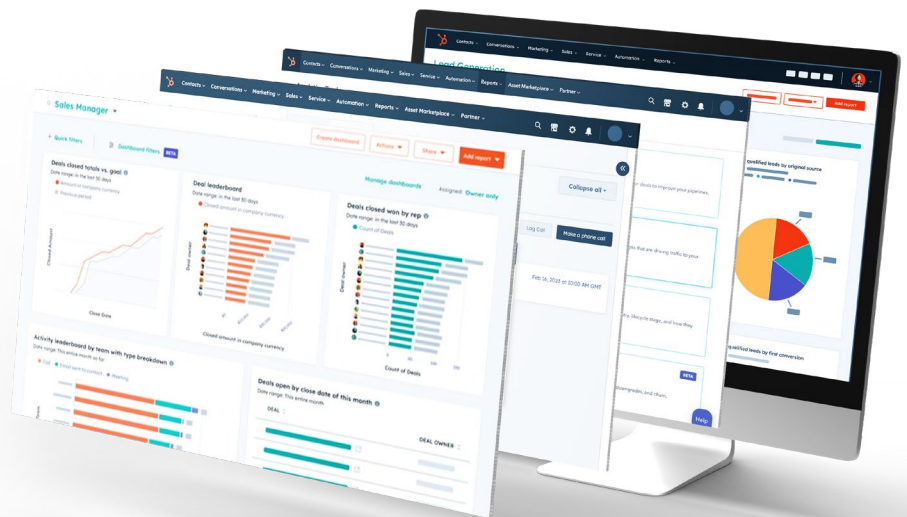
Our structured approach ensures every implementation is efficient and results-driven.

Customization

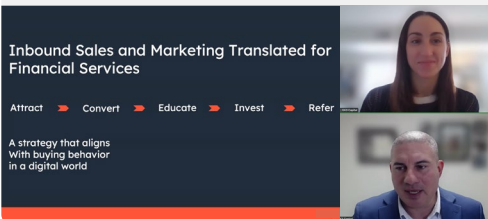
HubSpot is tailored to your specific business needs.

End-to-End Support

From strategy to execution, we handle it all.



Trusted by HubSpot to Lead in Financial Services



HubSpot selected GK3 Capital to co-host a dedicated webinar for financial services firms – spotlighting how to master marketing, sales, and technology in a highly regulated industry.

We weren't just a participant – we were the featured implementation partner trusted to share strategy, showcase best practices, and help financial firms unlock the full power of HubSpot.

[Watch Our Featured Webinar with HubSpot](#)

Power Your Growth with a Financial Services-Focused HubSpot Setup

Leverage GK3 Capital's expertise for a fully tailored, industry-specific implementation.

[Book Your Strategy Call](#)