HUBSPOT AUDIT

Hubsessed by
The Insight Studio

1 Check Your Users, Billing Details, Renewal Cycle, Who gets notifications

2 Check Your Data Contact, Deal, Company Data

3 Check Your Deal Pipeline & Pipeline Automation

4 Check Your Workflows

5 Check Your Contact Record Layout

6 Check Your Marketing to Sales Handoff Process

7 Check Your Website Performance

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13

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14

Check Your Social Performance

1

Check Your Users, Billing Details, Renewal Cycle, Who gets notifications

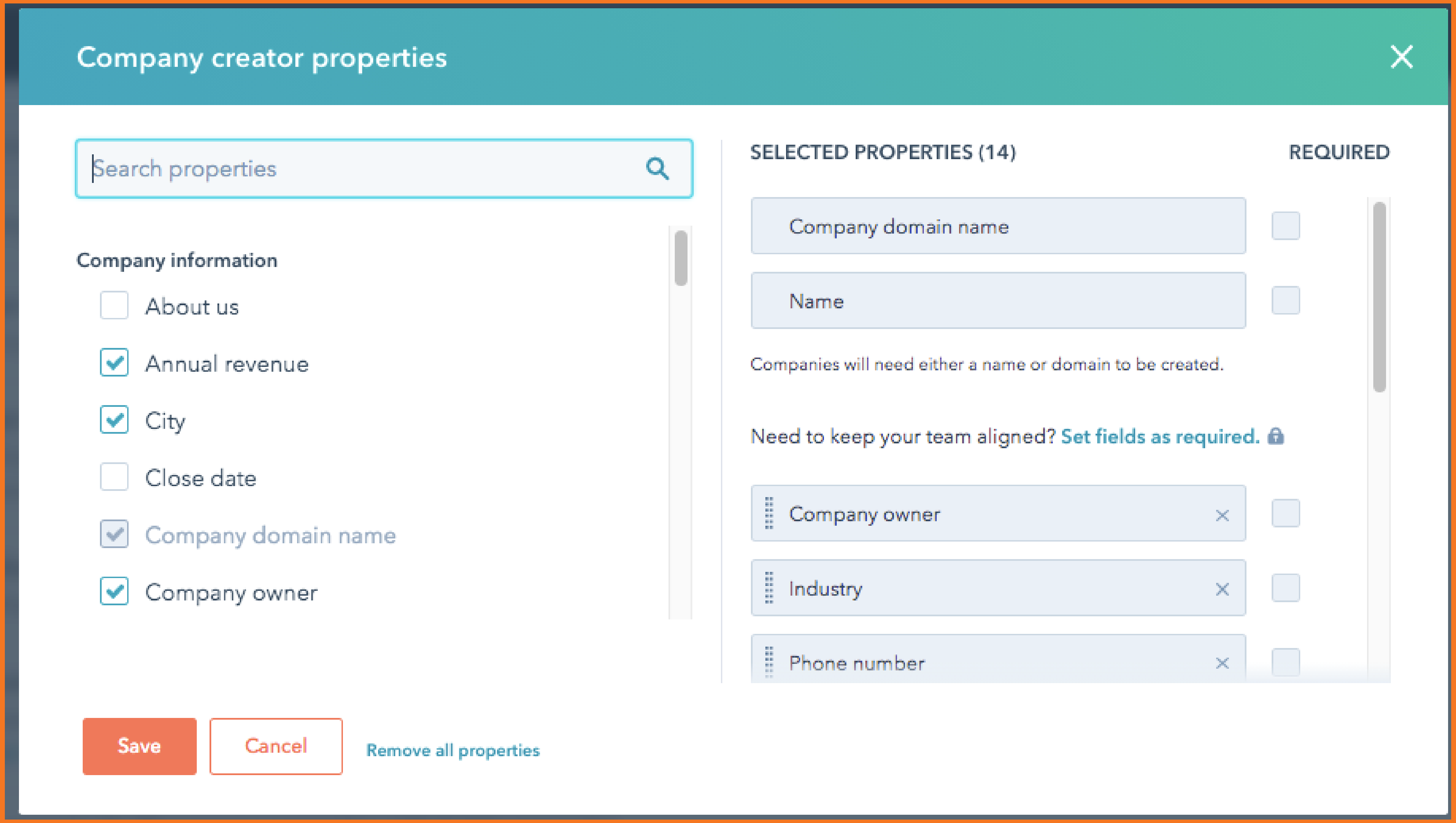
Have you had any employee turnover? Are all of the users in your account up to date? Receiving the right notifications?

NAME	TEAMS	ACCESS
Alex Watling alex@theinsightstudio.com		Super Admin
Andrew Schulz andrew@theinsightstudio.com		Super Admin

2

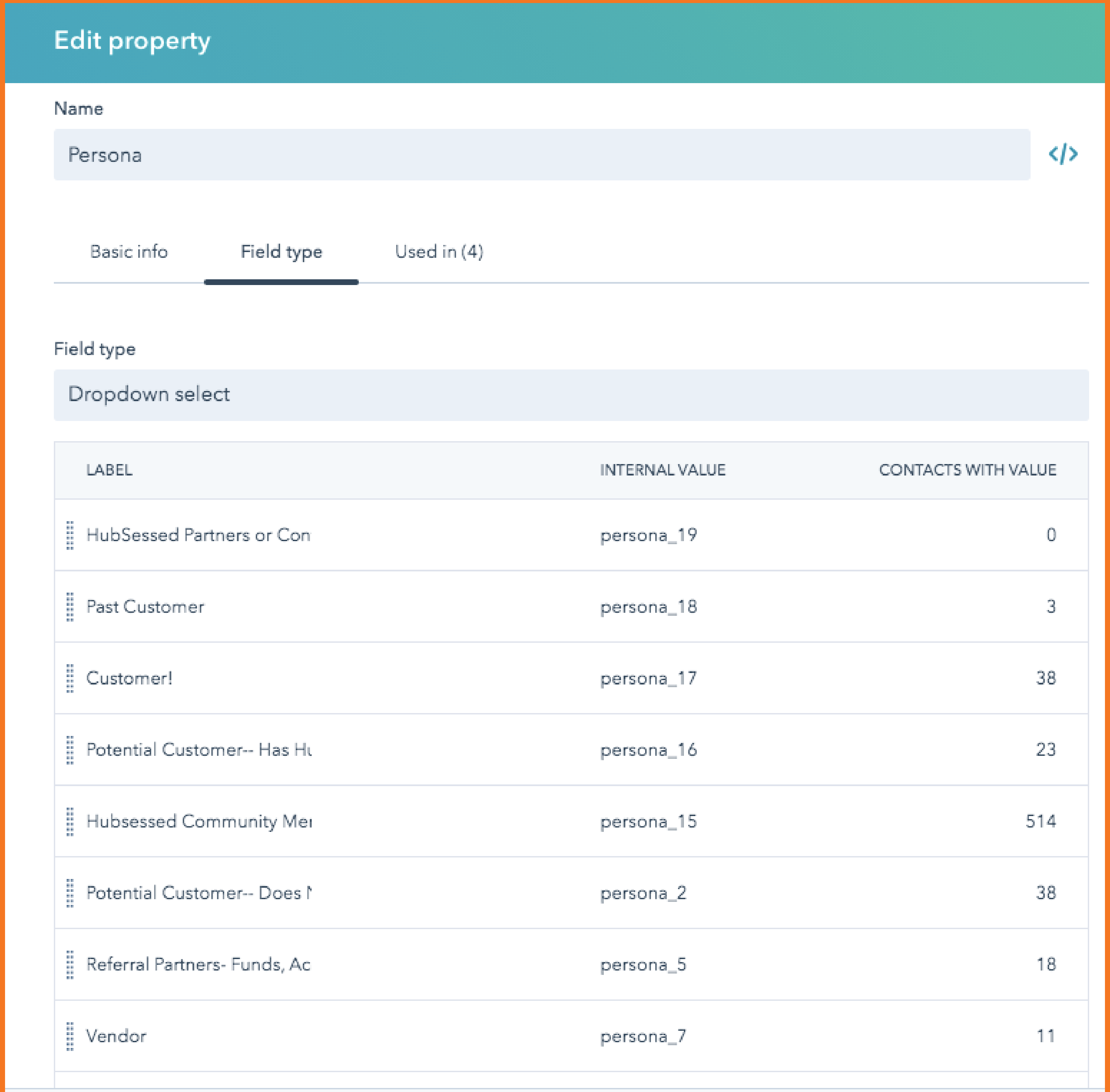
Check Your Data: Contact, Deal, Company Data

What properties are you using for your contacts, companies and deals? If you've launched a new offering, perhaps a new property is needed to make sure you are collecting and tracking the right information



2

Check Your Data: Persona



Edit property

Name

Persona

Basic info | Field type | Used in (4)

Field type

Dropdown select

LABEL	INTERNAL VALUE	CONTACTS WITH VALUE
HubSessed Partners or Con	persona_19	0
Past Customer	persona_18	3
Customer!	persona_17	38
Potential Customer-- Has Hu	persona_16	23
Hubsessed Community Mei	persona_15	514
Potential Customer-- Does N	persona_2	38
Referral Partners- Funds, Ac	persona_5	18
Vendor	persona_7	11

For your persona property do you most of your contacts have a value for it?

56% of companies developed higher quality leads using personas

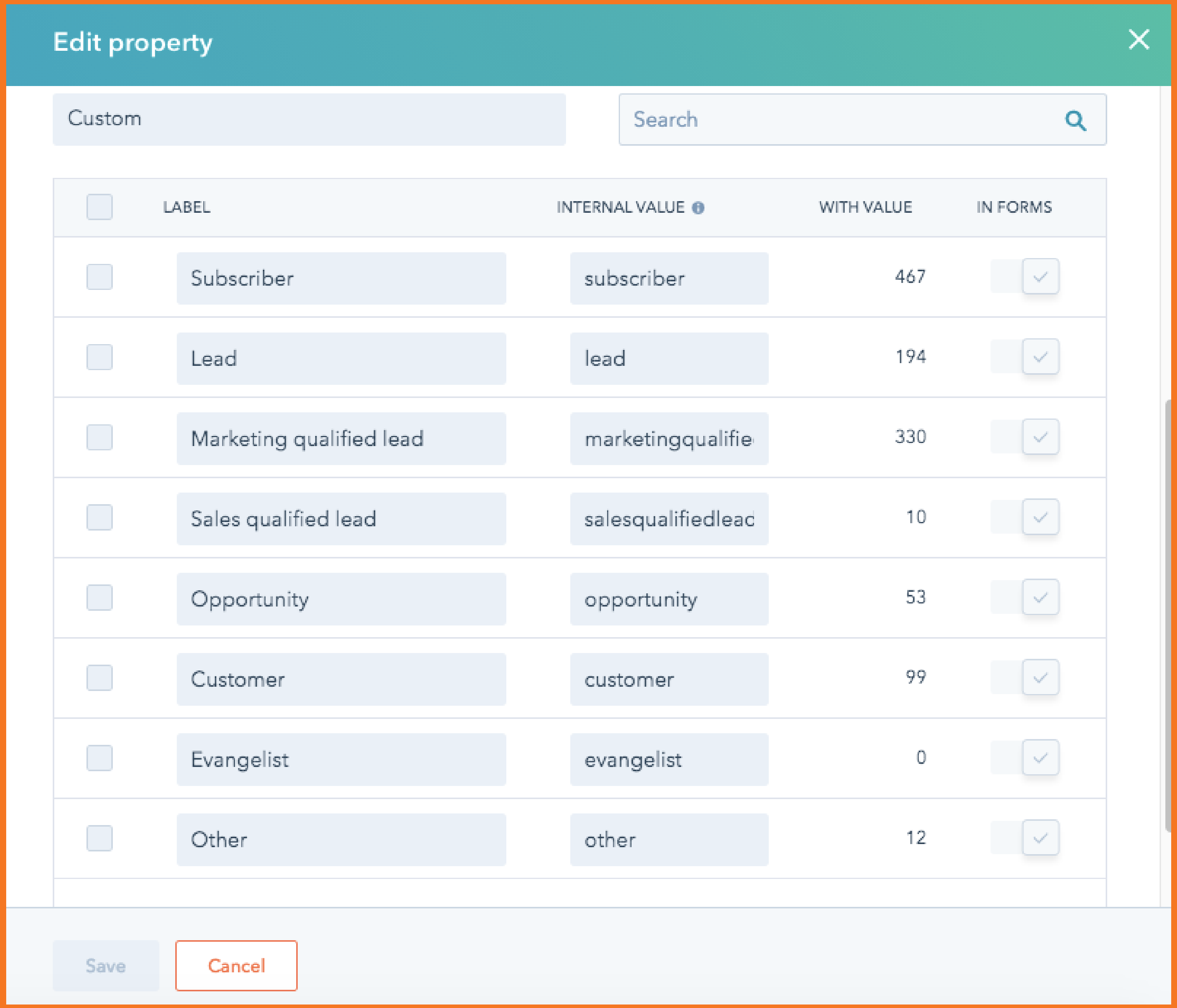
24% of companies gained more leads using personas

Research by Stephen Zoeller

2

Check Your Data: Lifecycle Stages

Are you making use of the Lifecycle stages in HubSpot?


Edit property

Custom

Search

LABEL	INTERNAL VALUE	WITH VALUE	IN FORMS
Subscriber	subscriber	467	
Lead	lead	194	
Marketing qualified lead	marketingqualifie	330	
Sales qualified lead	salesqualifiedleac	10	
Opportunity	opportunity	53	
Customer	customer	99	
Evangelist	evangelist	0	
Other	other	12	

Save Cancel

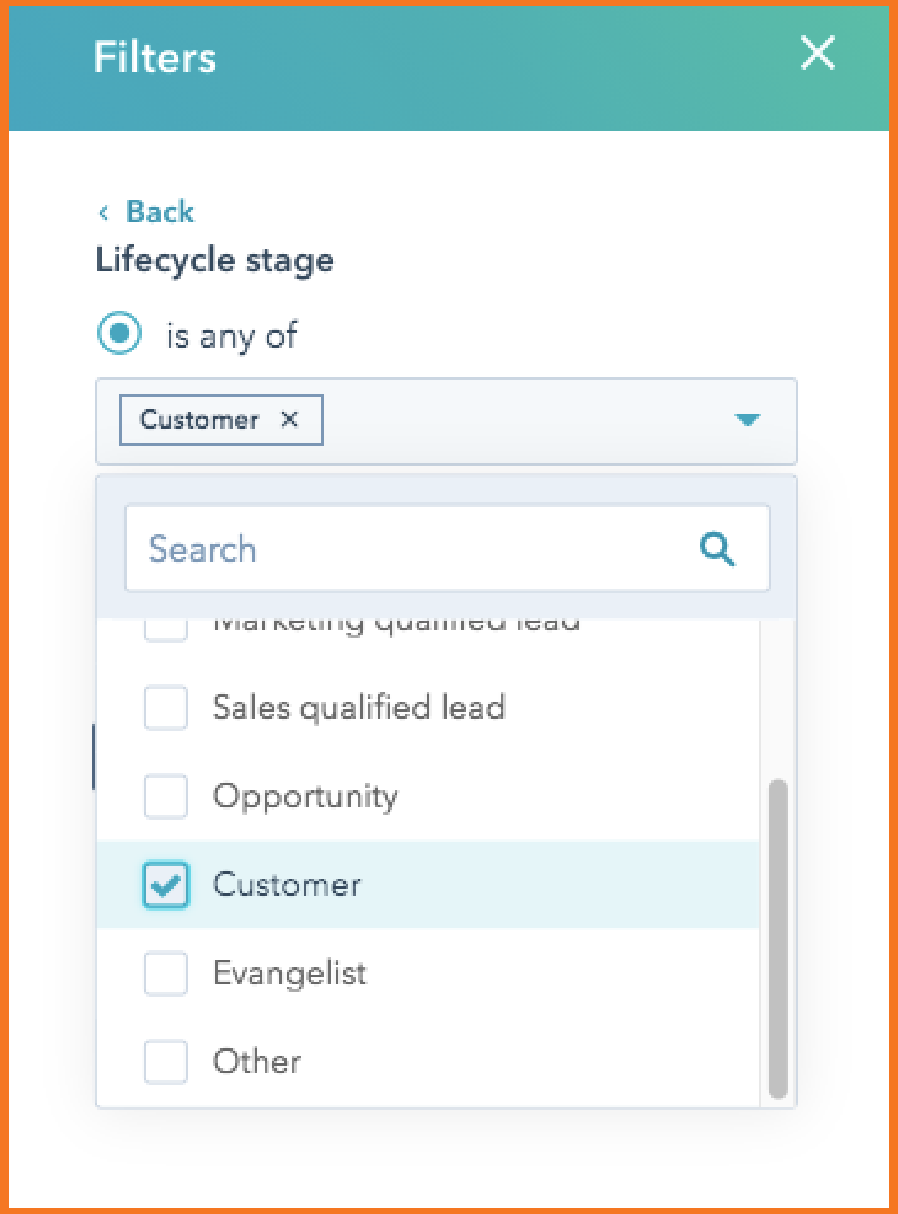
HubSpot's Lifecycle stages help you and your team where your contacts are in your funnel and further your understanding of how leads are passed off between marketing and sales.

How Can You Automate Updates For Stages?

- Set a property value in a workflow
- Use a hidden form field (Marketing Hub & Enterprise)

2 Check Your Data: Are Your Customers Getting Marked as Customers?

Do you have a system or list in place which stores all of your customers? We want to easily be able to come into our HubSpot account and see all of our active customers.



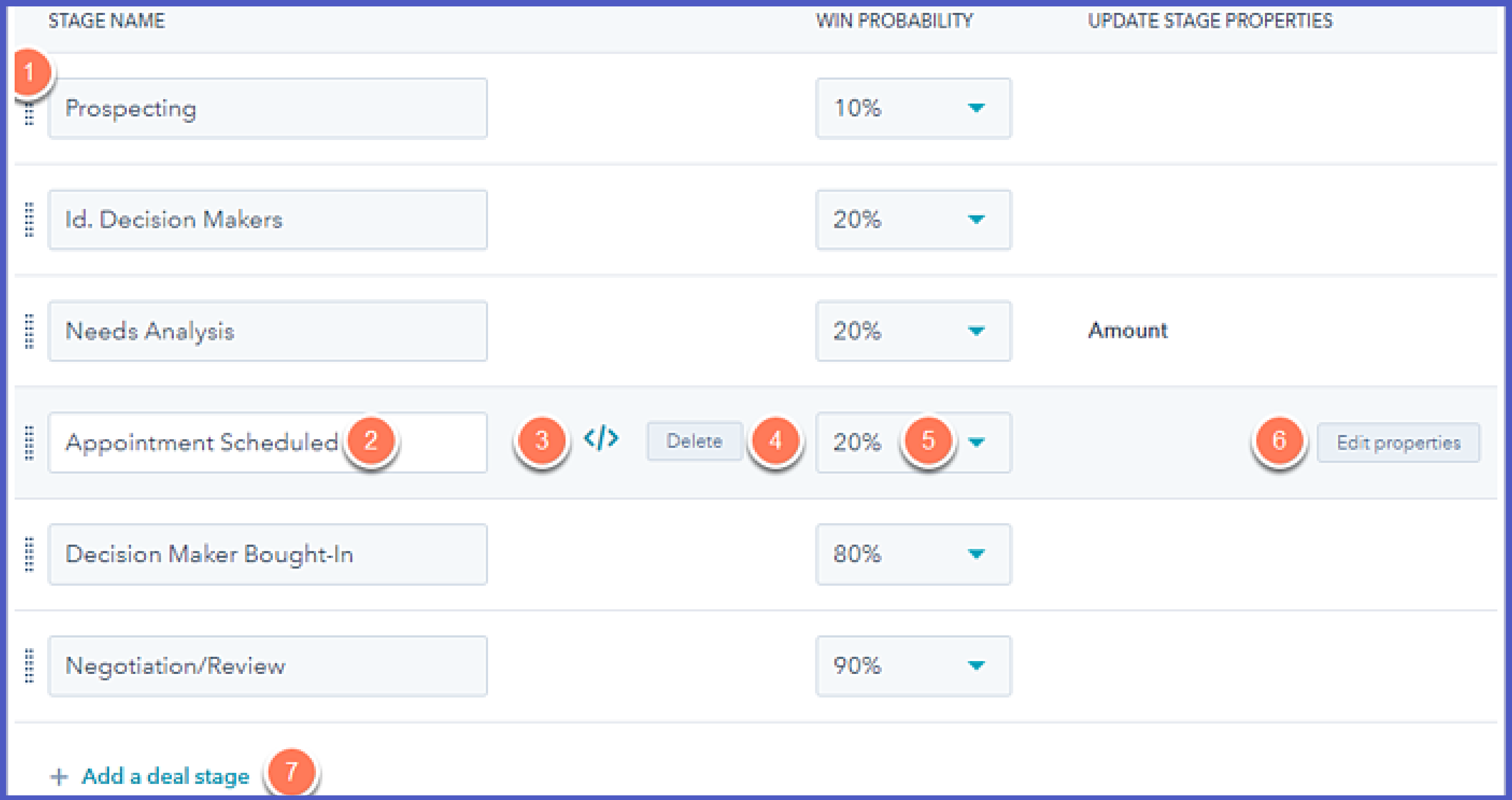
3

Check your deals pipeline and pipeline automation

Deal pipelines enable us to predict revenue and identify obstacles in each stage that stop a lead from becoming a customer. Leveraging your deal pipeline gives you a detailed picture of your projected revenue.

Make sure your pipeline matches your sales process

If you have Sales Hub professional You can autmate actions between each stage of your pipe



4

Check Your Workflows

More than 8 updates have been made to HubSpot's Worklow tool. Look at which workflows are on. Ask yourself if any could be consolidated. Consider organizing your workflows into folders specific to their intent.

Hubsessed Workflows (7)

View: All workflows Created by: All users Type: All workflows

Export workflows Search for workflows

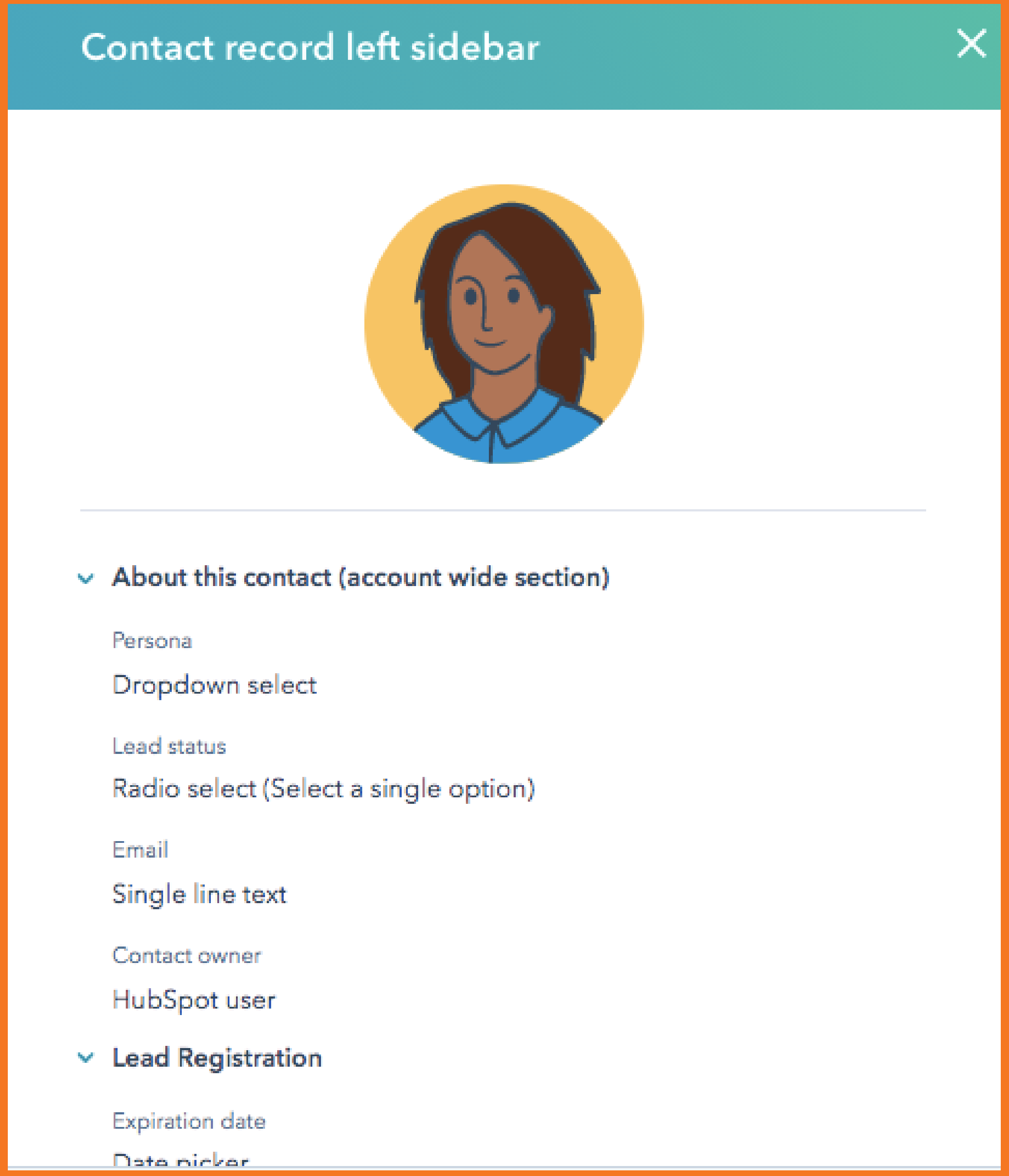
	NAME	TYPE	TOTAL ENROLLED	ACTIVE ENROLLED	LAST UPDATED	CREATED
	Hubsessed Relevancy Score Workflow On	Contact Standard	4	0	Nov 23, 2020 by Insight Studio	Nov 23, 2020 by Paolo Scanlon
	Hubsessed // Members that left Off	Contact Standard	60	0	Sep 10, 2020 by Samantha Moore	Jul 30, 2020 by Samantha Moore
	Member Source On	Contact Standard	308	6	Aug 7, 2020 by Samantha Moore	Jul 23, 2020 by Samantha Moore
	Hubsessed Lifecycle Stages On	Contact Standard	939	4	Aug 6, 2020 by Insight Studio	May 20, 2020 by Samantha Moore
	Hubsessed Membership Experience Survey On	Contact Standard	879	566	Aug 3, 2020 by Insight Studio	May 14, 2020 by Insight Studio
	Giving Back Friday - Feedback Request On	Contact Standard	7	0	Aug 3, 2020 by Insight Studio	Jun 15, 2020 by Samantha Moore
	Samantha's Dynamic meeting link Off	Contact Standard	0	0	Jun 23, 2020 by Insight Studio	Jun 23, 2020 by Insight Studio

5

Check Your Contact Record Layout

When you pull up a contact in your CRM you can pin the properties that are important to you.

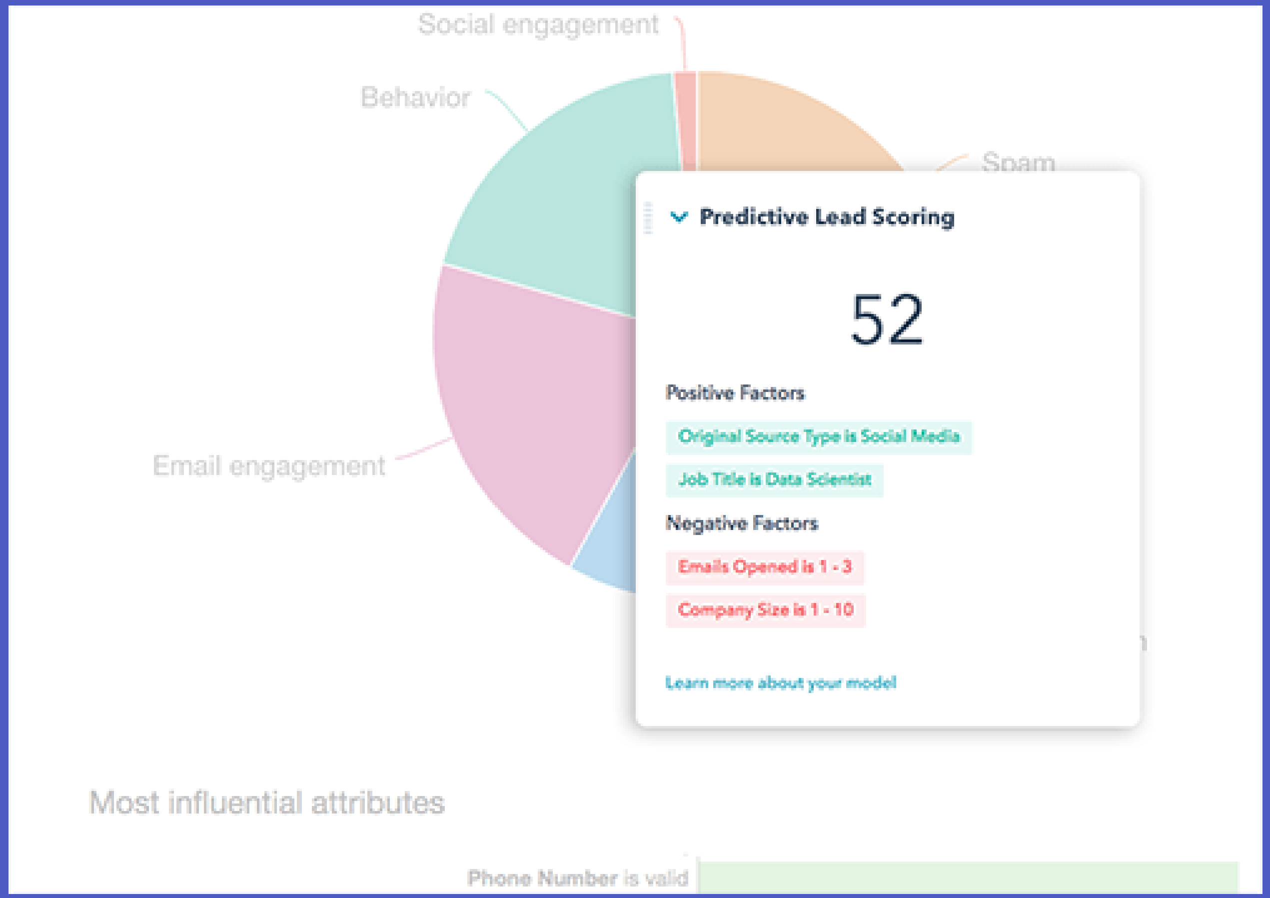
- In your HubSpot account, click the settings icon settings in the main navigation bar.
- In the left sidebar menu, navigate to CRM > Properties.
- Click the Records customization tab. You will see default record sidebars for each object.
- To view a preview of an existing record sidebar, click the name of the sidebar.
- To edit an existing record sidebar, hover over the name of the sidebar, click the Actions dropdown menu and select Edit.



6

Check Your Marketing to Sales Handoff Process

- Do we have a process of how sales get notified with new SQLs
- Is there a feedback loop on a quarterly cadence for sales and marketing to review this process?
- Are sales and marketing aligned around a revenue goal?

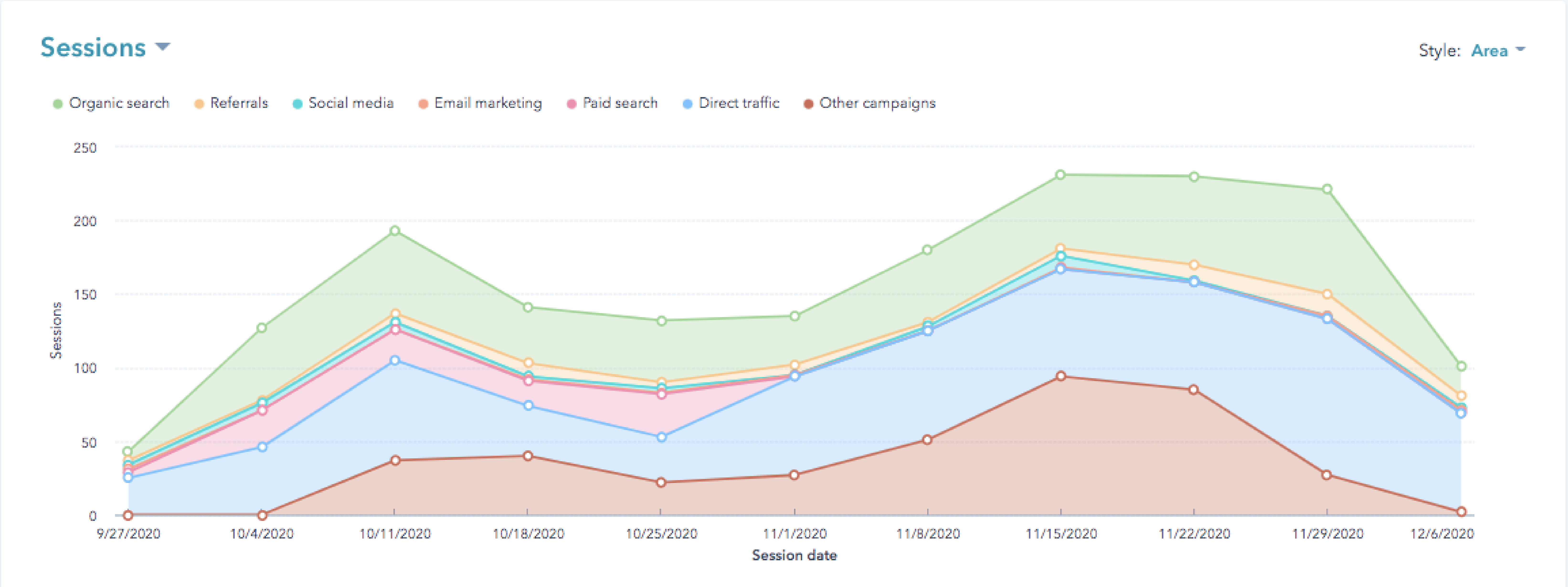


What tools in HubSpot can you use for this step?

- Lifecycle Stages
- Lead Scoring Tool

7 Check Your Website Performance and Traffic Analytics

- What source of traffic is generating the most traffic?
- What pages and pieces of content are generating the most traffic?
- Do you have a pillar page, if so how is that performing?



7

Check Your Website Performance and Traffic Analytics

Do you have a pillar page, if so how is that performing?

Page metrics

PAGE VIEWS	TOTAL FORM SUBMISSIONS	NEW CONTACTS	NEW CUSTOMERS	AVERAGE BOUNCE RATE	TIME PER PAGE VIEW
1,965	6	6	1	67.6%	50 seconds

EXITS PER PAGE VIEW	ENTRANCES
43.31%	821

Ideally you want to be between 40 - 55%

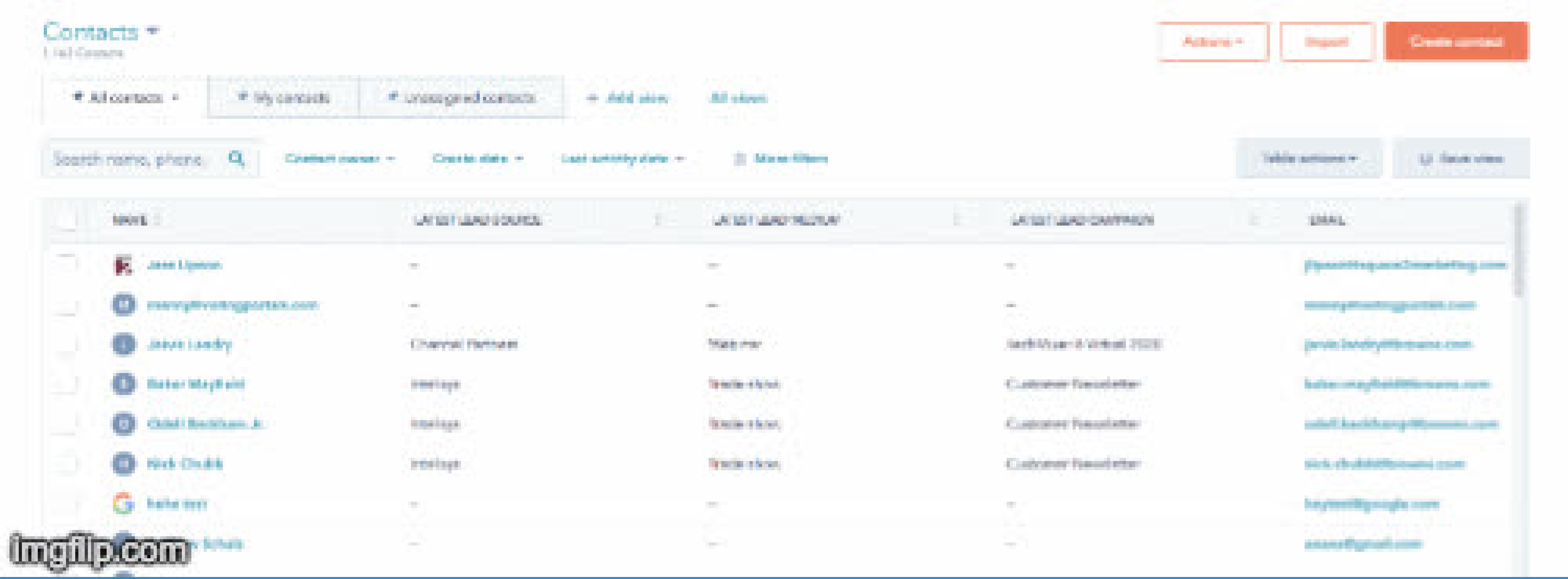
If your bounce rate is higher than desired ask yourself:

- Is the content on this page helpful to this persona or it salesy?
- Is my CTA relevant to this page?
- What is the speed of my webpage?

8

Check Your Contacts, Company and Deal Views

Is your team setup to easily switch between the actionable filters of your data?



Within your HubSpot Contact view, you have the option to pin filters. If you are in Sales you can pin the view, contact today, setting criteria around what contacts will end up on this view.

9

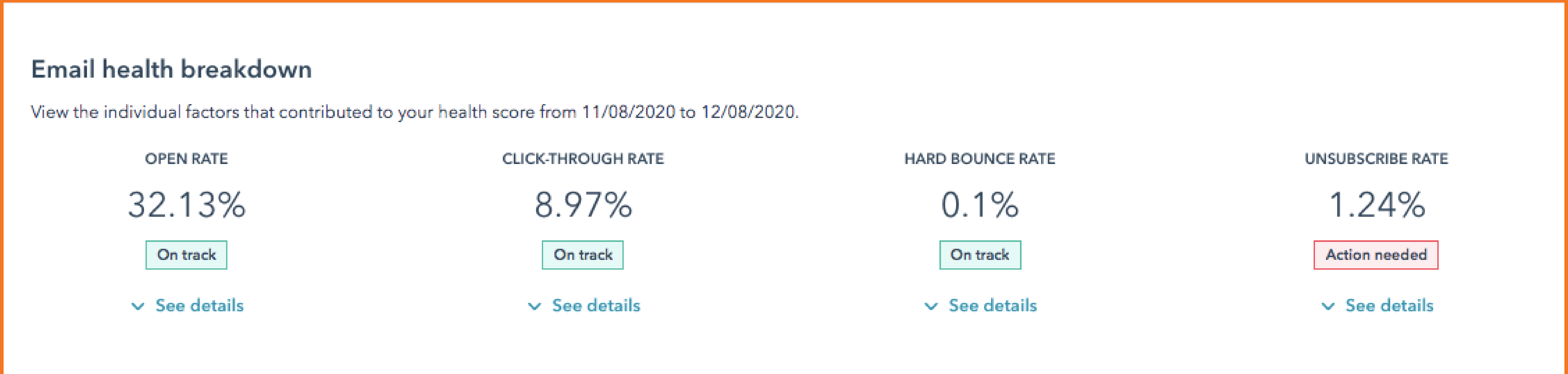
Check Your Lists

All contacts labelled as an Influencer	142	Active
All contacts labelled as an Champion	139	Active
All contacts labelled as a Budget Holder	119	Active
All contacts labelled as a Decision Maker	164	Active
All contacts with a Buying Role	1,036	Active
All contacts associated with Target Accounts	2	Active
[Workflows] - Fri May 29 2020 10:25:01 GMT-0...	2	Static

Example of helpful Lists

- Marketing Email
- Bounced Contacts
- Ad Audiences

Check Your Email Performance



Go to Marketing > Email > Health

Here HubSpot shows you how your emails have been performing. What needs work?

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Check Your Email Performance

Email health breakdown

View the individual factors that contributed to your health score from 11/08/2020 to 12/08/2020.

OPEN RATE	CLICK-THROUGH RATE	HARD BOUNCE RATE	UNSUBSCRIBE RATE
32.13%	8.97%	0.1%	1.24%
On track	On track	On track	Action needed
See details	See details	See details	See details

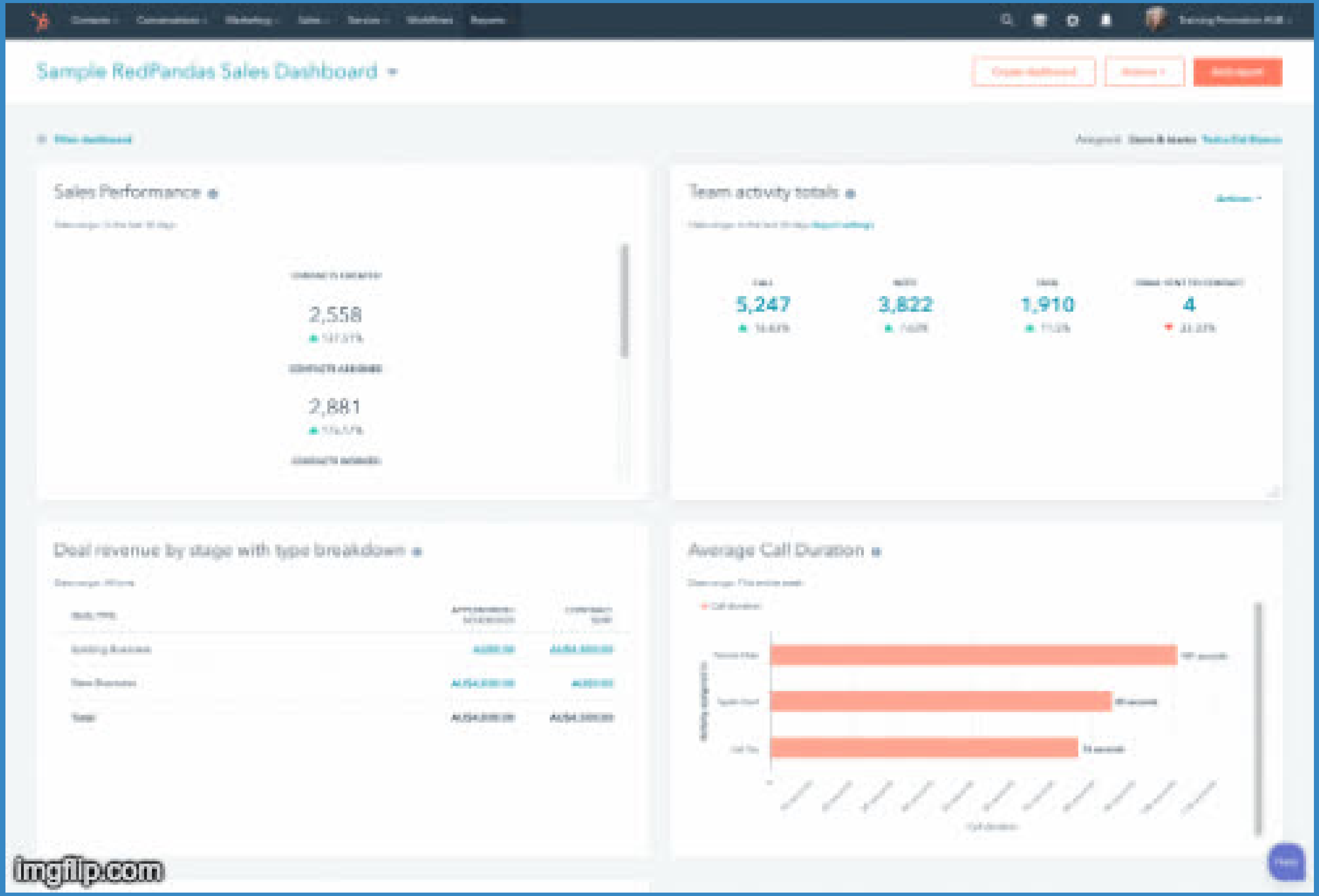
In this example the Unsubscribe Rate is high.

Are you sending emails to the right people? Could you segment your emails to the right contacts ensuring your message is relevant and in turn combatting the chance of your contacts unsubscribing?

11

Check Your DashBoards

Are there actionable dashboards that are being emailed regularly to the relevant stakeholders?



1.) Find the Dashboard you want to be emailed

2.) Click Actions in the upper left corner

3.) Email this dashboard

4.) Choose the frequency and who this dashboard should be emailed to

12

Are You Using Other Sales Tools?

Templates: Use templates for the emails you send frequently. You can personalize and tailor the content for your contacts

Meetings: Sync your calendar with HubSpot to make it easy for prospects to book a meeting with you.

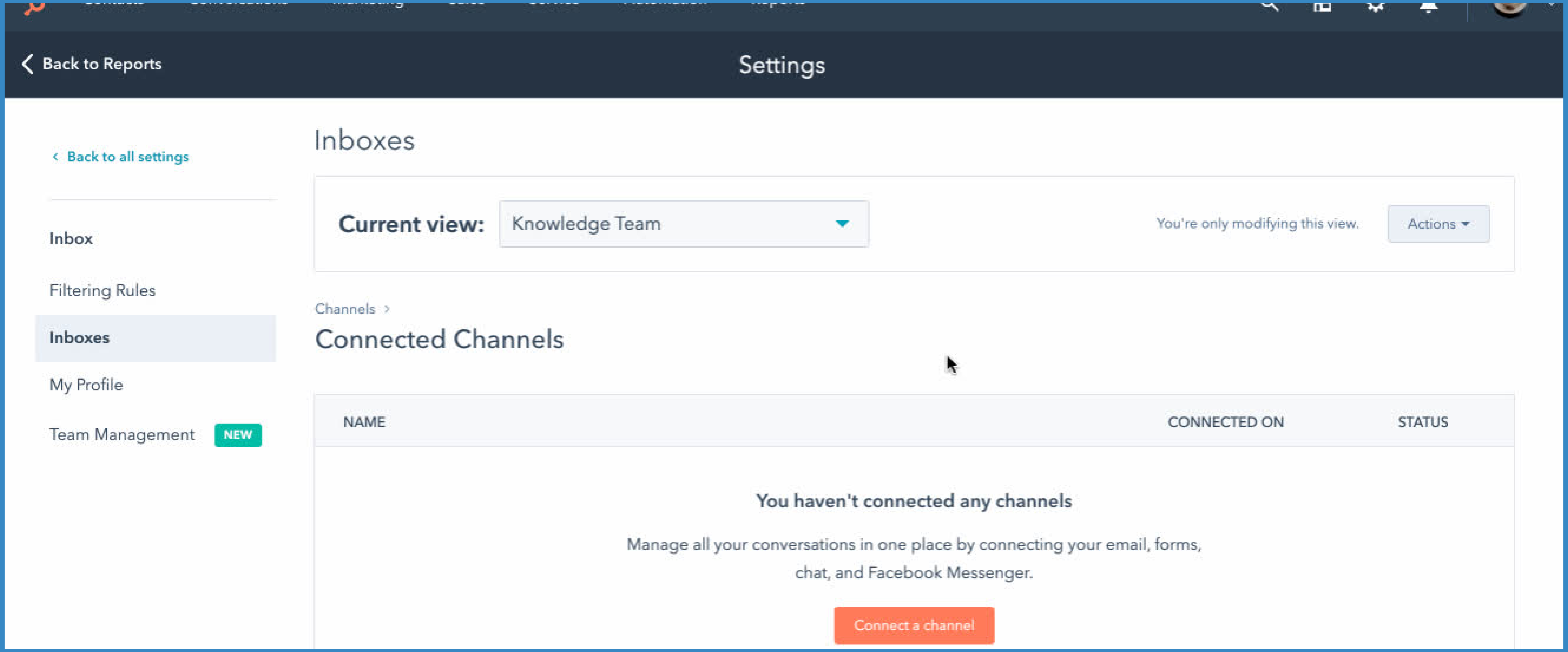
Sequences: With sequences, you can send a series of timed email templates to nurture your contacts over time. Add tasks to remind you to follow up.

Documents: The document tool allows you to build a library of content from your team to share with your contacts. You can track engagement like number of times opened from your contacts.

13

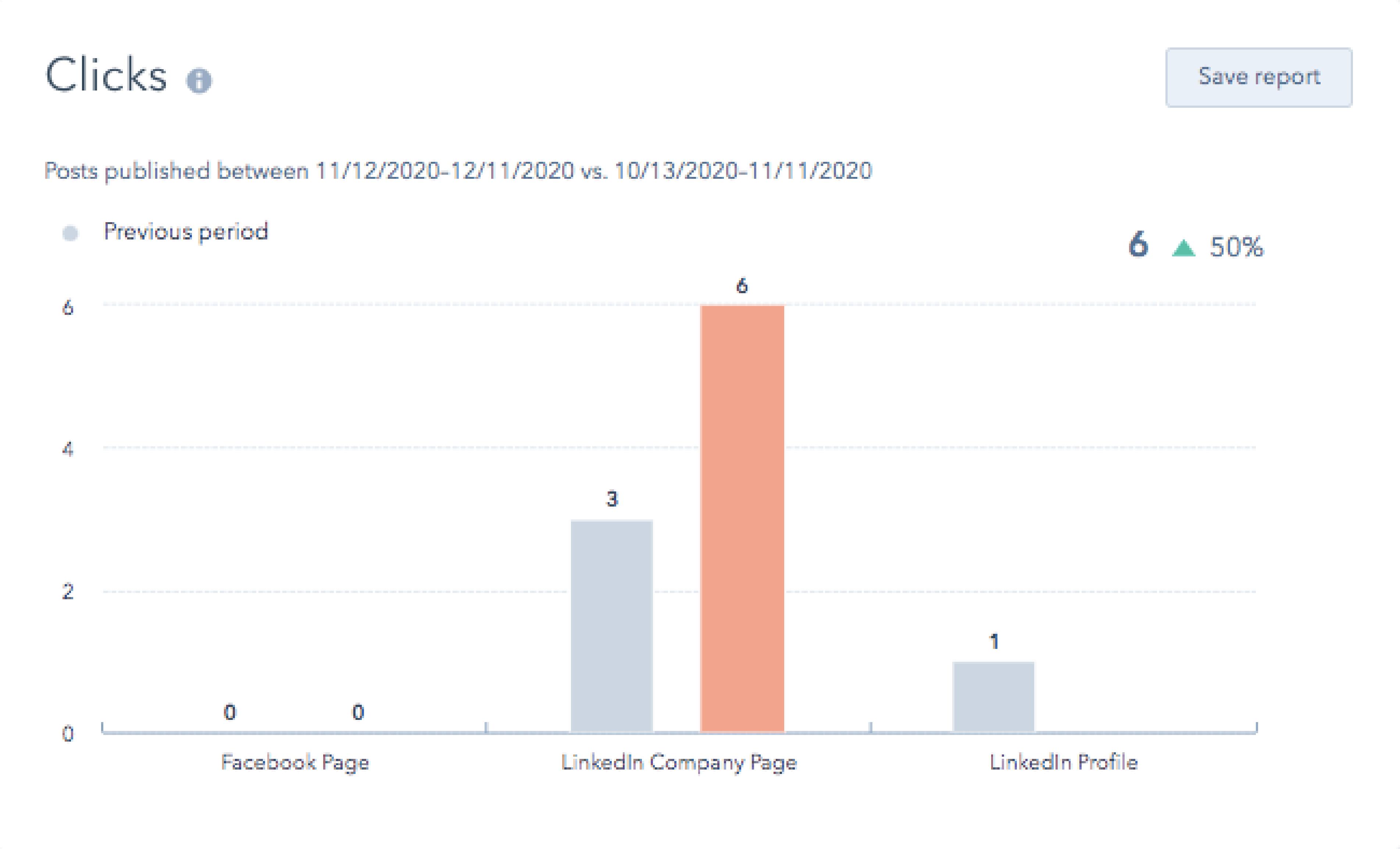
Are You Using Conversations?

This tool in Hubspot helps you and your team view, reply, and manage incoming messages from multiple channels. You can create tickets from conversations to track a visitor's experience with your business.



14

Check Your Social Performance



When you use HubSpot to post your social content you are able to leverage the Analyze tool in HubSpot to track your performance

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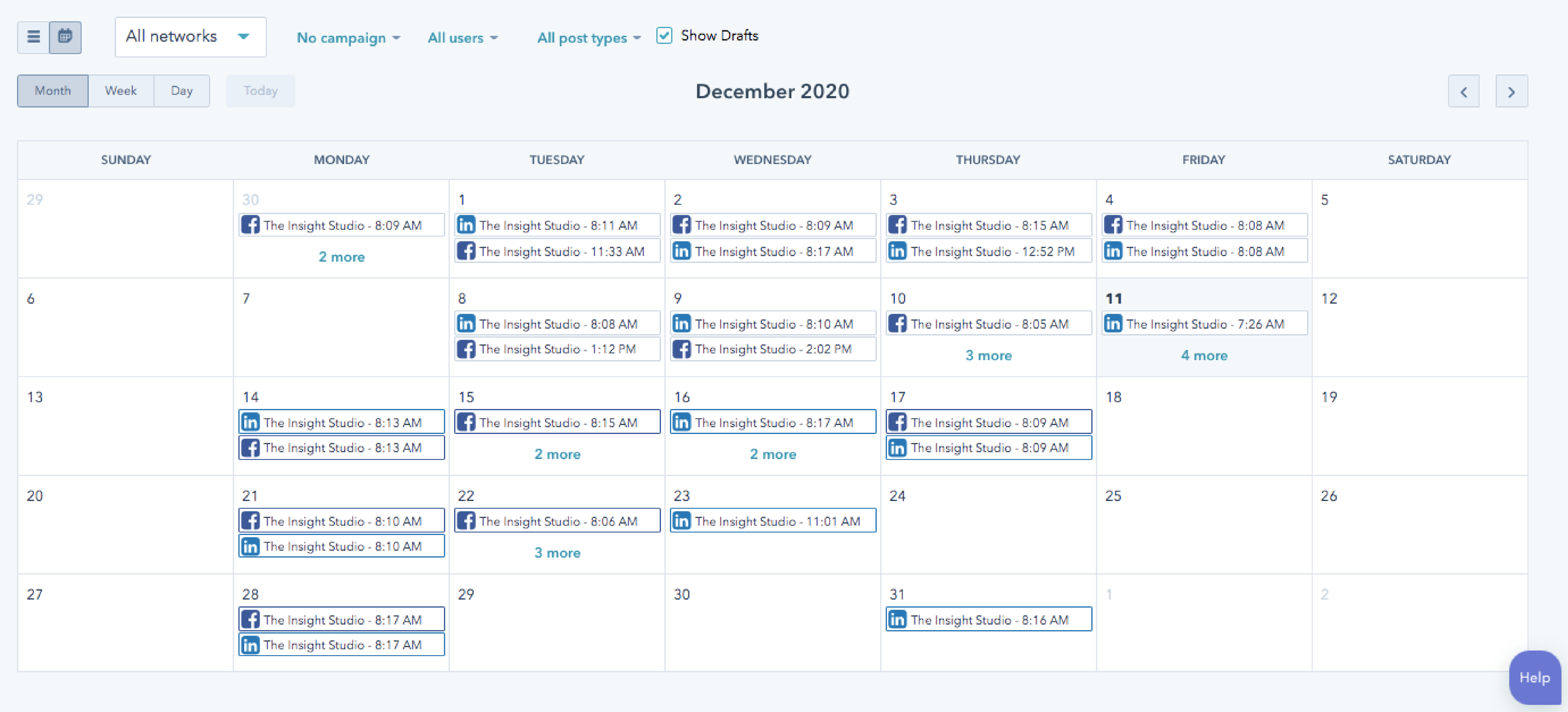
Check Your Social Performance



Are you using HubSpot's social calendar to schedule posts?

Set Up A Plan of Action

From this audit what are the next steps you need to take?

Who will be responsible?

Set a date.