

# HUBSPOT

# AUDIT



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

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Contact, Deal,  
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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?

<input type="checkbox"/>	NAME ↕	TEAMS ↕	ACCESS ↕
<input type="checkbox"/>	 <b>Alex Watling</b> alex@theinsightstudio.com		Super Admin
<input type="checkbox"/>	 <b>Andrew Schulz</b> 🛡️ andrew@theinsightstudio.com		Super Admin

## 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

**Company creator properties** [X]

Search properties [Q]

**Company information**

- About us
- Annual revenue
- City
- Close date
- Company domain name
- Company owner

**SELECTED PROPERTIES (14)**

	REQUIRED
Company domain name	<input type="checkbox"/>
Name	<input type="checkbox"/>
Companies will need either a name or domain to be created.	
Need to keep your team aligned? <a href="#">Set fields as required.</a> 🔒	
Company owner	<input type="checkbox"/>
Industry	<input type="checkbox"/>
Phone number	<input type="checkbox"/>

**Save** **Cancel** [Remove all properties](#)

# 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 Hi	persona_16	23
HubSessed Community Mei	persona_15	514
Potential Customer-- Does I	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?

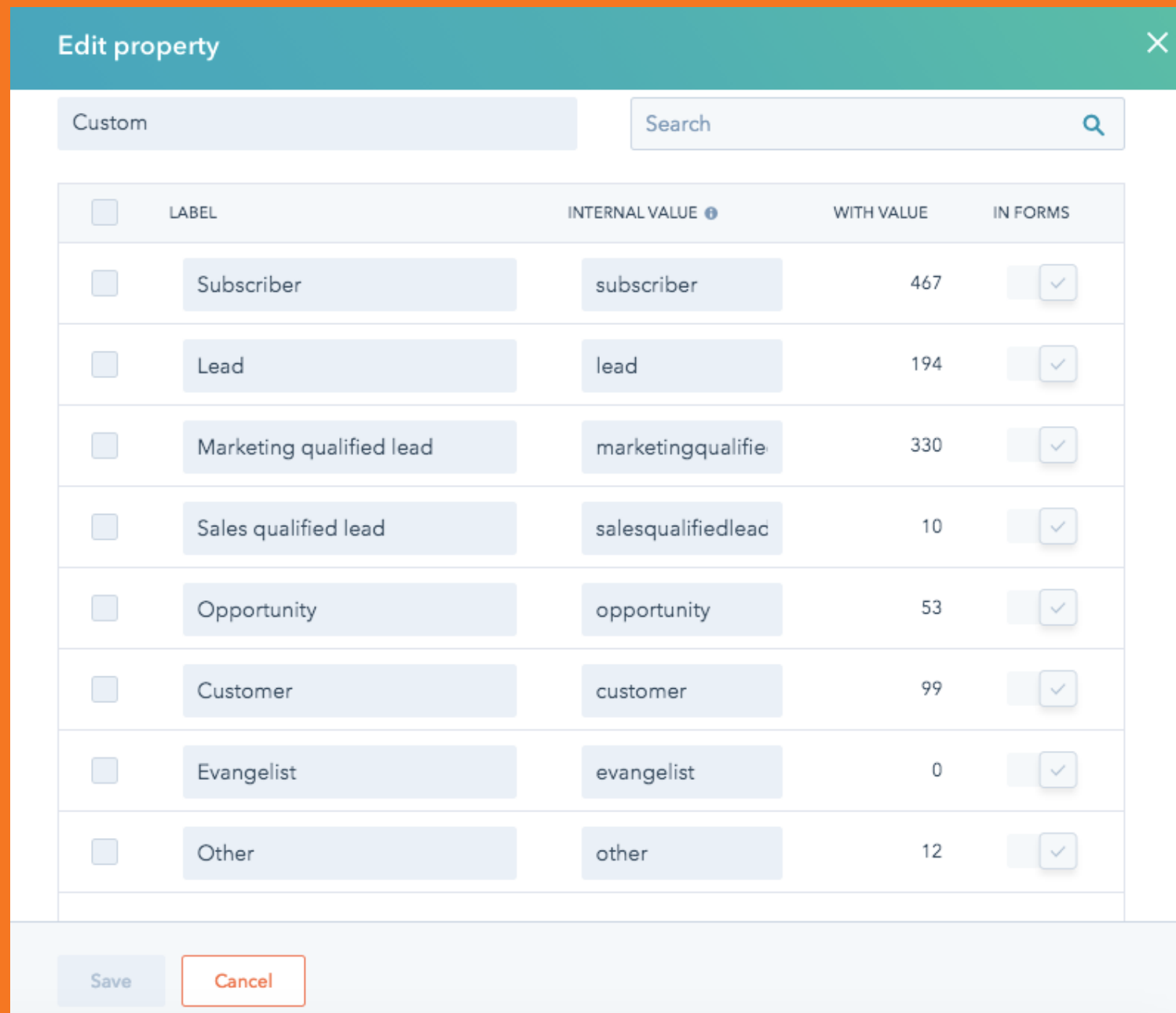
**56% of companies developed higher quality leads using personas**

**24% of companies gained more leads using personas**

Research by Stephen Zoeller

# Check Your Data: Lifecycle Stages

Are you making use of the Lifecycle stages in HubSpot?



The screenshot shows the 'Edit property' interface in HubSpot. At the top, there is a teal header with 'Edit property' and a close button. Below the header, there is a search bar and a 'Custom' filter. The main content is a table with the following columns: LABEL, INTERNAL VALUE, WITH VALUE, and IN FORMS. The table lists several lifecycle stages with their respective counts and whether they are used in forms.

<input type="checkbox"/>	LABEL	INTERNAL VALUE	WITH VALUE	IN FORMS
<input type="checkbox"/>	Subscriber	subscriber	467	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Lead	lead	194	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Marketing qualified lead	marketingqualifie	330	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Sales qualified lead	salesqualifiedleac	10	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Opportunity	opportunity	53	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Customer	customer	99	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Evangelist	evangelist	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Other	other	12	<input checked="" type="checkbox"/>

At the bottom of the interface, there are 'Save' and 'Cancel' buttons.

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?

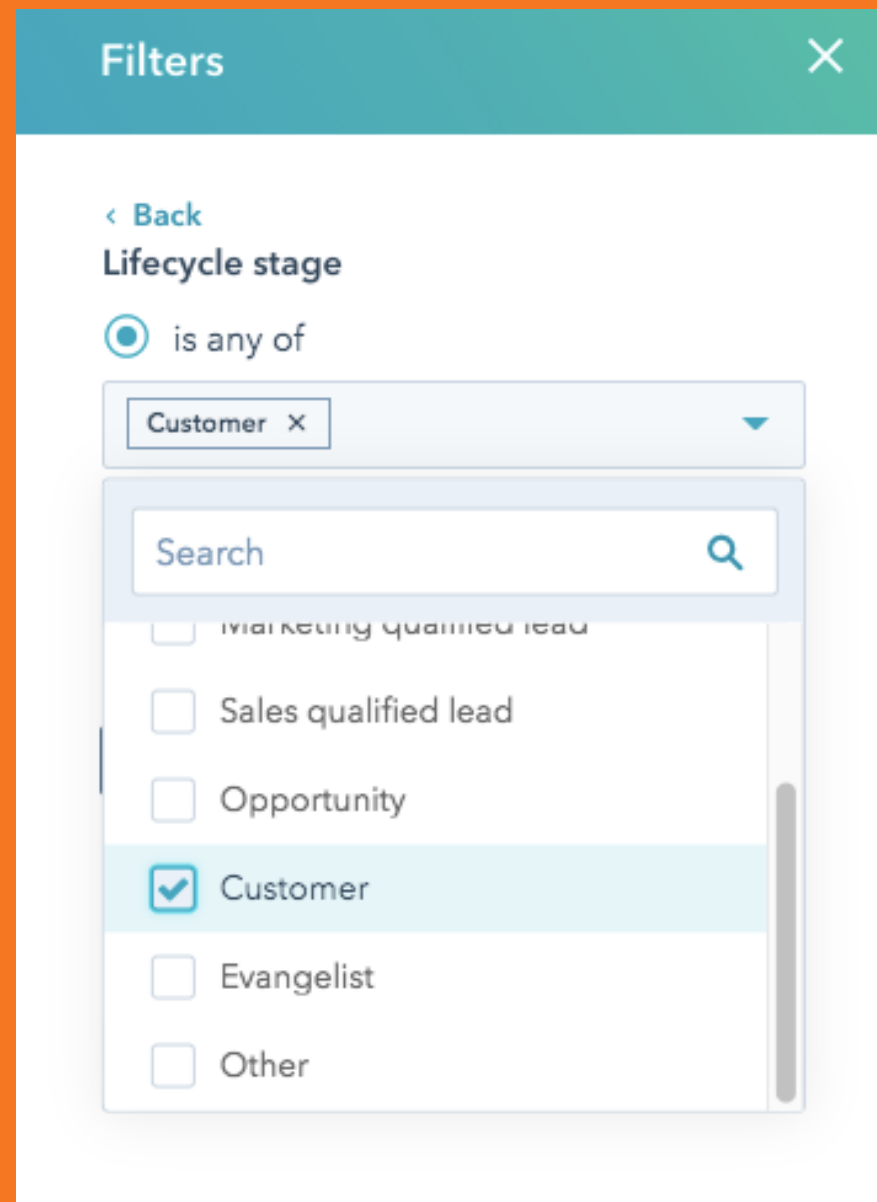
- Set a property value in a workflow
- Use a hidden form field (Marketing Hub & Enterprise)



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.



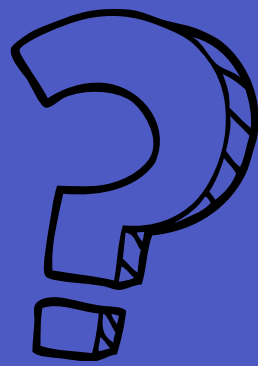
3

## 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

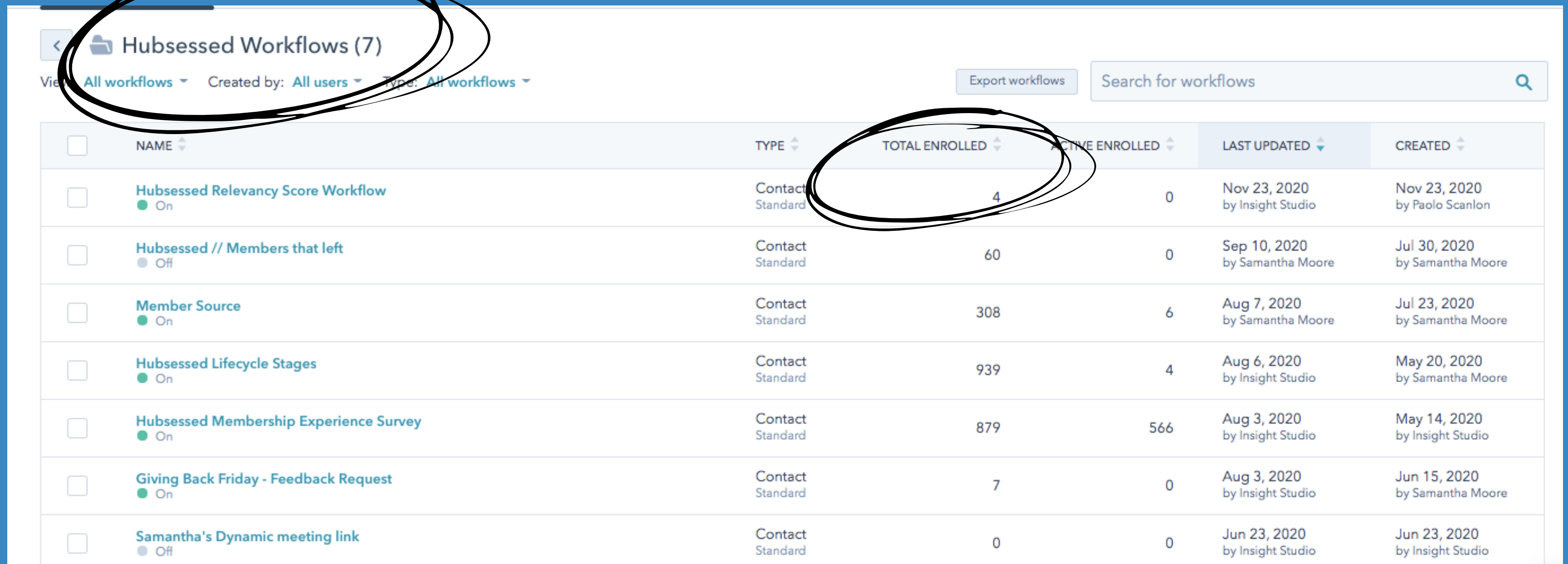


If you have Sales Hub professional You can automate actions between each stage of your pipe

STAGE NAME	WIN PROBABILITY	UPDATE STAGE PROPERTIES
1 Prospecting	10%	
Id. Decision Makers	20%	
Needs Analysis	20%	Amount
Appointment Scheduled 2	3 </> 4 20% 5	6 Edit properties
Decision Maker Bought-In	80%	
Negotiation/Review	90%	
+ Add a deal stage 7		

# Check Your Workflows

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



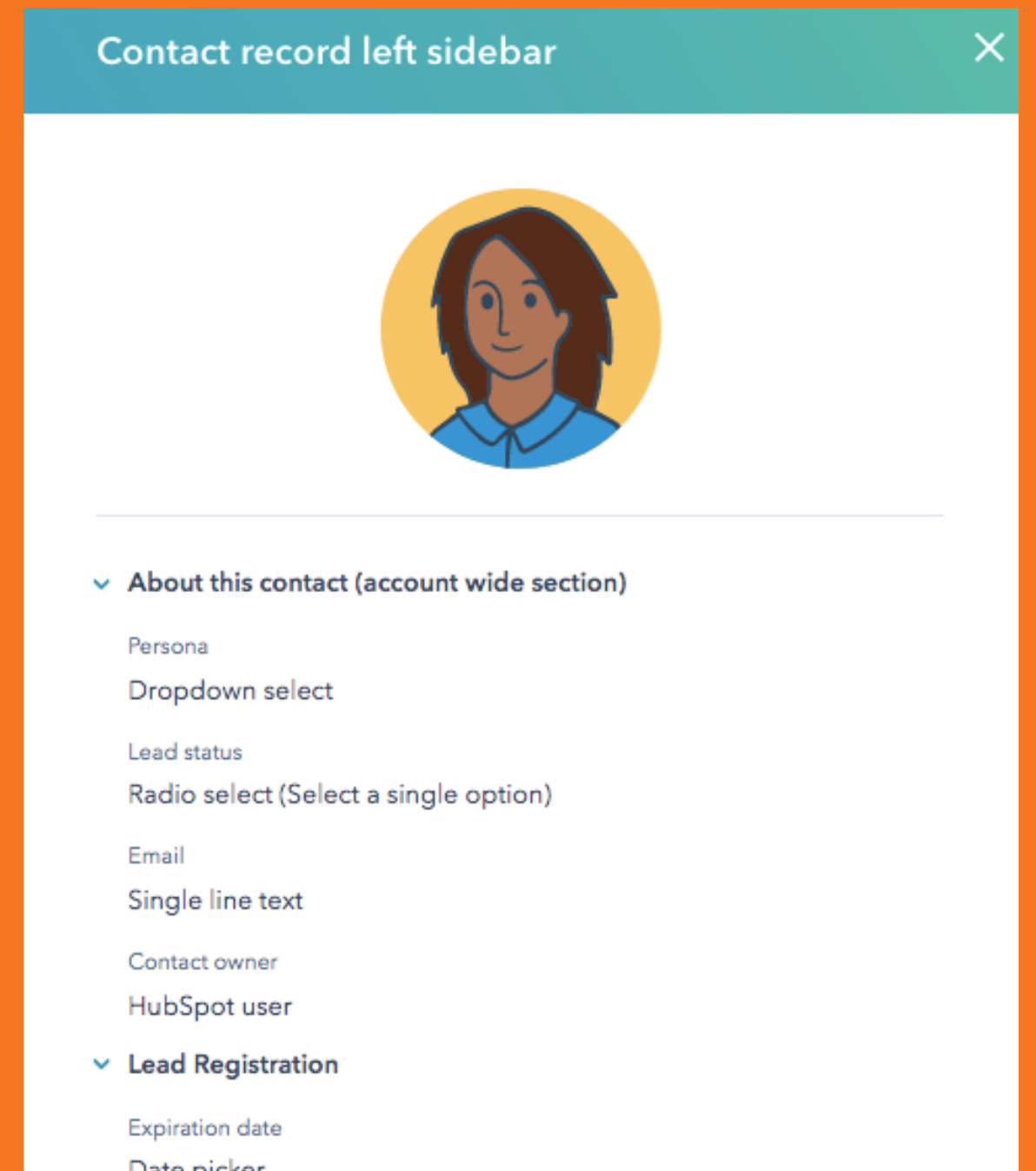
The screenshot displays the HubSpot Workflow tool interface. At the top, there is a folder icon and the text "Hubsessed Workflows (7)". Below this, there are filters for "View: All workflows", "Created by: All users", and "Type: All workflows". There is also an "Export workflows" button and a search bar labeled "Search for workflows".

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

# Check Your Contact Record Layout

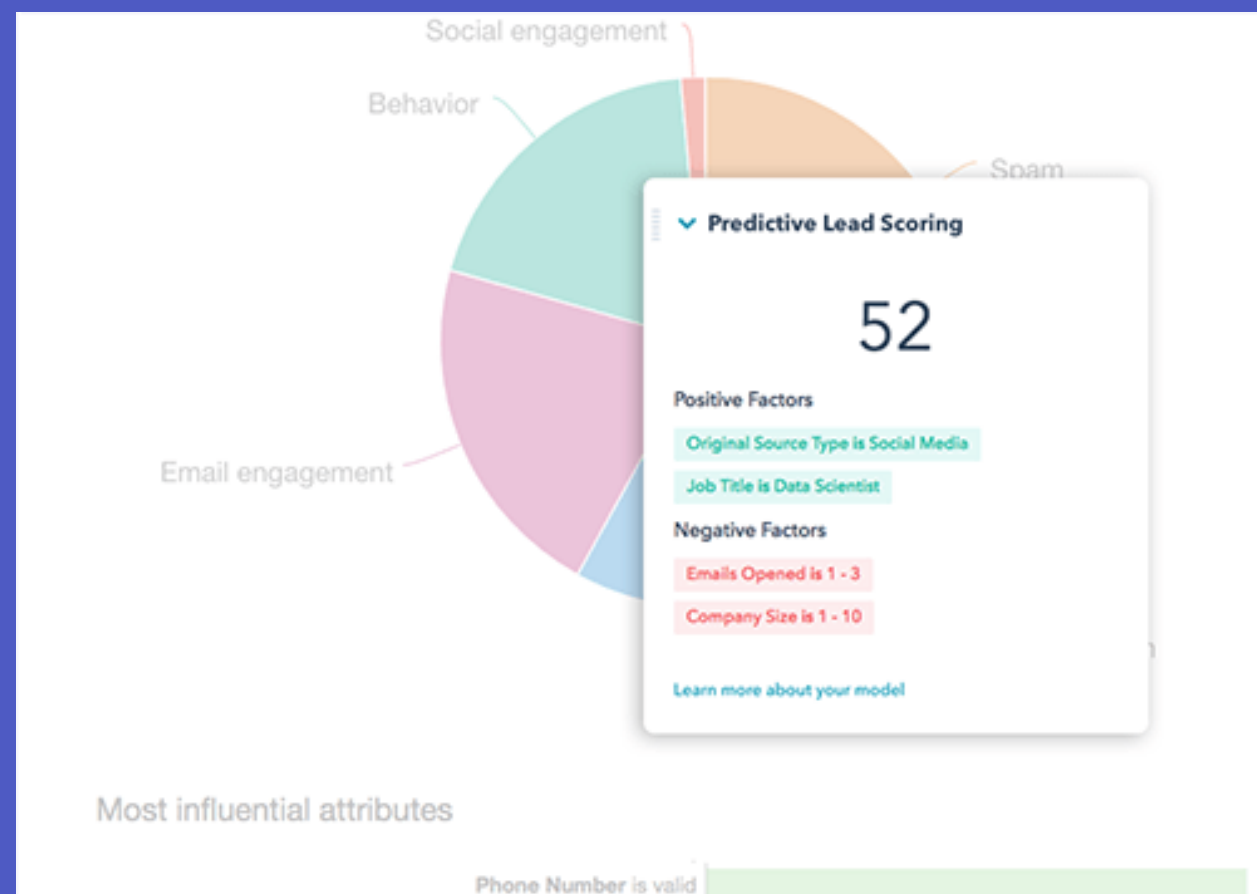
When you pull up a contact in your CRM you can pin the properties that are important to you.

- 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.



# 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?

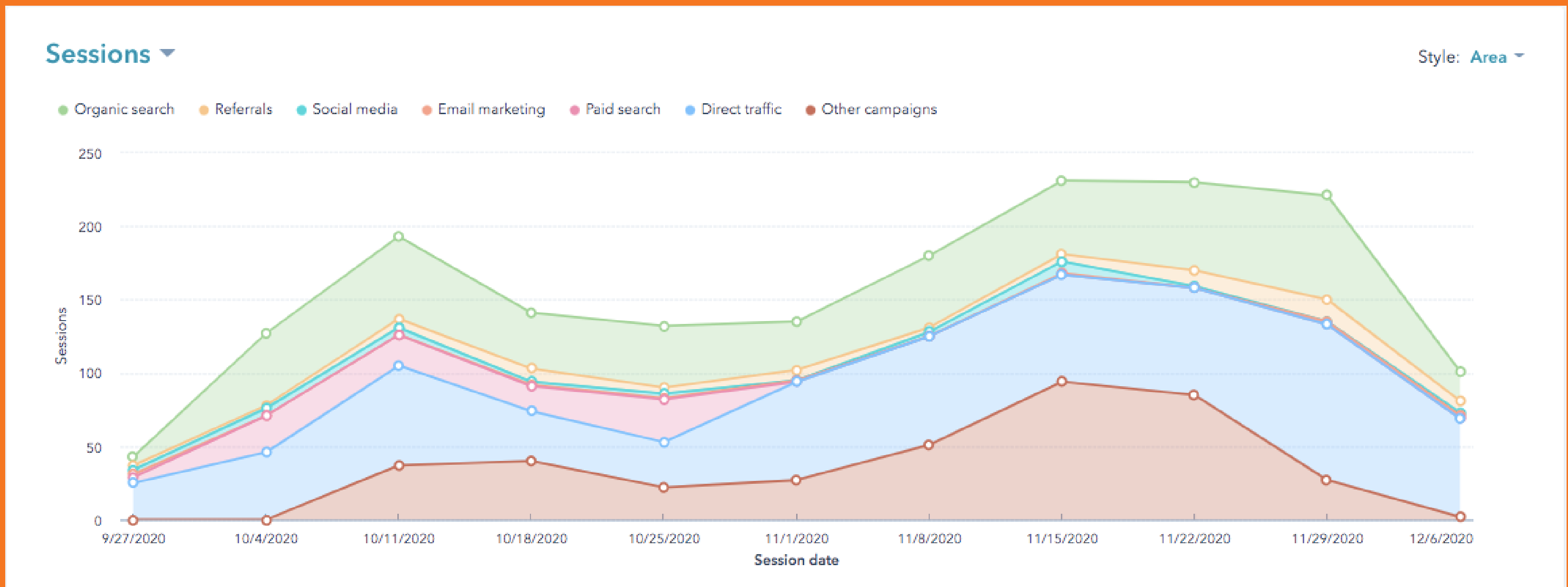


What tools in HubSpot can you use for this step?

- Lifecycle Stages
- Lead Scoring Tool

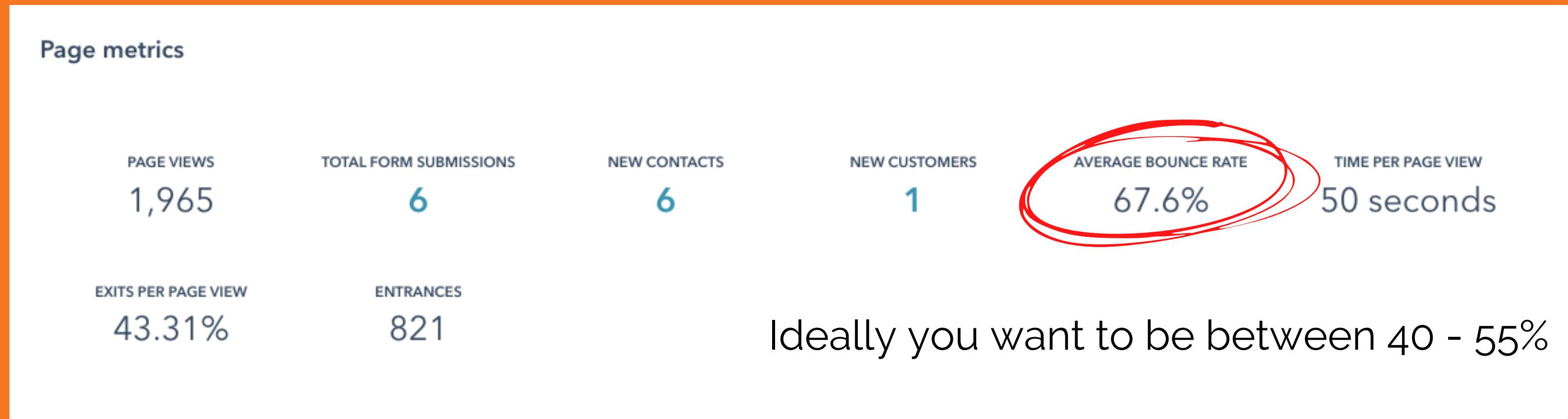
# Check Your Website Performance and Traffic Analytics

- 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?



# Check Your Website Performance and Traffic Analytics

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

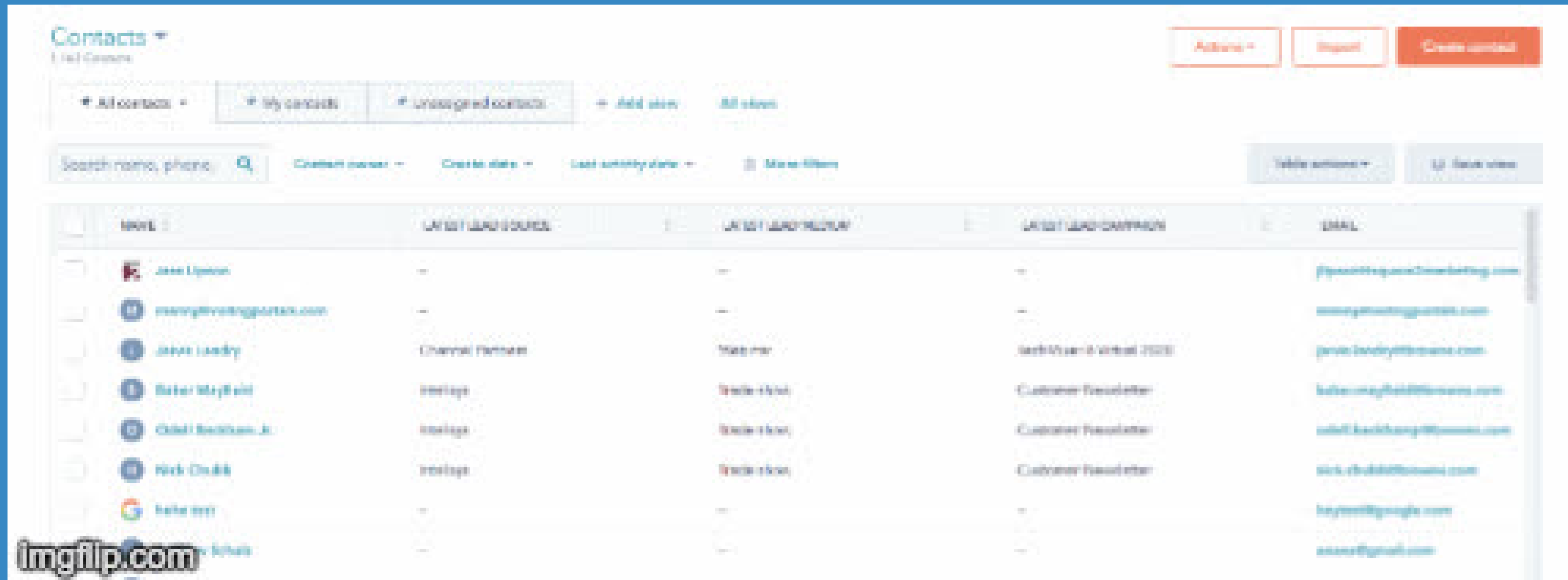


If your bounce rate is higher than desired ask yourself:

- 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?

# 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.



# Check Your Lists

<input type="checkbox"/>	All contacts labelled as an Influencer	142	Active
<input type="checkbox"/>	All contacts labelled as an Champion	139	Active
<input type="checkbox"/>	All contacts labelled as a Budget Holder	119	Active
<input type="checkbox"/>	All contacts labelled as a Decision Maker	164	Active
<input type="checkbox"/>	All contacts with a Buying Role	1,036	Active
<input type="checkbox"/>	All contacts associated with Target Accounts	2	Active
<input type="checkbox"/>	[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

## 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%
<span>On track</span>	<span>On track</span>	<span>On track</span>	<span>Action needed</span>
<a href="#">See details</a>	<a href="#">See details</a>	<a href="#">See details</a>	<a href="#">See details</a>

Go to Marketing > Email > Health

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

# 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.

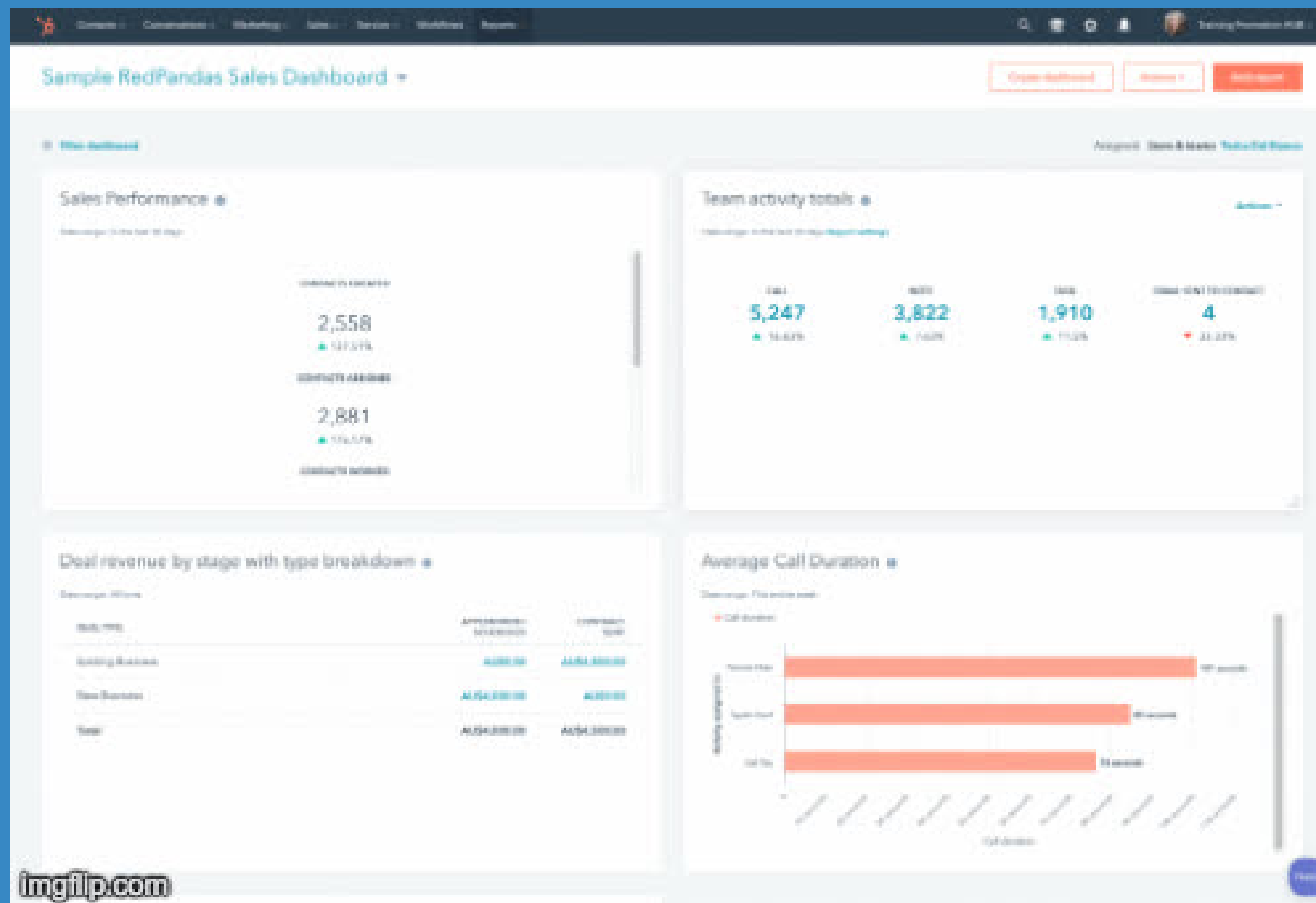
OPEN RATE	CLICK-THROUGH RATE	HARD BOUNCE RATE	UNSUBSCRIBE RATE
32.13%	8.97%	0.1%	1.24%
On track	On track	On track	Action needed
<a href="#">See details</a>	<a href="#">See details</a>	<a href="#">See details</a>	<a href="#">See details</a>

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?

# 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

## 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

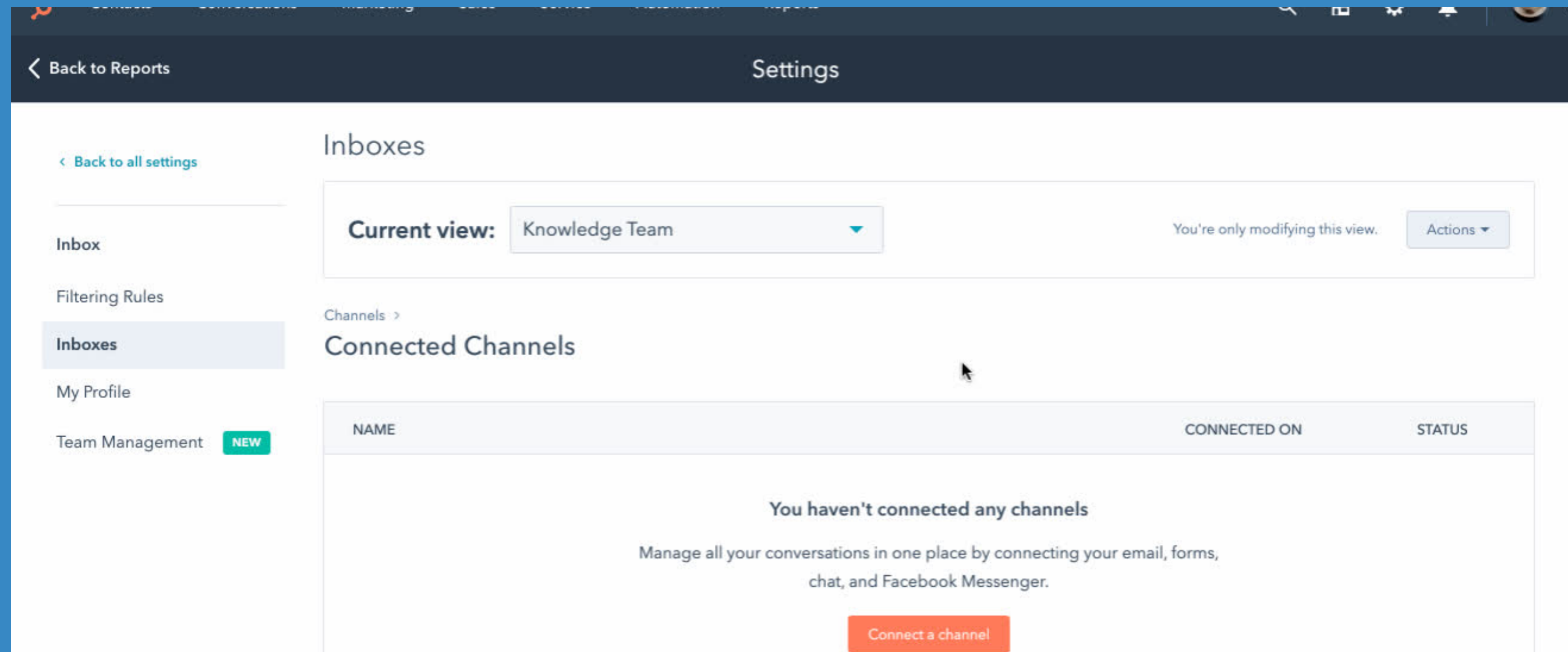
**Meetings:** Sync your calendar with HubSpot to make it easy for prospects to book a meeting with you.

**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.

# 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.



The screenshot shows the HubSpot Inboxes settings page. The top navigation bar includes a back arrow and "Back to Reports" on the left, and "Settings" in the center. The main content area is titled "Inboxes" and features a "Current view" dropdown menu set to "Knowledge Team". To the right of the dropdown, it says "You're only modifying this view." and an "Actions" dropdown menu. Below this, there is a section for "Channels" with a right-pointing arrow, followed by the heading "Connected Channels". A table with columns for "NAME", "CONNECTED ON", and "STATUS" is shown, but it is empty. Below the table, a message states "You haven't connected any channels" and provides instructions: "Manage all your conversations in one place by connecting your email, forms, chat, and Facebook Messenger." A red button labeled "Connect a channel" is positioned at the bottom of the message.

< Back to Reports

Settings

< Back to all settings

Inboxes

Current view: Knowledge Team

You're only modifying this view. Actions

Channels >

Connected Channels

NAME	CONNECTED ON	STATUS
You haven't connected any channels		

Manage all your conversations in one place by connecting your email, forms, chat, and Facebook Messenger.

Connect a channel

Inbox

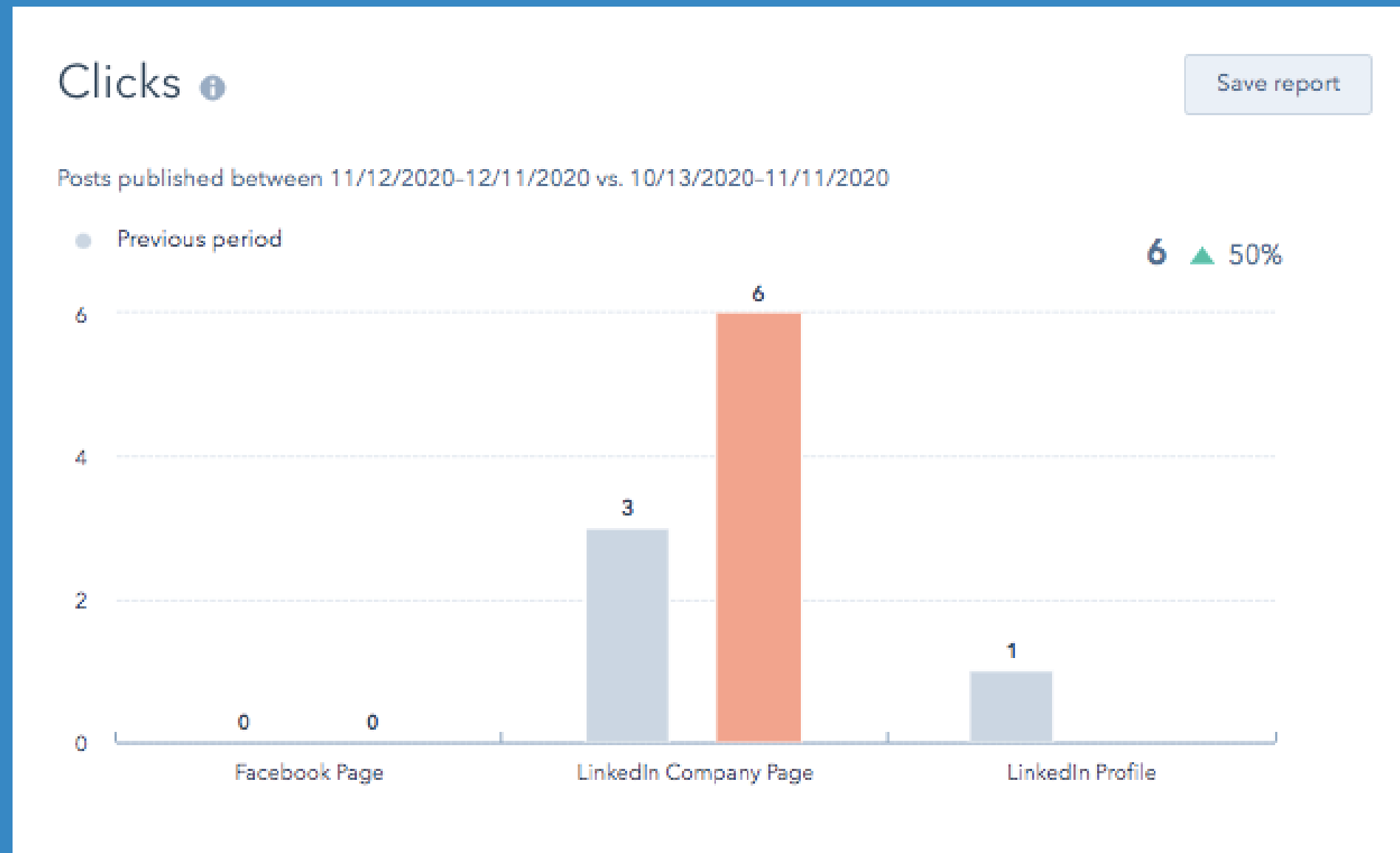
Filtering Rules

Inboxes

My Profile

Team Management **NEW**

# 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

# Check Your Social Performance

The screenshot displays the HubSpot social calendar interface for December 2020. The interface includes a navigation bar with filters for 'All networks', 'No campaign', 'All users', 'All post types', and 'Show Drafts'. Below the navigation bar, there are tabs for 'Month', 'Week', 'Day', and 'Today', with 'Month' selected. The calendar grid shows posts scheduled for various dates in December 2020. The posts are from 'The Insight Studio' and are scheduled for various times throughout the month. The interface also includes a 'Help' button in the bottom right corner.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29	30 f The Insight Studio - 8:09 AM 2 more	1 in The Insight Studio - 8:11 AM f The Insight Studio - 11:33 AM	2 f The Insight Studio - 8:09 AM in The Insight Studio - 8:17 AM	3 f The Insight Studio - 8:15 AM in The Insight Studio - 12:52 PM	4 f The Insight Studio - 8:08 AM in The Insight Studio - 8:08 AM	5
6	7	8 in The Insight Studio - 8:08 AM f The Insight Studio - 1:12 PM	9 in The Insight Studio - 8:10 AM f The Insight Studio - 2:02 PM	10 f The Insight Studio - 8:05 AM 3 more	11 in The Insight Studio - 7:26 AM 4 more	12
13	14 in The Insight Studio - 8:13 AM f The Insight Studio - 8:13 AM	15 f The Insight Studio - 8:15 AM 2 more	16 in The Insight Studio - 8:17 AM 2 more	17 f The Insight Studio - 8:09 AM in The Insight Studio - 8:09 AM	18	19
20	21 f The Insight Studio - 8:10 AM in The Insight Studio - 8:10 AM	22 f The Insight Studio - 8:06 AM 3 more	23 in The Insight Studio - 11:01 AM	24	25	26
27	28 f The Insight Studio - 8:17 AM in The Insight Studio - 8:17 AM	29	30	31 in The Insight Studio - 8:16 AM	1	2

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.

