UNLOCKING POTENTIAL

HubSpot Health Check Checklist

This checklist will take you through the key areas you need to review to take back control of your HubSpot portal.
INTRODUCTION

Before you get started:

• Some areas might not be relevant to you if you don’t have certain Hubs or functionalities enabled, so you’ll want to skip those

• This is designed to give you a high-level overview of key problem areas to check in your portal. If you want something more comprehensive, book a chat to learn more about our HubSpot Health Check service.

If you’re unsure on how to answer the question, there are information icons throughout. Hover over them for tips and further information on how to form a response.

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PORTAL SETUP

Review the following areas to ensure your portal has the right foundations set up:

☐ Account defaults
☐ Users and teams
☐ Social media
☐ Tracking and analytics
☐ Privacy and consent
☐ Inboxes

DATA

Review the following areas to assess the current state of your data, and whether you are using best practices for formatting and capture.

☐ Hygiene of Contact, Company and Deal records
☐ Necessary properties
☐ Lifecycle stages
☐ Field formatting
☐ Data capture
AUTOMATION

Review the following areas to assess the current state of your automation and if you are missing out on opportunities.

☐ Look for unused workflows

☐ Identify missed opportunities

☐ Workflow errors

CRO

Review the following areas to optimise your conversions.

☐ Forms

☐ CTAs

☐ Content audit

☐ Landing pages

☐ Security
EMAIL

Review the following areas to assess the health of your email sending strategy and self-spot areas for improvement.

☐ Open rate

☐ Click rate

☐ Smart content

☐ Nurturing

☐ Newsletter

WEBSITE TRAFFIC

Review your website traffic to self-identify areas for conversion and traffic improvement.

☐ Best source for traffic

☐ Worst source for traffic

☐ Bounce rate

☐ Landing pages
REPORTING

Review your current use of reporting to create a single source of truth in your portal.

☐ Dashboard audit
☐ Duplicates
☐ Key dashboards
☐ Sales & Marketing alignment
☐ Data hygiene

SERVICE HUB

Review the following areas in your service hub to make sure you’re making the most of the tool.

☐ Live chat
☐ Surveys
☐ Ticket pipeline
☐ Knowledgebase
☐ Customer portal
SALES HUB

Review the following areas in your sales hub to make sure you’re making the most of the tool.

- Tasks
- Playbooks
- Meetings
- Quotes
- Snippets/Templates
- Sequences
- Deal Pipeline

DON’T HAVE TIME TO GET INTO THE DETAIL?

We can do the whole HubSpot Health Check for you. You choose whether you want us to do a general check or a deep-dive into each focus area – or whether you’d like us to skip an area entirely. We’ll then get one of our elite HubSpot experts on the case, who will provide you with a detailed report and recommendations for next steps in each area. You’ll also get a consultation call to run through them all. Prices start at £1,200.

Book a chat to learn more.