HubSpot Health Check EXAMPLE

Overview

The audit will analyse and give recommendations for the main topics within your HubSpot instance:

o Contacts

o Conversations

o Marketing

o Sales

o Service

o Automation

o Reports

Landing Pages

- # Landing pages
- # Top 10 Landing pages performers
- Domain Settings

Questions and Recommendations:

ACT: 15 Landing pages in total are in the system. Including landing pages in the Nurture and Lead Capture strategy:

– Last was created in April 2022
– Mainly created in 2019

ACT: Rename Landingpage domain from info. to engage.

Data

- # of fields in the contact database: 397
- # of fields in the company database
- Usage of contact fields (Variance, Fill rate)
- Usage of company fields (Variance, Fill rate)
- # custom objects / list names
- Recommendation to consolidate/normalize data

→ An excel sheet will be provided with all standard and custom properties and their correspondent fill and variance rates.

Questions and Recommendations:

INF: Lead Source is only filled 1%

ACT: Introduce Lead Source Values

ACT: Fill mandatory fields for workflows, start with # of employees

Density graph

- High Engagers
- Dormant Potential
- Inactive or Indecisive
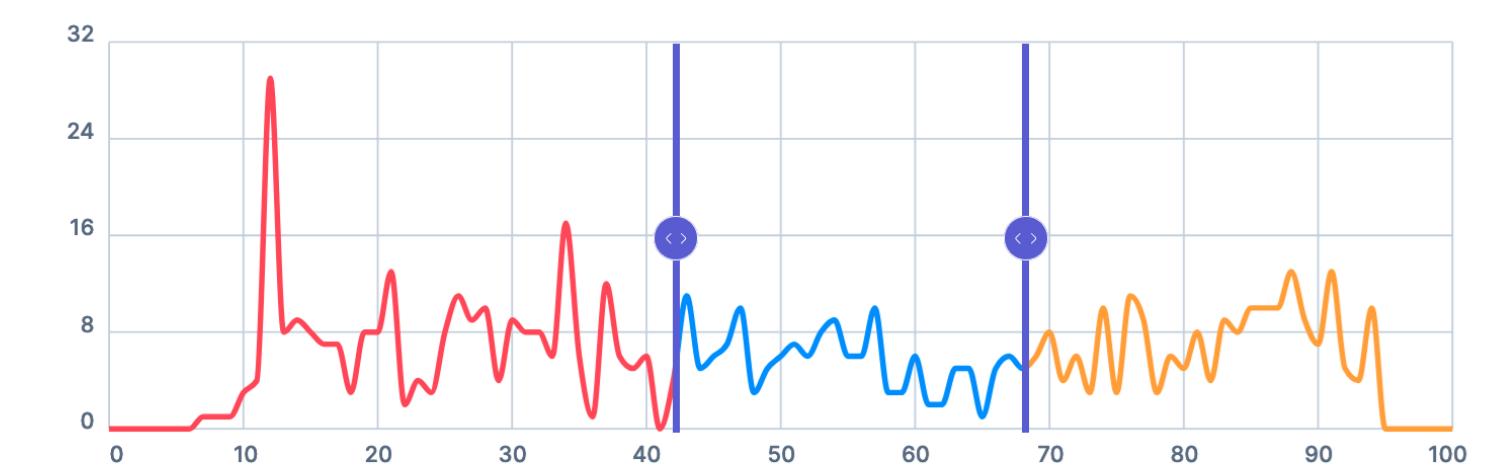
Data Model Overview

Questions and Recommendations:

QST: Why are there 185.671 records in Companies but only 11.041 records in the contact records?

ACT: Clean up company records – what is the value

ACT Deals: Since Salesforce is the Sales System – could the deals be deleted or are they still needed for Reporting reasons

Data Model Overview

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Companies
Example: ACME corp.
185.671 Company records creat...

Properties (105)
Example: Company name

Associated to 4 objects

Contacts
Example: Carol Denver
11.042 Contact records created

Properties (278)
Example: First name

Associated to 3 objects

Deals
Example: ACME corp. new contract
136 Deal records created

Properties (93)
Example: Deal stage

Associated to 3 objects

Tickets
Example: JIRA issue
0 Ticket records created

Properties (33)
Example: Ticket status

Associated to 3 objects

Contacts Overview

 # 11.042 total contacts

Questions and Recommendations:

INF: There is a very good distribution within the three segments

ACT: Review workflows and use the Engagement Segments to run A/B testing

Contact segmentation

- 3%
- 12%
- 70%
- 15%
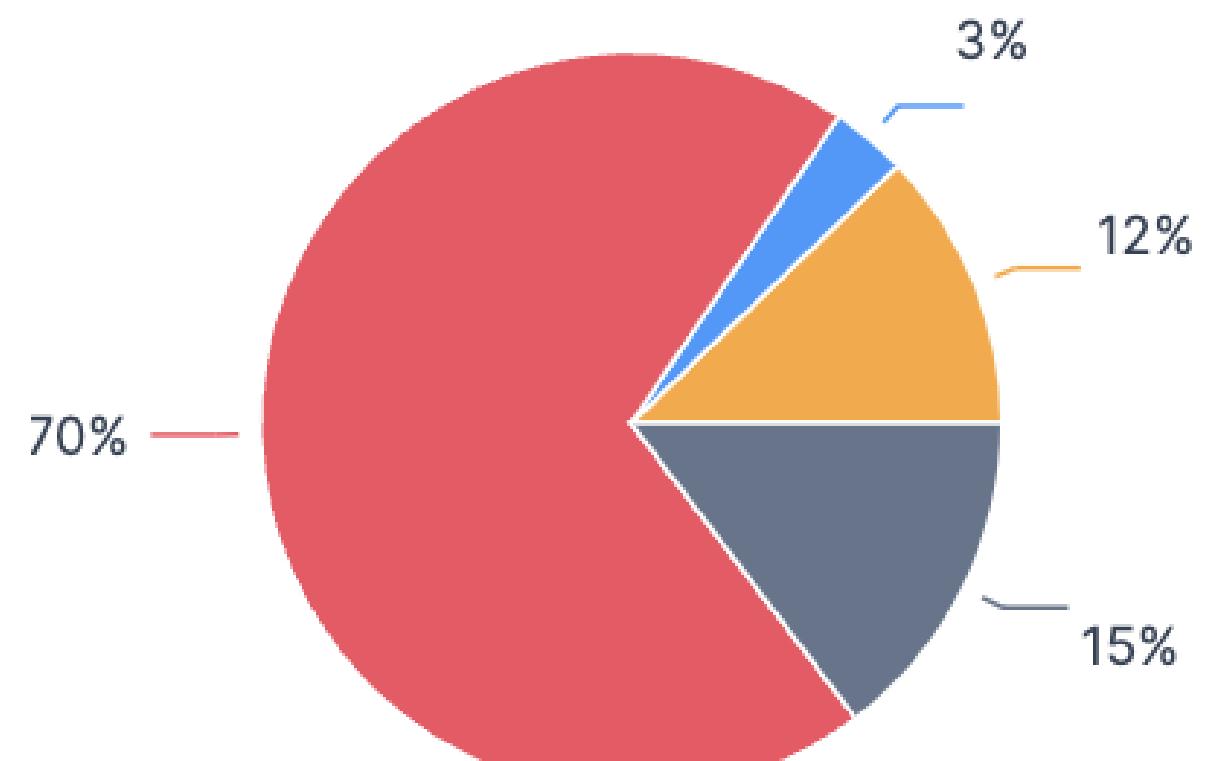
	High Engagers
	402 contacts

	Dormant Potential
	109 contacts

	Inactive or Indecisive
	2300 contacts

	No Activity
	482 contacts

Contacts Overview

 # 11.042 total contacts

Questions and Recommendations:

INF: There isn't a very good distribution within the three segments

ACT: Use the TES in the Dormant Potential Segment (60% - 70%) to run a special campaign - Campaign goal: Get #of employees

ACT: Use the TES in the Inactive / Indecisive Segment (30% - 45%) to run a special campaign – Campaign goal: Get #of employees

Density graph

● Inactive or Indecisive ● Dormant Potential ● High Engagers
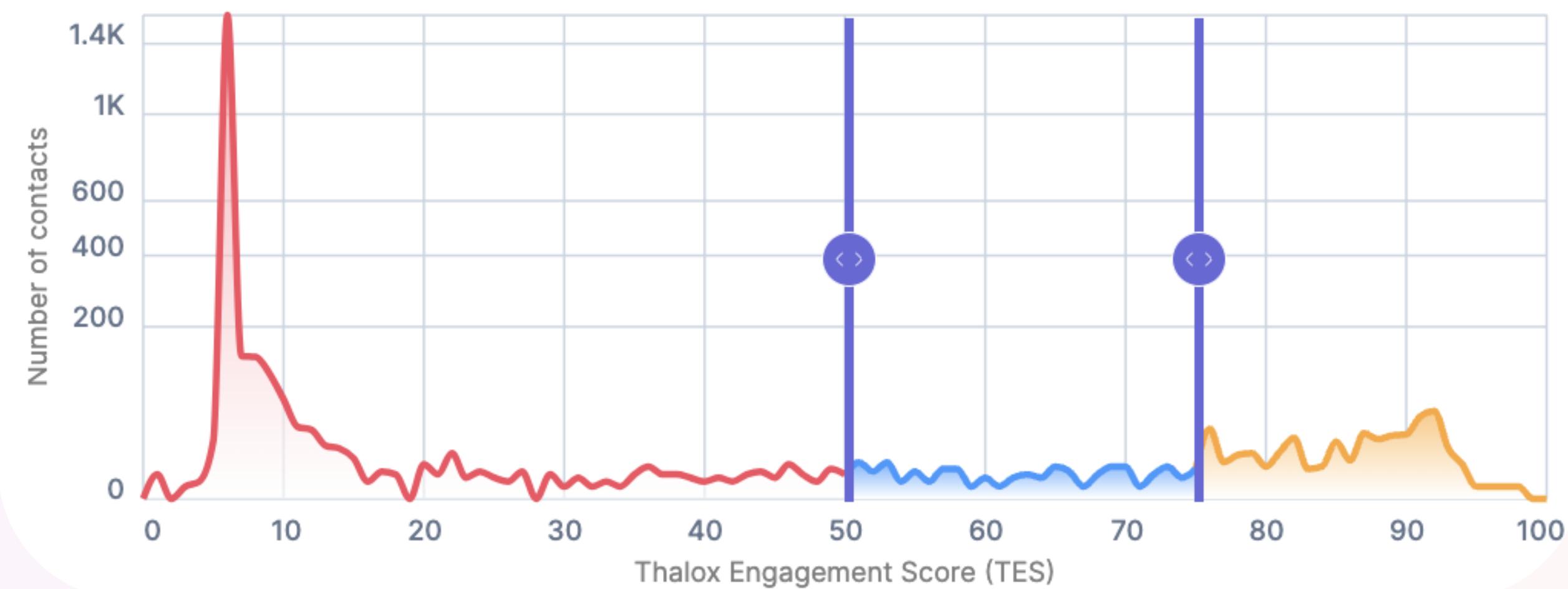
Contacts Contact Owner

 # 11.042 total contacts

Questions and Recommendations:

QST: Why are contacts not assigned to Marketing as a contact owner to reflect the lead management process

ACT: Sync this field with CRM to reflect the same data

ACT: Introduce individual sales signature to have a better trust element within in the email

BRUNO HABERBECK	DEMO THALOX	ERWIN ARNOLD	ERWIN ARNOLD
11	1	2	1,897

FALK VON RÖNN	LAURA KERSTING TUSSI	LISA FERRAZ	(NO VALUE)
75	116	1,287	14

Lists

- # lists
- # active lists
- # static lists
- # of currently often used lists
- # performance top 3 lists

Questions and Recommendations:

If not existing, create unsubscribe and bounce active lists, so is easier to identify contacts for deletion.

Lists

All lists (327)   Unused lists (135)   Recently deleted (17)

Lists

Questions and Recommendations:

ACT: Review and delete unused lists

ACT: Reduce active lists and check usage
Go to lists and sort by "USED IN" go to page 8 check all "0"

ACT: Folder all lists (Introduce System Folder + Workflow Folder)

Which types of list do we have?
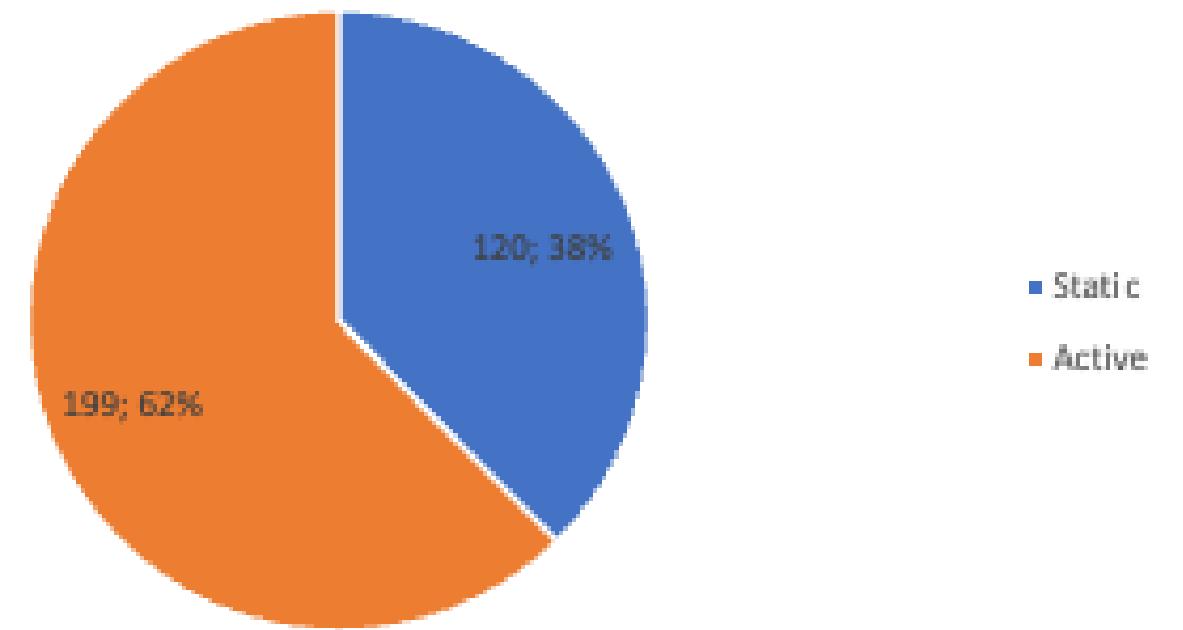
Chat flows/Snippets/Templates

- # chat flows /Settings
- # Snippets and usage
- # Templates and usage

Questions and Recommendations:

ACT: 11 Chat flows are set up but not in use – could those be deleted?

ACT: 2 Snippets – since the system is not used for Sales our recommendation is to delete them

ACT: 2 Templates: Are they still in use? If not we could delete them

Ads

- # connected to HubSpot / if yes are all ads flowing into the system

- Report

Questions and Recommendations:

ACT: Where do you report all campaign results?

If there is no other system ACT: Connect channels and accounts to Ads to make the following report accurate

See reporting: *link*
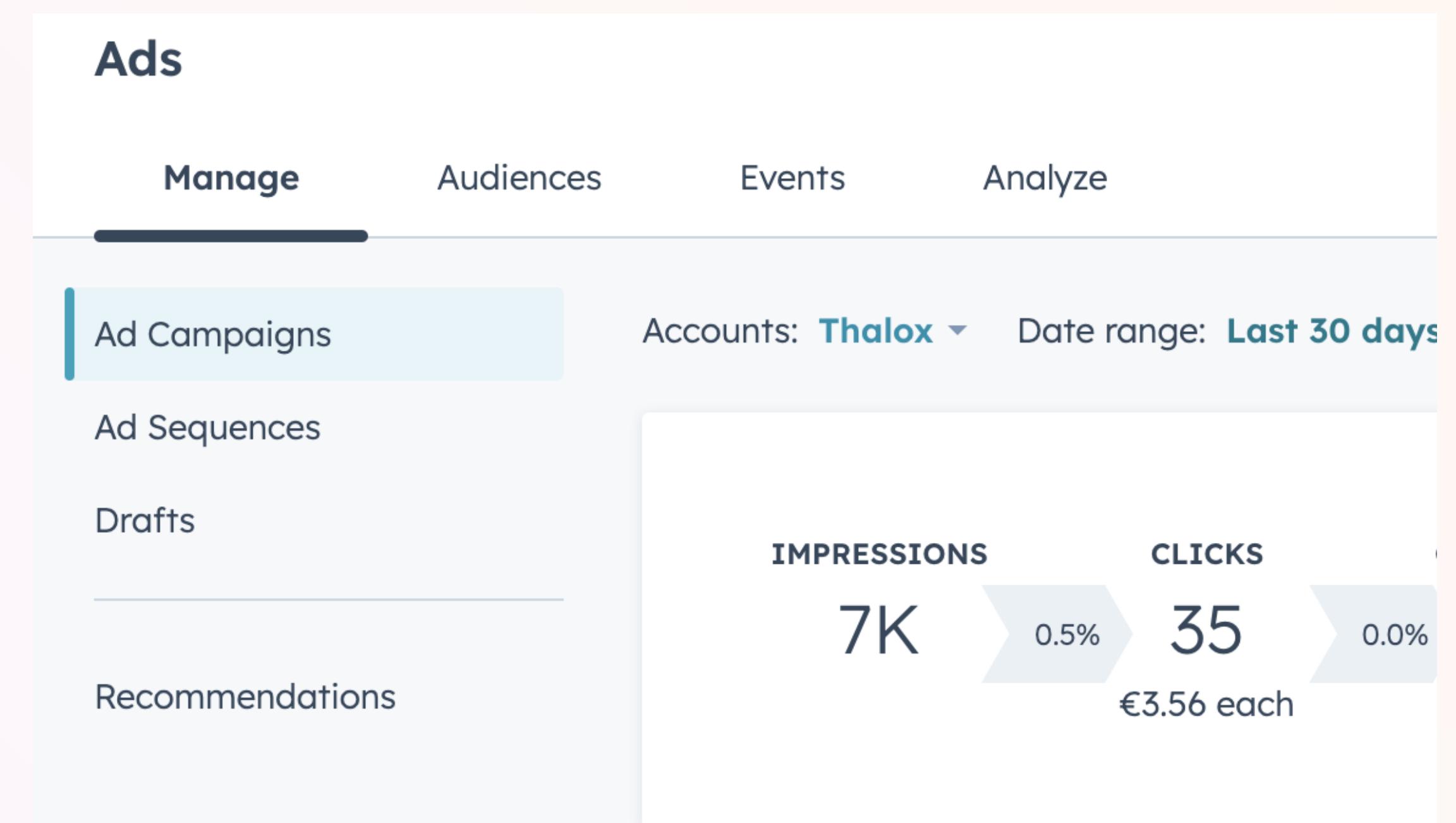
Emails

Questions and Recommendations:

ACT: Simplify Sender Name

ACT: Delete Emails which are older than 1 year

+ Performance overview

Email Usage

Currently Published Emails
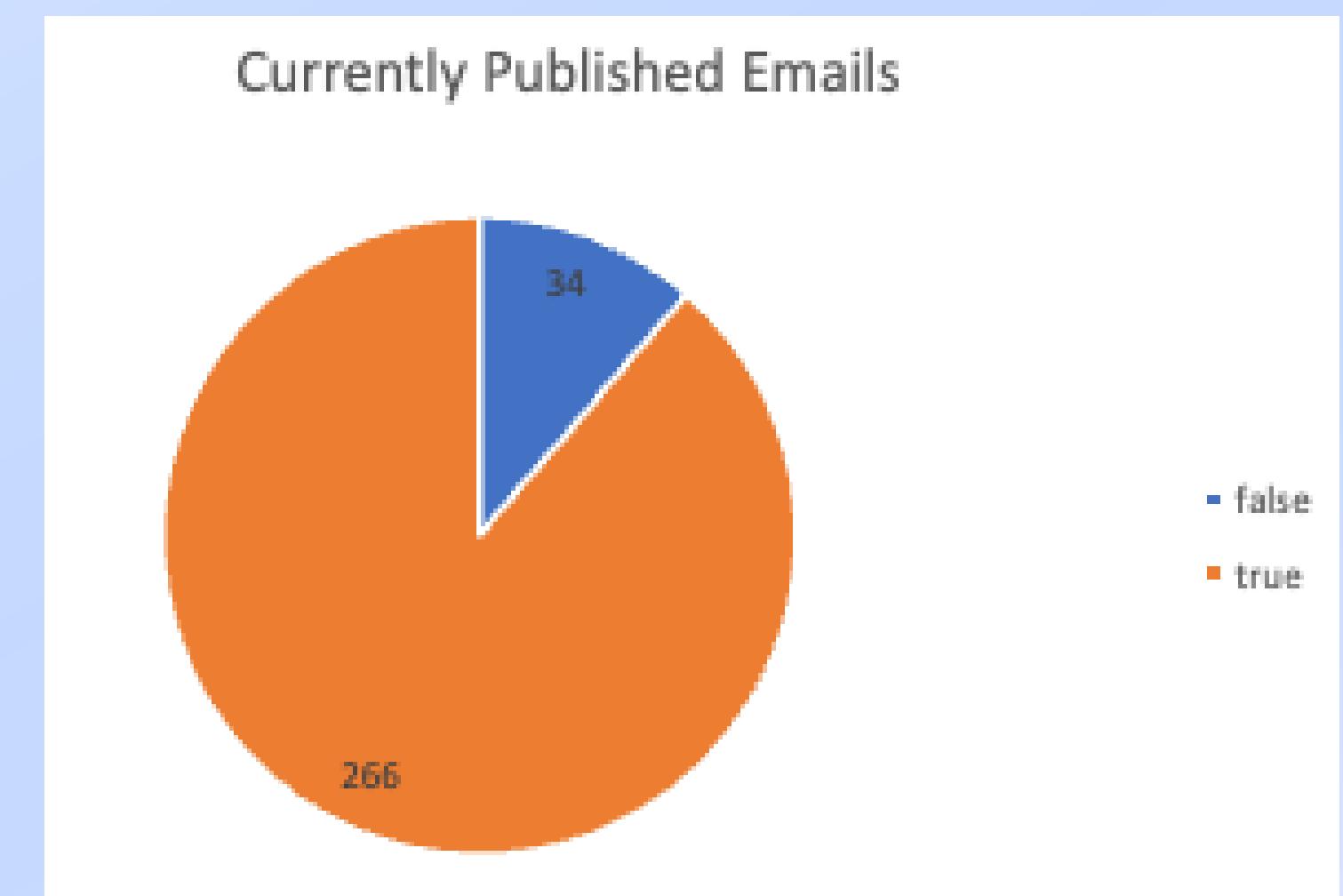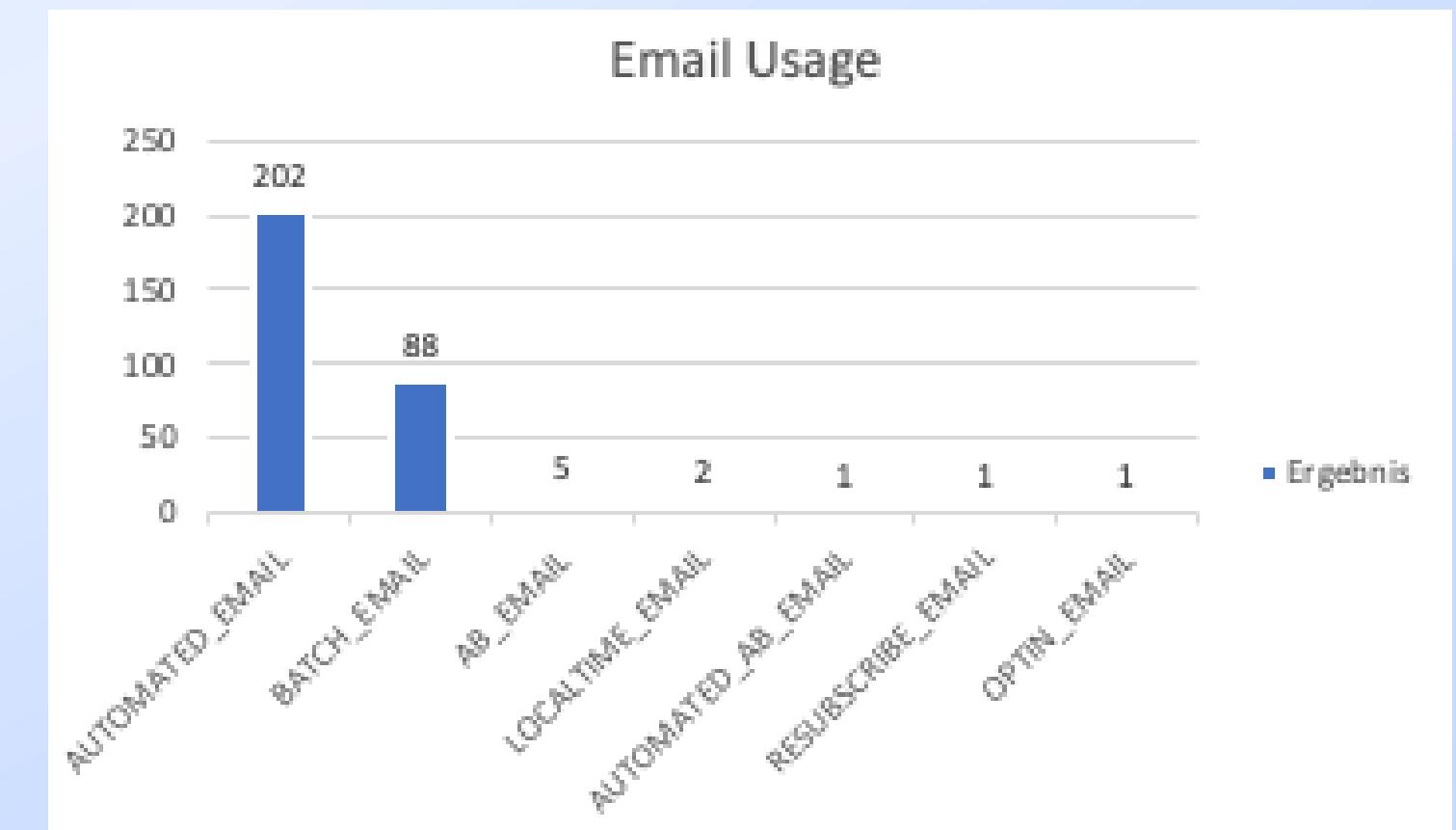
Sender Name	# of Emails
	110
	54
	44
	27
	19
	11
	9
	5
	4
	3
	2
	1
	1
	1
	1
	1
	1
	1
	1
	1
Gesamtergebnis	**300**

Double Opt In Process

- If in place – Review setup and general process

- If isn't in place – Recommendation of what you should implement

Landing Pages

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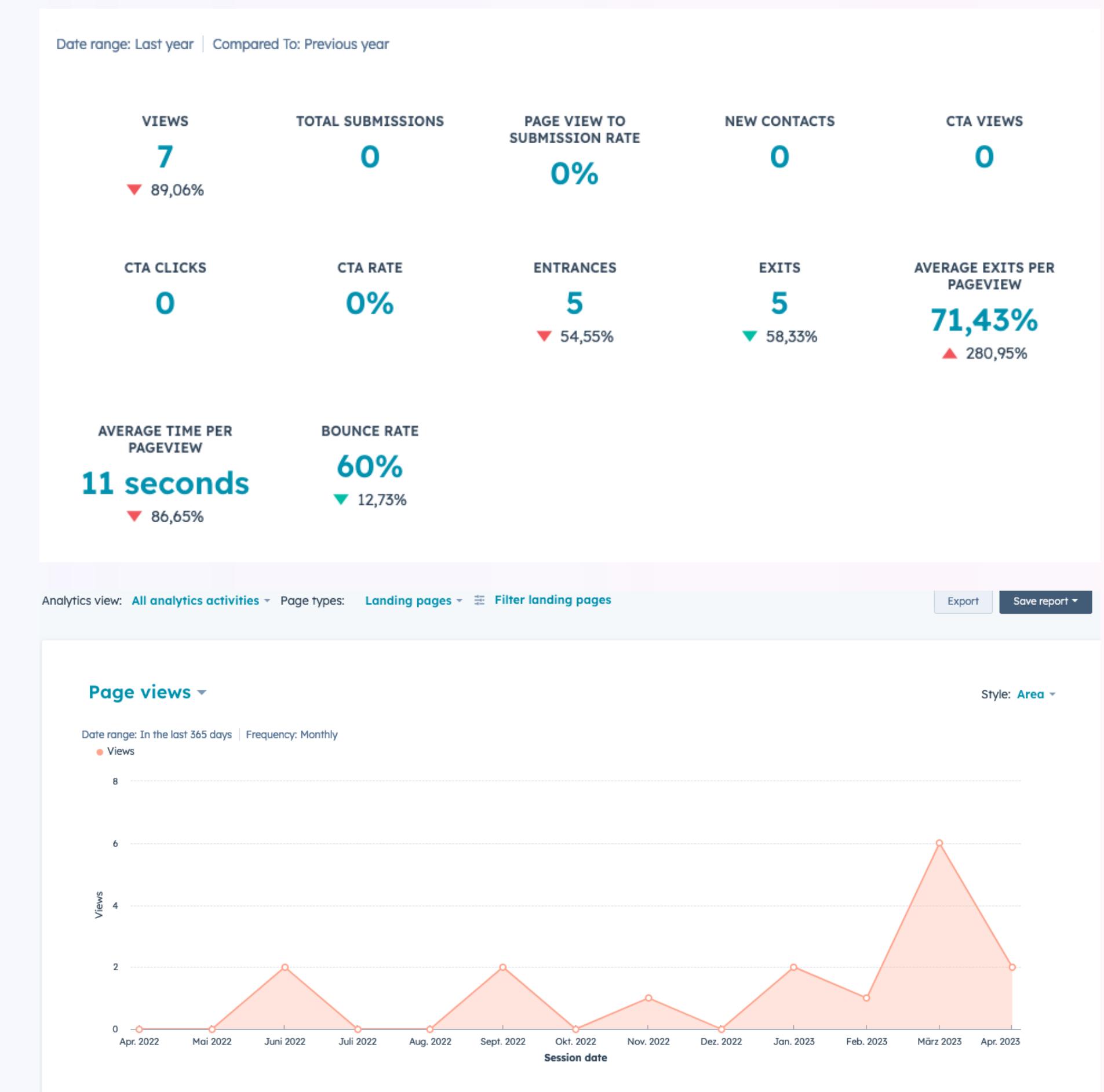
Social Media

- # of social media accounts connected to the system

- Social Media Monitor

Questions and Recommendations:

Social Media Accounts are not connected to the system.

ACT: Connect Social Channels to the system
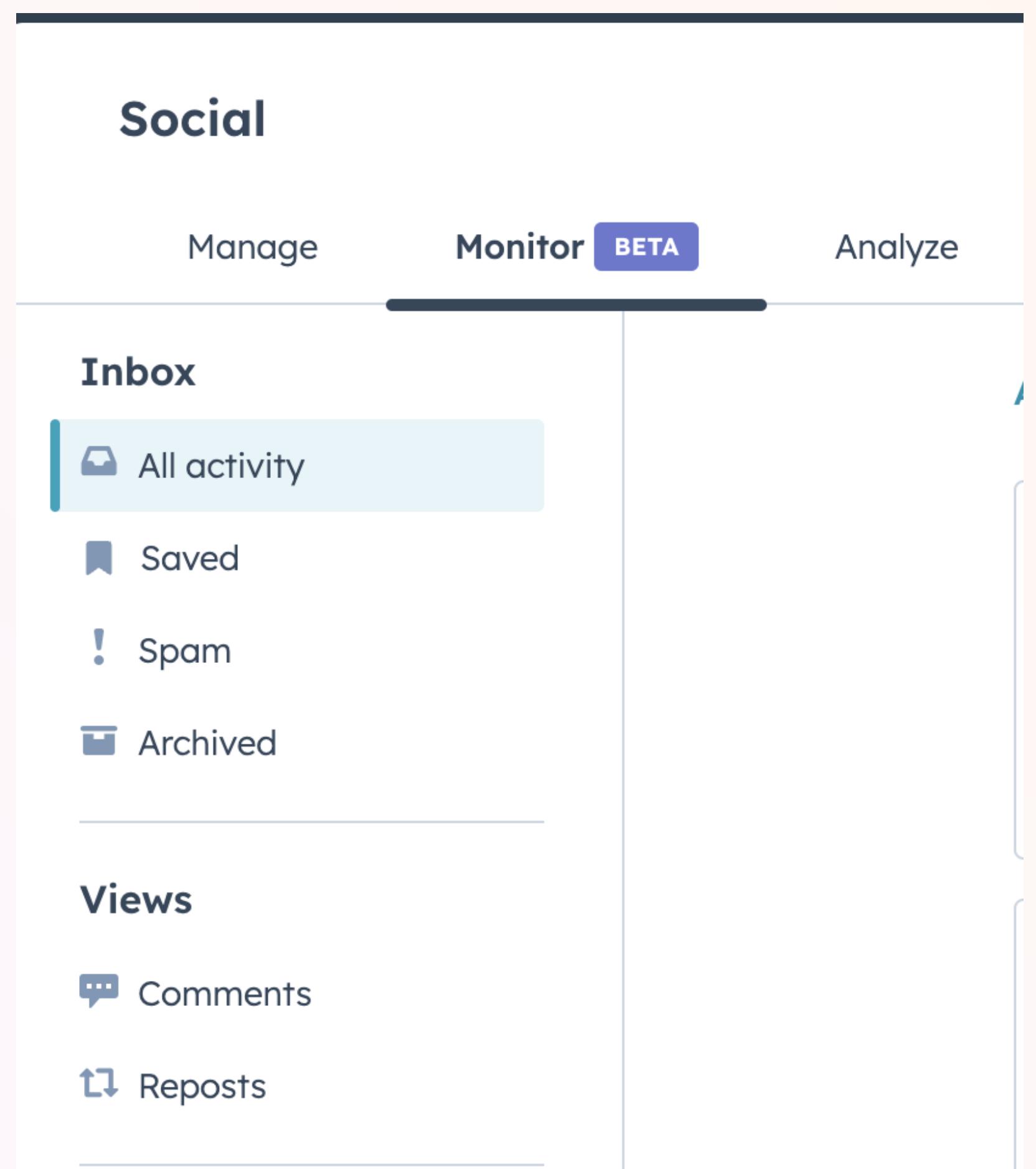
Files and Templates

- # of files and templates

Questions and Recommendations:

ACT: Review files / folder them – delete unused ones

Please note – if there is dependency in other assets, like published Emails.
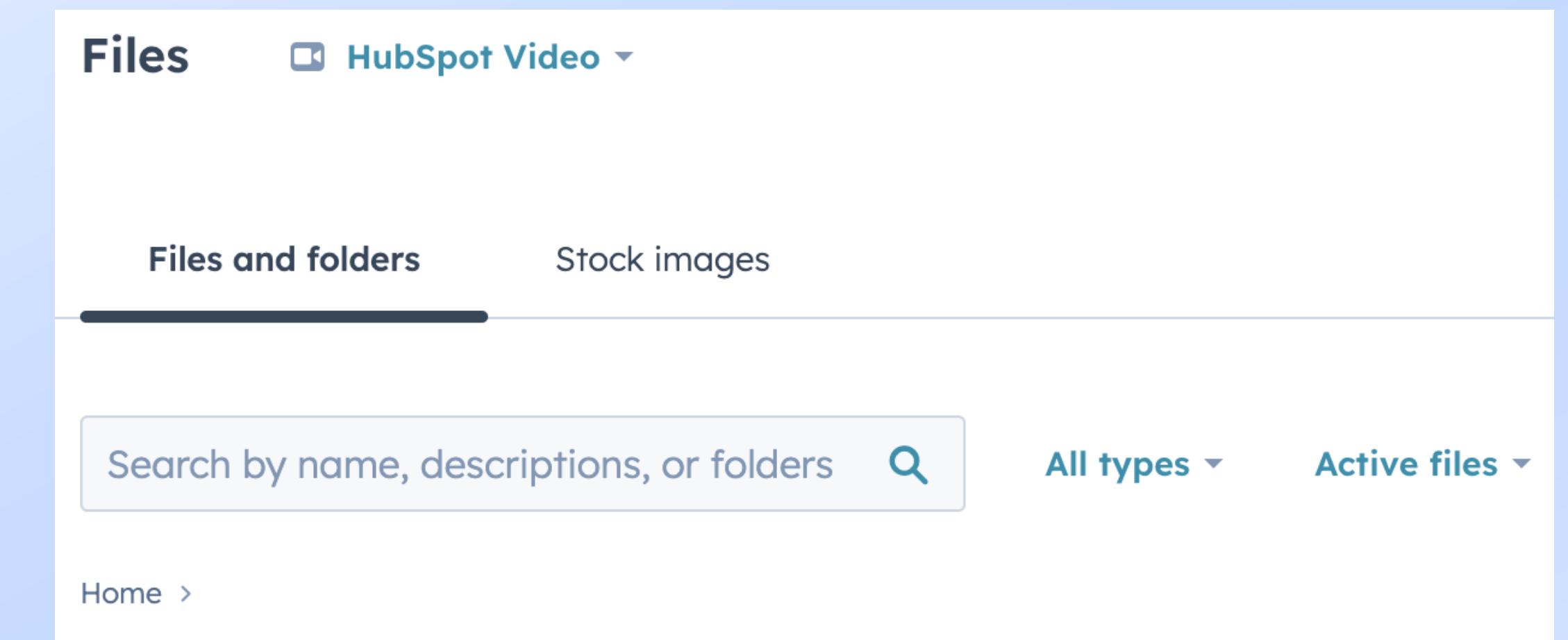
Leads Capture

- # of forms and usage recommendations

Questions and Recommendations:

ACT: 170 Forms are in the System

ACT: Check F1 and F2 Form (Views/Submissions) – maybe switch off tracking if possible

ACT: Review and Delete Inactive Forms

FORM	FORM TYPE	VIEWS	SUBMISSIONS	CONVERSION RATE
	Regular	90	118	–
	Regular	208	79	37,98%
	Regular	37	55	–
	Regular	28	47	–
	Regular	24	44	–
	Regular	22	43	–
	Regular	3.701	43	1,16%
	Regular	22	35	–
	Regular	32.683	34	0,1%
	Regular	32.687	28	0,09%
	Regular	119	23	19,33%
	Regular	752	15	1,99%
	Regular	576	15	2,6%
	Regular	22	7	31,82%
	Regular	20	7	35%
Report Total		**102.531**	**669**	**0,65%**

Inactive Forms (not submitted within last 365 days) – Potential to delete (no views/no submissions) > 45 mostly Pop Ups – please check if this assumption is correct / please check creation data before deleting!

CTAs

- # of CTAs and usage recommendations

Questions and Recommendations:

ACT: Run a test / What were the results for that?

	PREVIEW	NAME	VIEWS	CLICK RATE	CLICKS	LOCATIONS	LAST MODIFIED
☐	Download Today		0	0%	0	0	20. Apr. 2022
☐	Direkt anrufen		0	0%	0	8	20. Okt. 2020
☐	Hier gibt's Klimatipps		0	0%	0	1	14. Nov. 2019
☐	Leistungspaket zum Download		0	0%	0	1	22. März 2019
☐	Read More		0	0%	0	0	6. März 2019 Updated from template
☐	Read more →		0	0%	0	0	6. März 2019 Updated from template
☐	Find Out More		0	0%	0	0	6. März 2019 Updated from template

Workflows

- # of total workflows: 225

- # of At-risk workflows: 26

- # of Unused workflows: 146

- # of active workflows: 53

- Top 3 workflows – review (Next Page)

Questions and Recommendations:

INF REVIEWED:
- WF1

- WF2

- WF3

ACT: Delete or archive workflow "WF4" only 22 enrolments, last update 2021

ACT: Review or delete unused workflows

ACT: Check At-Risk Workflows

Top 3 Workflows

- WF1, WF2 and WF3 based on enrolment

Questions and Recommendations:

QST: Which workflows should we focus on?

QST/DCS/ACT: Simplify # workflows – what are the three main topics?

	NAME	ON OR OFF ⓘ	
☐	SYSTEM - Companys data usage in contacts	● On	
☐	SYSTEM - All forms Marketing OptIn & DOI	● On	
☐	Gated content (Ebook/White paper) Nurture - Lea	● On	

Reports

A review of the setup of the following dashboards:

- Marketing Channel Performance

- Sales Manager

- Lead Generation

- Website Analytics
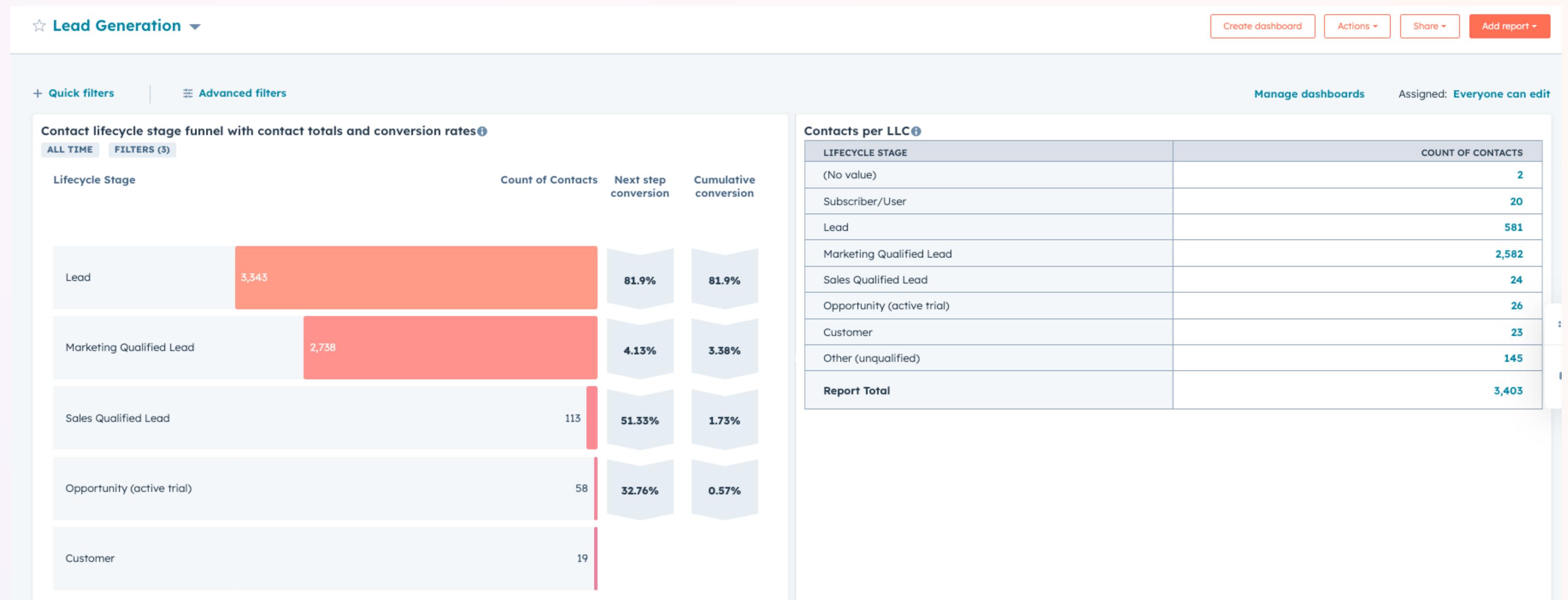
HubSpot Users

- # users: total 33
- # deactivated users: 3
- # review of roles and permissions

Questions and Recommendations:

ACT: Review users and decide which should be deleted

Permissions	#
Account defaults settings write	6
Admin base	6
Ads publisher	1
Ads read	7
CRM All Editor	5
CRM All Viewer	3
CRM Unassigned Viewer	1
Goal forecast all viewer	2
Super Admin	2
sum	**33**

Data – Installed Apps

- # of apps

- Review of usage and interfaces

Questions and Recommendations:

ACT: Check Interface to Slack
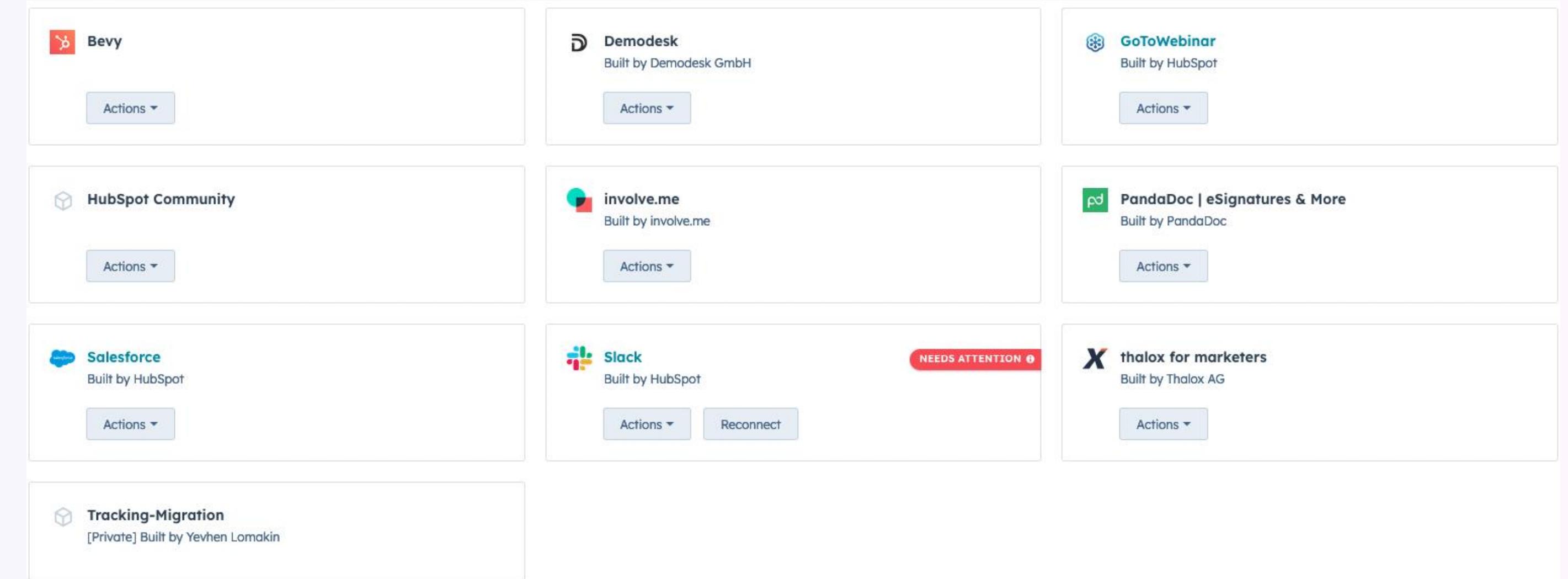
Data

Fill Rate of contact properties

**Duplicate of properties**

Variance of properties

Recommendations

Data

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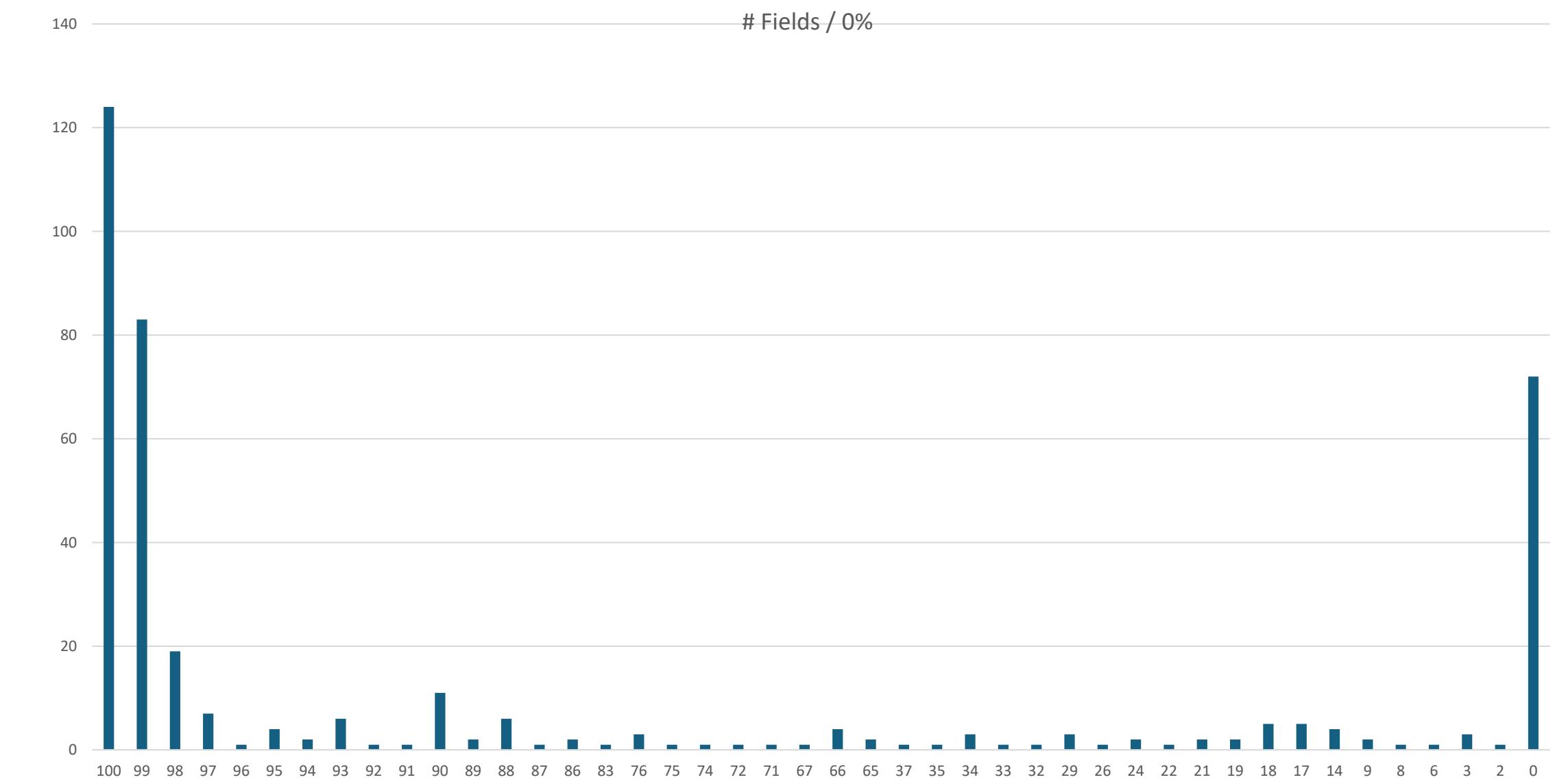
Fields / 0%

Questions and Recommendations:

INF: Lead Source is only filled 1%

ACT: Introduce Lead Source Values

ACT: Fill mandatory fields for workflows, start with # of employees

Thalox

Thank you

Reach out!

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