

HubSpot HealthCheck

A complete HubSpot portal
audit by experts with a clear
roadmap of actions and
improvements

[VISIT PRODUCT PAGE](#)



XEN

What is the HubSpot HealthCheck?

The HubSpot HealthCheck is an **audit** of your HubSpot portal and a **roadmap** with priorities and recommendations to improve it.

What you get in the HubSpot HealthCheck



A kick-off call to discuss concerns and goals for your HubSpot portal



Green, Amber, Red report of all audited items and their priorities



The HubShots Framework as a 5-stage plan for your business to get the most out of HubSpot



A clear roadmap combining the audit report and 5-stage plan (our plan of action to improve your portal)



A call to go through the roadmap and answer any questions



Access to our super responsive HubSpot Specialists and Strategists



Ongoing support after HealthCheck via our Virtual CRM Manager

[10-A] [Client] | HubSpot HealthCheck with XEN

Area	HealthCheck Item	Priority	HubSpot Link	Grade
Admin	Security Center ratings are Good	high	https://app.hubspot.com	
	Super Admin permission only applied where necessary	high	https://app.hubspot.com	
	Email sending domain is connected	high	https://app.hubspot.com	
	System pages look OK and align with branding on Pages/Landing Pages	high	https://app.hubspot.com	
	Import/Export audit checked for recent activity - activity is normal	low		
	Lead Stages configured/customised	low		
	Using HubSpot AI and HubSpot Insights for contact and company data enrichment	low		
	Create contact, company, deal, ticket forms have been customised	low		
	Presets set up	low		
	Users belong to teams and use permission sets	low		
	Currencies set up (multi-currency, exchange rate being updated)	low		
	Notification profiles set up	low		
	Account defaults set up (name, timezone, financial year)	low		
	Brand kit is set up (logos, colours, themes, favicon)	low		
	Naming Conventions in place	low	N/A	
	Check if non-Super Admins have Marketing contacts access (When editing permissions - go to Account, Settings) (this permission should be limited and turned off for those who don't need it)	low	https://app.hubspot.com	
	Teams created and users added to Teams	low	https://app.hubspot.com	
	Permission Sets created (Enterprise only) and assigned to Users	low	https://app.hubspot.com	
	GDPR only enabled if company operates globally	low	https://app.hubspot.com	
	Cookie policy published for appropriate countries	low	https://app.hubspot.com	
	Contact Property Groups created where appropriate	low	https://app.hubspot.com	
	Company Property Groups created where appropriate	low	https://app.hubspot.com	
	Deal Property Groups created where appropriate	low	https://app.hubspot.com	
	If using Products, Folders have been set up for Product Categories	low	https://app.hubspot.com	
	Email: Send frequency set (Enterprise only)	low	https://app.hubspot.com	
	Process for importing: import contacts as non-marketing contacts	low	N/A	
	Check notification destinations	low	https://app.hubspot.com	
	Folders avoid spaces in names	low	https://app.hubspot.com	
	Minimal files in root folder	low	https://app.hubspot.com	
	Document Folders in place	low	https://app.hubspot.com	
	Folders avoid using spaces in their names	low	https://app.hubspot.com	
	Do you have a Sandbox/Test HubSpot Portal?	low	N/A	
	Using HubSpot Drag and Drop Theme (i.e. CLEAN Theme)	low	https://app.hubspot.com	
	Tracking code: Bot filtering enabled	medium	https://app.hubspot.com	
	Tracking code: Exclude traffic IPs in place (internal IPs)	medium	https://app.hubspot.com	
	Contact Lifecycle Stages configured	medium	https://app.hubspot.com	
	Each Lifecycle Stage is 'used in' more than 1 contact record (if number are low please add to notes section)	medium	https://app.hubspot.com	
	Deal Pipelines have 'update stage properties' configured (make sure to check all pipelines in the drop down)	medium	https://app.hubspot.com	



CURRENT STATE

- Workflows triggering when you don't expect them to.
- Leading to communication and operational problems across the business.
- Unsure why things were set up this way.
- Scared to change things in case they break.
- Not sure if you are using all of the tools you could be.
- Not sure if what has been set up is following best practice.



FUTURE STATE

- Best practice guidance to ensure your HubSpot Portal foundations are in place.
- A clear picture of which areas of HubSpot to work on first (highest priority) versus what's nice to have.
- A clear understanding of how much use you are currently getting out of HubSpot.
- A clear path forward to get the most out of HubSpot.

Think you need a HubSpot HealthCheck?

There are two ways to tell:

1

You've been using HubSpot for six months or more, and you're looking for improvements.

2

You've inherited a HubSpot account and it's a bit of a mess. You want to review and streamline the account.



Your Expert HubSpot Team

We've been using HubSpot as our own CRM platform since 2012 and serving HubSpot customers since 2013, across a range of industries and company sizes.

As a XEN customer you gain access to an experienced, highly certified team of HubSpot specialists and strategists.

XEN, along with Search and Be Found, are the team that produce [HubShots](#), the #1 HubSpot focussed podcast in Australasia.

Outcomes

Here's the key deliverables and outcomes for your HubSpot portal:



Your HubSpot
Portal Fully
Audited



Areas of Concern
and Opportunity
Highlighted



Best Practice
Recommendations
by Priority



A Clear Plan
to get More out
of HubSpot

The HubSpot HealthCheck is only for companies who are ready to take action & grow their business

The HubSpot HealthCheck is ideal for:

- Mid-large companies
- Who have been using HubSpot for more than 6 months or have inherited an existing account
- Who feel that they are not using HubSpot to its full potential.

If you are brand new to HubSpot then our [HubSpot Ignition](#) offering is better suited to your needs.



What's included in the HubSpot HealthCheck?

The HealthCheck includes a review your HubSpot Portal, where we grade each of the items in our HealthCheck checklist. We then provide recommendations for improvement. We package this up into a clear roadmap to improve your HubSpot portal. One of XEN's Certified HubSpot Consultants will then walk you through the findings and answer any questions you have.

- ✓ 2 hours of one-to-one consulting via zoom with one of XEN's HubSpot Certified Consultants
- ✓ A full review of your HubSpot Marketing, Sales and Service Hubs
- ✓ Grades against each area of the items in the HealthCheck checklist
- ✓ Recommendations for improvement
- ✓ A walkthrough of the findings and answers to any questions you may have
- ✓ An actionable checklist to help you start optimising your HubSpot portal

The HubSpot HealthCheck will help you:

- ✓ Utilise your HubSpot portal **more effectively**
- ✓ Understand **what is working and what is not working**
- ✓ **Reeducate** yourself about the tools at their disposal
- ✓ Plan for your **future use of HubSpot**
- ✓ Learn what other companies are doing well that you could **consider for your own account**
- ✓ Make a plan to **incorporate HubSpot tools** that are not currently being utilised
- ✓ Highlight issues and **assign priority items to fix**
- ✓ **Reduce errors** caused by a lack of processes
- ✓ Optimise workflows and automation to **save time and money**
- ✓ Achieve **better engagement** with contacts
- ✓ **Improve reporting** processes and visibility

HubSpot Areas Reviewed



Naming
Conventions



Settings
and Options



Lists and
Filters



Campaigns



Active
Lists



Workflows



Lead Scoring



Emails



Forms



Pop-up
Forms



CTAs



Page
Performance



Content
Strategy



Competitor
Tracking



Reporting
Dashboards



And More

HubSpot HealthCheck Scope

INCLUSIONS and EXCLUSIONS

We highly value our customer relationships and we do our best to make sure you're happy with the work we do. We find it helps to make sure we are both on the same page from the start about what's included and what's not to avoid any confusion later on.



WHAT'S INCLUDED:

- **AUDIT:** We audit your entire HubSpot portal.
- **REPORT:** Based on the audit we produce a report grading each item we audit.
- **HUBSHOTS FRAMEWORK:** We'll show you where you currently are on our 5-stage Framework, and recommend strategies to get more out of HubSpot.
- **ROADMAP:** A clear roadmap to fix issues, improve processes and get more out of HubSpot.
- **HUBSPOT EXPERTS:** We're here to answer any questions you have about HubSpot tools and strategy.



WHAT'S EXCLUDED:

- **IMPLEMENTATION:** The HubSpot HealthCheck is purely an audit - to give you the information and recommendations you need to get more out of HubSpot. If you would like us to implement the recommendations from the audit, we can work with you via our Virtual CRM Manager service.
- **OTHER SYSTEMS:** We audit your HubSpot Portal in detail. We don't audit other systems that might be connected to HubSpot i.e. integrations, separate systems.
- **IN-PERSON WORKSHOPS:** We are happy to accommodate in-person meetings where possible and where appropriate. If we agree on an in-person meeting/workshop, our time spent travelling will be charged on top of your subscription.
- **CUSTOM DOCUMENTATION:** We provide training videos, slide decks and process documents where appropriate but we don't develop, manage or maintain custom documentation for your HubSpot portal.

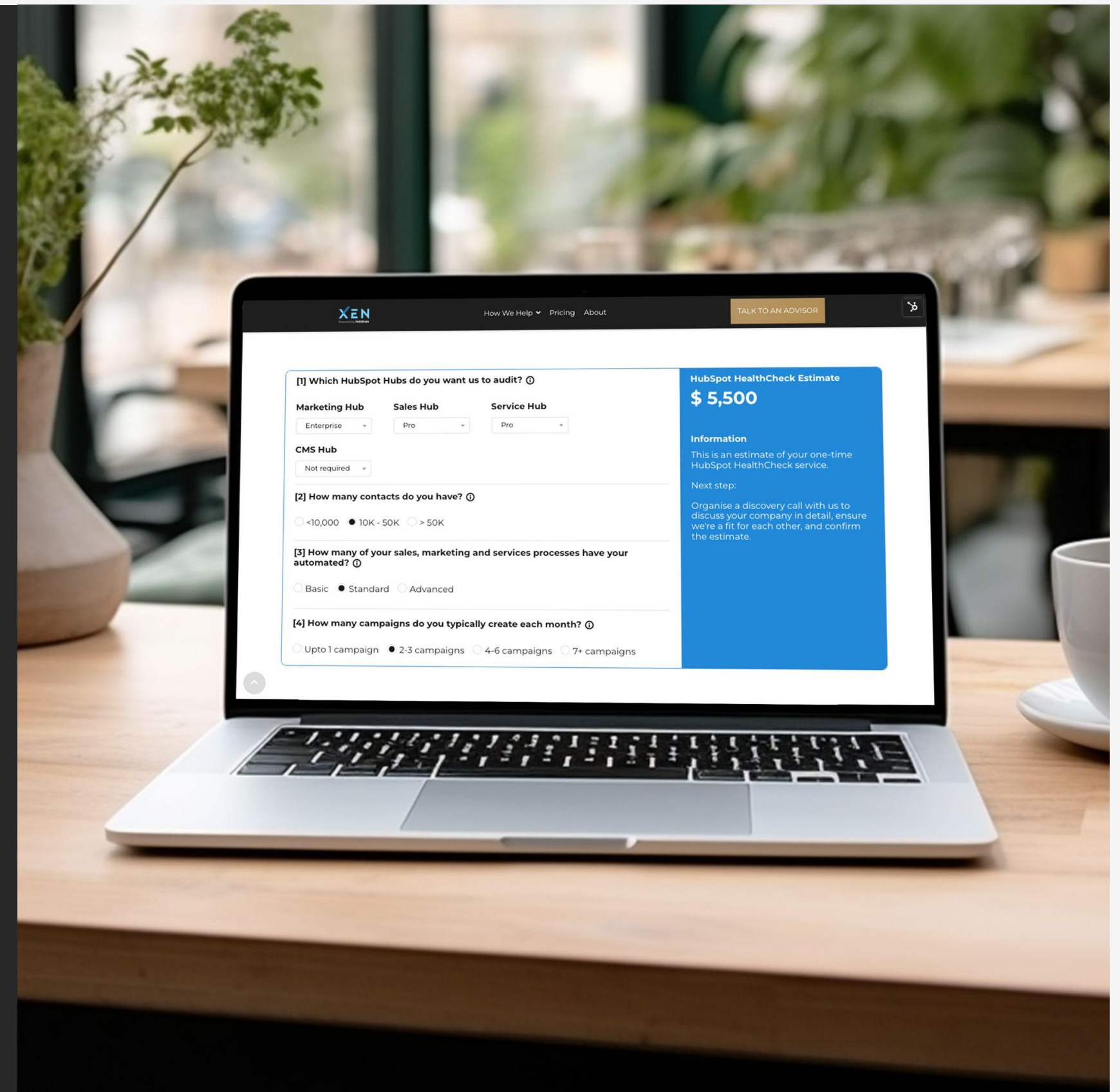
HubSpot HealthCheck

PRICING

The estimated cost will depend on the number of hubs you want us to audit, the number of contacts, your desired level of automation and the number of campaigns you typically create each month.

HealthCheck pricing ranges from **AUD \$2,500 to \$9,000** (plus GST for Australian customers) depending on portal setup, however most are between **AUD \$4,000 and \$6,000** (plus GST).

To get an estimate, check out our Pricing calculator on the HubSpot [HealthCheck page](#).



I'm Interested
**What's the
Next Step?**

If you are interested in chatting further
about the HubSpot HealthCheck offering:

Request a
HubSpot HealthCheck

TALK WITH AN ADVISOR

Not ready for a full HubSpot HealthCheck?

NO PROBLEM!

Start with a **QuickCheck** instead!

Find out if your HubSpot portal is following best practice
in just 1-2 hours with our HubSpot QuickCheck.

Request a HubSpot HealthCheck

TALK TO A SPECIALIST