

# HubSpot HealthCheck Checklist

If you've been using HubSpot for a while, chances are your portal has become a little complicated with contacts, emails, lists, workflows, pages, blog posts and numerous other areas. We review your portal and optimise HubSpot Marketing, Sales and Services Hubs including contacts, reports, lists, workflows, emails, sales pipelines, deals, and tickets.

Here are just some of the items we review in a **HubSpot HealthCheck**:

☐ **Review any HubSpot tools not being used or not being used effectively:**

- ☐ Recommend use cases and roadmap to adoption of tools or suggestions to improve use of tools
- ☐ Depending on your HubSpot Tier and HubSpot Hubs: Marketing Hub, Sales Hub, Service Hub, Operation Hub

☐ **Review all naming conventions:**

- ☐ Lists, emails, forms, workflows, campaigns, files, pages
- ☐ Recommend naming convention improvements

☐ **Review all settings and options including:**

- ☐ Account settings
- ☐ Security settings
- ☐ Permissions settings
- ☐ Object settings (Contacts, Deals, Companies, Activities, Products)
- ☐ Content settings
- ☐ Social settings
- ☐ Integration settings
- ☐ Property settings
- ☐ Email settings

☐ **Review Sales and Service Pipelines for:**

- ☐ Process refinement and areas for automation

☐ **Review Lists and Filters:**

- ☐ Lists being used for instant reporting and segmentation

☐ **Review Campaigns:**

- ☐ Campaigns use naming conventions and are used to group HubSpot assets

☐ **Review Active Lists for typical database hygiene activities including:**

- ☐ Cold contacts (low engagement, bounced, disinterested, legacy customers)
- ☐ High value contacts
- ☐ Target accounts
- ☐ Prospects

☐ **Review Workflows to:**

- ☐ Highlight potential problems (eg workflows with risky entry and re-enrollment criteria)
- ☐ Ensure consistency of naming
- ☐ Check internal notification send lists
- ☐ Check goals are added to workflows where appropriate
- ☐ Check workflows are using Go to action and avoid excessive branching and complexity

☐ **Review Lead Scoring rules**

☐ **Review Emails to:**

- ☐ Highlight old/legacy emails used in workflow automations
- ☐ Freshen email design templates (ensure use of drag and drop)
- ☐ Optimise internal notification emails
- ☐ Understand email health (Unsubscribe rate, Bounce Rate, Open rate and Click rate)

☐ **Review Forms to:**

- ☐ Highlight progressive field functionality where appropriate
- ☐ Recommend conditional fields where appropriate

☐ **Review Pop-Up Forms:**

- ☐ Optimise page targeting
- ☐ Recommend splitting into separate Pop-Up Form offers where appropriate

☐ **Review CTAs:**

- ☐ Check all CTAs and Smart CTAs for accuracy and performance
- ☐ Check multivariate or smart tests are being used

☐ **Review Page Performance:**

- ☐ Optimise web pages and landing pages for optimal results in Google

☐ **Review Content Strategy terms:**

- ☐ At least 5 key topics added to HubSpot SEO tool and content associated with topics

☐ **Review Reporting Dashboards:**

- ☐ Naming
- ☐ Scheduling
- ☐ Usefulness of reports