

# Advanced HubSpot Audit EXAMPLE

# Overview

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

- Contacts
- Conversations
- Marketing
- Sales
- Service
- Automation
- 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:

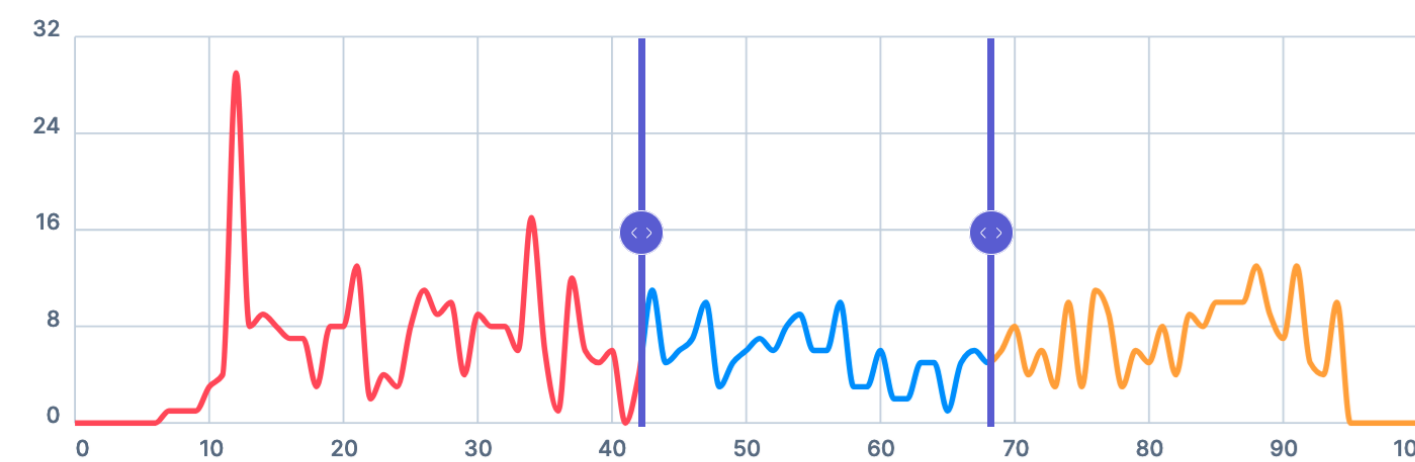
INF: Lead Source is only filled 1%

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



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# Contacts Overview

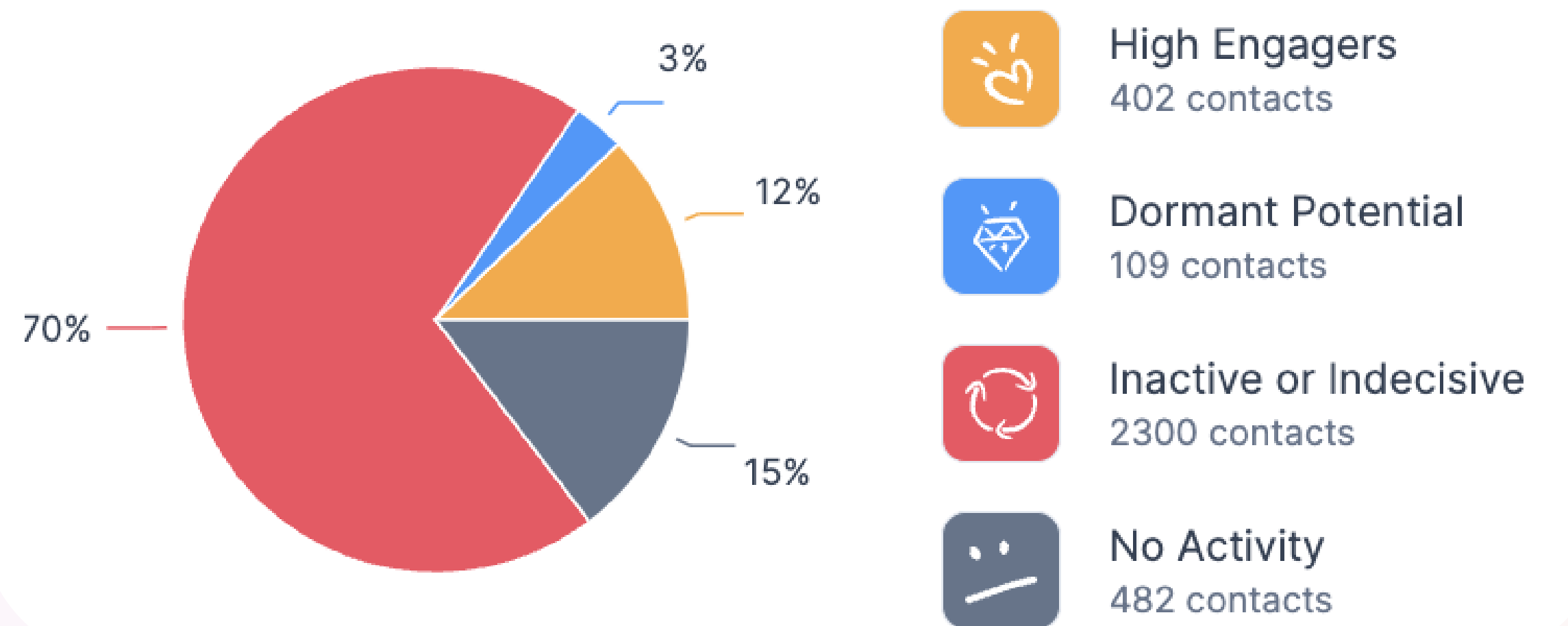
**# 11.042 total contacts**

## 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



# 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
<b>11</b>	<b>1</b>	<b>2</b>	<b>1,897</b>
FALK VON RÖNN	LAURA KERSTING TUSSI	LISA FERRAZ	(NO VALUE)
<b>75</b>	<b>116</b>	<b>1,287</b>	<b>14</b>

# 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

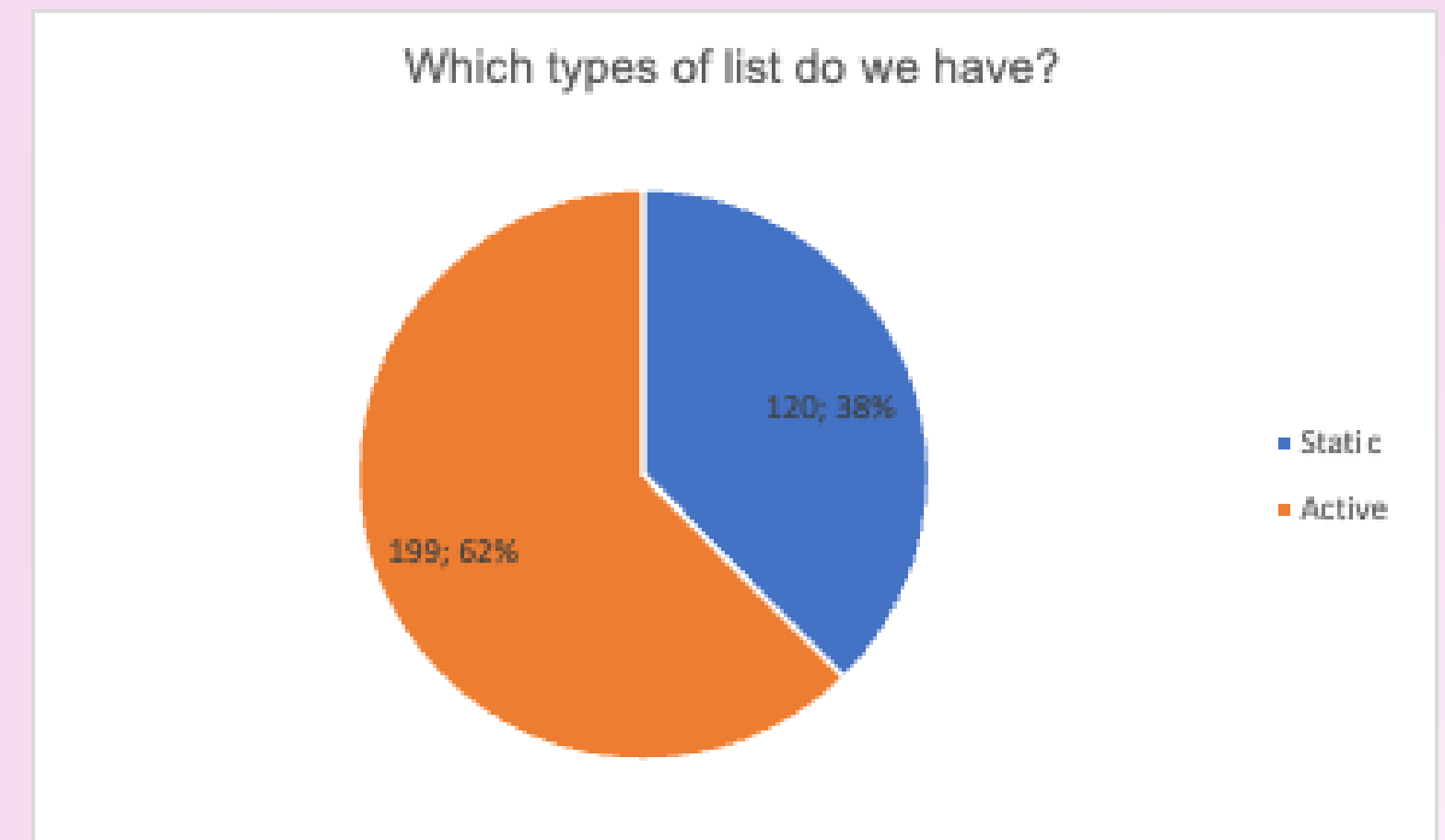
## Questions and Recommendations:

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)

<input type="checkbox"/>	NAME	SIZE	TYPE	OBJECT	LAST UPDATED (GMT+1)	CREATOR	FOLDER	USED IN
<input type="checkbox"/>					14. Okt. 2021 11:29	Team datenschutzexperte.de	Newsletter Segmentierung	77
<input type="checkbox"/>					20. Mai 2022 15:29	Deactivated User	-	74
<input type="checkbox"/>					10. Aug. 2020 13:32	Deactivated User	Unterdrückungslisten	34
<input type="checkbox"/>					7. Feb. 2023 07:31	Céline Mehlstäubi	Webinar Lead Nurturing	33
<input type="checkbox"/>					17. März 2023 10:07	Deactivated User	Unterdrückungslisten	32
<input type="checkbox"/>					31. Jan. 2023 15:56	Céline Mehlstäubi	Unterdrückungslisten	15
<input type="checkbox"/>					29. Okt. 2021 10:53	Team datenschutzexperte.de	-	9
<input type="checkbox"/>					16. Nov. 2020 11:15	Deactivated User	DSE-Generator	6
<input type="checkbox"/>					29. Okt. 2021 10:55	Team datenschutzexperte.de	-	6
<input type="checkbox"/>					5. Okt. 2022 13:24	Céline Mehlstäubi	DSB MA (Sept 2022) // Listen für engaged & unengaged Leads	5





# 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

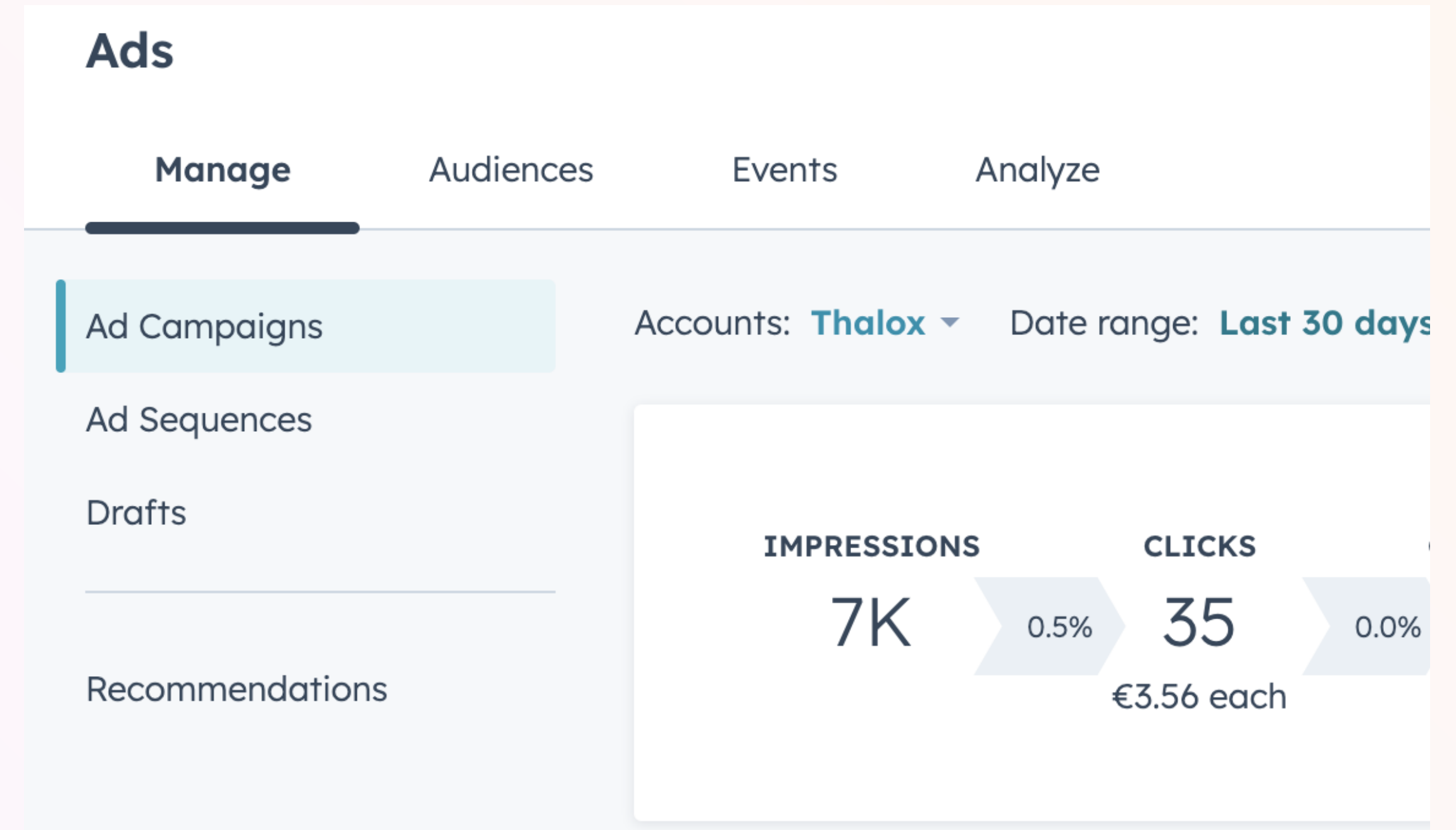
- # connected to HubSpot / if yes are all ads flowing into the system
- Report

## 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\\*](#)





# 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

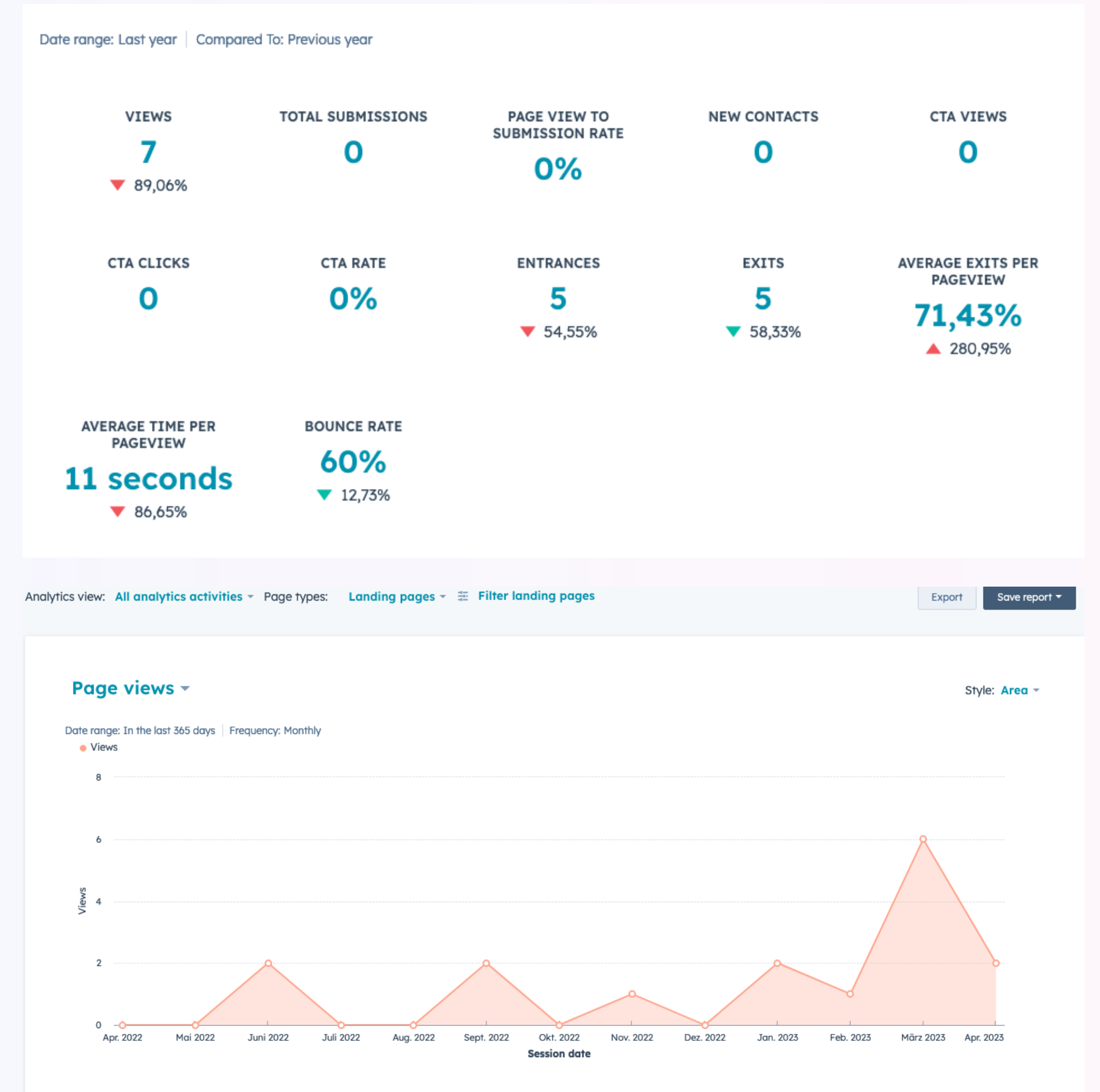
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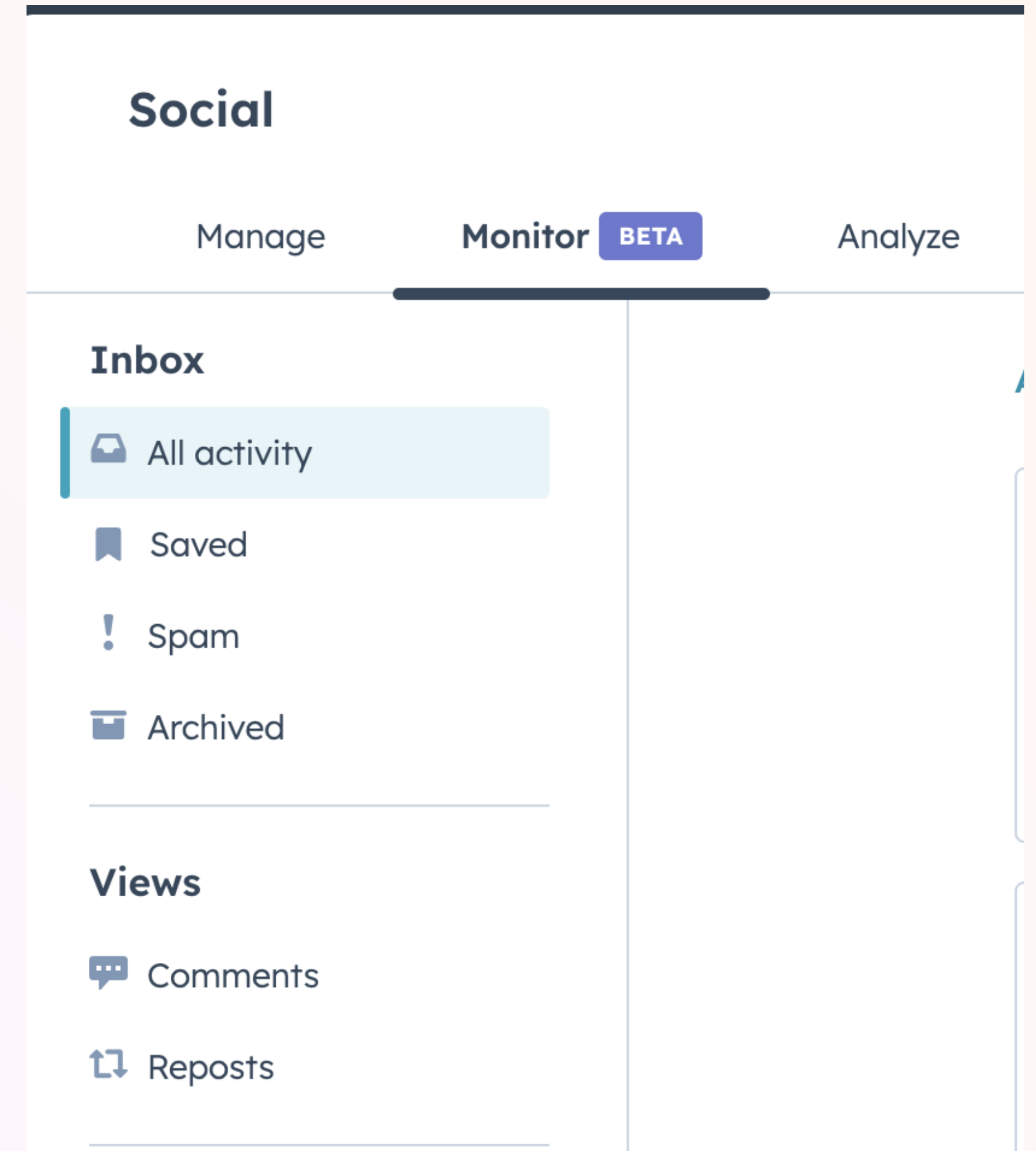
# Social Media

- # 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



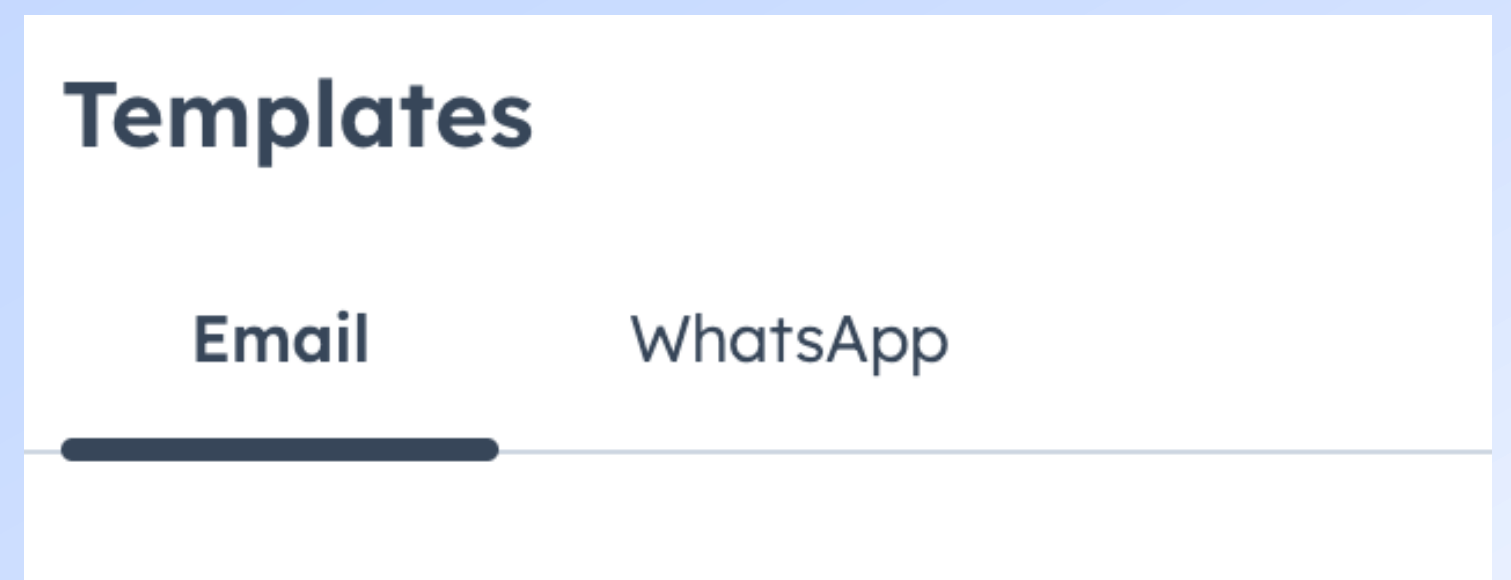
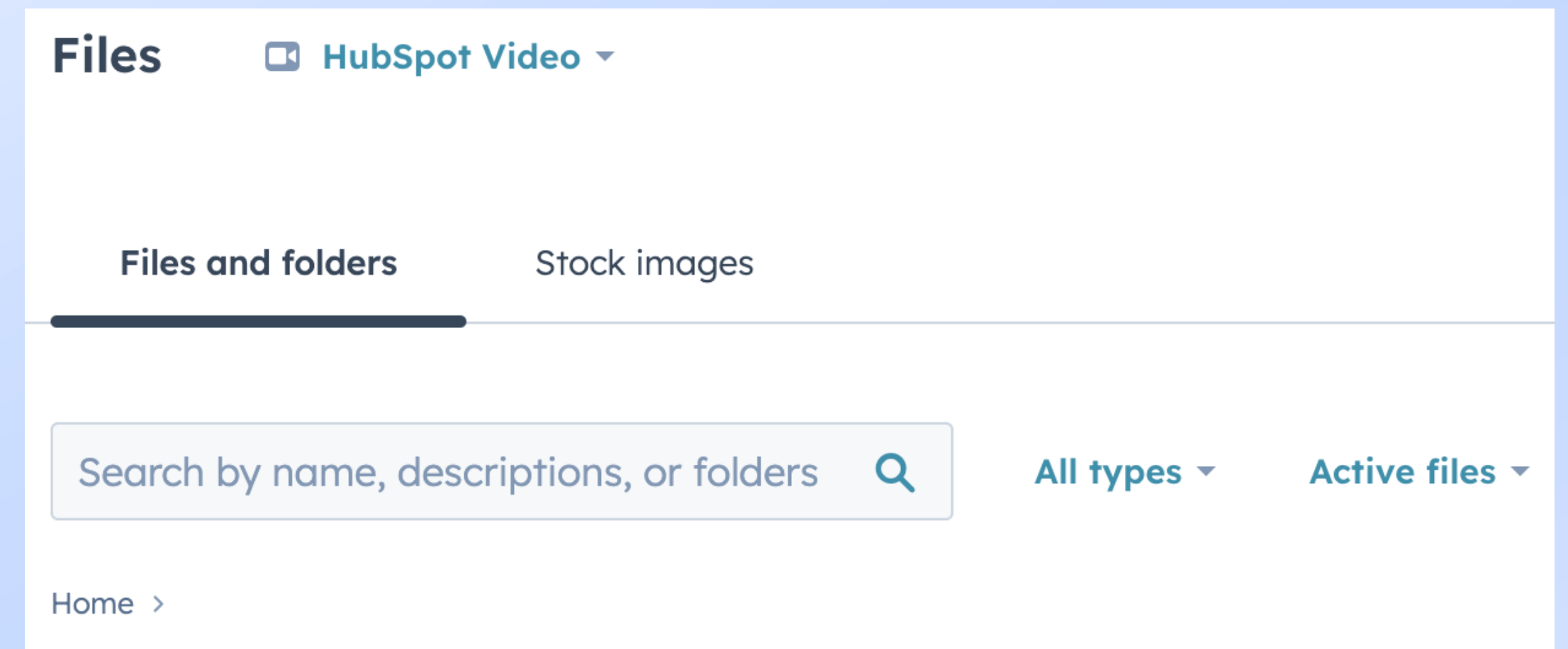
# Files and Templates

- # 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%
<b>Report Total</b>		<b>102.531</b>	<b>669</b>	<b>0,65%</b>

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?

<input type="checkbox"/>	PREVIEW	NAME	VIEWS	CLICK RATE	CLICKS	LOCATIONS	LAST MODIFIED
<input type="checkbox"/>			0	0%	0	0	20. Apr. 2022
<input type="checkbox"/>			0	0%	0	8	20. Okt. 2020
<input type="checkbox"/>			0	0%	0	1	14. Nov. 2019
<input type="checkbox"/>			0	0%	0	1	22. März 2019
<input type="checkbox"/>			0	0%	0	0	6. März 2019 Updated from template
<input type="checkbox"/>			0	0%	0	0	6. März 2019 Updated from template
<input type="checkbox"/>			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?

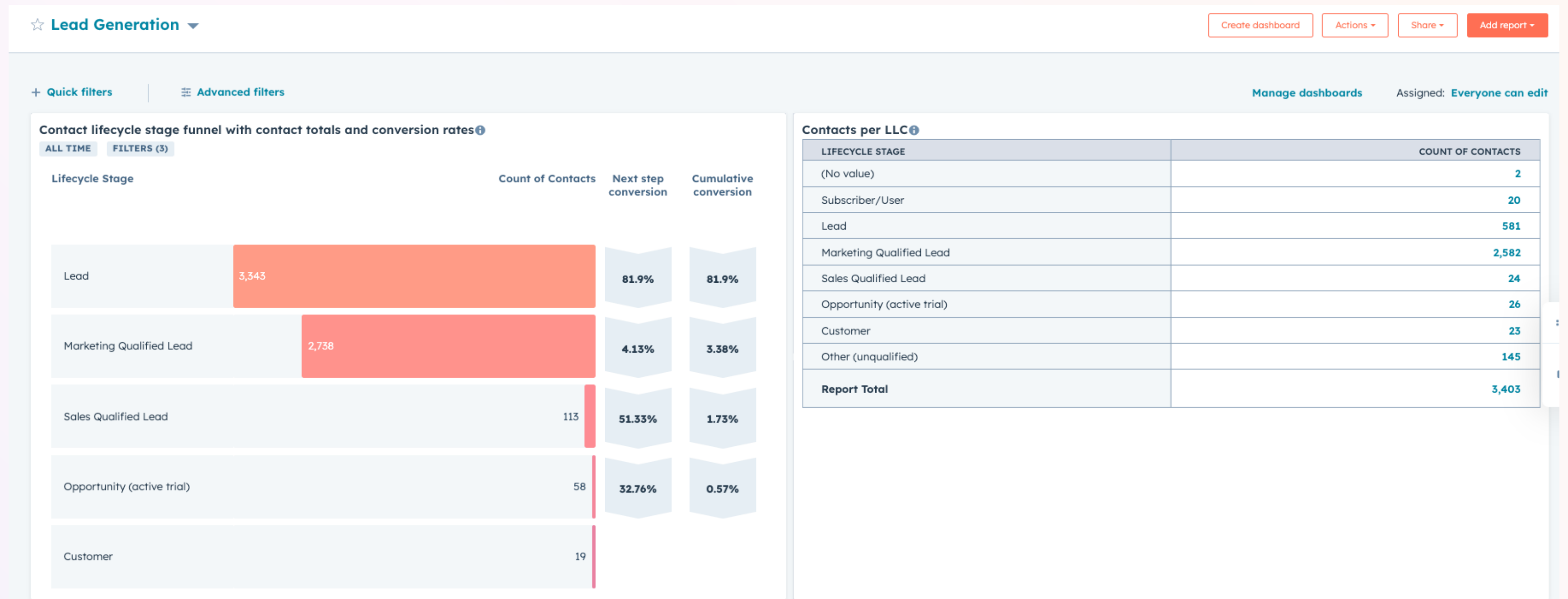
QST/DCS/ACT: Simplify # workflows – what are the three main topics?

<input type="checkbox"/>	NAME	ON OR OFF
<input type="checkbox"/>	SYSTEM - Companys data usage in contacts	● On
<input type="checkbox"/>	SYSTEM - All forms Marketing OptIn & DOI	● On
<input type="checkbox"/>	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
<b>sum</b>	<b>33</b>

# Data – Installed Apps

- # of apps
- Review of usage and interfaces

## Questions and Recommendations:

ACT: Check Interface to Slack

The screenshot displays a grid of installed applications. Each application card includes an icon, the app name, the builder's name, and an 'Actions' dropdown menu. The 'Slack' card is highlighted with a red 'NEEDS ATTENTION' banner and includes a 'Reconnect' button. The 'Tracking-Migration' card is marked as private.

App Name	Built by	Actions	Status
Bevy		Actions	
Demodesk	Demodesk GmbH	Actions	
GoToWebinar	HubSpot	Actions	
HubSpot Community		Actions	
involve.me	involve.me	Actions	
PandaDoc   eSignatures & More	PandaDoc	Actions	
Salesforce	HubSpot	Actions	
Slack	HubSpot	Actions, Reconnect	NEEDS ATTENTION
thalox for marketers	Thalox AG	Actions	
Tracking-Migration	Yevhen Lomakin		[Private]

# Data



**Fill Rate of  
contact properties**



**Duplicate of  
properties**



**Variance of  
properties**



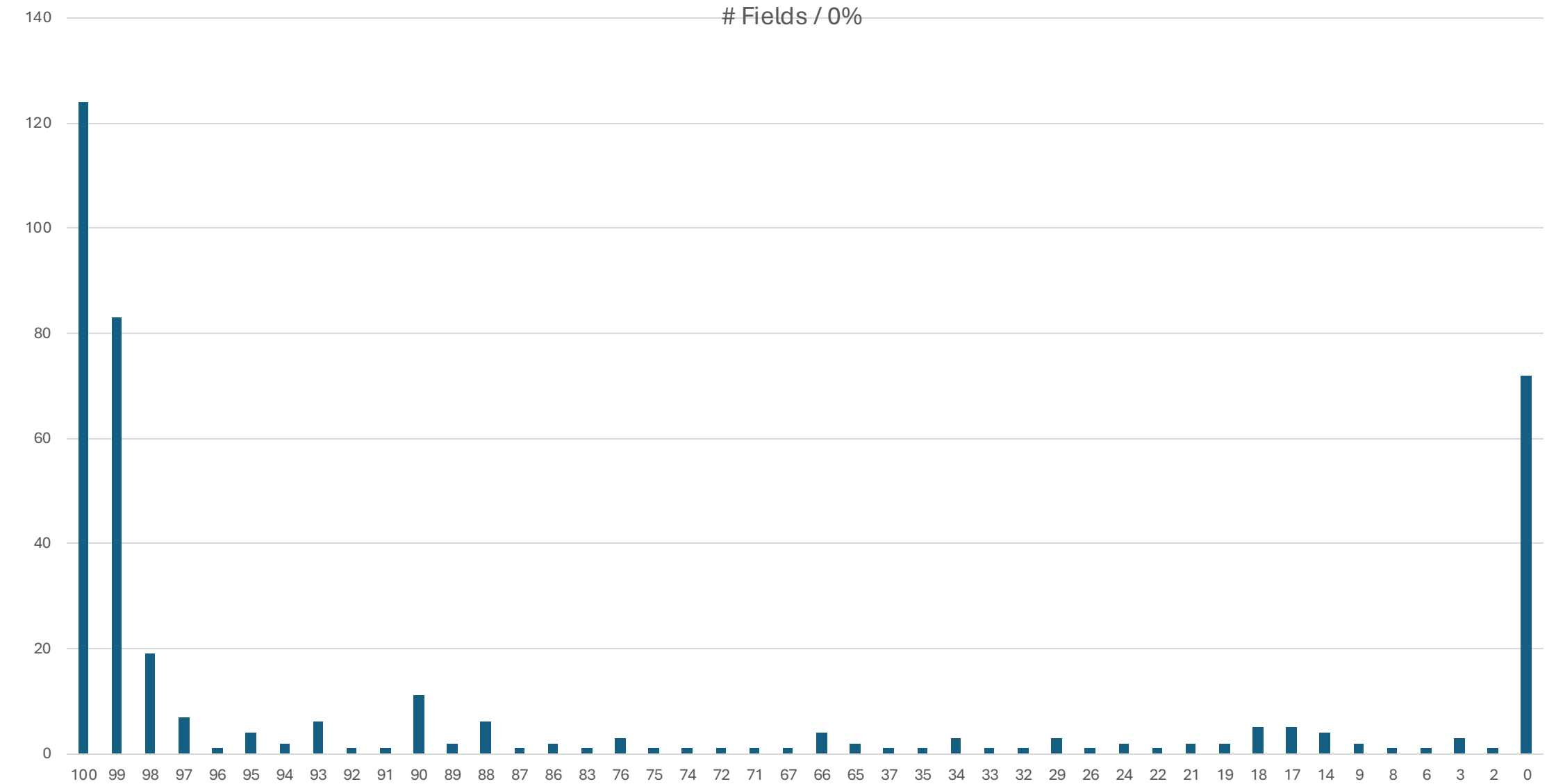
**Recommendations**



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

# Thank you

Reach out!

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