HubSpot Data Audit

Thalox

HubSpot
Certified App

HubSpot - Thalox Data Audit

Fill Rate of contact properties

Duplicates of properties

Variance of Properties

Recommendations

Data Audit Example

Fill Rate of 350 Contact properties

- 0%
- 1%
- between 2% and 5%
- between 6% and 50%
- between 51% and 100%
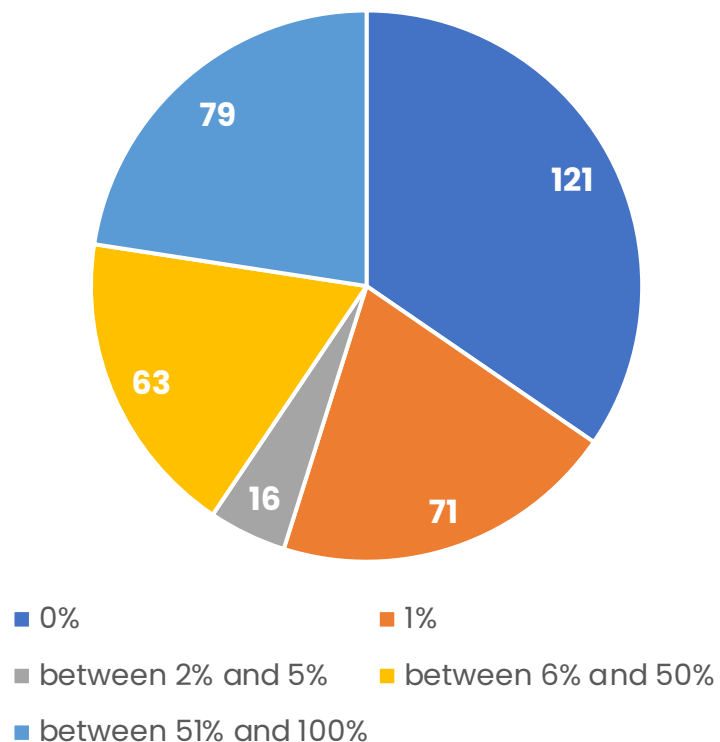
Recommended Actions

1. Check 0% properties and archive if possible.

2. Never immediately delete a property, archive it so you can restore it within 90 days if necessary.

3. properties with column name starting with hs_ are HubSpot standard property and cannot be deleted.

4. Always check if a property is from HubSpot and don't delete/archive those. When editing a property, you find at the top a note like this "This property is provided by HubSpot and can't be edited."

Data Audit Example

Fill Rate of 350 Contact properties

- **0%** — 121
- **1%** — 71
- **between 2% and 5%** — 16
- **between 6% and 50%** — 63
- **between 51% and 100%** — 79
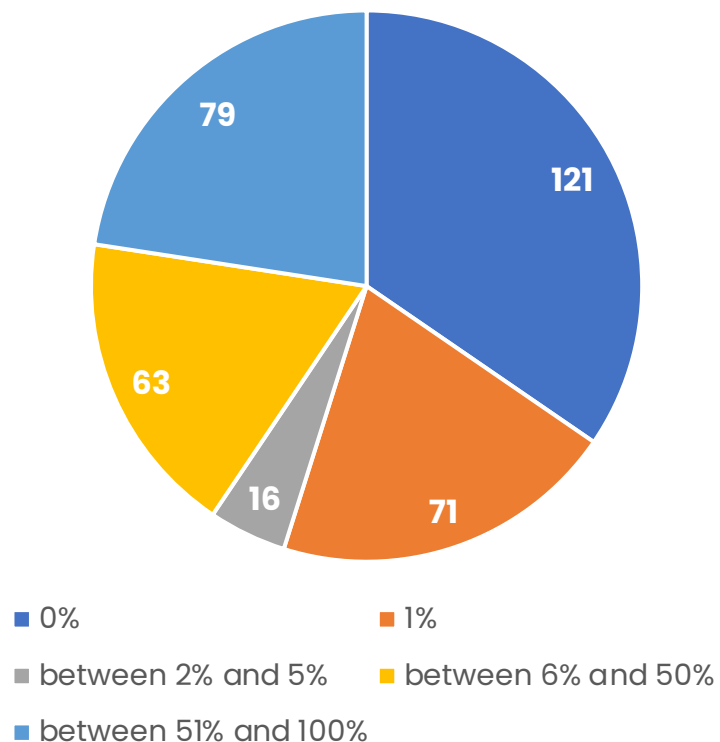
Recommended Actions

1. Check 1% properties and archive if possible.

2. You can only archive a property after you cleaned all values of this property out of your contacts.

3. Consider the same hints provided for archiving 0% contact properties.

4. Define tactics to increase the fill rate for relevant properties. Properties with a low fill rate will never be considered for machine learning.

5. Do the same for 2% - 5% properties.

6. For the other properties define tactics to increase the fill rate and keep the fill rate high – archive if applicable.

Data Audit Example

Potential duplicate properties

Example

Recommended Actions

1. Check potential duplicated properties and identify property that shall survive. If there is a HubSpot standard property take this as the survivor.

2. Merge data into survivor property. Consider rules what shall happen if data exists in several properties.

3. Archive the other properties. You can only archive a property after you cleaned all values of this property out of your contacts.

4. Consider the same hints provided for archiving 0% contact properties.

Critical findings

Approx. 2% of your Contacts have no First name AND no Last Name (47 Contacts)

- No personalized communication possible for these contacts.
- Define tactics to get first and last names – progressive profiling campaign or other.

0% of your Contacts have no Email address (0 Contacts)

- This is a great result – keep on doing this good work

1180 different job titles with a high variance

- Look at job title analysis in Excel
- If this is an important property, you should think about harmonizing job titles
- Clean up or categorize job titles in a new property to make them more speaking (e.g. there are 13 different values for CEO)

Critical findings

utm parameter properties not available

- Are you using different marketing channels like HubSpot Landing Pages, Google-ads, LinkedIn-ads, or other?
- To leverage the lead channel info, you should enhance all your campaigns with the corresponding info of utm parameters to keep track of the lead source in HubSpot.

Fields like industry, annual revenue and #employees

- In most of the cases those fields are important to build buyer personas or scoring and could be filled through an automated process using HubSpot Insights

Thank you

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