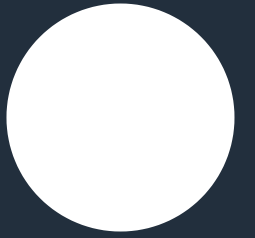


Biglytics HubSpot Health Audit



Marketing

Findings

Email health is doing well from an open rate perspective but is lacking on the click and click-through rates. Would recommend doing A/B split tests on content of the email. Test rich text vs graphical.

Campaigns tool is partially used (3 campaigns in last 90 days)

Naming conventions are sorely needed for better organization of emails, workflows, and forms.



Action Items / Questions

In general, the marketing side of HubSpot has a few areas of improvement and is about average overall.

- Build an inbound email strategy. Do you have case studies? Should set up a welcome series.
- Review your SEO recommendations [here](#).
- Create workflows for inbound lead grading / scoring (is a lead with a job title of Manager good?, etc.)

Sales

Findings

Review the Sales Analytics reports monthly.

You have little automation set up for when deals are moved to stages. I recommend several baseline items:

- Notify owner when deal sits too long with no activity
- Notify owner when close date is in the past
- Notify team when deal is won
- Notify owner when last contacted date is more than 30 days ago

 Use custom call and meeting types to track more detail on what types of calls/meetings are taking place.

Action Items / Questions

We've got a ton of old tasks sitting in HubSpot. I'm recommending workflows that generate tasks to follow up from deal movement.

- Enforce the day view, and we can train you on this
- Utilize the deal inactivity board actions
- Confirm meetings and signatures are generated for all
- Set up revenue goals for sales users

Sales

Findings

Take a look at the deal push rate. Some users are pushing more than others - this could just be a need to more accurately forecast close dates.

For close lost reasons, we need to hard set these, there are duplicates.

Set quotas for users to better gauge revenue goals.

Utilize and setup the forecasting for best case, optimal, etc.

Action Items / Questions

- Documents seem to be unused for the most part.
- Templates look to be unused?
- Utilize snippets for the live chat for common occurrences.



Admin

Findings

Recommend deal workflows to help ensure data consistency, “gates” for deal movement. These are partially setup now - so more of a recommendation to review.

Recommend checking connected apps for 3rd party apps that might not be used.

Force signatures by your users and have everyone set up a meeting link.

Action Items / Questions

We recommend fixing the following to keep the account clean and healthy.

- Several workflows have errors and several should be removed.
- **Highly Recommend** a common naming convention for workflows or some level of 3rd party documentation for internal HubSpot processes.



Immediate to-dos



These are the items you can do today to better your business for tomorrow. Items in **red** are urgent, **yellow** are important, and **blue** are optional although recommended.

- ✓ Review workflows and sales analytics report
- ✓ Use Target Accounts!
- ✓ Define “must-have” properties for deal stages and creation.
- ✓ Set up revenue goals for tracking reports
- ✓ Set up nudge deal workflows
- ✓ Force business emails for most forms
- ✓ Set up workflows for lead grading / scoring
- ✓ Review the SEO report bi-monthly, which has super valuable information for your domain and landing pages.
- ✓ Set in place a common naming convention
- ✓ Set up call and meeting types
- ✓ Set up and review the forecasting tool