Your HubSpot Audit Workbook

A guide to help you audit your own HubSpot portal.

intergage
marketing engineers

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Why do you need to audit your HubSpot Portal?

HubSpot is the heart of your inbound marketing strategy. Whether you are just using the free CRM features or spending hundreds (if not thousands) on a full suite of tools, the likelihood is you've invested a lot of time into the platform. And time is money.

If you spend all your time focusing on the day-to-day 'tasks' that go into running a HubSpot portal without regularly reviewing performance, you could be missing out on some valuable warning signs and opportunities to get more from your HubSpot investment.

There are many reasons you might need to audit your HubSpot portal. Perhaps you have found yourself in one of the following situations:

- You've been using HubSpot for a while and aren't sure how to get more from the platform.
- You've inherited a HubSpot Portal from a predecessor and want to know how it was run and how you can make the most of the software.
- You haven't used HubSpot before and your company has purchased the software and expect you to generate results.
- You are using lots of the tools within your HubSpot Portal but don't seem to be able to measure ROI effectively.
- Your HubSpot portal is a few years old and you know it's in desperate need of a data cleanse.

Carrying out a HubSpot audit will allow you to review your use of the software before deciding where to invest your time and money further.

How To Perform A HubSpot Audit

As a Platinum HubSpot Solutions Partner we have conducted our fair share of HubSpot audits and have been working with the software for a number of years. Each of our sales and marketing engineers is certified to use the software and generate inbound marketing campaigns.

As a result, we have manufactured a process to really get under the hood of the software, find glitches and identify opportunities for growth.

Of course, there is no one-size-fits-all audit. Every HubSpot portal is different, but the following ten steps are informed by our audit process and should provide you with the structure you need to review your current performance and make positive changes!

1

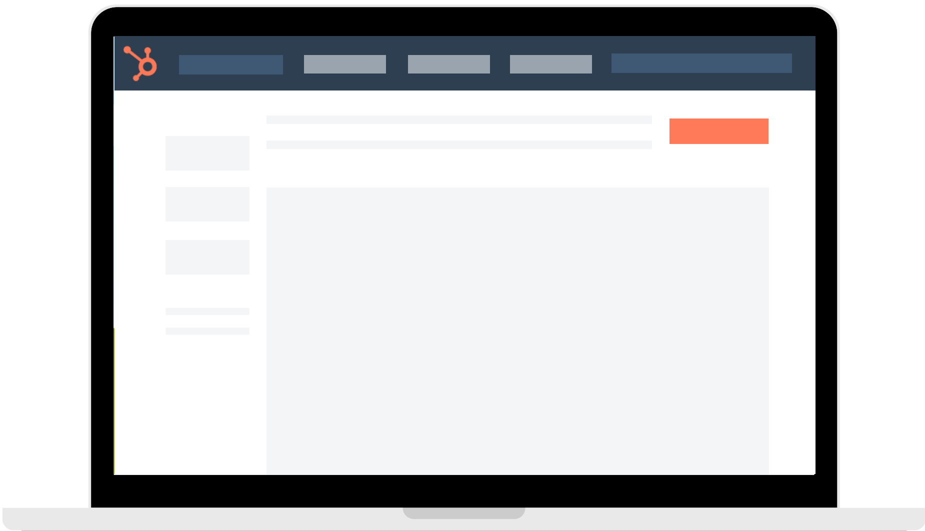
HubSpot Setup

We're going to go right back to basics here. We do this because more often than not, the basic HubSpot settings are only ever looked at once - when your HubSpot Portal was set up in the first place!

First, ensure your branding elements are all up to date in the platform. That means your logos, brand colours and of course, your company address are all correct. Not keeping this updated could mean your assets are inconsistent and cause confusion with your clients and prospects.

Likewise, ensure all of your domains are up to date and any landing pages that should be crawled by search engines are added to your site map. Yes – THAT'S why the landing page you created isn't getting any organic search traffic!

It's also worth doing a sweep of all of the settings in the platform to refamiliarise yourself and ensure everything is up to date!



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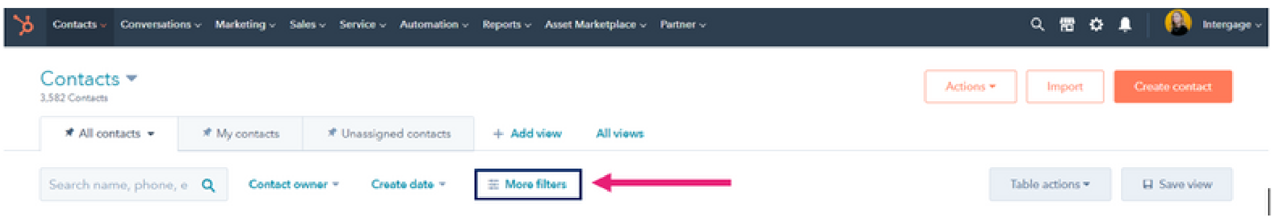
Data Clean-Up

Like any CRM software, you get out what you put in with HubSpot – and if your data isn’t up to scratch, you aren’t going to get much out of it.

As you know, HubSpot’s database is made up mainly of contacts, companies and deals – and these should talk to each other as much as possible. A great way to understand how well your data is organised is to filter your contacts and companies to understand things like:

·

- Are all of your contacts associated with a company? This is particularly important for B2B portals.
- Do all of your companies have associated contacts? If not, why not?
- Do all of your companies and contacts have the relevant lead status?·
- Are all of your companies and contacts assigned to a HubSpot owner?
- Are all of the deals you have recorded in HubSpot assigned to a company and a contact?
- Are the duplicate companies and contacts being managed?



These are some of the basic things you should be checking to assess how clean your data is. You should also be carrying out a data cleanse regularly - if not monthly, then quarterly - depending on how large your database is.·

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Data Clean-Up

If you are using the Marketing Hub, you can also set up workflows to help you keep the data in check and inform HubSpot users when their data is not up to scratch. For example, at Intergage, when one of our salespeople closes a deal – we send them a celebratory email reminding them to update the client's lead status.

Great news, you've closed a deal with Company Name !

Please update CONTACT.COMPANY's Lead Status to the relevant Tier in the database.

Thank you.

3

Email Health Check

Whether you’re using the FREE CRM or have an Enterprise level portal, it’s likely that email plays a big role in your marketing efforts.

HubSpot software makes it quick and easy to review important email metrics and identify where your emails can be improved. You can also measure how your email performance changes over time, so you know if the alterations you’re making are having an effect.

The email performance chart is a great place to start and get an overview of your email health and where your strengths and weaknesses are.

HubSpot also has some great insights into email benchmark data, which is useful to bear in mind when reviewing your own email health:

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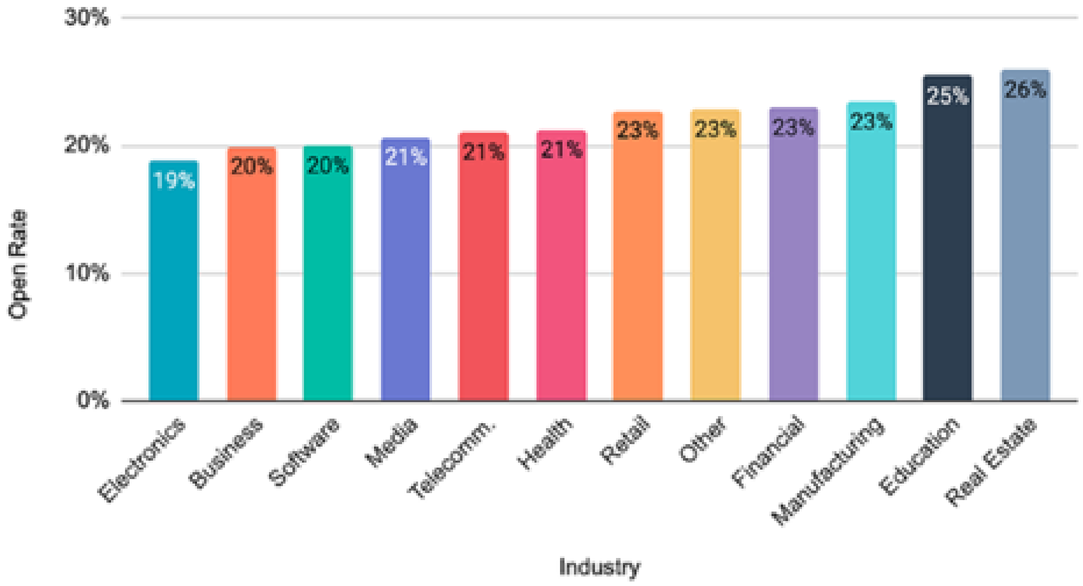
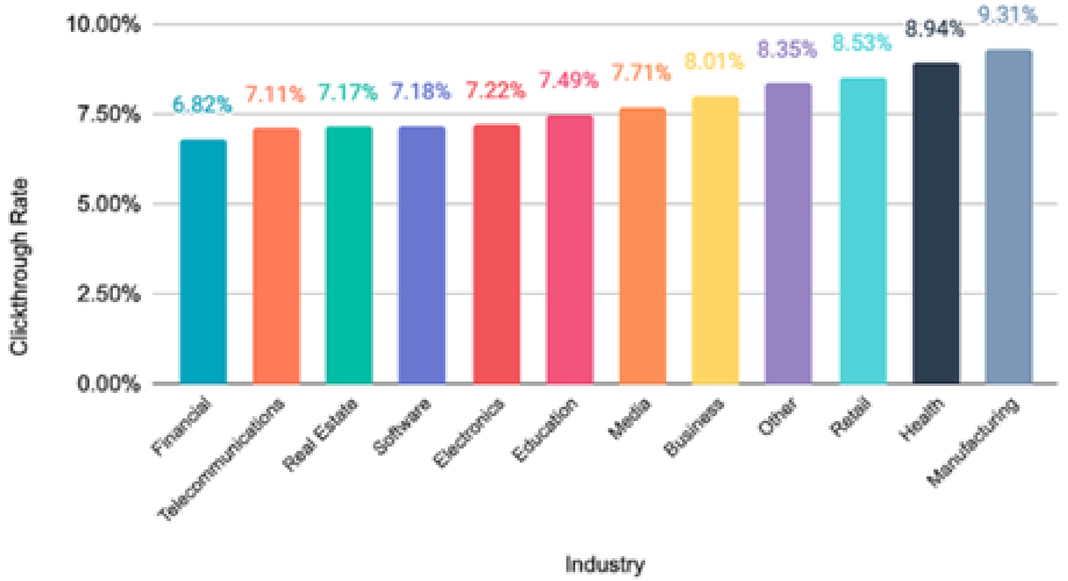
Email Health Check

Open Rates by Industry



Click-Through Rates by Industry



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Email Health Check

It’s also worth reviewing the level of email bounces and unsubscribes. To have a low open rate is one thing – but if your emails are leading to a large number of unsubscribes you really do need to act!

Remember, your results will be hugely dependant on how many contacts you have in your database, how well segmented your database is and the quality of contact information. This is why cleaning up your data regularly is so important!

4

Organise Your Assets

HubSpot is a never-ending portal of information containing everything from your landing pages, emails, persona information, images, forms, lists, workflows – the list goes on!

Regularly reviewing your assets and ensuring they are easy to find means you spend less time sorting through them and more time generating results.

Archive any assets you're no longer using and organise the ones you are using in folders. It's also a good idea to come up with a naming convention to make your assets even easier to find. For example:

Campaign_Asset-Type_Asset-Name_Date

which may translate into something like:

Engineering-and-manufacturing_Email_Download-your-free-report_Dec-2020

Develop a naming convention that makes the most sense with your campaigns and assets. You may want to include persona, product type or lifecycle stage in your naming convention. There is no 'once-size-fits-all'!

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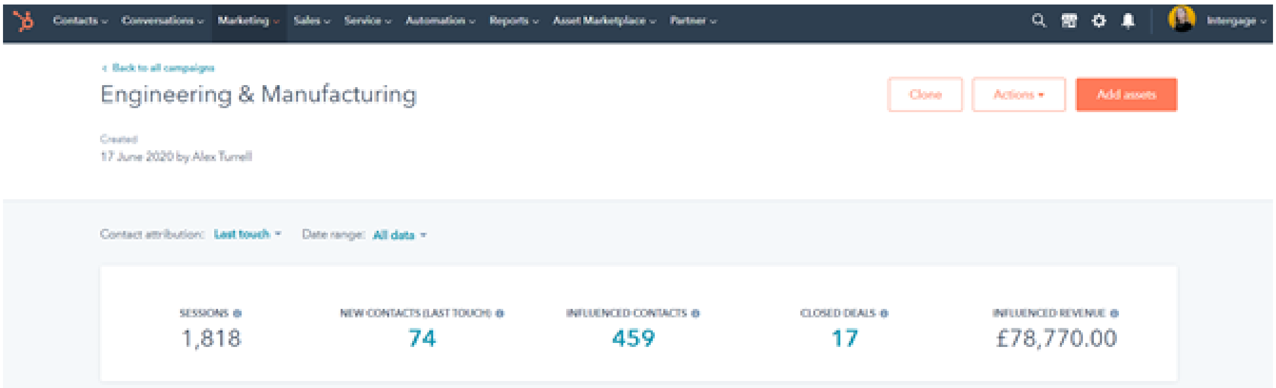
Campaign Performance Review

It takes a lot of different assets to make a campaign work - from blog articles to CTAs and forms right through to landing pages and workflows. In order to understand how your assets are working together they should all be attached to a campaign.

Doing this means you can fully understand how each asset contributes to influencing existing prospects, attracting new leads and ultimately, making sales. It means you can measure the ROI of your marketing efforts in a closed-loop report.



Start by ensuring all of your assets are assigned to a campaign. If you don’t feel they can be assigned to a campaign, and they aren’t internal assets, ask yourself why you need them.

Assets that should be assigned to a campaign include:

- Landing pages
- Blog posts
- Social media posts
- Forms
- CTAs
- Emails
- Workflows

It means that next time your boss asks you how much revenue your blog is generating – you can tell them! In fact, you can go one step further and tell them which blog topics are generating more revenue than others!

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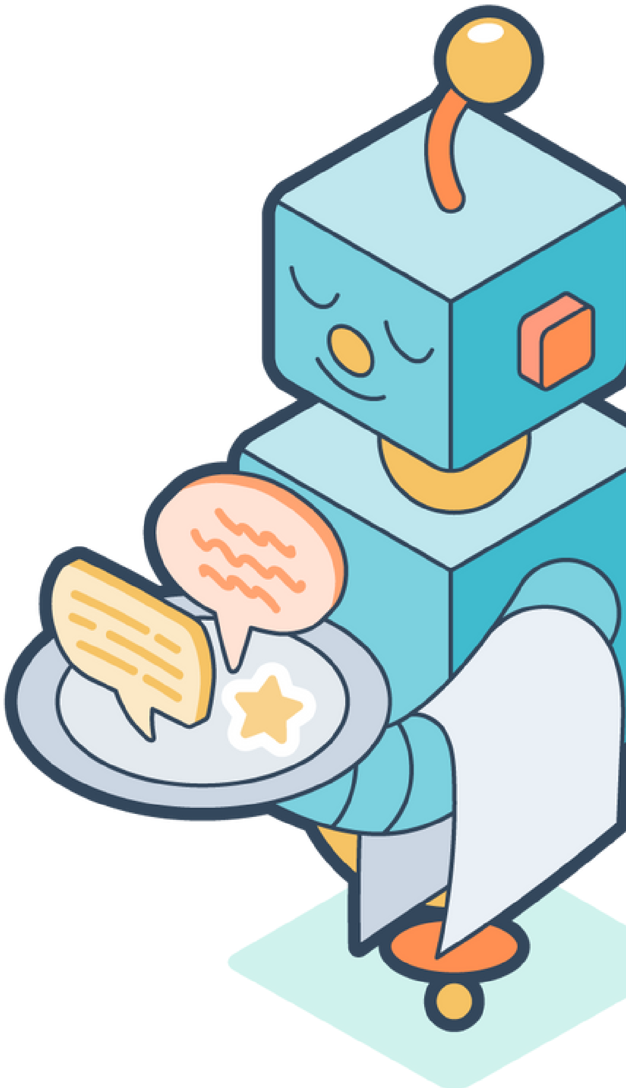
Tool Usage

If you're paying for HubSpot, you want to make sure you're getting the most for your money. It's worth looking at which tools you are using and which tools you have access to but aren't using yet. This could identify some great ways to improve campaign performance using tools you're already paying for!

Tools such as Chatbots, templates and email sequences can all help boost conversion rates and automate some of the admin your sales team are bogged down with.

It's also worth looking at the tools and packages you don't already have access to, so you can weigh up the cost and ROI. For example, you might benefit from spending an additional $500 per month so you can send transactional emails such as automated receipts. Or perhaps you would benefit from an increase in the number of workflows you can have in your portal – you can do this for $200 per month which will give you an additional 100 workflows!



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SEO Strategy MOT

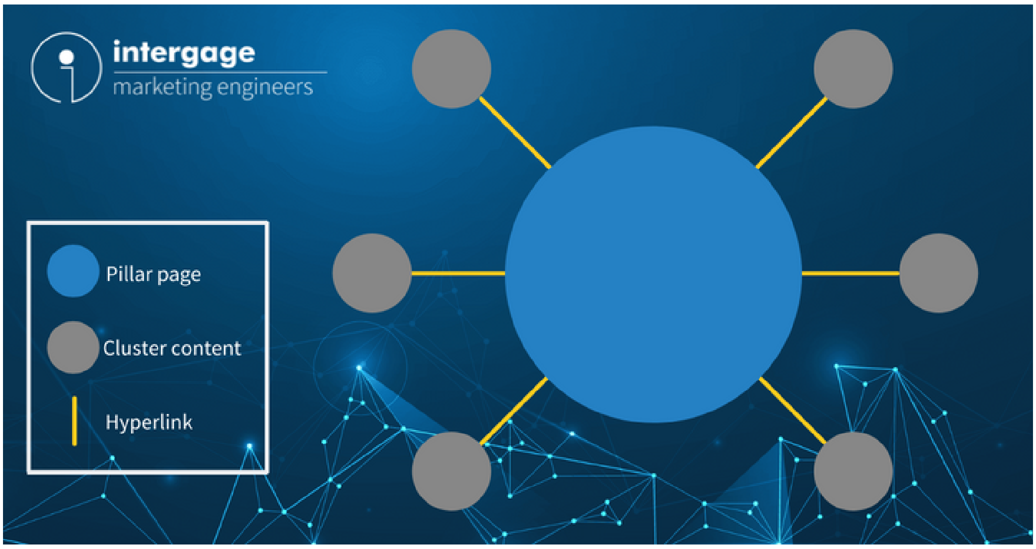
If you aren't already using HubSpot's SEO tools including the pillar page/topic cluster tool, then I highly recommend you do so! This will allow you to build content pillars by linking back and forth between related pieces of content to help:

1. Users find the information they are looking for easily
2. Google to understand you have a wealth of content on a particular topic.

If you are already using the pillar page tool, review the current topics you have set up and carry out some keyword research to see if there are any missing links or topics you could cover in more detail!

What's a content pillar?
Content pillars are made up of several blogs and supporting pieces of content (cluster content) that feed into a main pillar page. The pillar page summarises each of the blog posts surrounding it and links back into each of the blogs.

Below is a visualisation of what this looks like:



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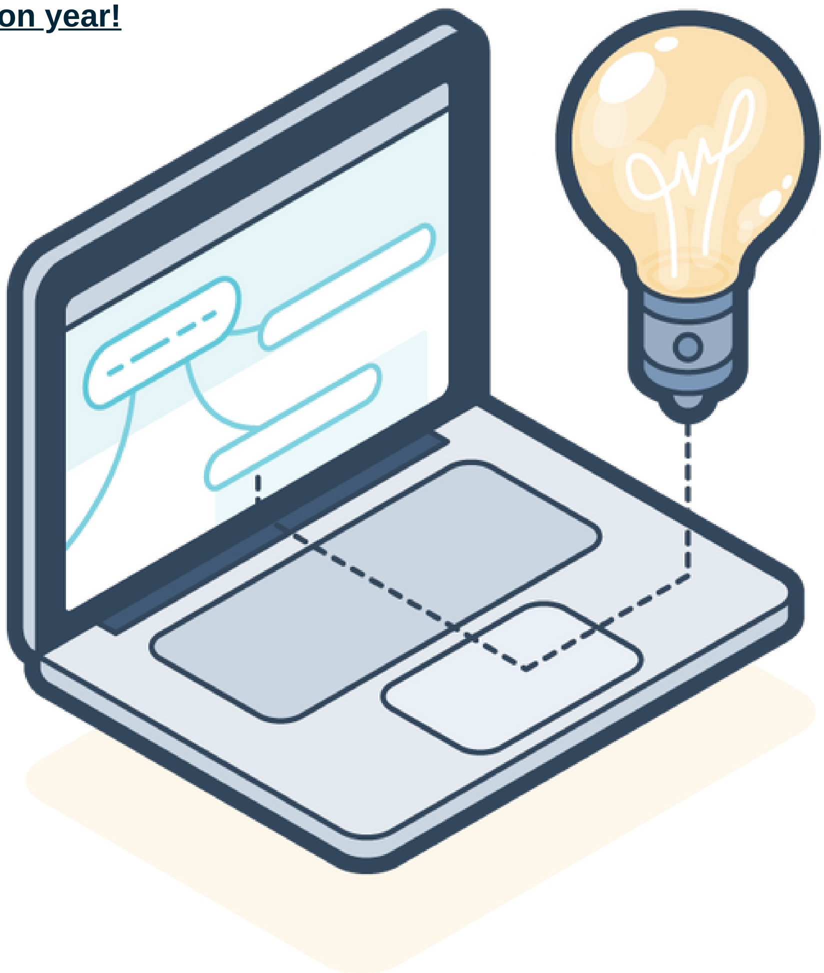
SEO Strategy MOT

The pillar page forms the hub of the campaign and will promote the content offer – this page is designed to consolidate all relevant information into the one page and should provide further insights aimed to help the searcher.

Structuring content in this way can bring huge results. In fact, one of our own clients saw an **84% increase in organic search year on year!**



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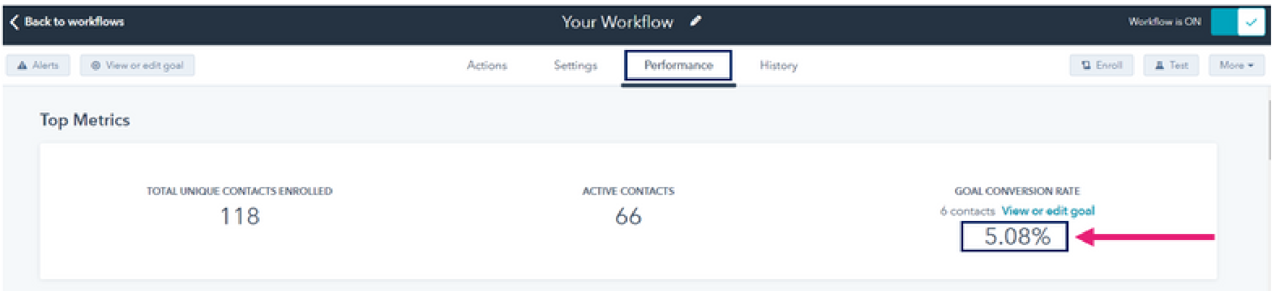
Workflow Performance Review

Just like your emails, your workflows should be reviewed regularly so you can improve performance and understand what's working and what isn't. It's always best to start with the workflows that are used the most and drive the most engagement. This is where you'll make the biggest improvements!

Review each workflow one at a time – looking at the performance tab to understand:

- What is the goal conversion rate on each workflow?
- Which emails are driving the most engagement/losing the most contacts?
- Where are contacts unsubscribing?
- Which additional steps need to be put in place to avoid losing contacts?
- Which days and times do contacts usually take action?



You should also check the workflow settings to make sure each workflow is attached to a campaign, as well as ensuring any unenrollment and suppression lists have been added. This will stop emails and actions going to the wrong people!

It's often best to then make a note of these issues and tackle one workflow at a time.

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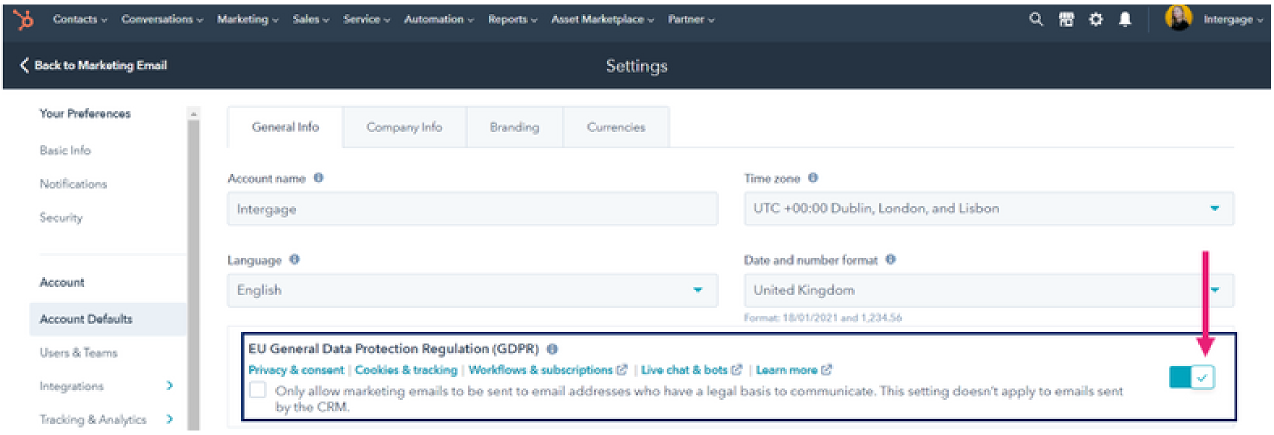
GDPR Setup

Granted, this is one that you probably don't need to look at all too often. However, it's always worth checking that your GDPR settings are up to date with the latest versions of your cookie and privacy policies.

There are three main places you need to ensure your GDPR settings are switched on to verify that you have consent to contact those in your database.

1. Make sure your GDPR settings are switched on in the first place! We have audited a number of portals who don't even have their HubSpot GDPR settings on. This may be because they haven't got round to doing it, or because they are using the GDPR tools of another software such as a third-party CMS. Please note, unless you have an integration with HubSpot's CRM, your consent settings will not be pulled across from your CMS to your CRM! To check this, go to: Settings > Account Defaults > General Info



2. Ensure you have cookie banners switched on for all relevant domains.
3. Ensure all of your forms have a GDPR statement detailing how you will use contact data and how you will communicate with contacts once they have completed that form.

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Review Growth Opportunities

Now you have gone through these steps, you should have the outline of a path to improve platform usage, increase ROI and use HubSpot as the central system for all your digital marketing needs.

However, there is likely a lot of work to be done. Break the tasks and opportunities down into groups so they're easier to manage. Prioritise tasks that will make the most difference and be sure to tackle quick wins first!

Still Need More Help?

If you don't have the resource to complete this audit in-house, Intergage can help. We offer FREE HubSpot portal audits which use some of the same steps above. This means you can put your feet up and let the experts take care of the audit for you. There's no catch and your FREE HubSpot audit will include:

- Data quality checks – contacts, companies and
deals
- HubSpot setup – email sending domains, templates, branding and segmentation
- Review of email marketing performance
- Review of campaign performance
- Insights into current HubSpot tool usage
- A list of growth opportunities and recommendations for you to implement.