



# HubSpot Health Assessment

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PREPARED FOR: CLIENT X

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## Key Insights

In March 2021, Hubcap Solutions performed an assessment of Client X's HubSpot Instance. These insights represent the most immediate concerns we identified within the instance as well as a few areas where the instance is already in line with best practices.

1. There are currently 178 active workflows in the instance. Many of these appear related to previous efforts to manage and route leads but are no longer relevant.
2. An external consultant is currently using the Lifecycle Stage on the Contact Object to track lead progress. However, that field is being set inconsistently by workflows, forms, and default system behavior.
3. There are 19 pages of forms within the instance. Most of these are single use forms and we can amalgamate these into a handful of master forms.
4. The Sales team is currently using Calendly to book meetings with prospects. As Sales Pro users, they have access to the HubSpot Meetings tool which should be explored.
5. There are 27 different apps integrated with HubSpot. Many of these do not appear to be used actively.
6. There are 329 fields on the Contact record. Most of those fields are populated for less than 5% of Contacts. A purge/amalgamation of unnecessary fields will radically improve the health of the database.

## Assessment

### Setup & Configuration

**Grade: A**

#### KEY CONSIDERATIONS

1. Tracking code is correctly configured on the Client X site.
2. Client X social accounts are correctly linked with HubSpot.
3. All Google, Facebook and LinkedIn ad accounts are connected to HubSpot.
4. Email and landing page subdomains are correctly configured.

#### ACTION ITEMS

No immediate action is required for system setup and configuration.

### Record Health

**Grade: C**

#### KEY CONSIDERATIONS

1. There are currently 162, 235 Contacts in the database. Roughly 60% of which have an Original Source of 'Offline Sources'. It is unclear where these Contacts originated or much value they currently add.
2. There are 329 fields on the Contact record. Most of those fields are populated for less than 5% of Contacts.
3. Of the 329 fields present on the Contact record there are redundant fields for tracking Industry, Competitors, and several other potentially valuable fields.
4. The 'About this Contact' section and the required fields when creating Contacts do not seem to align with the current data being requested in forms.

## ACTION ITEMS

1. A purge of unused fields and an amalgamation of redundant fields should be a priority item, as it will greatly improve the ability to segment the database.
2. The sales team should be consulted on the contacts with 'Offline Sources' as the Original Source. If these are not being actively pursued, we should consider removing them from the database.
3. The system defaults for the 'About this Contact' section should be brought into alignment with data being provided on forms.

## List & Subscription Management

**Grade: B**

## KEY CONSIDERATIONS

1. There are two subscriptions 'Our Two Cents' and 'Marketing Information', but it appears 'Our Two Cents' is never used when sending/segmenting emails.
2. All forms have GDPR compliance copy on them.
3. There are 411 lists in HubSpot, but it looks like the team does have a handful of master lists used when sending emails to Prospects vs. Customers. (And other common segments.)
4. The Sales and Leadership teams appear to be creating lists for uses that would be better suited to Reports or Filters, which is contributing to list clutter.

## ACTION ITEMS

1. The Sales and Leadership teams should be trained on other methods of searching/filtering the Contact database.
2. The 'Our Two Cents' subscription should be retired and 'Marketing Information' should be broken into more granular subscriptions.

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3. The 138 unused lists in HubSpot should be purged.