

# — DO IT YOURSELF — HUBSPOT AUDIT

## **Make the most of your HubSpot Investment**

HubSpot is a powerful platform with the tools you need to build, execute, and track marketing campaigns. But inefficiencies, misconfigurations, and underutilized toolsets can really set you back.

Use this checklist as a guide to reviewing your HubSpot account. Uncover issues, spark new ideas, and document your current state.

### **Stuck? Not sure what to do about your findings?**

Advanced HubSpot audits are available with Prairie Path Marketing-- findings summary, recommendations, and detailed audit documentation.

**[hello@prairiepathmarketing.com](mailto:hello@prairiepathmarketing.com)**

## Settings

- ☐ Single sign on is turned on
- ☐ 2FA is required
- ☐ GDPR settings are not on
- ☐ Blog, email, and landing page domains are setup

### USERS

- \_\_\_ active users
- \_\_\_ users have been active in the past 90 days
- \_\_\_ users have not been active in the last 90 days
- \_\_\_ users have permissions assigned are set as Super Admins.

### INTEGRATIONS

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## Settings

### SALESFORCE INTEGRATION

\_\_\_ Unresolved Salesforce sync errors

- ☐ An inclusion list is being used to limit contacts being synced

### Record Management

- ☐ New Salesforce contacts/accounts/leads are created in HubSpot
- ☐ New HubSpot contacts/accounts/leads in Salesforce
- ☐ Deleted contacts/companies in Salesforce are deleted in HubSpot
- ☐ Deleted contacts/companies in HubSpot are not deleted in Salesforce

### Field Mapping

- ☐ Are any fields set to Do Not Sync?
- ☐ Are any fields set to Prefer Salesforce
  - HubSpot won't be able to update existing data*
- ☐ Are any fields set to Always Use Salesforce
  - HubSpot won't be able to update even empty fields*

### NOTES

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## Contacts, Companies, & Lists

### CONTACTS

There are a total of \_\_\_\_ contacts  
\_\_\_\_ are marketing contacts  
\_\_\_\_ have had hard emails bounced  
\_\_\_\_ contacts are not assigned to as sales person  
\_\_\_\_ contact & company views have been customized  
\_\_\_\_ (bonus) team view have been setup

### LISTS

There are \_\_\_\_ lists  
\_\_\_\_ lists are active lists  
\_\_\_\_ lists are static lists ( \_\_\_\_ lists have been updated this year)  
☐ Necessary subscription types have been setup

### NOTES

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## Marketing

### EMAILS

Email open rate in the 60 days was \_\_\_\_%

Delivery rate in the last 60 days was \_\_\_\_%

Open rate in the last 60 days was \_\_\_\_%

Click rate was \_\_\_\_%, CTR was \_\_\_\_% in the last 60 days

\_\_\_\_ emails have A/B tests in the last 90 days

\_\_\_\_ emails are available to be used in Automations

### EMAIL HEALTH

Email Health Score is \_\_\_\_

\_\_\_\_ health ratings are "Needs work" or "Poor"

### NOTES

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## Social

- ☐ HubSpot social management is being used
- ☐ "Post like a human" is active
- ☐ Campaigns are being used to related social posts to other content

## Landing Pages, Campaigns, Forms, CTAs

### LANDING PAGES

There are \_\_\_\_ landing pages on the account  
\_\_\_\_ landing pages are for point-in-time content and still published  
\_\_\_\_ landing pages do not have any views in the last 90 days

### FORMS & CTAs

There are \_\_\_\_ forms total  
\_\_\_\_ forms do not have any submissions in the last 90 days  
There are \_\_\_\_ CTA's  
\_\_\_\_ CTAs do not have any clicks in the last 90 days

### CAMPAIGNS

- ☐ Campaigns are being used to organize and analyze assets

## Workflows & Reports

### WORKFLOWS

There are \_\_\_\_ workflows on the account – \_\_\_\_ workflows are on  
What utility/operational workflows are setup?

### REPORTS

\_\_\_\_ dashboards have been created on the account

\_\_\_\_ custom reports have been made

Are reports created for ongoing or one time use?

### NOTES

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# DIY HubSpot Audit

## Key Lists

List	Type	Membership/Filters	Size



# DIY HubSpot Audit

## Workflows

Workflow	Function	Enrolled	Unique Enrolled