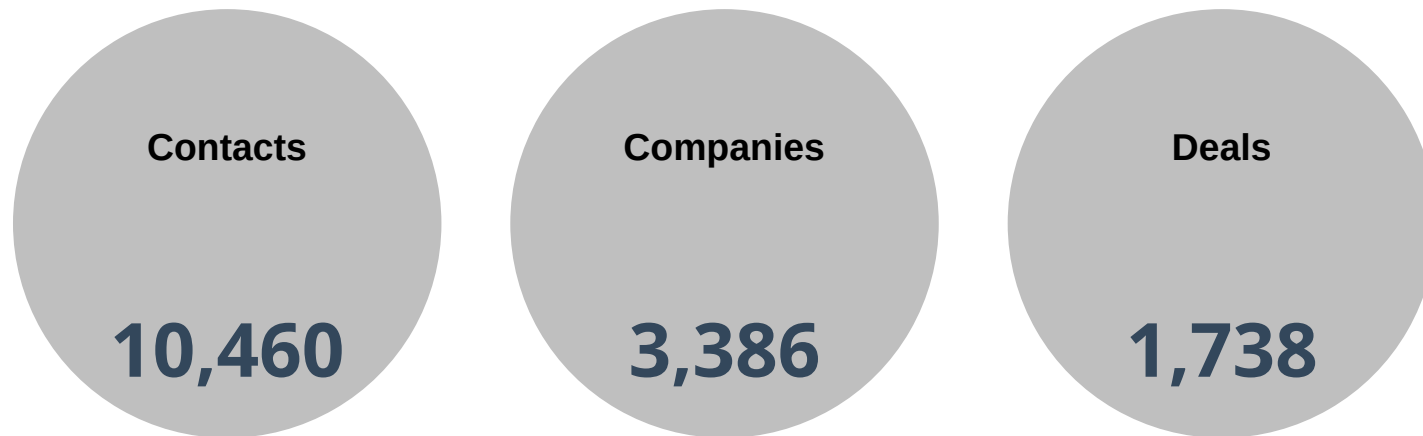


HubSpot Audit Report

Sample client (B2B SaaS)

Prepared by RevTechie

Overview of the client's Hubspot



TL;DR of the Audit

- Contacts with unassigned owners
- Data duplication
- Not utilizing the 'Lifecycle Stage' and 'Lead Status' property.
- No process from how a contact moves from Lead > MQL > SQL
- Workflows have error
- No nurturing setup for contacts
- Tasks assignment is not distributed properly
- No blog or Landing pages feature is utilized
- Sequences are hindering the effective utilization of contact database
- Reports can be optimised to get maximum visibility of the processes

Overview: Where Is Contact Data Coming From?

Major chunk of the data is coming from No Value (Offline Sources). Second in terms of percentage of the contacts are coming from Import and other database sources.



Overview: Where Is Company Data Coming From?

Like contacts, the majority of the company data is coming from No Value (offline sources) and Import.



Unassigned Contacts

~ **5,168** contacts are unassigned. [This is something we need to look into.](#)



Data Duplication

Example 1: Duplicate data in a table

Suppose we have a table with the following data. The first two rows are identical, indicating a duplicate.

Example 2: Duplicate data in a table

Suppose we have a table with the following data. The first two rows are identical, indicating a duplicate.

Lifecycle Stage

A large chunk of the contacts are not under any prospecting lifecycle stage like MQL.



Lifecycle Stage: Contact Owners are not known

Category	Value
Category 1	100
Category 2	100
Category 3	100
Category 4	100
Category 5	100
Category 6	100
Category 7	100
Category 8	100

Lifecycle Stage: Contact Owners are not known

A large part of the contacts are either in SQL and no lifecycle stage value.

There is no **process/automation** to mark the contacts from Lead > MQL > SQL?



Lead Status

Out of 10,0460 contacts, 5,614 don't have any current lead status. There is no mechanism/workflow to qualify the leads and move it to different stages.

Lead Status	Count
Not Set	5614
Lead	1000
Qualified	1000
Disqualified	1000
Follow Up	1000
Converted	1000
Lost	1000
Archived	1000

Total Contacts: 10,0460
No lead status value : 5,614

Workflows

Workflows are not being used.

There is no specific workflow for assigning leads, change of lifecycle stages.
The lifecycle stages are manually updated by contact owners.



Deals

There is huge gap as in number of contacts V/s Deals created

Number of contacts		Number of companies		Number of deals
10,460	Vs	3,386	Vs	1,738

Deals

Deals automation workflows are not setup to put a proper process for making deals moving forward.

Deal Name	Deal Name	Deal Name	Deal Name
Deal Name	Deal Name	Deal Name	Deal Name

Deals Automation Workflow				
Type the automation workflow name in the workspace				
Deal Name	Deal Name	Deal Name	Deal Name	Deal Name
Deal Name	Deal Name	Deal Name	Deal Name	Deal Name

Lists

Majorly the list health does not look good. Suggest to work on building up more lists

Category	Item	Status
Category 1	Item 1	Active
Category 2	Item 2	Inactive
Category 3	Item 3	Active
Category 4	Item 4	Inactive
Category 5	Item 5	Active
Category 6	Item 6	Inactive
Category 7	Item 7	Active
Category 8	Item 8	Inactive
Category 9	Item 9	Active
Category 10	Item 10	Inactive

Inbox

Inbox support not setup.

« Inbox

Unassigned 0

Assigned to me 0

All open 0

More >

The inbox feature is not being used at all.

Chatbot

Currently there is not Chatbot set.

If somebody wants to chat then there is no option. Only this form is set up.

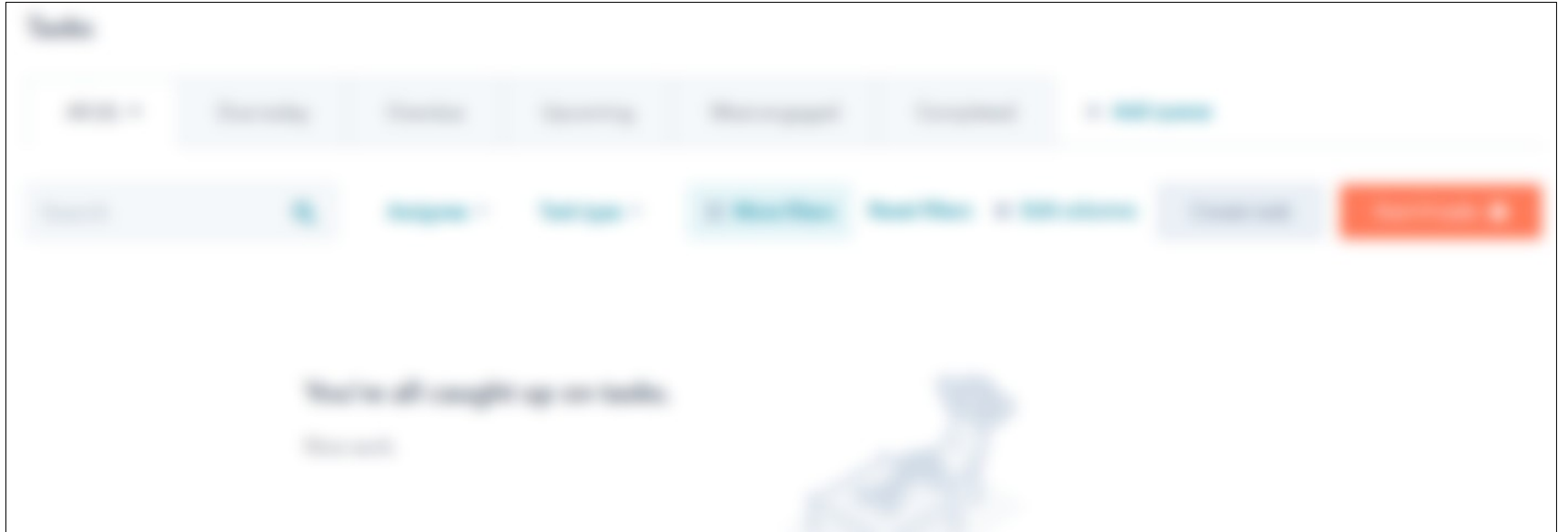
Fill up the form and our Team will get back to you within 48 hours.

Any questions or remarks? Just write us a message!

First name	Last name
Email	Phone
Message	
Send Message	

Tasks

There are zero tasks assigned. This tool is also not being used.



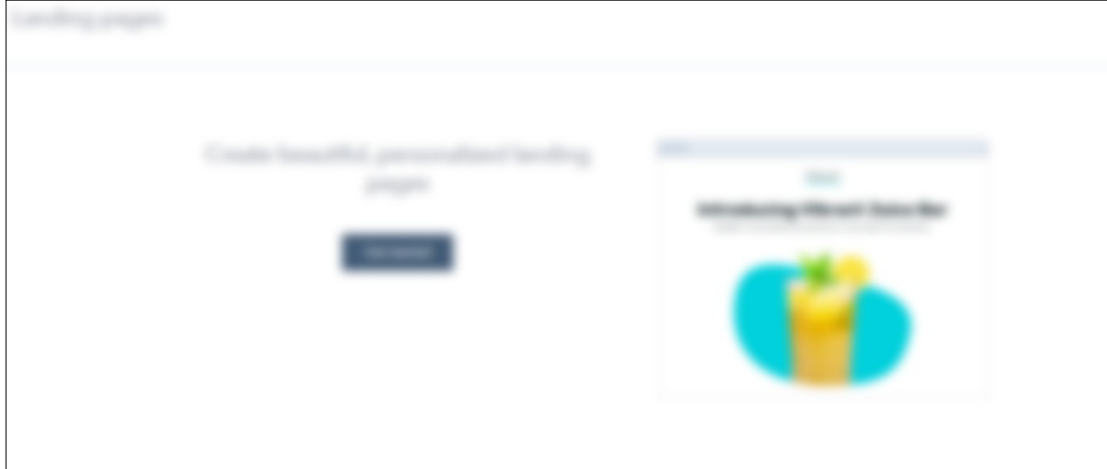
Newsletter

No nurture campaigns designed for the contacts. The newsletter contacts list has a size of **5,785**

Blog and landing pages

Advantage of blog hosted on Hubspot is that it make the content optimised for google search and which helps in brand visibility.

Landing pages can be created to lead customers to a specific product, service, or offer and encourage them to take action



Sequences

The sequences have not been designed. However all the sequences can be effectively configured using workflows to get a good ROI and the enrolment always happens due a event trigger.

Reports

There is only one reports dashboard. Multiple reports can be built to keep a track on various activities and steps.



Thank You