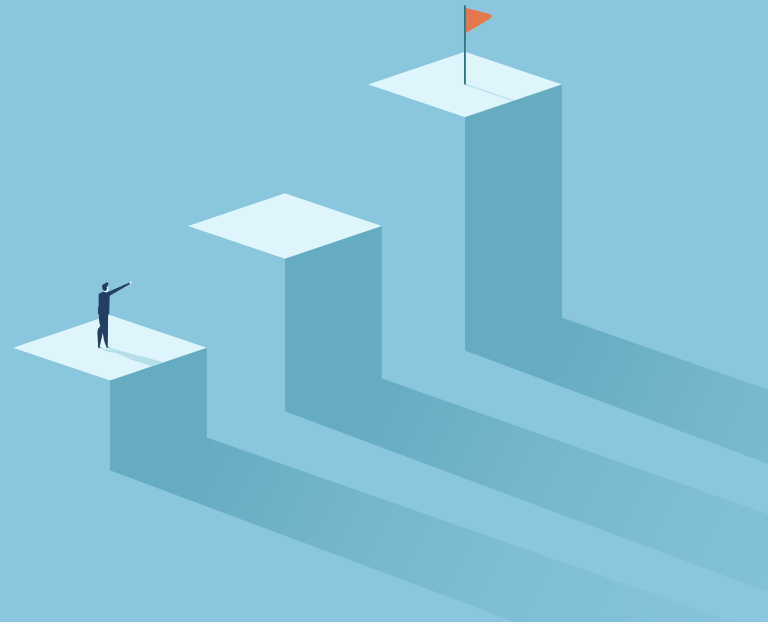


# The Ultimate HubSpot Audit Checklist : How to Optimize HubSpot

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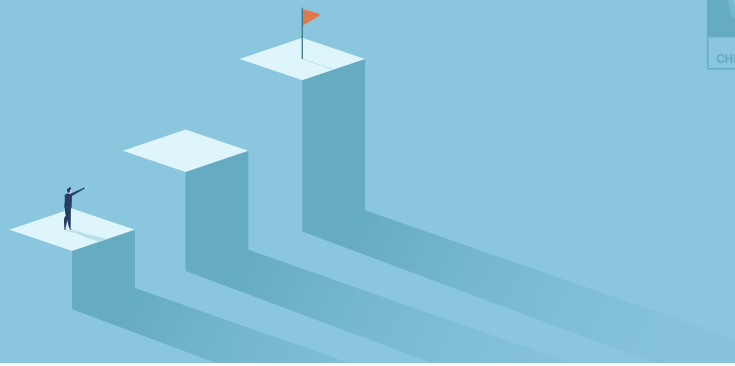


Let's be honest—when was the last time you did a deep dive into your HubSpot setup? If you're like most marketers and sales leaders, you're juggling a million things, and a HubSpot audit keeps getting pushed to the bottom of your to-do list. But here's the deal—an unoptimized HubSpot instance can quietly sabotage your marketing efforts, create inefficiencies, and give you unreliable data.

As a Fractional CMO, a Marketing Leader, or a HubSpot Power User, your success depends on visibility, automation, and clean data. A proper audit ensures that your CRM, marketing automation, and reporting are all working together seamlessly to give you the insights and structure you need to drive real business results. So, let's walk through this step-by-step HubSpot audit together—because you deserve a system that works for you, not against you.

*Next page..*

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## Step 1: CRM & Data Management

Your CRM is the foundation of your marketing and sales strategy. But let's face it—if your database is a mess, you're wasting time, misfiring on campaigns, and struggling to prove ROI.



**Clean up duplicate contacts and companies** to avoid redundancy and confusion.



**Standardize naming conventions** for properties and lists for better organization.



**Ensure lifecycle stages** (Lead, MQL, SQL, Customer, etc.) are correctly applied to track engagement.



**Validate deal pipeline stages** to reflect your current sales process.



**Audit custom properties** to remove outdated or unnecessary fields.



**Ensure GDPR compliance settings** are configured correctly.



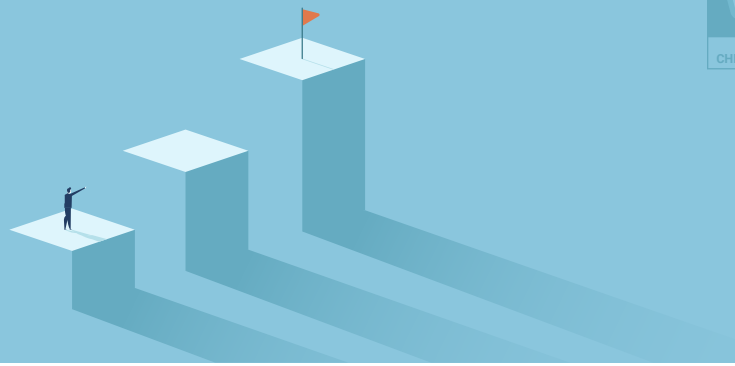
**Verify email opt-in preferences and subscription types** to maintain proper consent tracking.



### Pro Tip

A cluttered CRM leads to inaccurate marketing efforts. Regularly archiving inactive contacts (non-marketing contacts) and refining segmentation ensures higher-quality outreach.

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## Step 2: Lead Capture & Attribution

You work hard to generate leads—so don't let bad tracking make your numbers fuzzy. You'll miss valuable insights into what's driving conversions.

**Review and test all forms** for proper field mapping and lead routing.



**Check landing pages** to ensure conversion tracking is set up correctly.

**Validate UTMs and campaign tracking** for consistency in reporting.

**Ensure attribution reporting** is in place for paid ad campaigns.

**Audit CTAs (Calls-to-Action)** to optimize for better engagement and lead capture.

**Confirm chatbots and live chat routing** are aligned with your lead qualification strategy.

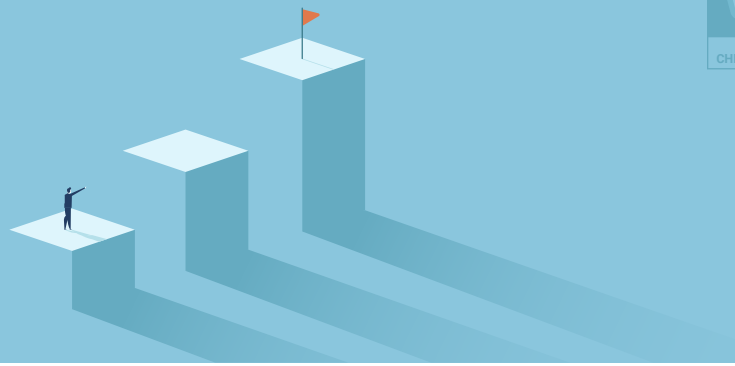
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### **Pro Tip**

Proper attribution helps marketing leaders prove ROI. If you're not tracking leads effectively, your pipeline visibility is limited.

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## Step 3: Marketing Automation & Workflows

Workflows should save time—not add complexity. A well-optimized automation setup ensures leads are nurtured efficiently.

**Review all active workflows** to eliminate redundancies or outdated sequences.

**Test lead nurturing sequences** to ensure engagement and personalization are optimized.

**Audit re-engagement and follow up** sequences -to capture lost opportunities.

**Ensure lead scoring models** align with marketing and sales priorities.

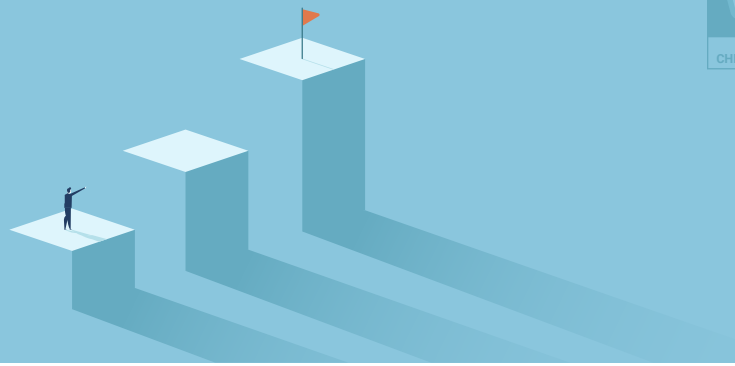
**Optimize email personalization and segmentation** for better engagement.

**Check workflow triggers, actions, and enrollment criteria** to ensure logical automation flow.

### → Pro Tip

Overcomplicated workflows can cause unnecessary delays and errors. Keeping workflows simple yet effective ensures better results.

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## Step 4: Reporting & Analytics

Your data should tell a clear story, not create more chaos. If your reports are confusing or incomplete, it's time for an audit.

**Validate marketing, sales, and service dashboards** for accuracy and relevance.



**Ensure key performance indicators (KPIs)** align with business objectives.

**Audit revenue attribution reports** to ensure the right channels are credited for conversions.

**Review contact and deal source tracking** for consistency.

**Identify data gaps in reporting** and implement necessary improvements.

**Check integrations with Google Analytics, LinkedIn Ads, and other platforms** to ensure data accuracy.

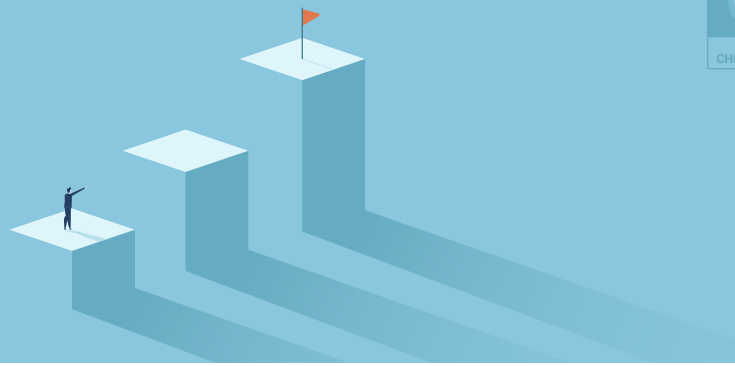
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### **Pro Tip**

Set up automated reports and dashboards to save time and ensure leadership has visibility into key performance metrics.

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## Step 5: Sales & Marketing Alignment

A misaligned sales and marketing team is a growth killer. Let's fix that.

**Verify proper MQL to SQL handoff process** to avoid lead leakage.

**Review email and task automation** to ensure timely sales follow-ups.

**Ensure lead routing is configured correctly** so reps receive qualified leads.

**Audit meeting scheduling tools and sequences** for a seamless sales experience.

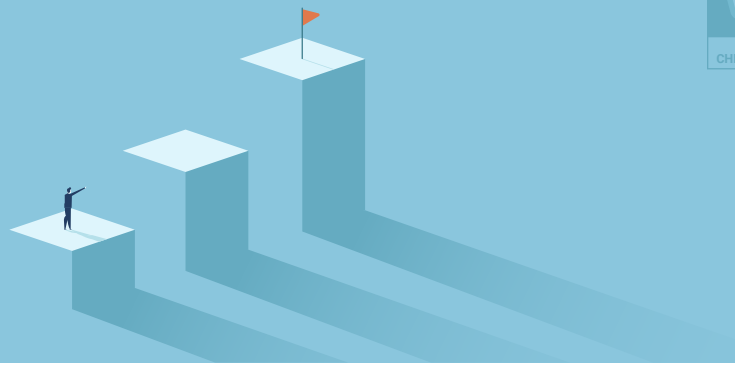
**Align sales pipeline stages** with marketing goals to improve forecasting.

**Confirm that sales reps are actively engaging** with the CRM.

### → Pro Tip

Marketing should regularly meet with sales to review lead quality and ensure HubSpot's CRM aligns with their needs.

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## Step 6: Integrations & Third-Party Tools

HubSpot works best when it plays nicely with your tech stack. These connections should be seamless, not problematic.

**Audit all third-party integrations** (Salesforce, Slack, Zapier, etc.).

**Verify data is syncing correctly** between HubSpot and external platforms

**Check API usage and custom integrations** for potential errors.

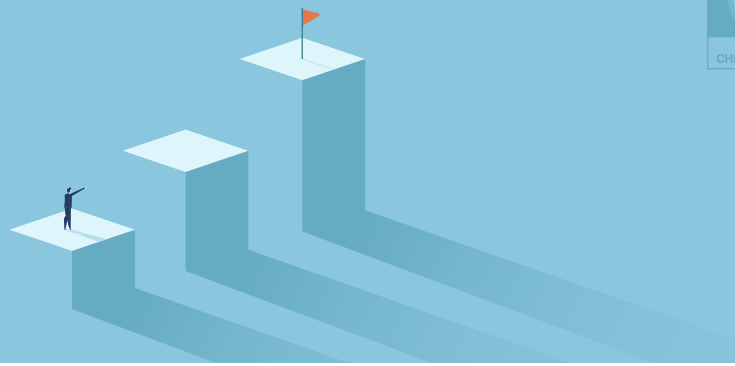
**Ensure paid ad platforms** (Google, Facebook, LinkedIn) are properly connected.

**Validate connections with webinar tools, scheduling tools, and support platforms** for a unified tech stack.

### **Pro Tip**

Unused or broken integrations can cause major data gaps. Review them quarterly to ensure seamless operations.

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## Step 7: Team Training & Adoption

HubSpot is only as good as the people using it. Ensuring your team is trained and engaged is a crucial part of the audit process.

**Identify gaps in team knowledge** and schedule necessary training.

**Ensure HubSpot users have correct roles and permissions** based on their responsibilities.

**Schedule regular internal reviews** to keep marketing and sales aligned.

**Document key processes in a HubSpot playbook** for easy reference.

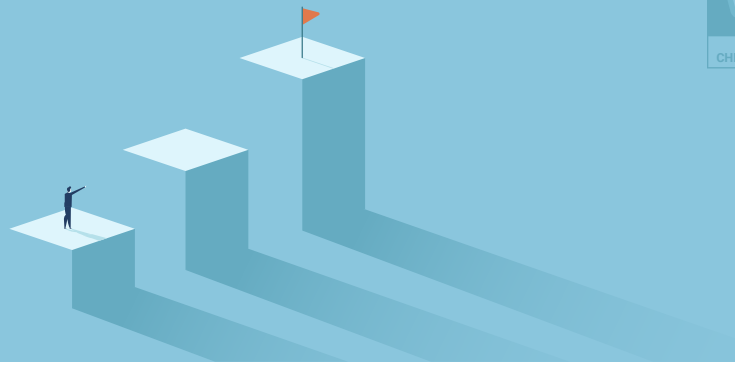
**Encourage ongoing learning** through HubSpot Academy resources.

### → *Pro Tip*

A well-trained team means fewer errors and better platform adoption. Regular training ensures that everyone is maximizing HubSpot's capabilities.



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## Final Steps: Implementing Your Audit Findings

Once you've completed your audit, it's time to prioritize, implement, and monitor improvements.

**Document key action items** and assign owners

**Create a timeline** for implementing necessary changes.

**Set up a recurring audit schedule** (quarterly or annually) to maintain platform health.

→ **Pro Tip**

Regular audits prevent data bloat, keep automation efficient, and ensure HubSpot continues delivering results.

### Need Expert Help with Your HubSpot Audit?

A well-optimized HubSpot setup can increase efficiency, improve reporting accuracy, and drive better business decisions. But audits can be time-consuming—especially when you're balancing strategy with execution.

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**Want a second pair of eyes on your HubSpot setup? Let's talk.**

**Get in Touch**