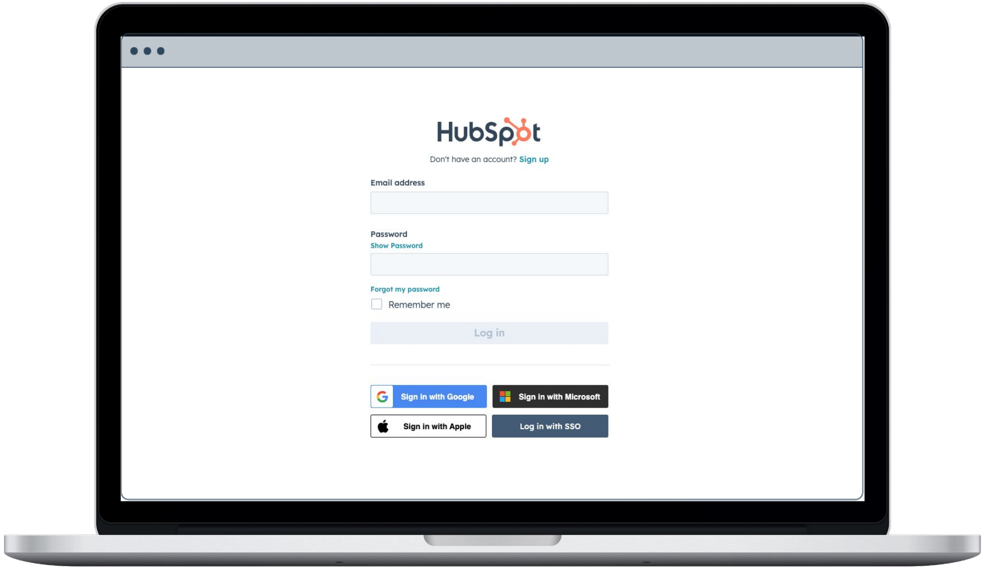
Portal Cheat Sheet

How to Familiarize Yourself with an Existing HubSpot Portal

By: Seslie Smith



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Settings: Part 1

Integrations

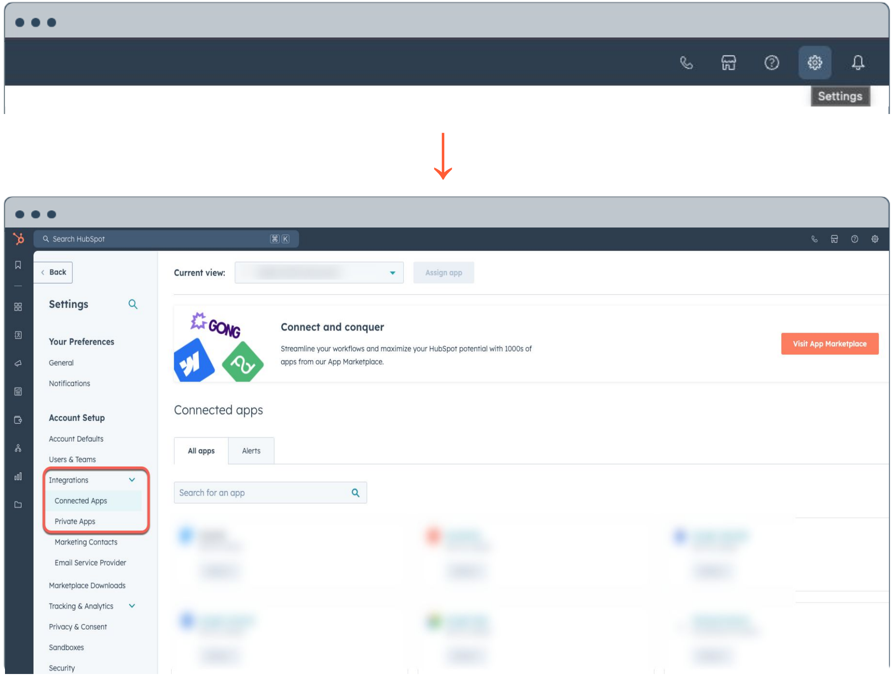
Navigation:
Settings > Integrations > Connected Apps
Settings > Integrations > Private Apps

Goal:

- ➔ Review Connected Apps
- ➔ Review Private Apps

Consider:

- What are the apps being used for?
- Are there any Apps you did not expect to see?



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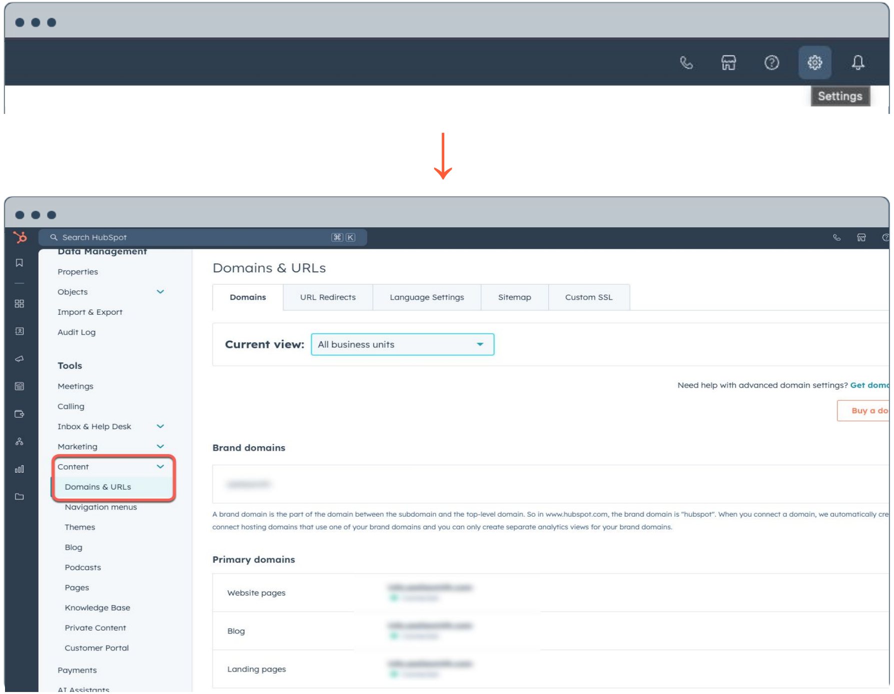
Domains

Navigation:
Settings > Content > Domains

Goal:
➔ Review Domain(s)

Consider:
- Are there any primary domains connected?
- Are they hosting content in HubSpot or externally?
- Are there any email sending domains connected?
- Are the domains configured correctly and authenticated?



Tracking

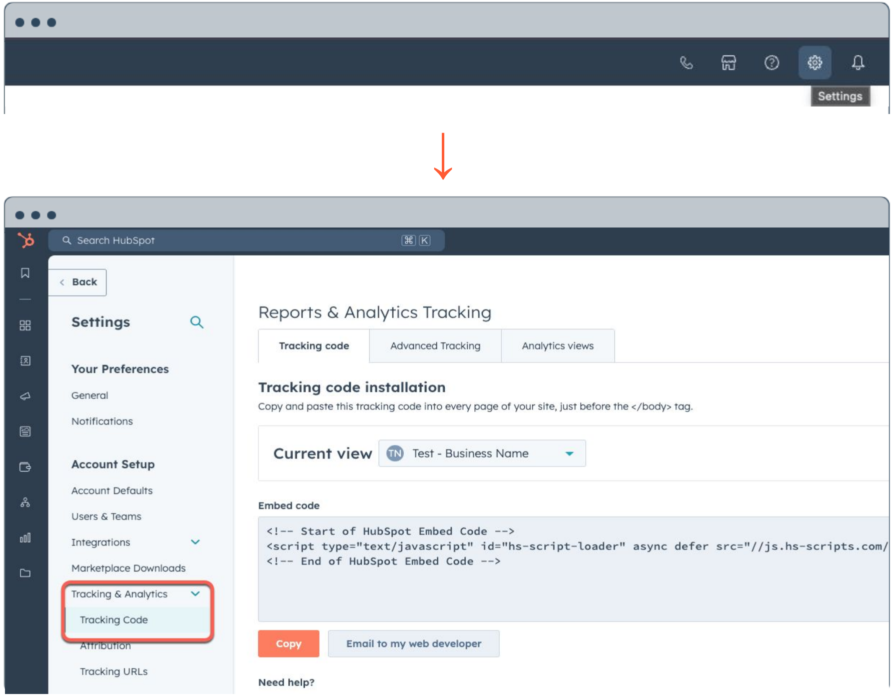
Navigation:
Settings > Tracking & Analytics > Tracking Code

Goal:

- ➔ Tracking Code Installation
- ➔ Advanced Tracking

Consider:

- Is the tracking code installed?
- Are they tracking externally hosted content in the Advanced Tracking tab?

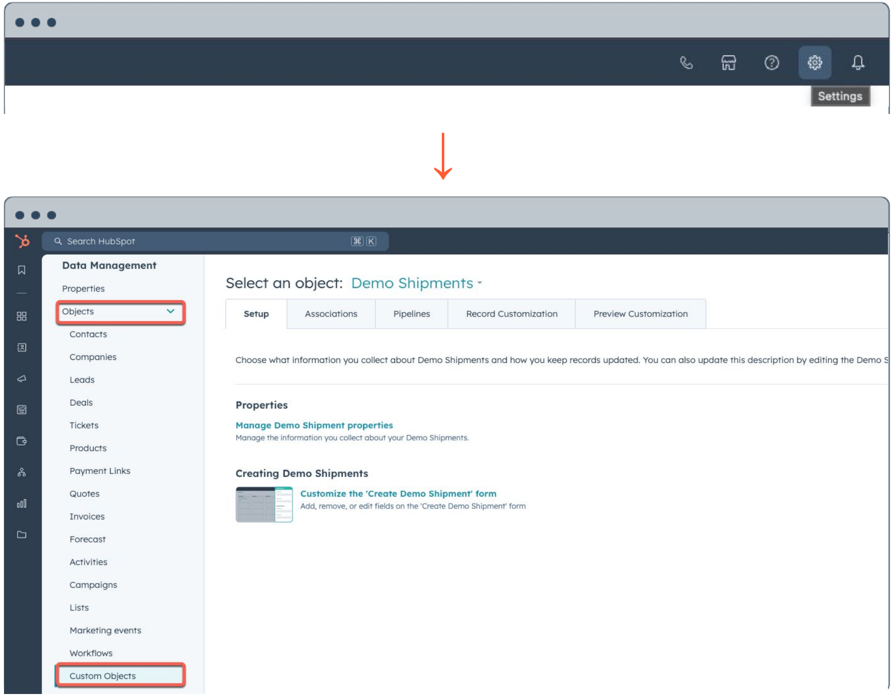


Custom Objects

Navigation:
Settings > Objects > Custom Objects

Goal:
- ➔ Review Custom Objects
- ➔ Associations

Consider:
- Are they using any Custom Objects?
  - If so, what are the associations to the standard objects?
    - 1:1
    - 1:Many
- What data is being stored in the Custom Objects?



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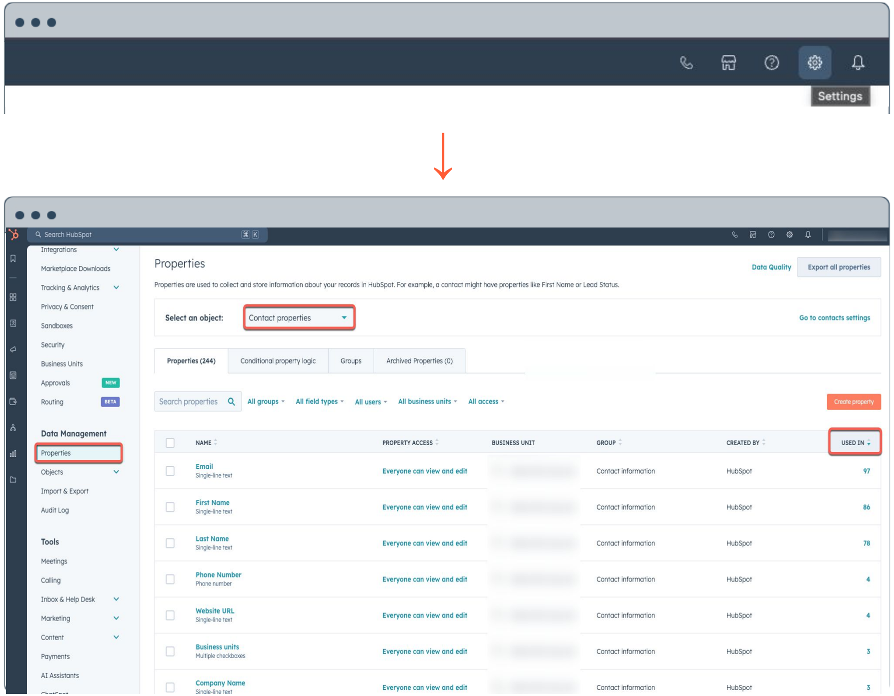
Properties

Navigation:
Settings > Properties

Goal:
- ➔ Contact properties
- ➔ Company properties
- ➔ Deal properties
- ➔ Ticket Properties

Consider:
- What are the most ‘Used In’ properties for each object?
- Where are those properties being used (list, reports, views, automation, etc.)?

(Continued)



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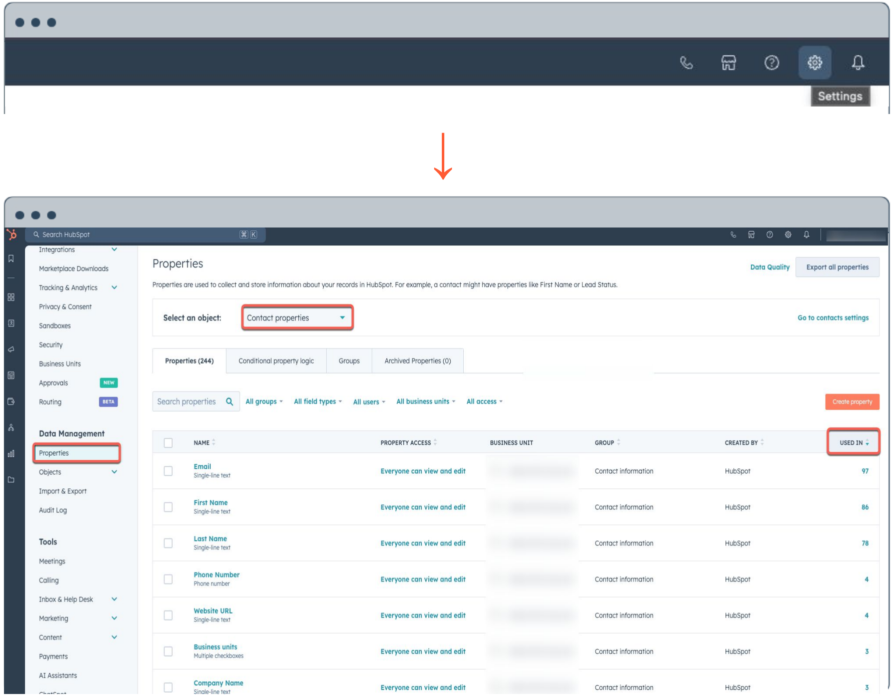
Settings: Part 1

Properties

Specific properties to review:

- Lifecycle Stage
  - Any custom stages?
  - Any automation?
- Lead Status
  - Any custom lead statuses?
  - Any automation?
- Marketing Contact Status
  - Are they using Marketing Contacts?
  - Are they setting this status using forms or workflows?
- Score properties
  - Filter by ‘Field Type’ > select ‘Score’
    - HubSpot Score
    - Custom ‘Score’ properties
    - Are they using custom score properties?



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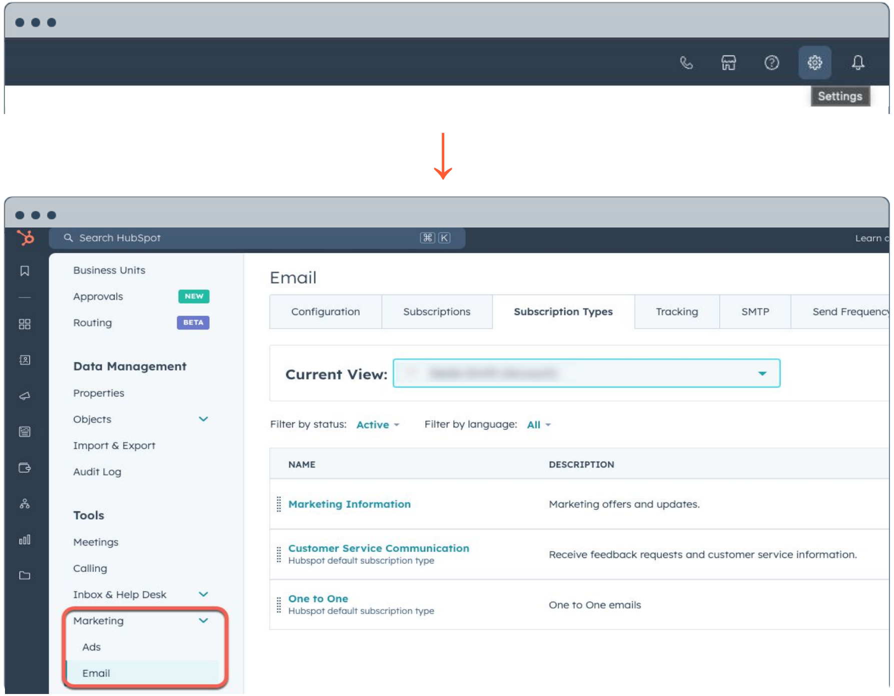
Subscription Types

Navigation:
Settings > Marketing > Email

Goal:
- ➔ Review Subscription Types
- ➔ Assess clarity and naming conventions

Consider:
- What types are being used?
- How many are being used?
- Are they being used for internal, external or both?

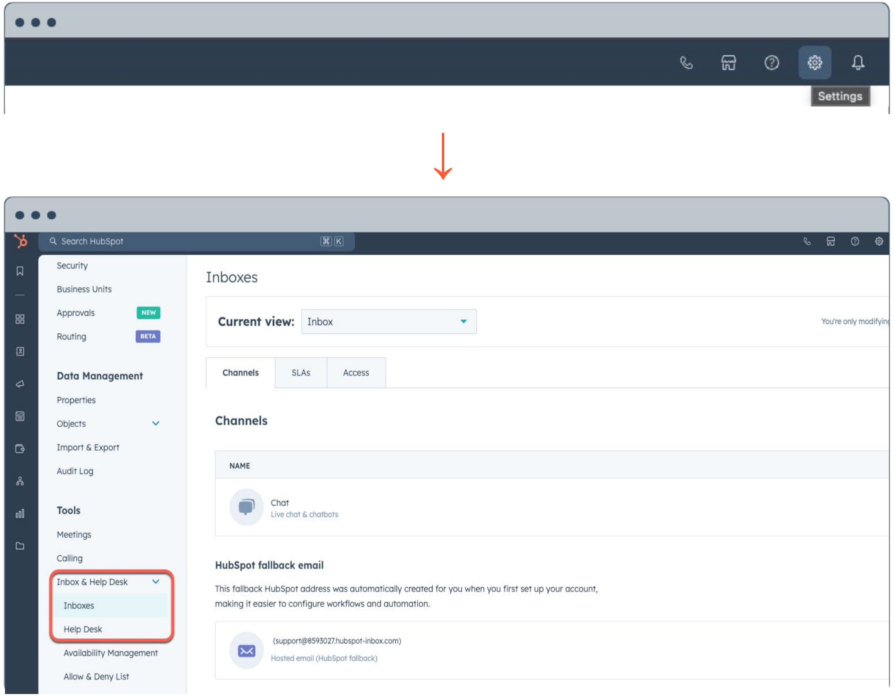


Inbox & Help Desk

Navigation:
Settings > Inbox & Help Desk > Inboxes
Settings > Inbox & Help Desk > Help Desk

Goal:
- ➔ Review connected channels in Inboxes
- ➔ Review connected channels in Help Desk

Consider:
- What channels are connected?
  - Forms
  - Email
  - Chat
- Are SLA's configured?
- Is access configured to specific teams or users?



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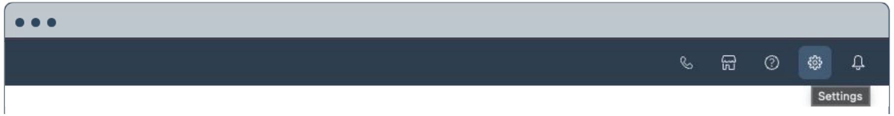
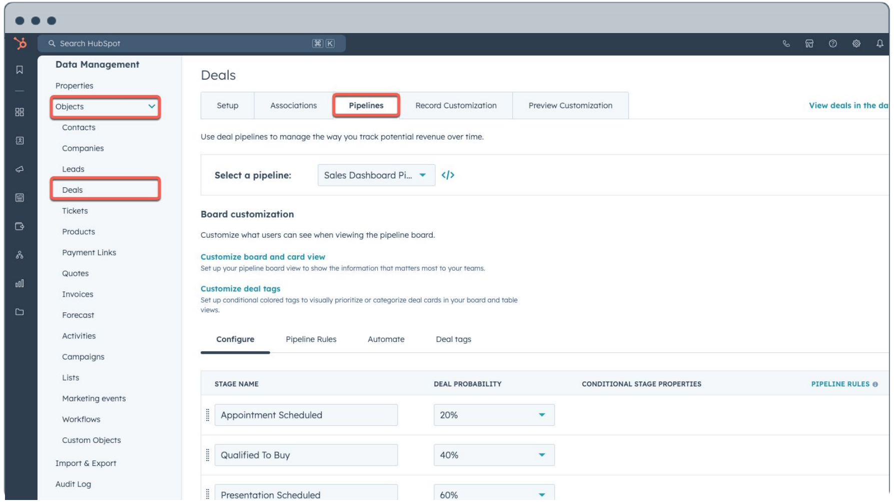
Deal Pipeline





Navigation:
Settings > Objects > Deals > Pipelines

Goal:
- ➔ Review Pipeline(s)
- ➔ Review Deal Stages
- ➔ Review Deal Probability
- ➔ Review Pipeline Rules
- ➔ Review Automation
- ➔ Review Deal Tags

Consider:
- Are there multiple pipelines? If so, how many?
- How many stages are in each pipeline?
  - Are there conditional stage properties being utilized?
  - Do the deal stage probabilities make sense?
  - Are there pipeline rules?
- Is there any automation for the deal stages?
- Are deal tags being utilized? Any redundancy?

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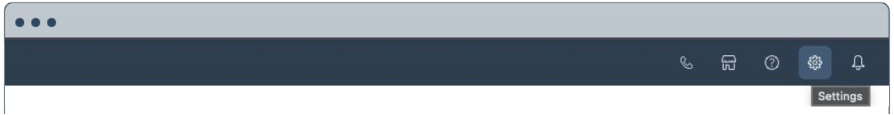
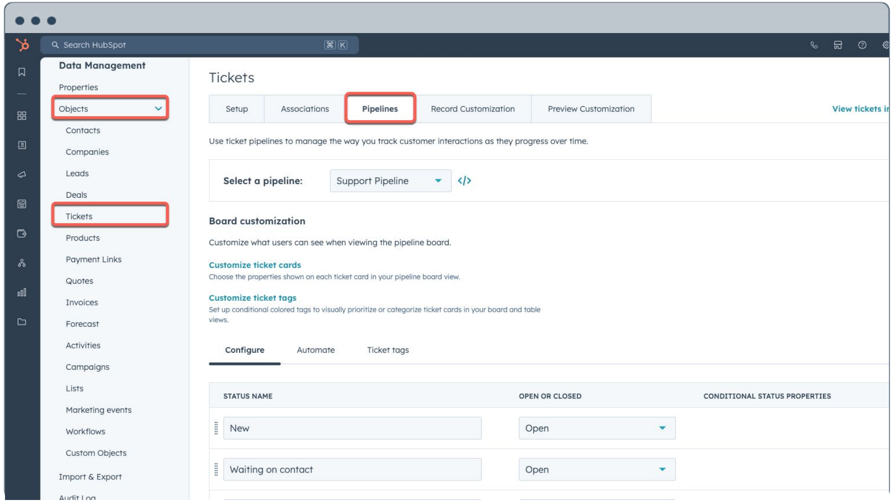
Ticket Pipeline





Navigation:
Settings > Objects > Tickets > Pipelines

Goal:

- ➔ Review Pipeline(s)
- ➔ Review Open or Closed
- ➔ Review Conditional Status Properties
- ➔ Review Automation
- ➔ Review Ticket Tags

Consider:

- Are there multiple pipelines? If so, how many?
- How many statuses are in each pipeline?
  - Are there conditional status properties being utilized?
  - Do the open or closed outcomes make sense?
- Is there any automation for the ticket statuses?
- Are ticket tags being utilized? Any redundancy?

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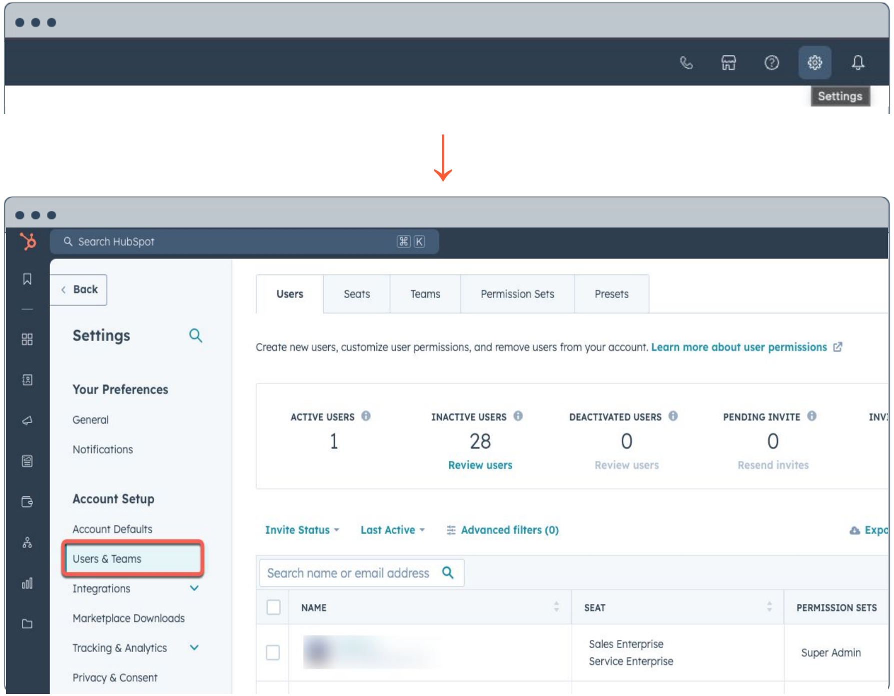
Users & Teams



Navigation:
Settings > Users & Teams

Goal:

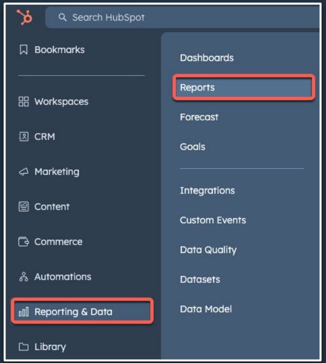
- ➔ Review ‘Last Active’
- ➔ Review Seats
- ➔ Review Teams
- ➔ Review Permission Sets
- ➔ Review Presets

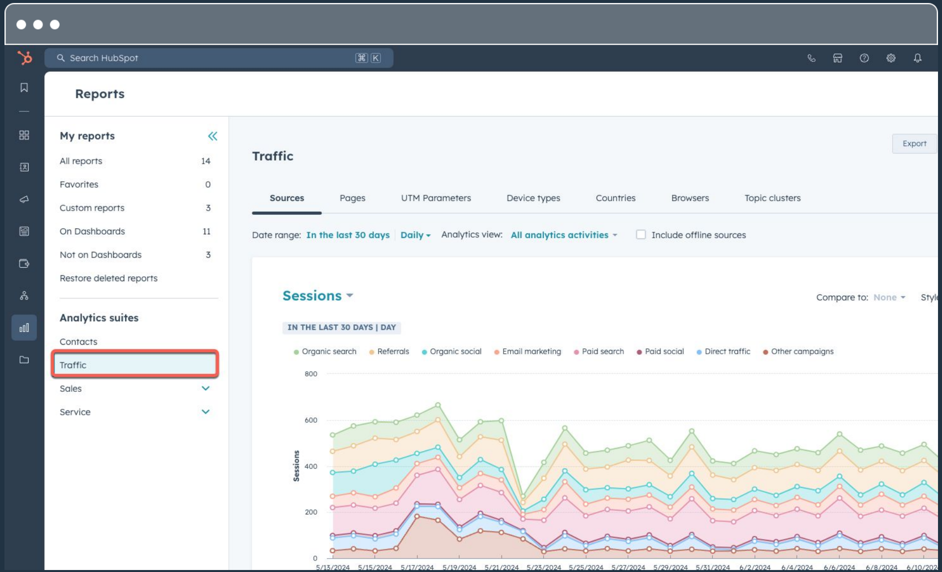
Consider:

- How many inactive or deactivated users?
- How many pending invite users?
- How many paid seats does the account have?
  - Which users have paid seats?
- Are users being organized into teams?
- Are users granted permission sets?
- Are presets being utilized?

Reporting

Traffic Analytics





Goal:

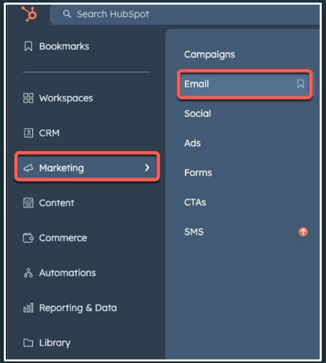
- ➔ Gain audience insights
- ➔ Identify trends

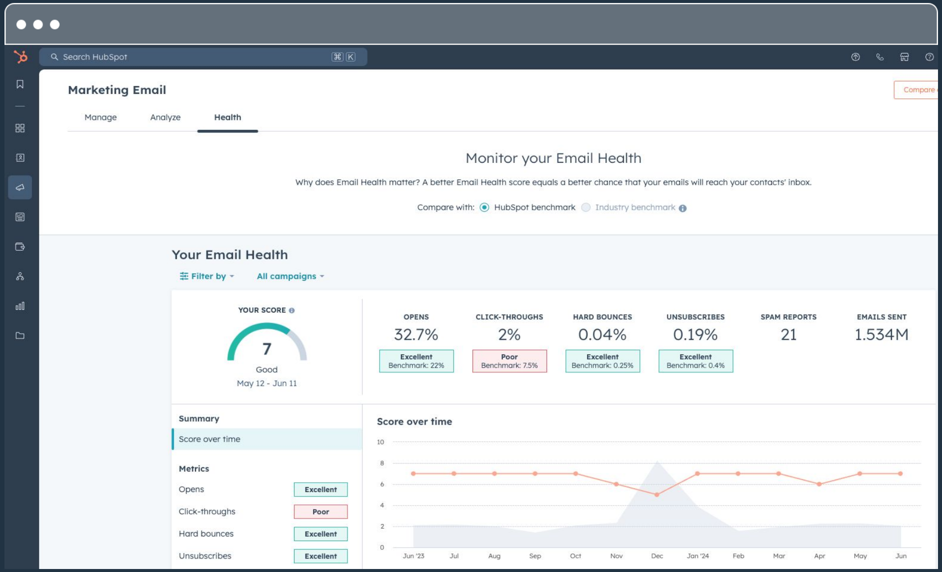
Consider:

Set the Date Range to ‘All Data’:

- How far back does the data go?
- Does the volume match your expectations?
- How does this traffic look if you exclude direct traffic?
- What are the primary channels?
- Any trends (upward vs downward)?
- Is any channel higher or lower compared to others?

Marketing Email Health





Goal:

- ➔ Review current and historical email sending reputation
- ➔ Review key performance indicators

Consider:

- What is the overall health score?
- What is the aggregate email engagement metric for each key performance indicator?
  - Are any of the key performance indicators needing improvement or poor?

Contacts

Use pre-built reports (Free & Starter): • Contact created totals by day • Contact totals by source with lifecycle stage breakdown • Contact lifecycle stage funnel with contact totals and conversion rates *OR* Use custom reports (Professional & Enterprise): • Add the following properties: ○ Create Date ○ Original Source ○ Lifecycle Stage ○ Any custom properties identified in 'Settings: Part 1' to further explore.	Consider: • How many contacts were created each month? • How many contact were created from each source? • How are conversion rates between lifecycle stages?

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Deals

Use pre-built reports (Free & Starter):	Consider:

Use pre-built reports (Free & Starter):
• Closed revenue by month with deal total and closed revenue breakdown
• Closed revenue by source
• Deal amount average by rep
• Deal stage funnel with deal totals and conversion rates
• Deals open by current stage
OR
Use custom reports (Professional & Enterprise):
• Add the following properties:
  ○ Create Date
  ○ Amount
  ○ Amount in Company Currency
  ○ Close Date
  ○ Deal Owner
  ○ Pipeline
	Consider:
	• How much revenue and how many deals were closed won each month?
	• Which sources are leading to closed deals?
	• Which reps have the highest average deal revenue?
	• How are conversion rates between deal stages?
	  ○ Any stages unused?
	• How many deals are in each pipeline?
	  ○ Which pipeline has the highest volume of deals?
	  ○ Which pipeline holds the most revenue?

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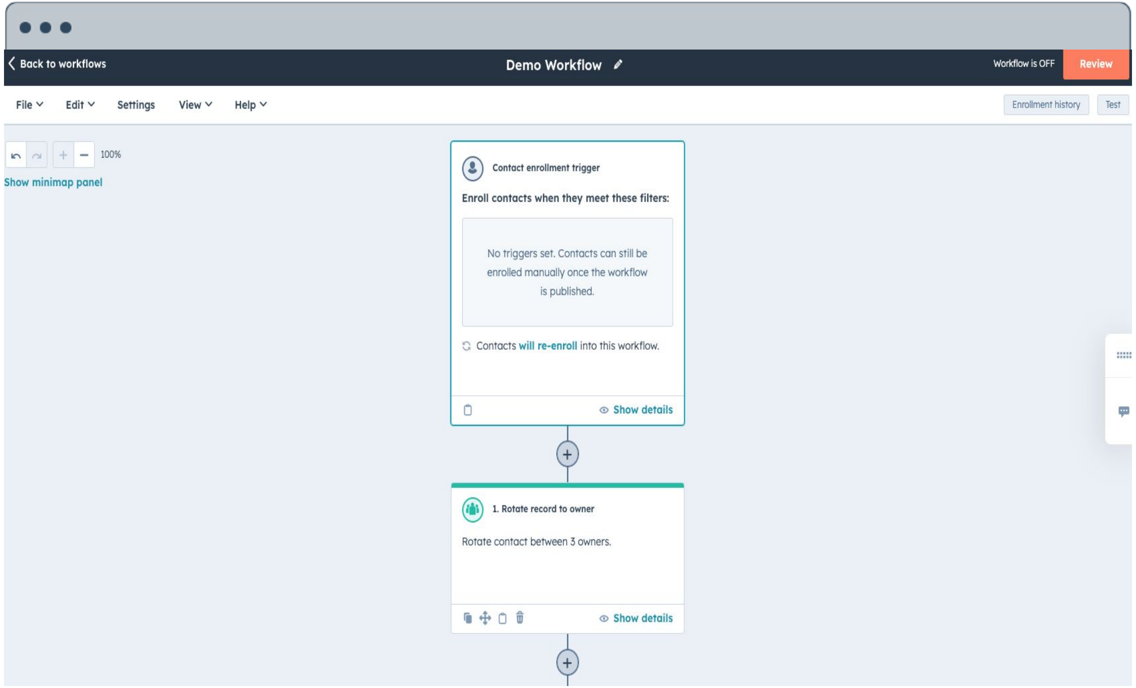
Workflows

Are the workflows relevant?

Any workflows that need review or have errors?



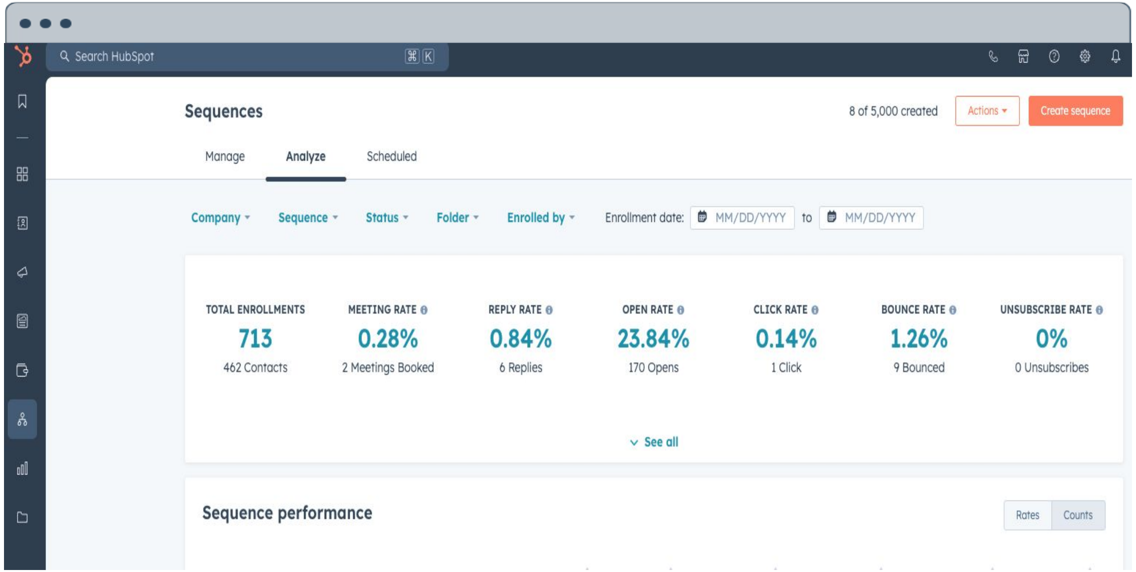
Can any of the workflows be improved for efficiency?

Are there any unused workflows that can be deleted?

Sequences

How are sequences performing?

How many enrollments have occurred?



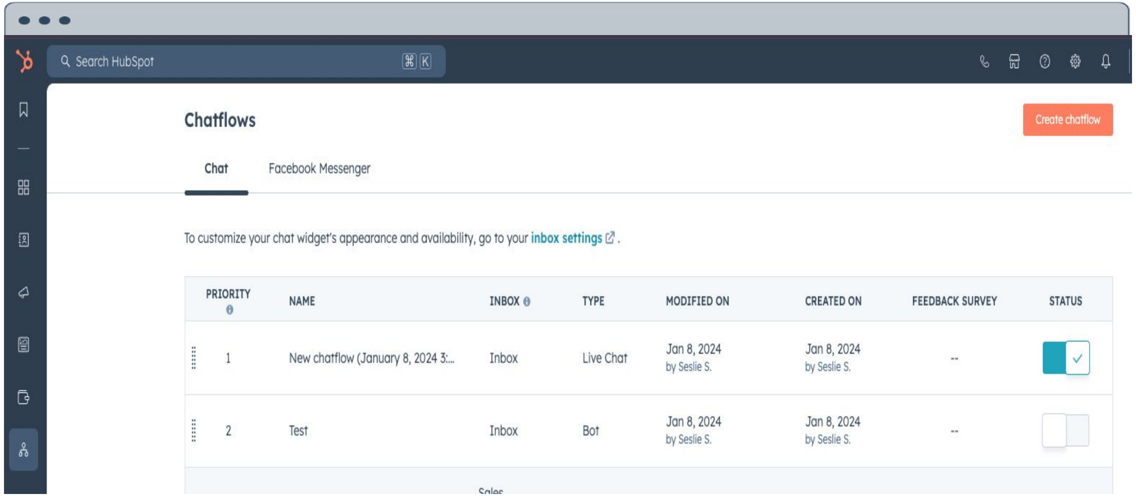
What is the meeting rate, open rate, click rate or bounce rate?

What's the total revenue for deals in the closed won stage that were influenced by sequences?

Chatflows

Are chatflows being utilized?

Which inboxes have chatflows connected?



Are they using bots, live chat, or a mix?

How many chats have a status of being toggled on? Any overlap in targeting?

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