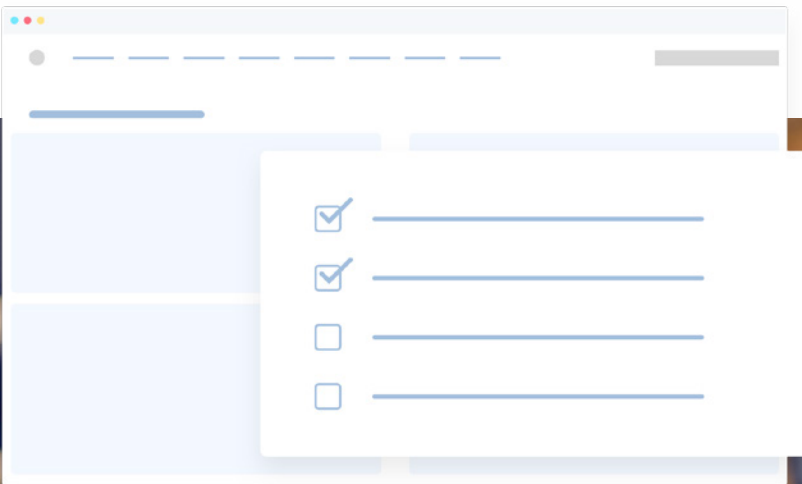
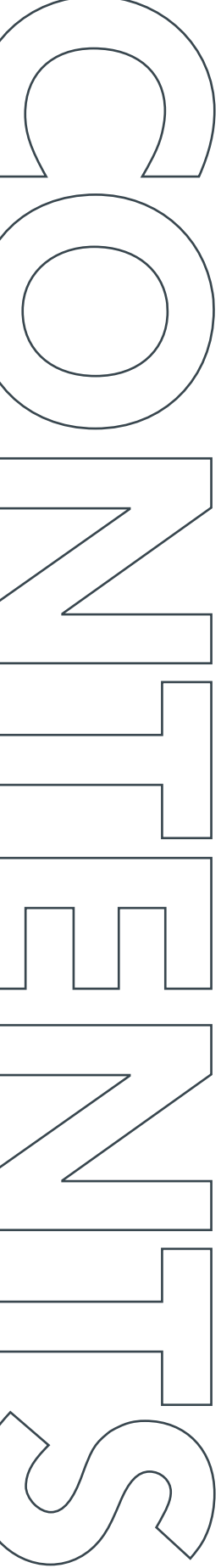




CAMPAIGN
CREATORS

THE ULTIMATE HUBSPOT PORTAL AUDIT CHECKLIST FOR MARKETERS





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WHY AUDIT YOUR HUBSPOT PORTAL?

Is your contact database a mess? Do you question whether you're using your HubSpot portal *the right way*? Does your team struggle to prove the ROI of your marketing? If you answered yes to any of these questions, then you're likely due for a HubSpot Portal Audit.

A HubSpot Portal Audit is the process of reviewing, cleaning up, and optimizing your platform. Whether you're a new or seasoned user, this process will help you identify opportunities for improvement and ensure you have the proper technical foundation set up. Overall, a HubSpot Portal Audit will help you make the most out of your platform investment.

As a HubSpot Diamond Solutions Partner that has spent the past 10+ years helping HubSpot customers, we've seen too many users committing the same portal mistakes. That's why our team at Campaign Creators created this complete checklist to ensure you're properly set up for success in HubSpot.

In this checklist, you'll learn how to configure your account settings correctly, best practices for cleaning up your contact database, and how to organize your digital marketing assets. Not all audits are conducted the same, but this checklist provides the technical guidance and strategic recommendations to help you optimize your HubSpot portal like a pro.


Let's get started.



CONFIGURING YOUR HUBSPOT ACCOUNT SETTINGS

Your HubSpot account settings hold some of the most overlooked yet critical features for marketing success. As HubSpot continues to release new features, and your business continues to evolve, you can't assume configuring your settings is a one-and-done deal. Use the items below as guidance to audit your account settings.

Account Defaults

Menu: [Settings](#)  → [Account Defaults](#)


- Review and update **General Info** tab
- Turn on **EU General Data Protection Regulation (GDPR)** settings.
 - ① *The GDPR is an EU Regulation that improves the protection of the personal data of European citizens and increases the obligations on organizations who collect or process personal data. There are certain cases where you do not need to turn this on, which you can learn about [here](#).*
- Enable **Hubspot Employee Access**
 - ① *This will allow HubSpot Support team members to dive into your portal if you are experiencing an issue.*
- Review and update **Branding** tab
 - ① *If you recently rebranded your company, you should update this tab.*

Contacts & Companies

Menu: [Settings](#)  → [Contact & Companies](#)

- Under Contacts, turn on **Assign company owner to contact by default and Automatically fill contact properties found with HubSpot AI**
 - ① *This may not be necessary for B2C/eCommerce companies.*
- Under Companies, turn on **Lifecycle stage sync, Automatically create and associate companies with contacts, and Automatically fill company properties with HubSpot insights**
 - ① *This may not be necessary for B2C/eCommerce companies.*
- Under Privacy and consent, select **Explicit or Implicit** consent
 - ① *This isn't necessary if you don't have your GDPR settings on.*

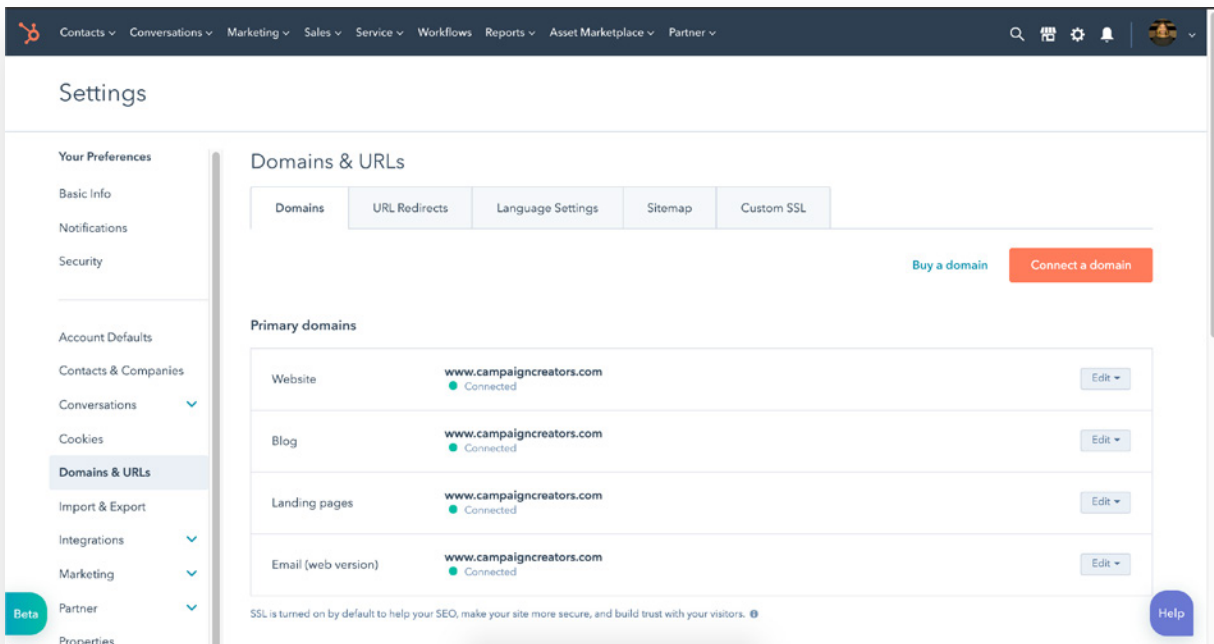
Domains & URLs

Menu: [Settings](#)  → [Domains & URLs](#)

- Connect your **Primary domains**
 - ① *This is critical for gathering data and for Search Engine Optimization (SEO).*

- Connect **Email sending domains(DKIM)**
 - ① *This allows your contacts to check that your emails were authorized by the domain owner.*

- Under Language Settings, **Enable Language-Specific Redirects** and choose the **Primary Language** for each domain
 - ① *This is critical for businesses functioning globally.*



Marketing

Menu: [Settings](#)  → [Marketing](#) → [Email](#)

- ❑ Review and update **Configuration** tab
- ❑ Under Subscriptions, turn on **Don't send to unengaged contacts**, **Resubscription email**, and **Double opt-in**
 - ① *Enabling “double opt-in” isn't necessary if you don't have your GDPR settings on.*
- ❑ Review and update **Subscription Types** and correctly customize to your content
 - ① *This helps decrease the rate of unsubscribes from all marketing emails by allowing contacts to customize their subscriptions (e.g. Monthly email newsletters vs. Weekly emails).*
- ❑ Under Tracking, turn on **Track email opens**, **Track clicks**, and **Identity tracking**

Menu: [Settings](#)  → [Marketing](#) → [Social](#)

- ❑ Under Accounts, reauthorize any expired social media accounts
 - ① *Your social accounts will automatically expire after some time for security reasons. Simply reconnect any expired accounts.*
- ❑ Create a custom **Publishing** schedule
 - ① *Review your social reports to identify optimal publishing days and times. Add these days and times to your schedule under the publishing tab. Learn more [here](#).*
- ❑ Determine **Email Notifications** preferences
 - ① *This emails you a roundup of all new social interactions, conversions, and followers.*

Reports

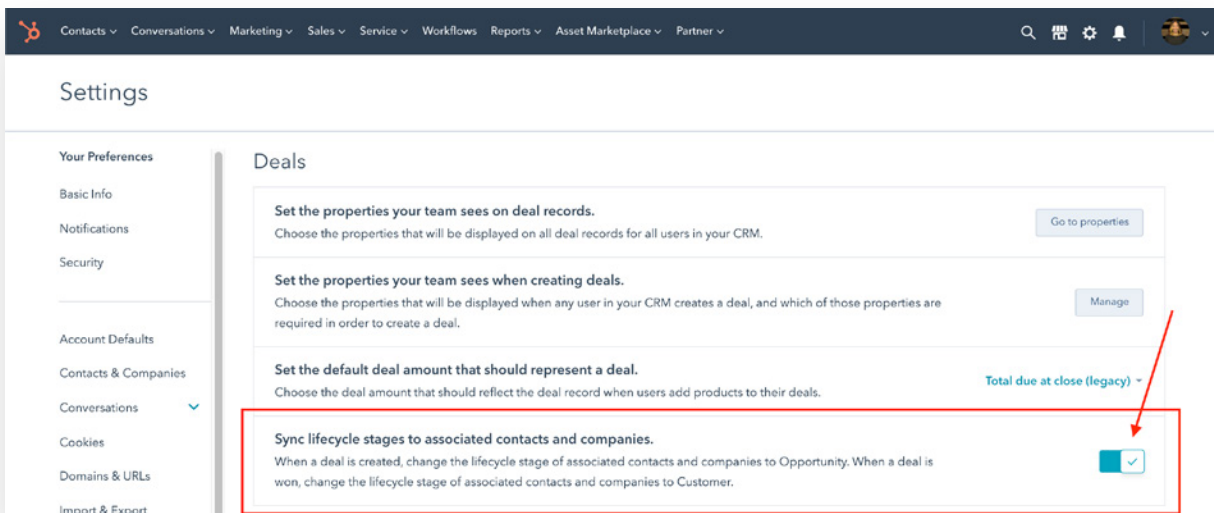
Menu: [Settings](#)  → [Reports](#) → [Tracking Code](#)

- Embed **Tracking code** into every page not hosted on HubSpot
 - ① *This helps capture data for non-HubSpot pages and includes it within your reports in the platform.*
- Under Advanced Tracking, **Exclude Traffic** coming from your team's IP addresses
 - ① *Exclude your company's office IP address and your team's individual IP addresses. If you work with remote team members, this will ensure your traffic analytics are accurate and not tracking traffic from your team.*

Sales

Menu: [Settings](#)  → [Sales](#) → [Deals](#)

- Turn on **Sync lifecycle stages to associated contacts and companies**
 - ① *This saves you time from updating contacts/companies and keeps your database updated with accurate info.*
- Update deal **Stage Names** to align with your company's sales pipeline
 - ① *Every company differs. Use [HubSpot's Sales Pipeline Guide](#) to learn how to create your company's sales pipeline.*



Users & Teams

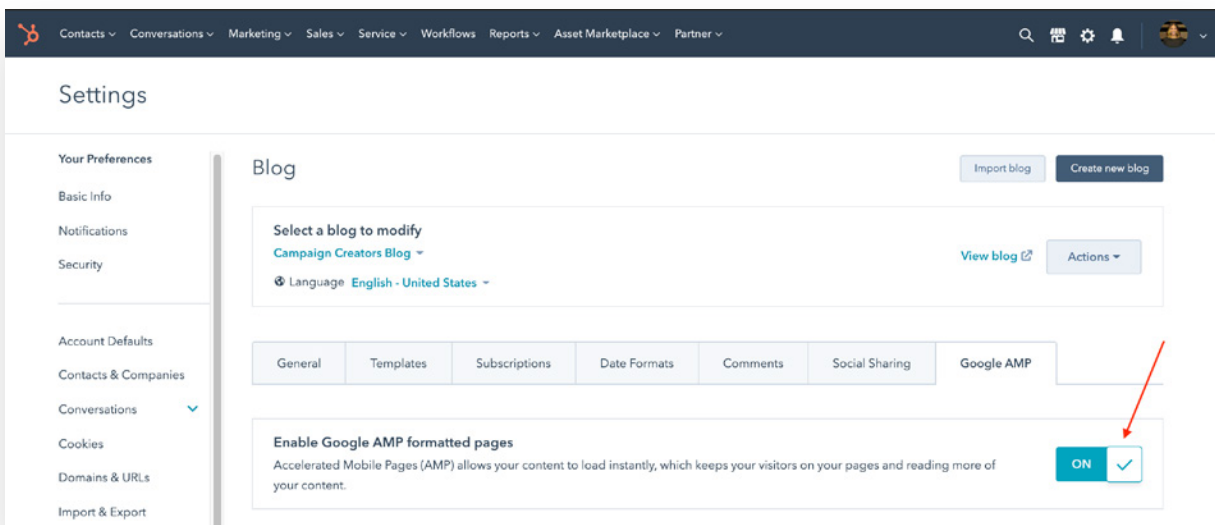
Menu: [Settings](#)  → [Users & Teams](#)

- Remove **Users** or team members that have left your company
- Create **Teams** to organize users in your account
 - ① *If you have several users working within one platform, this helps reduce errors such as accidentally overwriting content.*

Website

Menu: [Settings](#)  → [Websites](#) → [Blog](#)

- Review and update **General** tab
 - ① *Optimize your blogs for search engines by including your pillar topic keywords into your Page Title and Meta Description.*
- Select a team member to receive notification for **Comments**
 - ① *This helps your team stay on top of answering questions from comments. This isn't necessary if you disabled commenting.*
- Under Social Sharing, add your company's **Twitter account** and enable **Social sharing** buttons for all social accounts
- Under Google AMP, **Enable Google AMP formatted pages**



CLEANING UP YOUR HUBSPOT CRM DATABASE

Did you know that bad data costs companies around the world [\\$3 trillion per year](#)? But you probably already know how difficult it is working with a messy database. Luckily, HubSpot has several features to make your database clean and easy to use. Below are recommendations on cleaning up your HubSpot CRM.

❑ Delete bounced contacts

① *High bounce rates can hurt the deliverability of your marketing emails. HubSpot automatically suppresses these contacts, but deleting them will decrease platform costs.*

1. *Menu: Marketing > Email > Email bounce tools (left panel) > Create list of hard bounced contacts or Add hard bounced contacts to existing list*
2. *Menu: Contacts > List > Find list of hard bounced contacts > Delete all contacts*

❑ Delete unsubscribed contacts

① *HubSpot automatically suppresses unsubscribed contacts, but deleting them will keep you from paying for unnecessary contacts.*

1. *Menu: Contacts > More filters > Select 'Unsubscribed from all email' is True > Delete Contacts*

❑ Delete uninterested contacts

① *HubSpot defines unengaged contacts as:*

1. *Never opened a marketing email from you and hasn't opened the last 11 emails you've sent*
 2. *Previously opened a marketing email from you but haven't opened the last 16 emails you've sent.*
1. *Contacts > Lists > Create a list > Choose an active list > Add filters to pull how your company defines a unengaged contact (Or use HubSpot's definition above) > Save list to pull all contacts that meet criteria > Delete contacts*

❑ Merge duplicate contacts

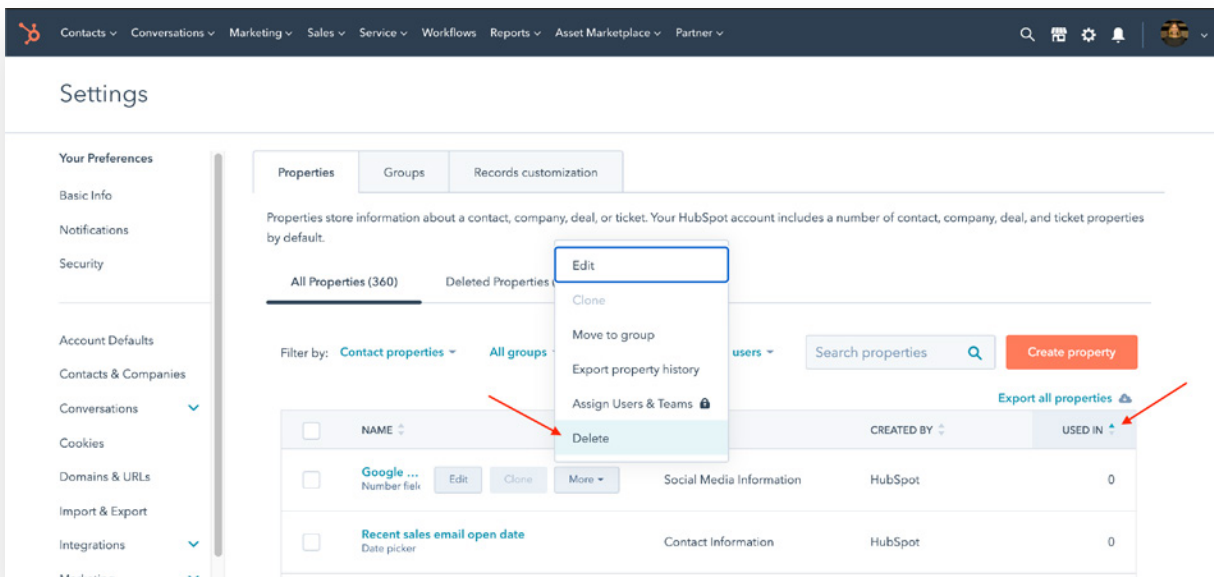
① This can be caused by an email misspelling or a person having more than one email. This keeps one person's online activity organized and in one place.

1. Menu: **Contacts > Contacts > Actions > Manage duplicates > See list of duplicate contacts > If contact is a duplicate, click review and merge contacts > If contact is not a duplicate, click dismiss**

❑ Delete unused contact properties

① This will reduce confusion when organizing your database. Identify properties not being used by organizing the list of properties by the "Used In" column. If they're used in '0' places, consider deleting it.

1. Menu: **Setting  > Properties > Select contact properties to delete**




The screenshot shows the HubSpot Settings page for Properties. The left sidebar lists various settings categories. The main content area is titled 'Properties' and includes a 'Deleted Properties' section. A table lists properties with columns for 'NAME', 'CREATED BY', and 'USED IN'. A context menu is open over the 'Delete' option for the 'Google ...' property. Red arrows point to the 'Delete' option in the menu and the 'USED IN' column header.

NAME	CREATED BY	USED IN
Google ... Number field	HubSpot	0
Recent sales email open date Date picker	HubSpot	0

❑ Consolidate duplicate data and contact properties

① *Duplicate data happens when users accidentally create a new contact property that already exists or a user uploads an email list that creates new properties.*

1. To identify duplicate contact properties

Menu: Settings  > Properties > Sift through the list or use the search bar (e.g. Searching location keywords like “state” or “city” can uncover duplicate address properties)

2. To consolidate or merge data, you have three methods:

- a. *Use HubSpot workflows to attribute old contact property values to the new contact property. Then delete the old contact property.*
- b. *Export the data to manually consolidate it in a spreadsheet view and reimport it back into HubSpot. Then delete the unused contact property.*
- c. [Contact Campaign Creators](#) to help clean up your database.

❑ Assign correct lifecycle stages

① *Organizing your contacts by lifecycle stages helps you determine where a specific contact is in your buying process. It also ensures leads are handed off from marketing to sales seamlessly.*

1. To find contacts without lifecycle stage values

Menu: Contacts > Contacts > More filters > Select “Lifecycle stage is unknown”

2. To update a contact’s lifecycle stage

Select contact record > View all properties > Search lifecycle stage property > Update property with correct lifecycle stage

❑ Standardize contact property value formats

This will improve the effectiveness of your personalized marketing efforts that incorporate personalization tokens. This also ensures manual data entry is uniform moving forward.

1. Consider the following properties:

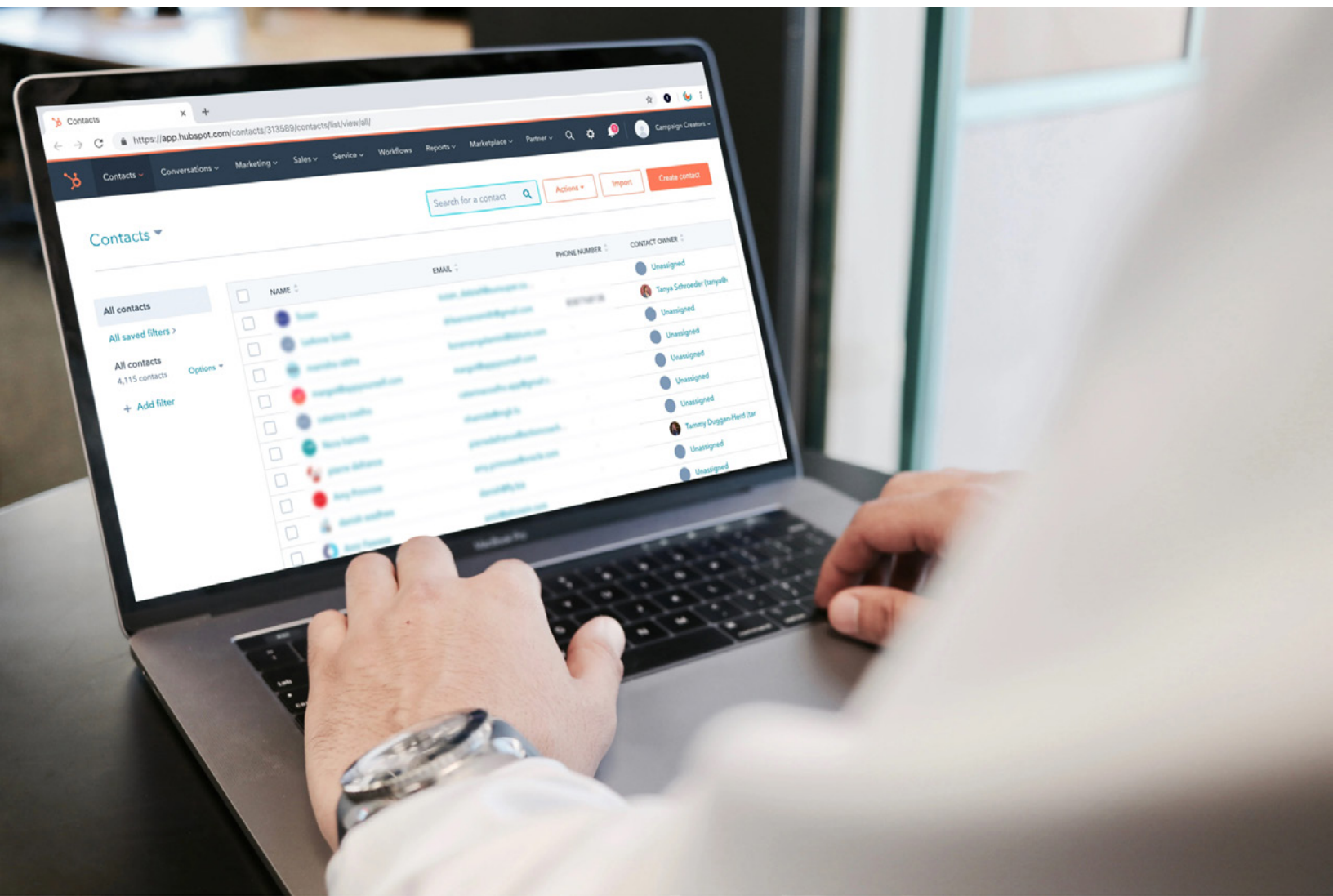
- ➔ First and last names with proper case
- ➔ Phone numbers
- ➔ Mailing addresses
- ➔ Proper "name@domain.com" email form
- ➔ Standard job titles
- ➔ Industries

Tips & Best Practices

- ❑ Create an active list that pulls contacts that have unsubscribed from all of your emails or hard bounced from your emails. This makes it easy to delete unnecessary contacts from your database every month. Learn more about creating a list [here](#).
- ❑ Create a Permission Pass Campaign. This type of campaign helps if you've lost track of the opt-in status of your contacts or never confirmed permission to email them. Learn how to create this in HubSpot [here](#).
- ❑ Create a Re-engagement Email Campaign that automatically enrolls unengaged contacts. This can serve as your final attempt to engage a contact before completely deleting them from your database. See re-engagement examples from HubSpot [here](#).
- ❑ For every form created, add a hidden lifecycle stage property that has a preselected value for that field. For example, when creating a form to subscribe to your email newsletter, add a hidden lifecycle stage and preselect "Subscriber".
- ❑ When creating a new form, use the property label feature instead of creating a new property. For example, if you want a contact to enter their work email, you can use the main "Email" contact property and change the label to "Work Email".

The screenshot displays the HubSpot form editor interface. At the top, there is a navigation bar with a back arrow, the text "Back to all forms", the page title "CC | eCommerce Marketing - eCommerce CRO Guide - Tofu", and a "Publish" button. Below this is a secondary navigation bar with tabs for "Form", "Follow-up", "Options", and "Style & preview", along with "Share" and "Actions" buttons. The main content area is titled "Edit contact property" and shows a configuration panel on the left and a form preview on the right. In the configuration panel, the "contact property name" is set to "email" and the "Field Type" is "Single-line text". The "Basic" tab is selected, and options include "Make this field required" (checked) and "Make this field hidden" (unchecked). The "Label" section is highlighted with a red box and shows the text "Work Email" with a rich text editor above it. In the form preview, the "Work Email" field is highlighted with a red box and an arrow pointing from the configuration panel. Other fields in the preview include "First Name *", "Last Name *", and a checkbox for "Receive Campaign Creators' Biweekly Newsletter". The "Lifecycle Stage" is set to "Marketing Qualified Lead" (selected) with "Subscriber" and "Lead" as other options.

- ❑ Use [Lead Scoring](#) to track your contacts' engagement and help sales identify leads they can reach out to.
- ❑ Use HubSpot Workflows to update contact property values for bulk contacts. For example, you can enroll anyone who has subscribed to your newsletter, and add an action that sets their lifecycle stage property value to subscriber.
- ❑ Create a spreadsheet that outlines standard data formats. This can be sent to your sales team or anyone who manually inputs data into your HubSpot CRM.
- ❑ Use [Marketing Contacts](#) to only pay for contacts in your database that you choose to market to. This allows you free storage of up to one million non-marketing contacts.



ORGANIZING YOUR DIGITAL MARKETING ASSETS

If you spend too much time looking for marketing assets, or struggle to prove the ROI of certain campaigns—you're likely due for a clean up. Use the items below to organize and improve how you create new digital marketing assets.

Email Marketing

Menu: [Marketing](#) → [Emails](#)

Use standard naming conventions for emails

① *This helps your team organize and find specific emails in your system.*

Create folders for emails

① *Organize your emails by year, product line, or other categories.*

Remove unused emails

① *Users often forget to remove test emails or HubSpot practicum emails. Delete or archive these old emails.*

Analyze your email deliverability, open rates, and click-through rates

① *Use the Analyze tab to find your hard bounce rates, unsubscribe rate, spam reports, open rates, and click-through rates. See how these results compare to your historical data and [industry standards](#).*

Improve your email deliverability, open rates, and click-through rates

① *Use the Health tab to see details and recommendations of how to improve your deliverability, open rates, and click-through rates. Learn about tests you can run to improve your [deliverability](#), [open rates](#), and [click-through rates](#).*

The screenshot shows a help article titled "Current click-through rate" with a "Back" link. It features a progress indicator showing "Work to be done" and "Your click-through rate was 5.91%". A note states "A good click-through rate is 9% or higher." The article is divided into three columns: "What is it?" (definition of CTR), "Why is it important?" (importance of CTR), and "Recommendations" (tips for improving CTR). The recommendations include: "Create clear CTAs" (having at least one clear CTA button), "Look at your open rate" (low open rates can contribute to a low CTR), "Personalize your emails" (using personalization tokens), and "Targeting" (segmenting lists for more targeted campaigns).

[Back](#)

Current click-through rate

Work to be done Your click-through rate was **5.91%**

A good click-through rate is 9% or higher.

What is it?

Click-through rate is the percentage of people who clicked a link in your email out of those who opened your email.

Why is it important?

Emails are a powerful way to market to your contacts when they're engaging with them. If they're not opening your emails and clicking on links to get to your website, then you may not be getting the most from your emails.

Recommendations

Create clear CTAs [🔗](#) :
Having at least one call-to-action (CTA) button that's easy for contacts to see at a glance, can help increase your click-through rate.

Look at your open rate:
Low open rates can contribute to a low click-through rate. You should investigate if your open rate is contributing to a low click-through rate.

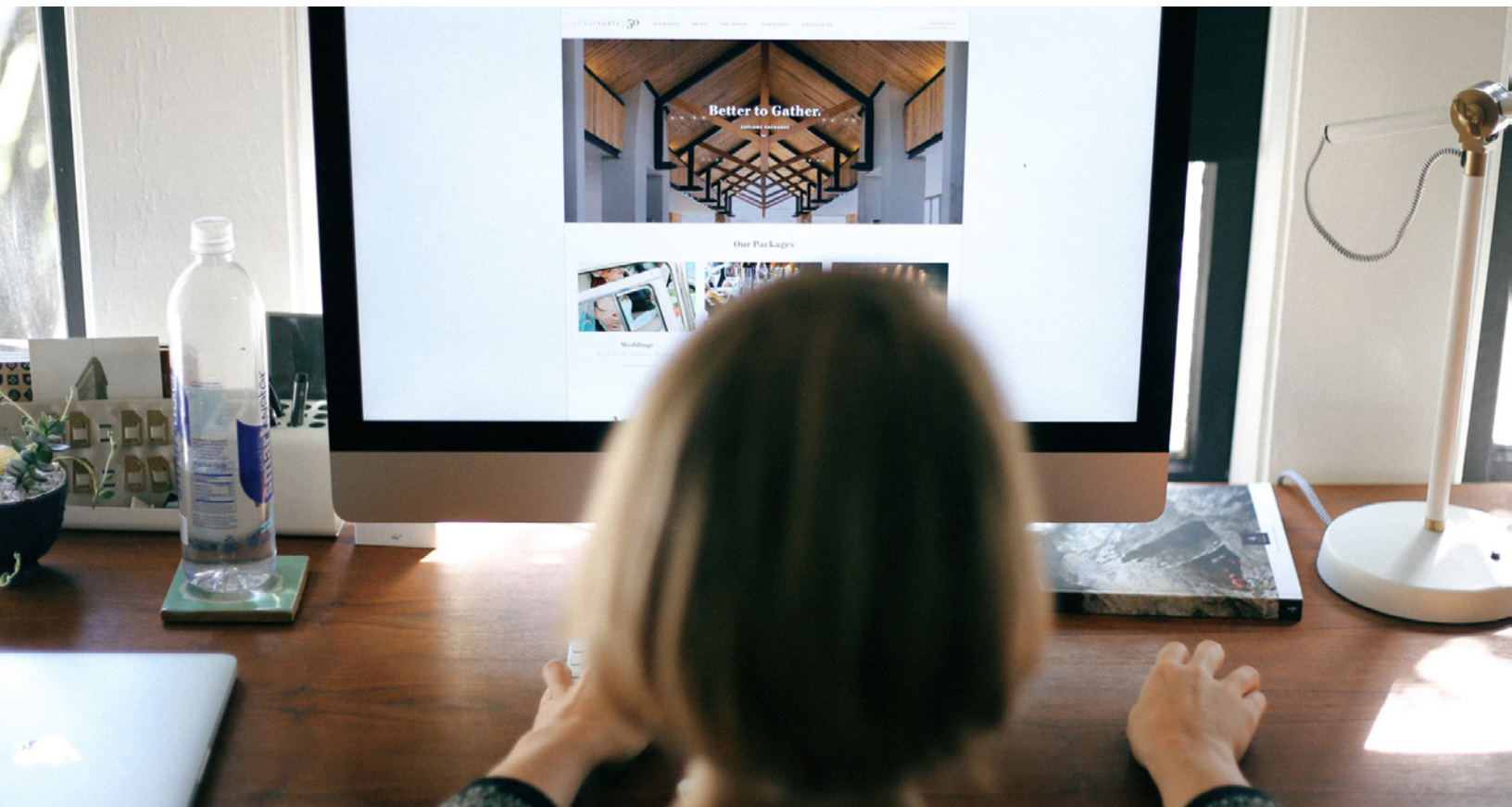
Personalize your emails:
Using personalization tokens, like the contact's name or CTAs relevant to them, can create rapport with each recipient. This can lead to better engagement and higher click-through rates.

Targeting [🔗](#) :
You can segment your lists to send smaller and more targeted campaigns that are more likely to get engagement.

Website

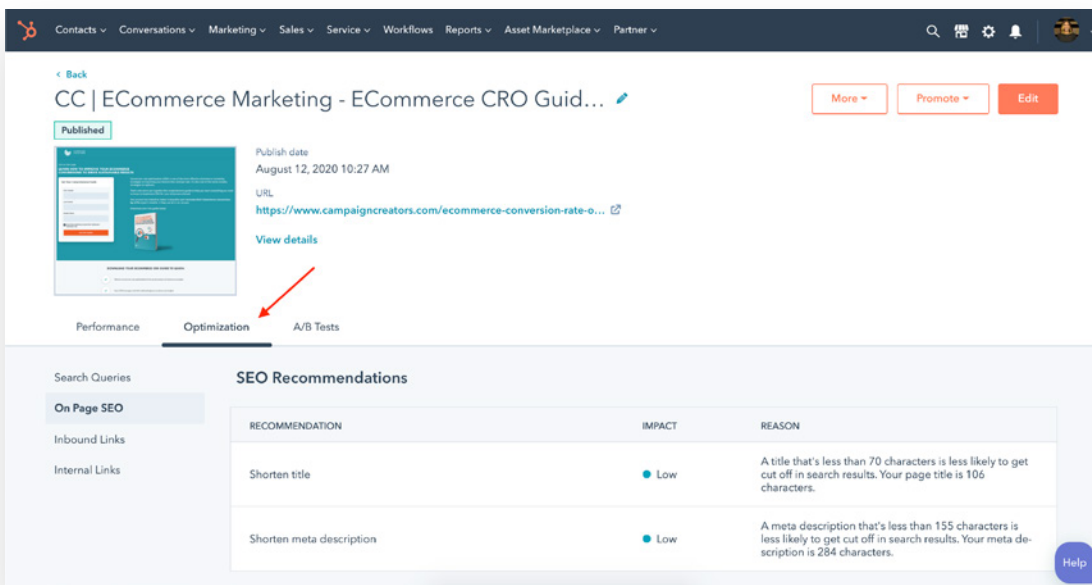
Menu: [Marketing](#) → [Website](#) → [Website Pages](#)

- ❑ **Use standard naming conventions for website pages**
 - ① *This will help your team easily find pages and attribute results to certain pages.*
- ❑ **Remove unused website pages**
 - ① *Delete or archive test pages or old page drafts to keep your system organized.*
- ❑ **Choose a winner for old A/B tests**
 - ① *Optimize your page's performance by choosing to show the page that yielded the best results. To choose a winner: Select the page > Test results > Scroll down and hover over each page > Choose a winner*
- ❑ **Use the Optimization tab to improve individual website pages**
 - ① *This identifies opportunities of how to improve each HubSpot page's SEO.*
- ❑ **Check results of recently published website pages**
 - ① *See how your page is performing in terms of page views, clicks, or other KPIs you're using to determine the success of your page. Address any discovered issues.*



Menu: [Marketing](#) → [Website](#) → [Landing Pages](#)

- ❑ **Use standard naming conventions for landing pages**
 - ① *This will help your team easily find pages and attribute results to certain pages.*
- ❑ **Create folders for landing pages**
 - ① *Organize your pages by year, product line, or other categories.*
- ❑ **Remove unused landing pages**
 - ① *Delete or archive test pages or old page drafts to keep your system organized.*
- ❑ **Choose a winner for old A/B tests**
 - ① *Optimize your page's performance by choosing to show the page that yielded the best results. To choose a winner: Select the page > Test results > Scroll down and hover over each page > Choose a winner*
- ❑ **Use the Optimization tab to improve individual landing pages**
 - ① *This identifies opportunities of how to improve each HubSpot page's SEO.*



- ❑ **Check results of recently published landing pages**
 - ① *See how your page is performing in terms of page views, conversions, or other KPIs you're using to determine the success of your page. Address any discovered issues.*
- ❑ **Attribute landing pages to correct campaigns**
 - ① *This will ensure your campaign reporting is accurate. Attribute the correct campaign in the page's settings.*

Menu: [Marketing](#) → [Website](#) → [Blog](#)

Check and respond to blog comments

① Respond to any questions and take note of interesting comments to share with your team.

Remove unused blog posts

① Delete or archive test pages or old blog drafts to keep your system organized.

Use the Optimization tab to improve individual landing pages

① This identifies opportunities of how to improve each HubSpot blog post's SEO.

Clean up your blog tags

① Combine similar tags or delete tags not being used. Learn more about this [here](#).

Check results of recently published blog posts

① See how your page is performing in terms of page views, average time on page, or other KPIs you're using to determine the success of your blog posts. To improve views, [turn on settings](#) to automate publishing new blogs to your social accounts.

Menu: [Marketing](#) → [Planning & Strategy](#) → [SEO](#)

Identify opportunities to improve areas of your website

① This lists recommendations to fix SEO issues to get more search traffic.

SEO

Recommendations Topics

[Back to domains](#)

Recommendations

Find and fix SEO issues to get more search traffic.

[www.campaigncreators.com](#)

● Recommendations up-to-date

RECOMMENDATIONS	PAGES AFFECTED	IMPACT	REASON
Confirm the correct pages are hidden from search results	20+	● High	Pages that contain a "noindex" meta tag or return a "noindex" directive in the HTTP response won't appear in search results. Review the list of pages you're blocking from being found. If you intend to block these pages from search engines, no change is necessary. View pages
Address pages with duplicate content	11	● High	Pages are duplicates of each other if at least 85% of their content is the same. Duplicate pages compete for the same search terms. This may result in less visibility for either page. Sometimes, View pages

Files & Templates

Menu: [Marketing](#) → [Files & Templates](#) → [Files](#)

Create folders for files you access often

① *This will make it easier for your team to find commonly used files. For example, create a folder with all versions of your logo.*

Rename files you use often

① *HubSpot pulls a file's name as its alt-text when used on a website page or email. For files you use often, this will save you time from always updating its image alt-text. Start with updating your company logo files.*

Add a custom thumbnail image for video files

① *Similar to choosing a thumbnail image for YouTube videos, you can choose an image that will display whenever this video is embed in your marketing, saving you time from updating this each time it's used.*

Menu: [Marketing](#) → [Files & Templates](#) → [Design Tools](#)

Create a folder for all templates for live pages

① *It's easy to end up with duplicate iterations of templates. Organizing all live templates into a designated folder will make it easier to find and update later.*

Delete old and unused templates

① *Before deleting a template, make sure it's not being used. Select a template > Actions > Show dependents > This will list any pages using that template.*



Call-To-Action (CTA) Buttons & Forms

Menu: [Marketing](#) → [Lead Capture](#) → [CTAs](#)

- Update CTAs with standard naming convention**
 - ① This will help your team easily find and organize CTAs.
- Attribute CTAs to correct campaign**
 - ① This ensures your campaign reporting is accurate.
- Consolidate multiple CTAs with the same offer and design**
 - ① Even if they're used on different pages, you can pull results of that CTA's performance on each page. This will keep CTAs organized and easy to find in your portal.
- Delete unused CTAs**
 - ① Filter the list of your CTAs to show the date range of "All time". Delete CTAs that have 0 views, 0 clicks, and 0 locations.

The screenshot shows a dashboard titled "Calls-to-action" with a navigation bar at the top containing various menu items like "Contacts", "Conversations", "Marketing", "Sales", "Service", "Workflows", "Reports", "Asset Marketplace", and "Partner". A search bar and a "Create CTA" button are also visible. Below the header, there are filters for "Date Range: All time", "Campaign: All campaigns", and "Type: All". An "Export Data" button and a "Search CTAs" input field are also present. The main content is a table with the following data:

PREVIEW	NAME	VIEWS	CLICK RATE	CLICKS	LOCATIONS	LAST MODIFIED
<input type="checkbox"/>	Join March 2020 Webinar - Email CTA Simple	0	0%	0	0	Mar 19, 2020
<input type="checkbox"/>	Branding Infographic - MOFU Confirm Simple	0	0%	0	0	Jul 22, 2016
<input type="checkbox"/>	New Call-to-action Simple	0	0%	0	0	Jul 11, 2019 Updated from template

Menu: [Marketing](#) → [Lead Capture](#) → [Forms](#)

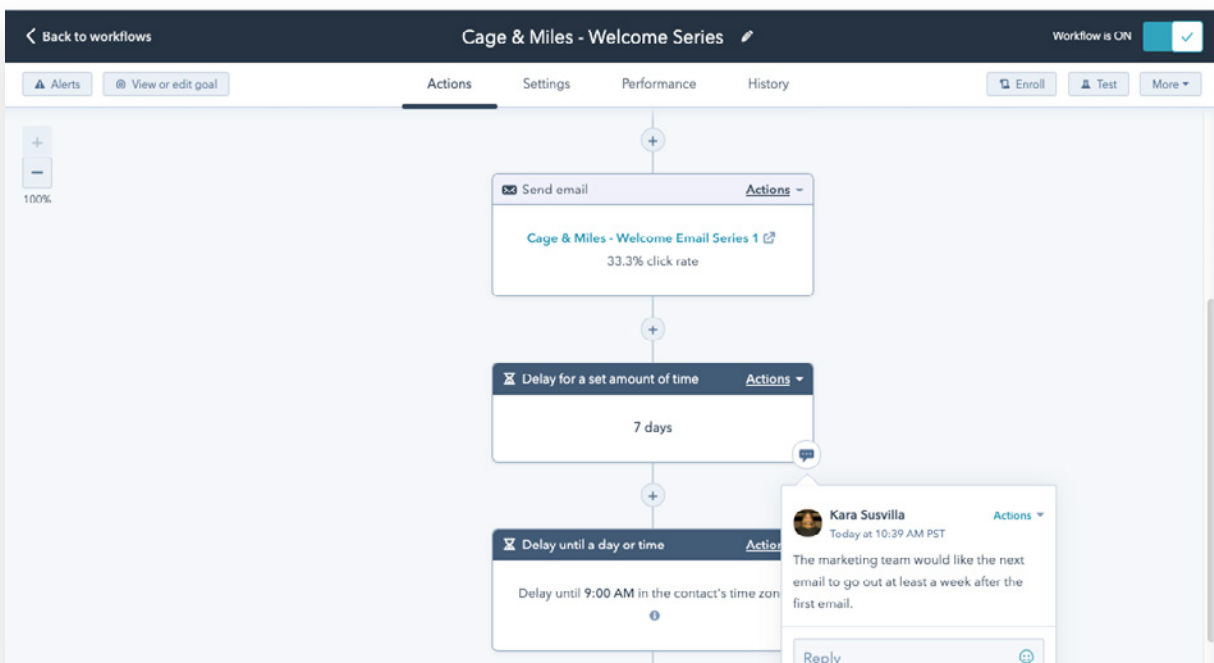
- ❑ **Update forms with standard naming convention**
 - ① *This will help your team easily find and organize forms.*
- ❑ **Create folders for forms and pop-ups for different campaigns**
 - ① *If you have a a lot of forms, this will make it easier to find and organize your forms in your portal.*
- ❑ **Consolidate multiple forms with the same fields**
 - ① *Even if they're used on different pages, you can pull results of that form's performance on each page. This will keep forms organized and easy to find in your portal.*
- ❑ **Delete unused forms**
 - ① *Filter the list of your forms to show analytics for "All time". Delete forms that have 0 views, 0 submissions, and does not appear on a HubSpot page.*
- ❑ **Add a hidden lifecycle stage field to forms**
 - ① *This ensures new contacts that enter your database through the form automatically have a lifecycle stage. Pop-ups have a drop down to select this. For forms, add this as a hidden field.*



Workflows

Menu: [Workflows](#)

- Update workflows with standard naming convention**
 - ① *This will help your team easily find and organize workflows.*
- Create folders for workflows used for different campaigns**
 - ① *If you have a a lot of workflows, this will make it easier to find and organize your workflows.*
- Attribute workflows to correct campaign**
 - ① *This ensures your campaign reporting is accurate.*
- Turn off old workflows**
 - ① *Make sure you're not accidentally sending old emails that shouldn't be going out. Turn off old workflows used once to clean up data.*
- Delete unused workflows**
 - ① *Use the "Unused workflows" tab to review and clean up your list of workflows.*
- Add comments to a workflow used by multiple team members**
 - ① *This allows you to give context to an automated process and collaborate with your team.*



NEED EXTRA HUBSPOT SUPPORT?

Whether you need a custom HubSpot solution or don't have the time to manage your HubSpot activities, we can help.



As a HubSpot Diamond Solutions Partner with 10+ years of platform experience and recently named one of the 17 HubSpot Advanced CMS Implementation Partners worldwide—we have expertise to support any of your HubSpot needs.

Book a free 30-minute strategy session so we can help you:

- Evaluate your current online strategy
- Identify your biggest HubSpot & digital gaps
- Determine the best solution for you

[Talk to a HubSpot Expert](#)

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