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HubSpot Checklist

TOOLS THAT YOU SHOULD BE USING

HubSpot is a powerful platform with a plethora of tools to streamline and simplify your workflows. There may be many tools you're not even aware of yet that'll help make your life easier.

This checklist will familiarize you with tools and features within your HubSpot portal and how to leverage them to get you on the way to increasing your conversions — and, ultimately, increasing your revenue.

Personalize Your Dashboard

- [ ] Customize the way you see your website, social media, and email marketing performance on your dashboard.

PRO TIP:

Don't forget to exclude your team's IP addresses in HubSpot settings for more accurate for more accurate analytics.

Page Performance Reports

- [ ] View the results of seven different search engine optimization (SEO) categories in the Marketing Hub to get a feel for how your website pages are performing.

Social Publishing & Monitoring

- [ ] Connect your social media accounts. Use HubSpot's intuitive scheduler to plan your social media strategy and schedule your posts.

Personas

- [ ] Leverage HubSpot's persona generator and enter your persona details into your contact properties to help you segment your contacts and deliver the right message, to the right people, at the right time.

Contact Lists

- [ ] Create segmented lists based on personas, lifecycle stages, or other criteria. This allows you to deliver the most relevant information and track their engagement.

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Forms

☐ Use forms to gather information that is exactly relevant to your sales team so they can spend less time inputting data. To take it a step further, opt for progressive forms so you can gather additional information each time a contact fills out a form.

On–Page SEO

☐ Evaluate your content SEO with HubSpot's on-page (and on-blog) optimization toolbar.

Reports

☐ Filter your data the way that works best for you and your team. Save it as a report and schedule it to email your team with updated data whenever you want.

Email

☐ Don't just send emails sporadically. You need to strategize, design, and analyze your email efforts with HubSpot's built-in email optimization and reports tools

Calls–to–Action

☐ Design and monitor your CTA buttons and images based on page performance, conversions, views, and more.

Smart Content

☐ Use smart content to give every visitor a unique experience with your website. This will help you nurture them seamlessly down your lead funnel.

For Professional and Enterprise accounts only

Social Inbox Streams

☐ Utilize inbox streams to identify engaging content, respond to conversations, gather insights about new followers, and monitor social stream posts — all in one place.

Lead Scoring

☐ Assign positive and negative points to HubSpot-tracked actions to score your leads as they navigate your content.

For Professional and Enterprise accounts only

Campaigns

☐ Track your marketing performance by topic — including keywords, emails, blogs, website and landing pages, CTAs, and social media.

Workflows

☐ Automate your sales and marketing processes so your contacts' interactions with your content will trigger automatic email responses.

For Professional and Enterprise accounts only

Ads

☐ Create and track ads in HubSpot to easily manage new contacts into automated smart lists. This helps to simplify retargeting your leads for better organization and more accurate messaging.

Sequences

☐ Create, share, and schedule personalized email templates with your team for a more standardized sales process without losing their personal touch.

Available in Sales Hub Pro

Meetings

☐ Allow your clients, prospects, and website visitors to book time with you directly. This allows for a more transparent and responsive sales process.

Available in Sales Hub Free

Chatflows

☐ Talk to your prospects through your website with this interactive messaging tool. You can create a chatbot, use live chat, or a combo of both. For Service Hub Professional or Enterprise accounts, more sophisticated chatbots are available.

CRM

☐ Manage your sales pipeline and marketing contacts with lifecycle stages, lead statuses, and deal tracking as your contacts convert and become clients.

Available in Sales Hub Free

Want a little more than a self-guided checklist to help you master HubSpot?

Get in touch with our team and we'll run a free, no-strings-attached assessment of your HubSpot portal. We'll show you what you can currently improve on and how to utilize the tools that will work best for your business.

Get My Free HubSpot Assessment

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