



Your decision to purchase HubSpot was probably driven by knowing how this powerful software could scale and improve your operational efficiencies. And now, you're wondering if there are growth opportunities you hadn't even thought of or maybe hidden mistakes you might have missed.

Even the best marketers or sales people could do with a 3rd party perspective of the account. Being knee-deep in many HubSpot portals every day, having worked with B2B and B2C businesses and developing out-of-the-box solutions to solve all sorts of challenges, I am keen to help you!

If you ever find yourself asking these questions, the HubSpot Deep Dive Audit is a good next step.

- Am I making the most out of HubSpot?
- Is HubSpot going to scale with my business?
- Is my data set up properly?
- Is HubSpot the right software for my team?
- Are there any untapped opportunities?
- Are there any mistakes I'm unaware of?
- Am I maximising the HubSpot apps?
- I'm unable to build the right reports, what am I doing wrong?
- I still don't have the visibility I need from my account, I'm not sure if this is the setup is right

As part of the HubSpot Audit, I'll look through every nook and cranny of your account and provide you with a written document containing practical recommendations, mistakes to be fixed and best practices to follow and why. The audit is very much tailored to your business needs and challenges.

What's Involved?

1. 15 minute exploratory call to understand your business goals and challenges
2. HubSpot deep dive audit where we dig through every corner of your portal
3. Provide you with a recommendations roadmap
4. 30 minute review call to run through the audit

Who is This For?

The HubSpot Audit is perfect for any current HubSpot users of any level looking to get more from their HubSpot investment - be it for inbound marketing, sales enablement, sales operations or CRM management.

How many pages will the audit be?

Good question - as many pages as your account requires. This will depend on the complexity of your HubSpot goals, business needs and account level. The quality of and insights from the audit are more important than the number of pages!

Why do I look at every corner of your portal?

Unlike a lot of the HubSpot audits out there which require you to pick your top areas that you'd like the audit to be focused on, I believe that the siloed approach is wrong and an audit needs to be holistic and complete.

Every aspect of your HubSpot portal is connected to each other in some way. One slip up or incorrect setup could have knock-on effects on other aspects of your business - especially your data!

Will I review your 3rd party tools?

If you are using 3rd party tools like Zapier, PieSync etc which directly impact your business data, operations and automations in HubSpot, then yes I will include that as part of your custom HubSpot audit.

How to get started?

Once you've selected the level of HubSpot audit (please reach out if you're not sure which to pick) and payment has been made, please share full access to your portal with me and book your connect call. From the connect call, I can give you a date of when you can expect the audit to be completed.