



HubDo Monthly Health Check Maintenance

The monthly health check of your HubSpot portal ensures that the vital requirements, data and settings, within the active portal are connected and functioning correctly.

Summary

1. Domain Manager Check - Each month we ensure that the correct domains and subdomains are properly configured and connected to the portal.
2. Global Modules Check (Email, Website Pages, and Landing Pages)
3. Form Testing - Ensure that all forms are working well and have an inline thank you message or redirecting to a thank you page (this will depend on the number of HubSpot forms)

Product Description

General Definition

A regular health check of your Hubspot Marketing CRM is important so that you can ensure that all components are working properly. This also avoids any breakdown within the website that can cause disruption both to your business and user experience.

HubDo Product Definition

HubDo is a certified Hubspot service provider that can help you and your client maintain a worry-free utilization of your Hubspot Marketing CRM. This service will ensure all essential components and website connections are working without any issues. We will provide immediate recommendations and action items as solution when problem arise in your Hubspot account during this monthly health-check.



Product Deliverable

1. Domain Manager Check -- Ensure that domains and subdomains are properly configured and connected to the portal
2. Global Modules Check (Email, Website Pages, and Landing Pages)
3. Form Testing -- Ensure that all forms are working well and have an inline thank you message or redirecting to a thank you page (this will depend on the number of HubSpot forms)
4. Hubspot Support - Guide you and the client on how to resolve issues that you encounter in your account



HubDo Process

Involved team members are Inbound Project Manager, MarTech, Consultant and the client.

Job Onboarding

- A. Consultant/client to fill out job order request for the Hubspot Monthly Health Check
- B. HubDo Controller to confirm the job and prepare the invoicing
- C. HubDo Inbound Project Manager to send onboarding messages and process briefing to the consultant
- D. Consultant/client to accomplish the provision of necessary access to HubDo especially Hubspot Portal and data tracking tools
- E. HubDo team to confirm the information provided and start the job

Hubspot Health Check

- F. Domain Manager Check - Ensure that domains and subdomains are properly configured and connected to the portal.
- G. Global Modules Check - Ensure that global modules for Email, Website Pages, and Landing Pages are properly set and configured.
- H. Form Testing -- Ensure that all forms are working well and have an inline thank you message or redirecting to a thank you page (this will depend on the number of HubSpot forms)
- I. Send notes to consultants if there are issues found during the audit.