Auditing Your Marketing Hub Account

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Complete the section "How to Audit Your Marketing Hub Account."
Go through each step in your own account and fill out the corresponding columns in the worksheet. You'll find additional resources below to help you complete each step.

1 | ACCOUNT & BILLING

Question	Answer	Needs follow-up action?
What are your subscription levels?		
What is your current contact tier?		
Who is listed as the primary contact? Decision maker?		
Does your primary contact or decision maker need to be updated?		

RESOURCES

- **Marketing Hub Pricing Page**

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2 | WEBSITE HOSTING

Question	Answer	Needs follow-up action?
Where is your website hosted?		
Where are your landing pages hosted?		
Where is your blog hosted?		
Is your email sending domain connected?		
Is the tracking code on your externally hosted pages?		

RESOURCES

- **Connect your domain to HubSpot**
- **Install and use the HubSpot WordPress plugin**
- **Connect your email sending domain**
- **Troubleshoot the HubSpot tracking code**
- **Install the HubSpot tracking code**

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3 | INTEGRATIONS

Question	Answer	Needs follow-up action?
What apps are currently integrated with HubSpot?		
What apps in your tech stack are not integrated with HubSpot? Should they be?		

RESOURCES

- HubSpot App Marketplace

4 | MARKETING EMAIL

Question	Answer	Needs follow-up action?
Is your account using HubSpot for marketing emails? What types and how often?		
How are your emails performing in terms of open rates, click rates, and bounce rates?		

RESOURCES

- Email Open Rates By Industry

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5 | SOCIAL

Question	Answer	Needs follow-up action?
Which social accounts are connected to HubSpot?		
Which social platforms do you use that are not connected to HubSpot?		
Are you publishing frequently? What kind of content are you publishing?		
Are any networks performing better than others?		

RESOURCES

- **Connect your social media accounts to HubSpot**
- **Analyze social reports**

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6 | ADS

Question	Answer	Needs follow-up action?
Which of your ad networks are connected to HubSpot?		
Which ad networks do you use that are not connected to HubSpot? Why?		

RESOURCES

- **Connect your Facebook ad account to HubSpot**
- **Connect your Google Ads account to HubSpot**
- **Connect your LinkedIn Ads account to HubSpot**

7 | FORMS

Question	Answer	Needs follow-up action?
Which form has the highest number of submissions?		

RESOURCES

- **Analyze form submissions data**

8 | WORKFLOWS

Question	Answer	Needs follow-up action?
What processes are currently being automated by the workflows tool?		
What processes are not currently automated that could be?		

RESOURCES

- **Understanding Workflows in HubSpot**

9 | REPORTING

Question	Answer	Needs follow-up action?
What key metrics stand out?		
What reports would you like to see that aren't currently on a dashboard or in the report library?		

RESOURCES

- **Create and manage your dashboards**

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NEXT STEPS

What are your KPI's?

What are your top 3 priorities/goals for the short term? Long term?

SHORT TERM:

Goal #1 |

Goal #2 |

Goal #3 |

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NEXT STEPS

LONG TERM:

Goal #1 |

Goal #2 |

Goal #3 |