

The Hubspot Health

Checklist

The 20 checklist items

A graphic showing a network of glowing blue nodes and lines on a dark background. A central hexagonal node is highlighted with a blue border and contains the word "AUTOMATION" in white capital letters. Other nodes in the background show various icons like a person, a gear, and a signal tower.

AUTOMATION

The HubSpot Health Checklist

● CRM & Contact Setup

- ☐ All contacts have a lifecycle stage assigned (Lead, MQL, SQL, Customer, etc.)
- ☐ Contact properties are mapped to the actual sales process not just HubSpot defaults
- ☐ Duplicate contacts are merged and the database is clean
- ☐ All form submissions are automatically creating or updating contact records in the CRM

● Lead Capture

- ☐ Every page on the website with significant traffic has a clear lead capture mechanism (form, CTA, or live chat)
- ☐ At least one lead magnet exists and is connected to a HubSpot form
- ☐ Forms have the minimum number of fields needed
- ☐ Thank you pages exist for every form and include a clear next step

● Email & Nurture

- ☐ A welcome or lead confirmation email is sent automatically within 5 minutes of every form submission
- ☐ At least one nurture sequence exists for new leads
- ☐ All marketing emails are sent from a named person, not a generic company address
- ☐ Email deliverability is configured and set up correctly

● Automation & Workflows

- ☐ A lead assignment workflow exists in which new leads are automatically routed to the right owner
- ☐ A deal stage automation workflow exists: deal stages update based on contact activity, not manual input
- ☐ A re-engagement workflow exists for contacts who have gone cold (90+ days no activity)
- ☐ Lead scoring is configured — contacts are scored based on demographic fit and behavioural signals

● Reporting & Tracking

- ☐ HubSpot tracking code is installed on every page of your website
- ☐ A custom reporting dashboard exists with at least 5 key metrics (leads by source, pipeline value, email open rate, landing page CVR, deal velocity)
- ☐ UTM parameters are being used for all paid and social traffic so source attribution is accurate
- ☐ Monthly reporting is automated with a scheduled report that is sent to key stakeholders without manual effort

