

HubSpot Audit (Client Example)

Sections:

1. CRM (Contacts, Companies, Lists)
2. Planning Strategy (Campaigns & Projects)
3. Email
4. Workflows
5. Social
6. Landing and Website Pages
7. Blogging
8. Files
9. Lead Capture (CTAs, Forms)
10. Sales
11. Ads
12. Dashboards/Reports

1. CRM

Overview: The CRM is the customer relationship model. Its the backbone of your HubSpot account. It gives you access to each contact's information and see every interaction you've already had. You use CRM data to create hyper-targeted campaigns that close more deals.

CRM data includes **company information/properties** such as (office address, company website, social media links, etc.) and **contact information/properties such as** (contact name/email, workflows associated, webpage activity, lists associated, products purchased associated deals, HubSpot score, etc.)

Lists are a part of the CRM data. Lists can be segmented in a variety of ways important so you can understand your audiences better. For example, lists can be segmented into website visits, recent deals, forms filled in, workflows completed, lead scoring, etc. **Lists can be static**, meaning capturing data in a one time use, **or lists can be active** and constantly be updated automatically by HubSpot.

You can create your own customized properties in the system and/or use HubSpot's default properties.

Best Practices (videos and links):

HubSpot's default contact properties <https://knowledge.HubSpot.com/contacts/hub-spots-default-contact-properties>

Contacts lesson - <https://academy.HubSpot.com/contact-management>

Best practices lists' management - <https://knowledge.HubSpot.com/email/how-to-clean-up-your-contact-lists-to-improve-deliverability#:~:text=Best%20practices%20for%20adding%20and,as%20an%20opt%20Dout%20list.>

Good examples vs needs more development:

Good - Good to see that some contact owners have their own lists, example - <https://app.HubSpot.com/contacts/2920140/lists/767>

< Back to lists

Pete [redacted] Contact Owner UC Email Prospect Lis [redacted]

Count: 54 contacts

	NAME	EMAIL	PHONE NUMBER	CONTACT OWNER
<input type="checkbox"/>	Tue [redacted]	[redacted].net	(75 [redacted])	Pete [redacted]
<input type="checkbox"/>	Ste [redacted]	[redacted]gent.com	(75 [redacted])	Pete [redacted]
<input type="checkbox"/>	Jus [redacted]	[redacted].com	(85 [redacted])	Pete [redacted]
<input type="checkbox"/>	Bra [redacted]	[redacted]@mymic...	(75 [redacted])	Pete [redacted]
<input type="checkbox"/>	RV Ro [redacted]	[redacted]x-group.com	(75 [redacted])	Pete [redacted]
<input type="checkbox"/>	RB Ro [redacted]	[redacted].com	(88 [redacted])	Pete [redacted]
<input type="checkbox"/>	Da [redacted]	[redacted]-inc.net	(75 [redacted])	Pete [redacted]
<input type="checkbox"/>	ME Ma [redacted]	[redacted].com	(75 [redacted])	Pete [redacted]
<input type="checkbox"/>	MO Mi [redacted]	[redacted]ward.com	(75 [redacted])	Pete [redacted]

Need more dev - Keep your library clean and free from lists that are no longer useful to you and your team. There are 105 lists that haven't been updated in the last two months

Lists

Contact lists library (146) Company lists library (0) **Unused Contact lists (105)**

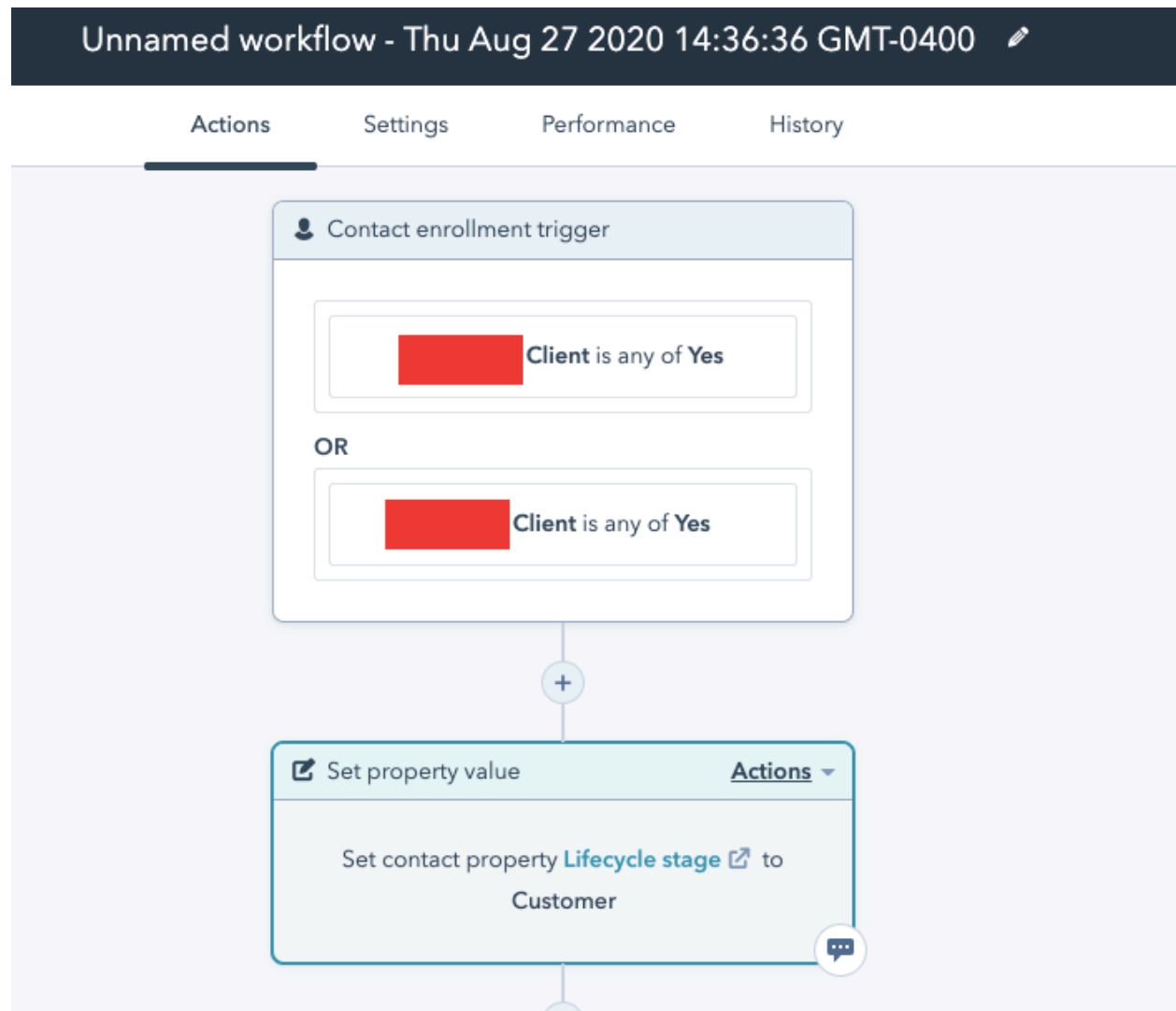
Keep your library clean of lists that are no longer useful to you and your team.

The lists shown here haven't been updated in the last two months. And are also not being used in any tools like workflows or emails.

<input type="checkbox"/>	NAME	TYPE	CREATE DATE	CREATOR	SIZE	USED IN
<input type="checkbox"/>	[redacted] June 15 2017.csv	Static	Jun 15, 2017 5:20 PM	Deactivated User	73	0
<input type="checkbox"/>	[redacted] CFO's.csv	Static	Jun 21, 2017 4:44 PM	Deactivated User	138	0
<input type="checkbox"/>	[redacted] 2017	Static	Jun 21, 2017 5:02 PM	Deactivated User	31	0
<input type="checkbox"/>	[redacted] health CIO/CTO	Static	Jun 21, 2017 5:15 PM	Deactivated User	2	0
<input type="checkbox"/>	[redacted] Customers	Active	Jun 16, 2017 5:59 PM	Deactivated User	761	0

(<https://app.HubSpot.com/contacts/2920140/lists/cleanup>). And they are also not being used in any tools like workflows or emails.

We don't know the purpose of certain lists. For example, this one stemming from a workflow <https://app.HubSpot.com/contacts/2920140/companies/list/view/all/>




Recommendations:



We recommend that you sort all your lists in a standardized format so we can understand the some formality of each list. For example, [Purpose][Name][Date] > Events:

CIO Attendees - April 2018. Or another example, [Pete's Monthly or Quarterly or Yearly Contacts] "Pet's contacts: August/Q2/2020".

Again, some lists are dangling in the database without a purpose. For example, this one is just a test <https://app.hubspot.com/contacts/2920140/lists/719> You should also archive lists after 6 months if not used, thus using folders is helpful.

With companies, we see many don't have contact owners. To help organize the database better, you need to assign contacts to the relevant owner on the sales team. Here is the list we started, with over 1,000 contacts who are without an owner. <https://app.hubspot.com/contacts/2920140/lists/791>

Contact owner unknown 
Count: 1,172 contacts

Search  Actions  Save

NAME	EMAIL	LIFECYCLE STAGE	PHONE NUMBER	CONTACT OWNER
Diane	coastdemolition...	Opportunity	7740	Unassigned
prog	ap.com	-	-	Unassigned
A. abar	greenlandenter...	-	-	Unassigned
S. suzy	86@hotmail.com	-	-	Unassigned
hbad	gaalliance.org	-	-	Unassigned
skirk	sci-va.com	-	-	Unassigned
L. ifoste	upstate.com	-	-	Unassigned
vgoo	aheart.com	-	-	Unassigned
Greg	blusmgt.com	Opportunity	282	Unassigned
C. conn	rgesco.com	-	-	Unassigned

2. Planning Strategy

Overview: Planning strategy is a feature that enables you to create campaigns, and organize different projects. Campaigns are within "planning strategy" under the HubSpot menu. Campaigns hold different assets including call to actions (buttons), emails, workflows, landing pages, and social media posts and so forth. Projects are within "planning strategy" and are a nice feature that enables you to organize your initiatives, from your development efforts to execution.

Best Practices (videos and links):

Running a Campaign in HubSpot <https://www.HubSpot.com/running-a-campaign-in-HubSpot>

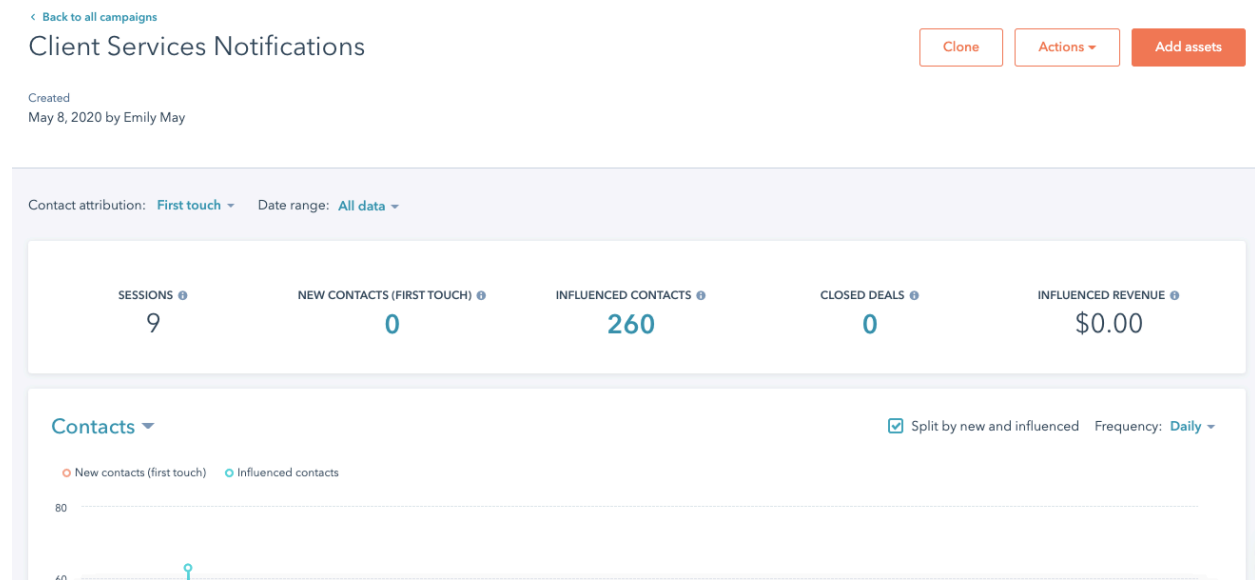
How to Organize HubSpot Campaigns for Better Reporting and Optimization
<https://blog.pipelineops.com/how-to-organize-HubSpot-campaigns-for-better-reporting-and-optimization>

UTM Tagging Best Practices for Campaigns - <https://hubspotcourse.com/lessons/utm-tagging-best-practices/>

Using Workflows in Your Sales Process <https://app.HubSpot.com/academy/2920140/lessons/589/2943>

Good examples vs needs more development:

The good - This is the most developed campaign we found, including most influenced contacts campaign is here (200+ people), 12 + emails, new traffic visitors (4) <https://app.HubSpot.com/campaigns/2920140/1998a6b4-f099-4d14-bc05-63047aaf10bb>



Demo

Clone

Actions

Created
June 30, 2017

This is a legacy campaign. It will have different metrics than campaigns created after Sept. 1, 2017.

▼ Landing pages (1)

NAME	VIEWS 	CONTACTS (FIRST TOUCH)
Demo Landing Page 	5	

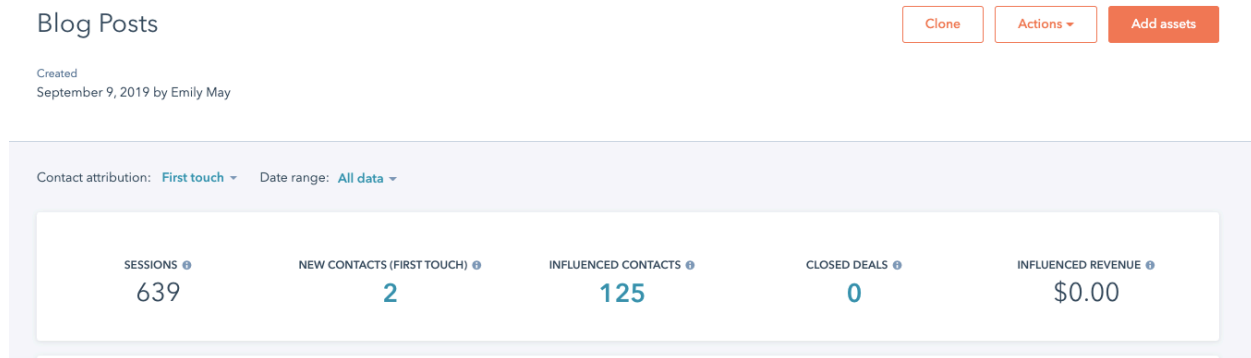
Need more development -

1. Demo campaign - <https://app.HubSpot.com/campaigns/2920140/27de5d9f-d4e8-4c3d-97f9-66a0dd89038d> Only have one landing page. We don't have social media posts, CTAs, workflows, blog posts, etc. Demos campaigns are super important for SQL reasons and opportunities.

newsletter's blogs	Jul 5, 2017 6:35 PM
newsletter blogt	Jul 5, 2017 6:35 PM

2. There are 2 campaigns that are the same name "newsletter blogs" <https://app.HubSpot.com/campaigns/2920140/170386b8-3efb-45e7-b4a3-a4fa2c28e18d> and "newsletter blog" <https://app.HubSpot.com/campaigns/2920140/618da09b->

ba05-436b-91ce-d15f4ab5d41d. Should delete one or both. They're more than 3 years old, with old metrics.



3. Blog posts <https://app.HubSpot.com/campaigns/2920140/02c6aeed-a074-4284-87a2-50147c68cb1a>- Blog posts vary. They should be sorted in separate campaigns depending on the topics. Also, they shouldn't be separated from newsletter.

4. Also, all the campaigns from 2018-2017, are they relevant anymore? Then you should consider which campaigns are important to learn from or not. If some aren't anymore, you should just delete.

5. We should have influenced revenue data in these campaigns, going forward.

6. Campaigns should follow a standardized format. For example, month-year-name. 7.20 ALL-IN VoIP Promo

Recommendations:

Campaigns encompass different assets in order to maximize performance while tracking data. Assets are various components of a campaign, including social media posts, CTAs, workflows, blog posts, ads, landing pages, website pages, and static lists. Each campaign should have a set goal. Some examples of goal-oriented campaigns include:

1. Demos or sales call campaigns: they are super important for pushing leads down the funnel to becoming opportunities or sales-qualified leads (SQL).
2. Content themed: These campaigns are nice for creating multiple blog posts surrounding a pillar piece of content, such as a report, customer case study, or eBook.
3. Event based: Events such as webinars, remote calls, or in-person events usually require a lot of ground work. Building out a campaigns surrounding it can be beneficial pre-event, during, and post-event stages. Creating awareness blog posts, social media announcements, landing pages to register, emails workflows to execute, all are a few ways to get events going.

You should also consider using influenced revenue in your campaigns, which is the total of all closed deals from the contacts associated in the campaign. Campaigns also compose influenced contacts which are contacts who are new or existing that recently engaged with one of your assets in that particular campaign. The influenced contacts metric is highly recommended to use as metric indicating the performance of the campaign.

Projects are an important tool also to organize your initiatives in the beginning of setting up HubSpot. You should finish getting started with HubSpot project - <https://app.HubSpot.com/projects/2920140/387378/task/6412118>. Other projects are already pre-made from HubSpot and can help guide you in executing different plans. See picture below.

Service General Setup Tasks

Developing a Link-Building
SEO Strategy

Developing a Link-Building
SEO Strategy

Setting Up a Lead Nurturing
Workflow

Nurture Your Leads -
Onboarding

Sales Pro Tools Set Up -
Onboarding

Setting up the HubSpot
CRM

Inbound Marketing
Essentials - Onboarding

Edit campaign goals



Enter a goal number for each metric. Goals will display alongside the metrics in your campaign.

Sessions ⓘ

New contacts ⓘ

Influenced contacts ⓘ

Closed deals ⓘ

Influenced Revenue ⓘ

Save

Cancel

3. Email

Overview: Emails are fundamental for marketing. You can create stunning email templates, automatically personalize subject lines and content for each recipient, and run A/B tests to improve open rates and click throughs. HubSpot emails can be automated and sent more than once without doing it yourself via a workflow or emails can be sent only once.

Emails can be scheduled, scheduled for different timezones, or published immediately. Email templates can be customized in the design manager. Email templates are free or cost money in the marketplace here - <https://app.HubSpot.com/marketplace/2920140/products?source=topNav>

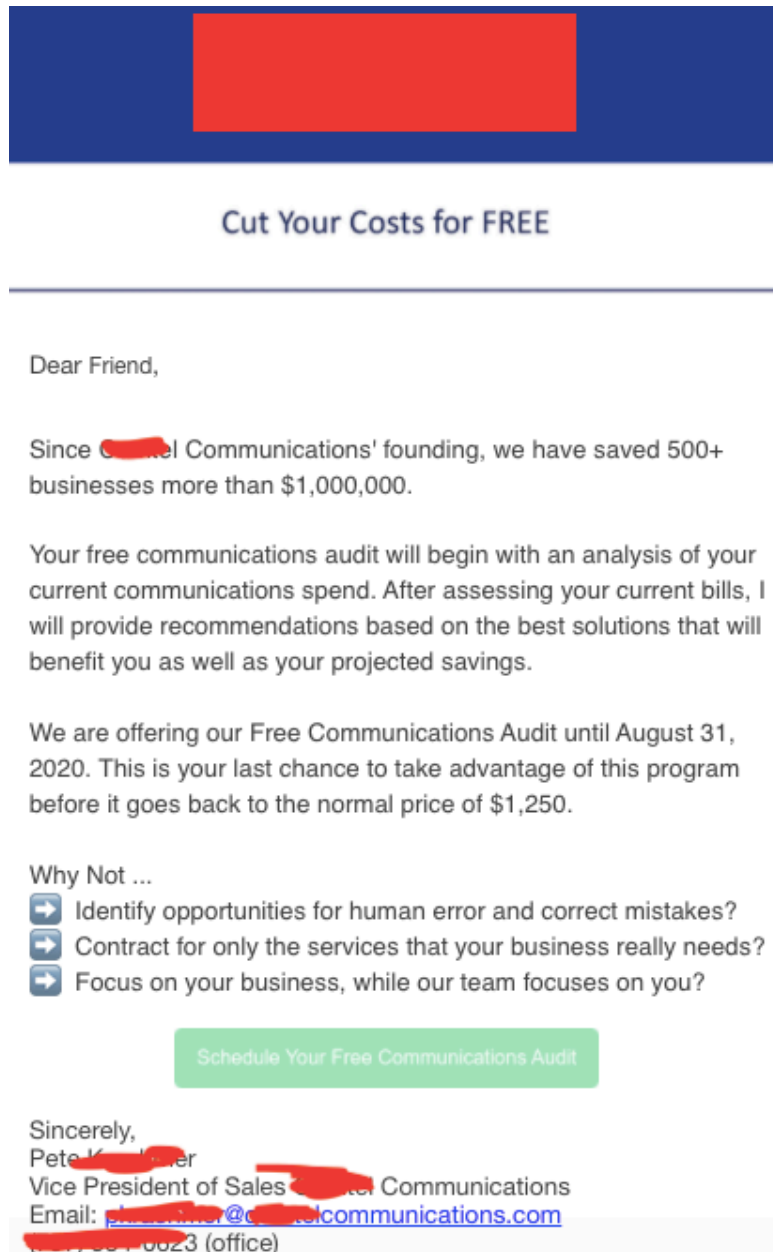
Best Practices (videos and links):

17 Email Marketing Best Practices That Actually Drive Results

<https://blog.HubSpot.com/blog/tabid/6307/bid/23965/9-email-marketing-best-practices->

[to-generate-more-leads.aspx](#)

HubSpot Email Certification - <https://app.HubSpot.com/academy/2920140/tracks/11/218/1142>



Good examples vs needs more development:

Good - Overall the open rates are excellent, average of 25%. However, we should see higher CTR, at least hit a 1%. Also, the design for some emails is pretty good. Example - <https://app.HubSpot.com/email/2920140/details/30304693687/performance> we see a brand-

ed header, a convincing copy of body, line breaks, bullets, a CTA, and contact info at the bottom.

We also noticed your overall email performance metrics from all time is pretty good!

SENT
56,498
319 Emails
-

OPEN RATE
15.77%
8,807 Opened
-

CLICK RATE
1.3%
728 Clicked
-

CLICK-THROUGH RATE
8.27%
-
-

Need more dev - We sometimes see clones of emails and not being named properly



Dear [REDACTED] Clients:

We are currently experiencing issues with the [REDACTED] Go app push certifications on iOS devices. Currently, calls pushed to iOS devices are not ringing.

Our engineers have identified and are working diligently to correct the issue.

We will provide updates as soon as available. We apologize for the inconvenience.

Thank you,

The [REDACTED] VoIP Team

<https://app.HubSpot.com/email/2920140/details/33945852375/performance>

Also would be good to see an improved Weekly notification email for blog "Client VoIP Blog", it is very basic with no CTAs.



[\[Redacted\] VoIP Gets Set to Release v41 Upgrade](#)

By Amy [Redacted] Sep 2, 2020
6:15:00 AM



As businesses are getting back into the office, we at [Redacted] continue our efforts to improve our services despite the challenging times. To ensure you are getting the most out of your phone system, our [Redacted] engineers are releasing a new update, v41!

This update includes loads of new features to improve efficiency and accessibility, and most are for no additional costs.

[Read more »](#)

Recommendations: Overall, we see that your emails are varied in different branding, format, and purpose. Different logos, and colors are used which can confuse readers in your branding and communications. For example, we see XYZ Communications as one company name, then Client as another.

We also recommend that you do monthly newsletters. We see that you do them, namely The Communicator Monthly Newsletter, but you don't publish them monthly, rather a bit sporadically. Also the name formatting isn't consistent. Some are named just "newsletter."

Additionally, we see emails that say very vague names like "offer #3." It is necessary to name emails as specific and standardized as possible, like the way we label campaigns, lists, workflows, etc. Because you have over 56,000 emails in your database, organization and standardization is key to having a well-managed library or HubSpot database.

4. Workflows

Overview: Workflows enables you to automate your marketing, sales, and service processes. It's one of the most important tools of HubSpot because you can design different marketing email campaigns and tasks, and actions, all through an automated process.

For example, internal processes that can be automated include notifying and assigning deals to your sales team based on various qualifying factors, as well as rotating leads.

Workflows are crucial for pushing content to new leads, or reworking contacts that aren't engaged anymore, or warming up to a sale. Drip campaign workflows are a good example of developing leads to becoming SQLs or converting sales/opportunities.

Best Practices (videos and links):

How to Set Up Automated Email Marketing Workflows (+ Examples) <https://blog.HubSpot.com/marketing/email-marketing-automation-examples>

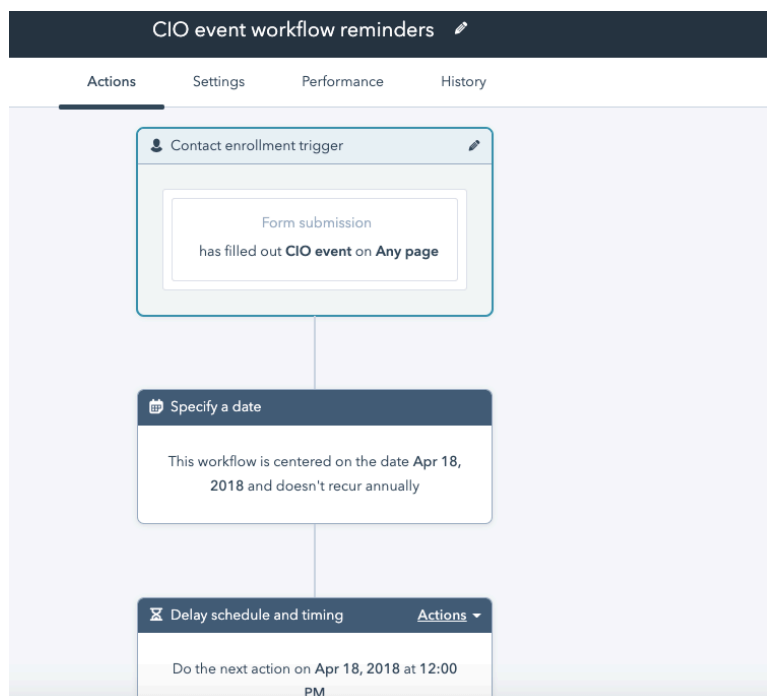
5 Biggest Workflow Mistakes (and How to Avoid Them) <https://blog.HubSpot.com/customers/5-biggest-workflow-mistakes-how-to-avoid-them>

Understanding workflows <https://academy.hubspot.com/lessons/understanding-workflows-in-hubspot>

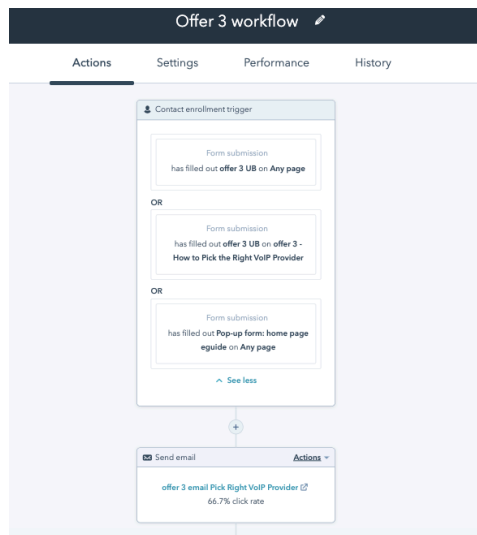
Workflow Actions <https://knowledge.hubspot.com/workflows/choose-your-workflow-actions>

Good examples vs needs more development:

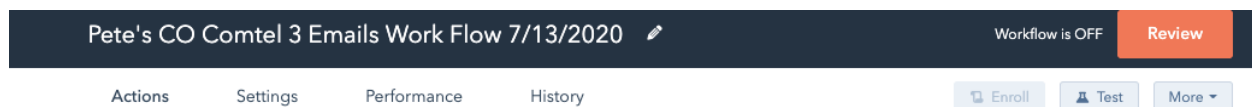
Good - This is a nice workflow surrounding an CIO event. Good method of using 3 emails <https://app.HubSpot.com/workflows/2920140/platform/flow/14693413/edit> but we need a split if/then action for those that didn't open or click the 1st follow email, so that people don't get constant reminders of #2 and #3



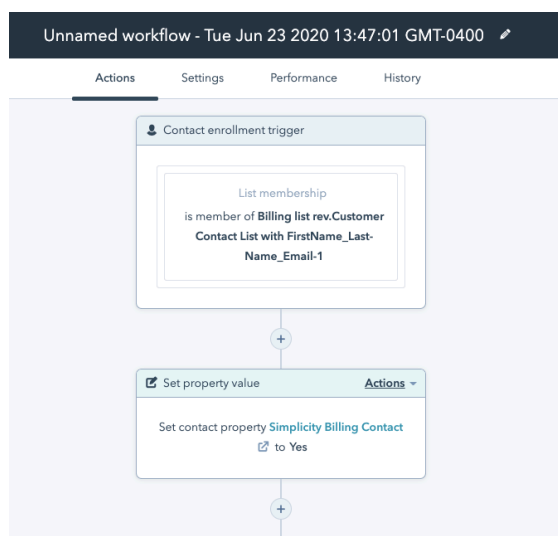
More development - Need to name workflows more clearly. Example, what does the offer 3 mean? <https://app.HubSpot.com/workflows/2920140/platform/flow/14688844/edit>



Some workflows aren't live yet. Decide which ones need to be revisited and turned on, example <https://app.HubSpot.com/workflows/2920140/platform/flow/33818064/edit>



Some are untitled too - <https://app.HubSpot.com/workflows/2920140/platform/flow/32431927/edit>



Recommendations:

Overall we see you have over 95 workflows that are being used. That is a good start, however, there are over 67 workflows that aren't being used. That is a waste of space in your hubspot database, so we recommend you go through each workflow and archive or delete the unnecessary ones.

We've also noticed a lot of workflows are build out very in a basic way. We didn't find ay workflows that have the "if/then" branch. This branch is highly important to segment contacts into receiving different emails depending on the action they took. For example, if a contact didn't open the first email, the "no branch" would automate the 2nd follow up email to this contact.

The point of workflow is to automate the process of lead nurturing. We want to see more of this in your workflow developments. Workflows are highly important capability in HubSpot, and can offer dozens of different ways to communicate with your contacts and companies. Also setting up workflow goals is important so you know what you want to achieve. We encourage you to check out the resources above to get started.

5. Social

Overview: HubSpot offers social media publishing, monitoring, and analytics capabilities. Social media can be automated in a scheduled fashion, enabling you to prepare the work in advance and let HubSpot execute the social media posts. Essentially, you can monitor brand mentions and relevant conversations, track engagements automatically, and schedule your social posts to be published when the right people will see them. You can also import massive excel sheets with the right formatting into HubSpot social, if you prefer to prepare and edit the social media posts outside the HubSpot in Excel.

Best Practices (videos and links):

Social media certification - <https://app.HubSpot.com/academy/2920140/tracks/29/263/3532>

2 minute lesson - <https://app.HubSpot.com/academy/2920140/lessons/552/2819>

Social media strategy - <https://app.HubSpot.com/academy/2920140/lessons/263/3532>

Good examples vs needs more development:

Good- It's great to see you are using the tool to publish social, you've published more than 2,500 messages this year! Also good to see you are using relevant hashtags. We also appreciate that you are publishing holiday posts, such as the Happy Labor Day posts.

Additionally, it is also good to see you are publishing social media posts that don't always backlink to your site. Sharing relevant information outside your company is important because it means you're not centering everything around your brand. For example, you shared a tip post to this site about remote work <https://searchunifiedcommunications.techtarget.com/tip/Why-remote-work-needs-mobile-unified-communications> It had more likes and interactions than other company center posts.





Ben

Actions ▾

[telecommunications](#) has you covered with mobile UC solutions anytime, anywhere. Contact us, [https://www\[redacted\]/contact](https://www[redacted]/contact) This is a great article to learn more about UCaaS! #WFH #UCaaS [https://searchuni\[redacted\]communications?](https://searchuni[redacted]communications?)



Why Remote Work Needs Mobile Unified Communications

Featured images not displaying correctly? Find out how to troubleshoot the issue. [Learn more](#)

Published at Aug 31, 2020 8:32 AM

Created by Emily May

Via HubSpot Web

URL [https://www\[redacted\]voip.net/contact](https://www[redacted]voip.net/contact)

Campaign None

Add

LIKES

[View](#)











3

COMMENTS

0

HUBSPOT TRACKED CLICKS

1









<input type="checkbox"/>	 [REDACTED] VoIP's trusted advisors trained on the v41 software upgrade with 10+ new features - including [REDACTED] a robust video... Campaign: v41 New Features Link: https://[REDACTED]	 Image
<input type="checkbox"/>	 [REDACTED] VoIP's trusted advisors trained on the v41 software upgrade with 10+ new features - including [REDACTED] a robust video... Campaign: v41 New Features Link: https://[REDACTED]	 Image
<input type="checkbox"/>	 [REDACTED] VoIP's trusted advisors trained on the v41 software upgrade with 10+ new features - including [REDACTED] a robust video... Campaign: v41 New Features Link: https://[REDACTED]	 Image
<input type="checkbox"/>	 [REDACTED] VoIP's trusted advisors trained on the v41 software upgrade with 10+ new features - including [REDACTED] a robust video... Campaign: v41 New Features Link: https://[REDACTED]	 Image
<input type="checkbox"/>	 [REDACTED] VoIP's trusted advisors trained on the v41 software upgrade with 10+ new features - including [REDACTED] a robust video... Campaign: v41 New Features Link: http://[REDACTED]	 Image
[REDACTED] VoIP's trusted advisors trained on the		

More dev- However, we noticed you have repetitive images in each post. Try to change it up so that your followers have some variety to look at.

Recommendations:

We recommend that you make your images have more variety. Repeating the same image can indicate that you didn't put efforts into each post. Also repeating the same text for different people doesn't convey authenticity. We are ok with the same text being repeated per company social channel, but when it comes to individuals representing the company, we think they should vary their message.

We also recommend that you study your top posts of the month, quarter or year. See the picture below to see which posts did well. You can find this information under "analyze" in social media. https://app.hubspot.com/social-reports/2920140/?rangeType=THIS_YEAR

Top posts		Filter by: Most interactions ▾				
	"It doesn't matter if the job is small or large, ProfitComm will give it dedicated attention until the job is completed and then they... Published Jan 15, 2020 1:39 PM	 Link preview	INTERACTIONS 22	CLICKS 7	SHARES N/A	IMPRESSIONS N/A
	The walkie-talkie feature will let groups of employees speak to each other by pressing a button in the Teams mobile app. Users will be able... Published Jan 17, 2020 5:59 AM	 Link preview	INTERACTIONS 14	CLICKS 5	SHARES N/A	IMPRESSIONS N/A
	I'm really excited about this new service we offer-- we're eliminating RFPs to save you time and money: https://hubs.ly/H0mGGm80 Published Jan 24, 2020 9:09 AM	 Link preview	INTERACTIONS 12	CLICKS 12	SHARES N/A	IMPRESSIONS N/A
	AT&T's Matt Ellison, Account Manager (second from left) visited [redacted] to relaunch AT&T/ACC during our monthly educational session....	 Image	INTERACTIONS 12	CLICKS 0	SHARES N/A	IMPRESSIONS N/A

6. Landing Pages & Website Pages

Overview: A landing page is a page on your website where you can offer a resource from your business in exchange for a visitor's contact information. Marketers can capture this contact information using a lead-capture form, where visitors can enter details like their name, email address, and job title. Website pages are hosted via HubSpot and are directly incorporated on your website.

Best Practices (videos and links):

Guide to LPs best practices <https://blog.HubSpot.com/marketing/landing-page-best-practices>

25 minute guide to creating better LPs <https://app.HubSpot.com/academy/2920140/lessons/39/1727>

Getting started <https://knowledge.HubSpot.com/cms-general/get-started-with-landing-pages-and-website-pages>

Good examples vs needs more development:

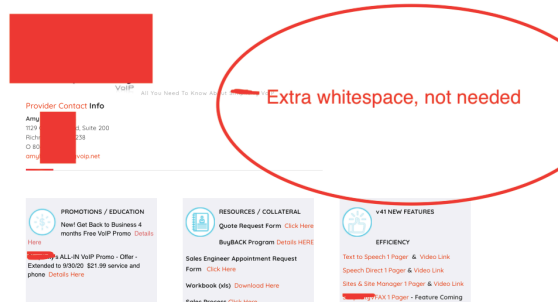
Good - Overall, it's very good that you are hosting some of your website pages on hub-spot and using the landing page tools to host content.

Needs dev - We see that your overall performance of all pages (landing pages, blog pages, and website pages) this year needs improvement in terms of submission rates. We should aim to have at least 1.5%. Ideally, we should have a 5% submission rate overall. Right now it's (.93%). We can improve this metric by cleaning up the landing page/website pages mechanics and blogging.

	PAGE	PAGE TITLE	URL	VIEWS	SUBMISSION RATE	CONTACT RATE	CONTENT TYPE	PUBLISH DATE
<input type="checkbox"/>	Home Page - 8.12 Edits		https://ww...	5,100	0.27%	0.12%	Standard ...	8/12/2017
<input type="checkbox"/>	Login	-	-	947	0%	0%	-	-
<input type="checkbox"/>	Team		https://ww...	534	0%	0%	Standard ...	9/8/2017
<input type="checkbox"/>	Agent Portal Home Page	Agent Port...	https://ww...	522	0%	0%	Standard ...	2/20/2020
<input type="checkbox"/>	All-In VoIP Promo Landing Page June 2020	All-In VoIP...	https://ww...	470	0.43%	0.21%	Landing p...	6/15/2020
<input type="checkbox"/>	New Features		https://www...	377	0%	0%	Standard ...	8/4/2020
<input type="checkbox"/>		VoIP Phon...	https://ww...	228	0%	0%	Standard ...	9/8/2017
<input type="checkbox"/>	E-Guides and Content	E-Guides ...	https://ww...	224	0%	0%	Standard ...	10/10/2017
<input type="checkbox"/>	VoIP Business Phone Systems	Business P...	https://ww...	215	0.93%	0.93%	Standard ...	1/24/2018
<input type="checkbox"/>	Contact Us	Contact Si...	https://ww...	206	4.37%	4.37%	Standard ...	7/11/2017
	Total			15,998	0.93%	0.44%		

Here's some examples of pages that can improve:

<https://www.simplicityvoip.net/getbacktobusinesspromotion> We can see multiple offers in 1 landing page and too much text. It can be overwhelming for a visitor to take any action. Slim it down and see if submission rates go up.



We've also noticed some web pages aren't very clear. The text is very small and the links and content isn't very clear on what the purpose is. There's a lot of whitespace also in these website pages.



GET BACK TO BUSINESS PROMO



Do you need a new phone solution that supports your business anytime, anywhere?

Get 4 months *FREE* VoIP Service*

You won't have a bill until 2021!

[Redacted]'s VoIP Service

• Includes full feature functionality, such as:

- Unlimited Domestic Calling
- Portal Access
- Mobile App
- Softphone
- SMS
- Voicemail Transcription

Check out [Redacted] VoIP

Learn More About [Redacted] VoIP

Orders must be \$500 to qualify for the Get Back to Business Promo. For orders under \$500, check out the **All-in VoIP Promo**.

All-in VoIP Promo Details

To

Yes, I am interested in getting a quote for services!

First Name*

Last Name*

Company name

Email*

Phone Number

What best describes your phone system needs?

Please Select

How many employees will use your system?

Please Select

SUBMIT

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CC BY-NC-SA

Recommendations: Overall, we see a lot of room for improvement in your landing pages and website pages. We noticed that some pages haven't been used or updated in over 3 years. Please consider archiving, deleting or updated what is needed. Also figure out which **draft pages** are needed to keep or archive.

In terms of visual design and mechanics, your website/landing pages should have clear call-to-actions (purpose) for the visitor to take. Forms, buttons, copy and images should be clear for the leads/visitors to understand what to do on each page. Also, using con-

sistent branding is needed per page. It would be good to use images on pages showing the offer, or conveying what the page is about.

Additionally, each page should have a green light SEO, with relevant keywords, meta descriptions, alt text, etc. Some pages are published but have 0 views, contacts, sub-
missions, etc. That is a problem and we need to investigate why this is the case. Perhaps the page isn't in your menu or visible online in a link for the visitor to find. See BaSS picture below.


<input type="checkbox"/>	netsapiens resources ● Published	Aug 9, 2018 2:57 PM	Oct 22, 2019 8:44 AM Emily May
<input type="checkbox"/>	<input type="text"/> VoIP Technologies ● Draft	Jun 3, 2019 11:59 AM	Jun 3, 2019 5:02 PM Abbey Twining
<input type="checkbox"/>	kickers ● Published	Apr 15, 2019 2:41 PM	Apr 16, 2019 3:41 PM Abbey Twining
<input type="checkbox"/>	Referral Form ● Draft	Nov 27, 2018 3:58 PM	Nov 27, 2018 3:58 PM Abbey Twining
<input type="checkbox"/>	Glossary VoIP terms ● Published	Jun 19, 2017 5:06 AM	Mar 5, 2018 10:24 AM Abbey Twining
<input type="checkbox"/>	FAQ page ● Published	Jul 20, 2017 10:43 AM	Feb 8, 2018 3:33 PM Abbey Twining
<input type="checkbox"/>	VoIP and Hosted PBX ● Published	Sep 8, 2017 1:27 PM	Jan 18, 2018 9:23 AM Abbey Twining
<input type="checkbox"/>	About ● Published	Sep 8, 2017 11:37 AM	Jan 18, 2018 9:15 AM Abbey Twining

Are these pages needed? Do they need to be updated? Or can we archive or delete them?

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BaaS

Published



Publish date

April 13, 2018 3:49 PM

URL

<https://www.oiop.net/baas>

View details

Performance

Optimization

A/B Tests

Date range: This month

Frequency: Daily

VIEWS

0

TOTAL SUBMISSIONS

0

NEW CONTACTS

0

CUSTOMERS

0

BOUNCE RATE

0%

TIME PER PAGEVIEW

0

7. Blogging and Blog Posts

Overview: Blogging is a highly important capability within the HubSpot platform. It's a tool that enables you to publish relevant, engaging, conversion-optimized content. HubSpot has clear and easy blogging features that speed up the blog creation, keeps the formatting consistent, and make it easy to optimize your blog posts for search and SEO. HubSpot gives content creators and bloggers the chance to build up search and SEO authority around your topics and generating traffic and relevant leads to your site ultimately.

Best Practices (videos and links):

17 mistakes in blogging <https://blog.HubSpot.com/marketing/beginner-blogger-mistakes>

Business blogging course - <https://app.HubSpot.com/academy/2920140/tracks/43/376/2050>

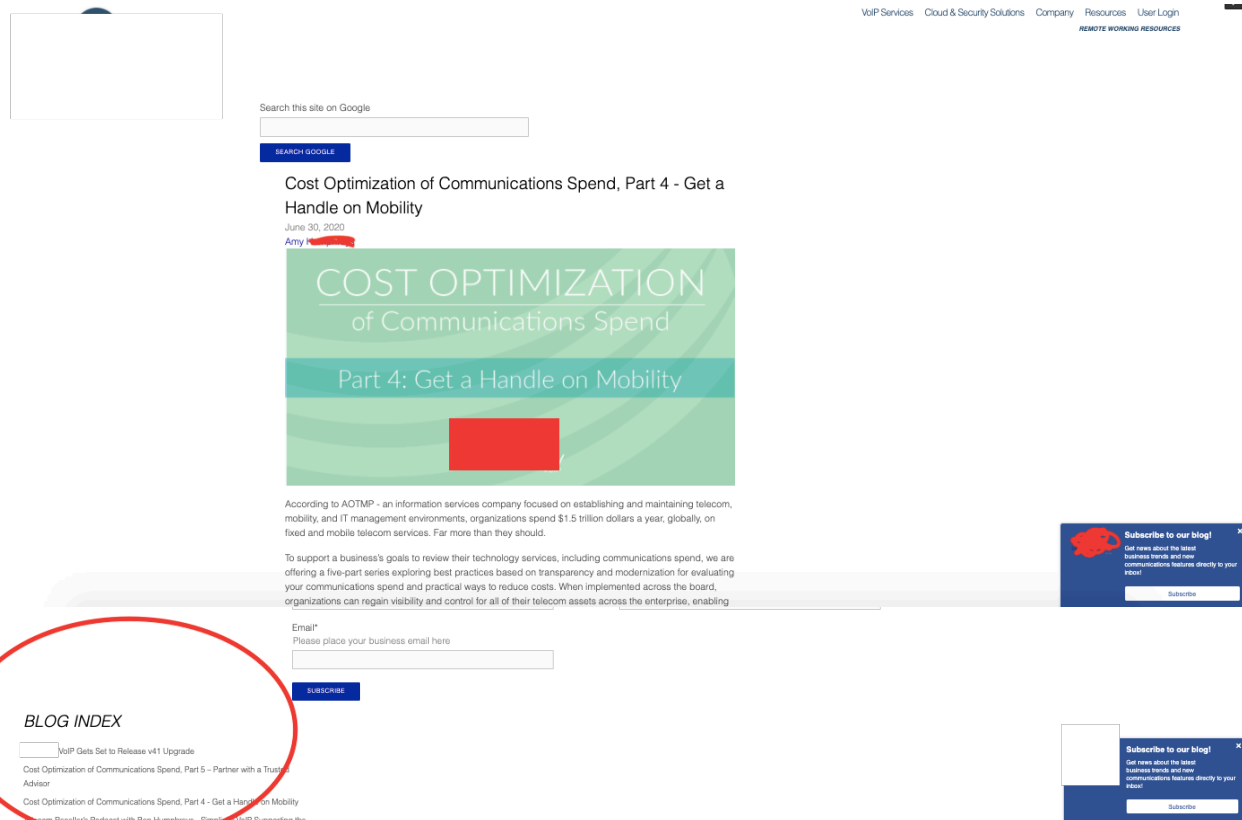
13 minute HubSpot blogging class - <https://app.HubSpot.com/academy/2920140/lessons/36/45>

Content strategy for blogging <https://blog.HubSpot.com/marketing/blog-strategy-guide>

Good examples vs needs more development:

Good - good to see you use blog posts as landing pages for resources

Need dev - Some blogs are missing images, sub-headers, and space between long paragraphs, example <http://blog..>



Recommendations:

Also the overall blog design needs improvement. You should make the subscribe button higher top of the funnel, and the pop-up more pronounced. The blog index shouldn't look like a list, but more like a visual diary, easier on the eyes. The search site on google in top isn't necessary, it's confusing because a user can search google in another tab.

On a high level, the most important takeaway is that you should have a content strategy put into place so we can attract the right kind of leads. Blog content can be used as an awareness tool, essentially shedding light on topics that the reader is interested in learning more about. Awareness content is supposed to educate the leads into taking an action or getting solutions to a problem they might have.

The bottom of each blog post should always have a call-to-action. The call to action can be a resource on the bottom of the blog post, such as reports, factsheets, sales calls, demo requests, etc. We highly recommend you develop a content calendar also and keep blogging as a consistent activity, with relevant resources, links, and actions for the reader to take. Blogging only works when you go all in, and building up content marketing overall takes commitment, consistency, and relevant research put into each blog post. Hiring a writer who can take on this commitment and knowledge is necessary for the uses of the blog and content marketing strategy. Also, you should consider using the topics cluster tool to organize your topics and keywords per blog post <https://app.hubspot.com/content-strategy/2920140/clusters>.

8. Files

Overview: Files are the backend of your HubSpot account. Files include images, fonts, audio files, PDFs, and other files will be hosted on HubSpot's content delivery network servers.

Best Practices (videos and links):

HubSpot how to article <https://knowledge.HubSpot.com/cos-general/upload-your-site-assets-to-file-manager>

External article <https://www.alanizmarketing.com/blog/best-practices-for-organizing-the-HubSpot-file-manager/>

HubSpot blog post <https://blog.HubSpot.com/customers/naming-convention-for-HubSpot-file-manager>

Good examples vs needs more development:






Good - It's good you have folders (12) so far. Folders are super important to store campaign files, images, videos, and so forth inside.

More development - You have more than 100 pages of files! This is a huge project in itself to delete unnecessary files that aren't used anywhere, and place files that require proper placement in folders. Take advantage of organizing now, or you will have a more bloated system in the future, and that will be difficult to give future employees structure.

Recommendations:

You should organize your videos into 1 folder or place extra images into individual folders. For example, there are employee headshots, should go in employee folder. Also,

you could make individual campaign folders with dates and place files in there. And make sure you put your assets such as white papers, reports, pdfs into folders.

<input type="checkbox"/>	 Masergy_MQ_UCaaS_2018	Public	246 KB	pdf	November 13, 2018
<input type="checkbox"/>	 Master Services Agreement General Terms of Services Brons...	Public	205 KB	pdf	August 14, 2018
<input type="checkbox"/>	 Master Services Agreement General Terms of Services Brons...	Public	206 KB	pdf	July 16, 2018
<input type="checkbox"/>	 Master Services Agreement General Terms of Services Brons...	Public	298 KB	pdf	June 23, 2020
<input type="checkbox"/>	 Mastering VoIP 3 Immediate Ways to Save Money on Your S...	Public	197 KB	pdf	December 1, 2017
<input type="checkbox"/>	 Mastering VoIP Offer Case Study Image Template 6-3-2020	Public	1.14 MB	png	June 4, 2020
<input type="checkbox"/>	 Matrix - SD-WAN - Technologies (1)	Public	118 KB	pdf	March 19, 2018
<input type="checkbox"/>	 Matrix - UCaaS v3.0 (1)	Public	546 KB	pdf	March 19, 2018

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Date the asset is first used/or the campaign launches. For naming standardization, we would recommend YYYYMM, YYMM, or YYQ# (19Q1) because this will keep your campaigns in order. - Give the asset an identifier so you know what type of asset it is: EM for Email, LP for Landing Page, etc.

If you have products or groupings within your product consider an identifier for that. Or consider an identifier for the stage of the lifecycle stage.

9. Lead Capture

Overview: Lead capture is the art of attracting visitors to your website, and converting them to becoming a lead, once they fill in a form or sign up for something. Call-to-Actions are buttons or image buttons that visitors clicks to take an action or get an offer. HubSpot can track and know who clicks which CTAs, and measure performance to optimize clickthrough rates over time. Offers can be forms or assets such as reports, eBooks, factsheets, customer case studies, demos, newsletter sign ups, blog subscriptions, etc.

Lead nurturing is the art of educating or pursuing your leads (or contacts) into becoming a more developed lifecycle stage such as a marketing qualified lead (MQL), sales qualified lead (SQL), opportunity and more. Lead nurturing strategies vary. Some strategies

stem from email marketing and workflow campaigns, while other strategies focuses more on different content marketing stages, such as awareness, consideration, and decision triggered offers.

Best Practices (videos and links):

Lead Management: Segmentation, Nurturing, and Lead Qualification <https://app.HubSpot.com/academy/2920140/tracks/35/212/1083>

Nurture Leads and Customers With HubSpot <https://app.HubSpot.com/academy/2920140/tracks/56/212/1083>

Good examples vs needs more development:

Good - There are some defined lifecycle stages here, but majority of contacts are listed as “leads” Only these 8 contacts came up as MQL or SQL.

Your list has been processed. You can now use your list.				
<input type="checkbox"/>	NAME	EMAIL	LIFECYCLE STAGE	
<input type="checkbox"/>	ES Eric St	mail.com	Sales qualified lead	
<input type="checkbox"/>	JT Jim Tu	cre.com	Sales qualified lead	
<input type="checkbox"/>	M mildre	ommunication...	Marketing qualified lead	
<input type="checkbox"/>	Simpli	yvoip.net	Sales qualified lead	
<input type="checkbox"/>	RH Ray He	cast.net	Marketing qualified lead	
<input type="checkbox"/>	C consul	0@gmail.com	Marketing qualified lead	
<input type="checkbox"/>	WD Williar	na@gmail.com	Marketing qualified lead	
<input type="checkbox"/>	R Nancy	orld.com	Sales qualified lead	

Recommendations:

We recommend that you develop better lifecycle stages for defining Leads, MQLs, SQLs, Opportunities, etc. Define these terms first, then segment these people based on

the terms you defined. Align your lifecycle stages with a developed content marketing plan. You can create content assets, workflows/emails, and campaigns that would cater to these different stages of the lifecycle.

For example, an awareness stage would cater to leads, or people who subscribe the blog. Content can be about problem solving blog posts or events that might interest the reader. Consideration stage material would cater to MQLs or SQLs. These are the people who would sign up for a customer case study or watch a webinar. Lastly, the decision making stage would cater to people who are ready to speak to sales. They've already made their decision and did their research into your company. They could be considered an "opportunity."

In terms of CTAs, you have over 300 buttons! We know that many of these buttons aren't being used actively. Consider cleaning up the database and eliminating CTAs that aren't used anymore or anywhere. There should also be some CTA content offers that are visual instead of a button. See the 2nd pic for an example of a company the makes visual CTAs for their assets, like a downloadable guide about retail in AI.

<input type="checkbox"/>	PREVIEW	NAME	VIEWS	CLICK RATE	CLICKS	LOCATIONS
<input type="checkbox"/>	T42G user guide	T42G Simple	659	0.3%	2	3
<input type="checkbox"/>	Polycom VVX Colour Expansion Model	Polycom VVX Colour Expansion Model Simple	661	0.76%	5	3
<input type="checkbox"/>	Soundstation IP 5000 User Guide	Soundstation IP 5000 Simple	663	0.9%	6	3
<input type="checkbox"/>	VVX 600 user guide	VVX 600 guide Simple	663	0.9%	6	3
<input type="checkbox"/>	VVX 500 user guide	VVX 500 guide Simple	662	1.36%	9	3
<input type="checkbox"/>	VVX 400 user guide	VVX 400 guide Simple	663	5.58%	37	3
<input type="checkbox"/>	VVX 300 user guide	VVX 300 guide Simple	663	3.17%	21	3
<input type="checkbox"/>	Demo CTA	Demo CTA Simple	201	1.49%	3	0

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Guide

Drive Retail Growth With AI-Driven Data Analytics

Today's most successful retailers are data-centric. In this guide, you'll learn how AI can help you make use of your customer data and therefore improve customer satisfaction.

[Download Now](#)



10. Sales


Overview: HubSpot Sales automates all sales-related operations, and saves valuable time at every stage of the funnel. HubSpot sales pro includes features like pipeline management, lead scoring, email templates, and pre-scheduled sequences.

Best Practices (videos and links):

Sales certification - <https://app.HubSpot.com/academy/2920140/tracks/12/425/2347>


The Ultimate Guide to Sales Prospecting: Tips, Techniques, & Tools to Succeed
<https://blog.HubSpot.com/sales/prospecting>

Open tasks

Filter by: Hubspot Team MarketDesign (Kate) (hubspot@marketdesignco.com) ▾ All types ▾ All priorities ▾ All time ▾ Edit Columns 

The best reminders you've ever had.

Create tasks to remind your team to send follow-up emails, make discovery calls, or to do anything else you can think of that needs doing. HubSpot will take care of the rest.



Habits of successful sales people <https://blog.HubSpot.com/sales/habits-to-become-a-more-effective-salesperson>

Good examples vs needs more development:

Good - excellent use of the sales dashboard. We see you're making good use of the deals and different stages of the sales process.

Need development - Tasks can be created to give reminders to contact owners to look at a new lead coming in, as we see many in the CRM who are lacking an account holder. this task can be arranged in the workflows and can be referenced here <https://app.HubSpot.com/contacts/2920140/tasks/list/view/all/?ownerId=50353868>

Also meeting widgets can be used in emails, LPs, to help drive more calls with sales <https://app.HubSpot.com/meetings/2920140/integration>

Book meetings without the hassle

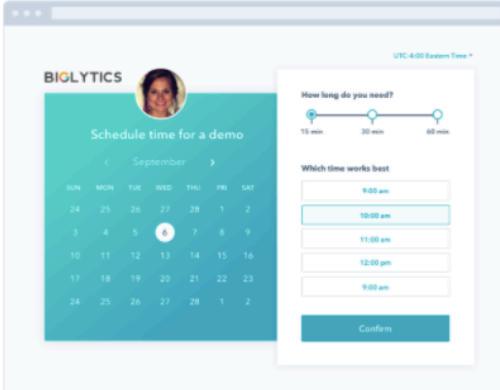
Stop wasting time with endless "What time works for you?" back-and-forth emails.

Empower prospects and customers to book meetings on your calendar to save you time from sending unnecessary emails.

Activate Meetings inside your HubSpot Sales account by connecting your calendar:

 [Connect your Google calendar](#)

 [Connect your Office 365 calendar](#)



Recommendations: First we believe you should take your sales pipeline the the next level by enabling a book a meeting widget, helpful for visitors who want to schedule on the spot a meeting with sales. We also think you should manage your open tasks better, there are many that are still open an overdue.

Open tasks

Filter by: Heather Vereecken (heather@profitcomm.com) ▾ All types ▾ All priorities ▾ All time ▾

Edit Columns

Search for a task



<input type="checkbox"/>	STATUS ▾	TITLE ▾	TYPE ▾	PRIORITY ▾	ASSOCIATED WITH	DUE DATE (GMT+3) ▴
<input type="checkbox"/>	✓	Fireline - Vault Move	To-do	-	-	Jan 29, 2019 6:30 PM
<input type="checkbox"/>	✓	Comcast Direct 75/75	To-do	-	Holly Schadler	May 16, 2019 5:00 PM
<input type="checkbox"/>	✓	Updated Pricing for Data Ce...	To-do	-	--Nick Roethemeier Roethe...	May 16, 2019 6:30 PM
<input type="checkbox"/>	✓	Allied Circuit for Springfield ...	To-do	-	Jay Angle	May 17, 2019 3:00 PM
<input type="checkbox"/>	✓	Abacus GA	To-do	-	-	May 17, 2019 8:00 PM
<input type="checkbox"/>	✓	S.Plainfield - Abacus	To-do	-	Kelly Lindsay	May 20, 2019 3:00 PM
<input type="checkbox"/>	✓	Move to net sapiens	To-do	-	-	May 22, 2019 3:00 PM
<input type="checkbox"/>	✓	Residential One	To-do	-	-	May 22, 2019 5:00 PM

100 per page ▾

Help

We also recommend that you consider using lead scoring to help qualify your leads better. Lead scoring is an excellent capability within the HubSpot platform that allows you to quantify each lead from a positive to a negative score, depending on what actions they do. For example, if a lead visits your site more than 2 times a month, then you could give them 2 points. Or is a lead subscribes to your blog, give them 5 points, or if a lead unsubscribes, - 2 points. These lead scoring criteria depends on what you find important or not for quantifying leads, MQLs, SQLs, and so forth.

Also you are missing quote owners per on the quote pages. See <https://app.hubspot.com/quotes/2920140/>

Quotes

Status: All ▾ Owners: All users ▾

Search all quotes



Create quote

QUOTE ▾	QUOTE AMOUNT ▾	STATUS	QUOTE OWNER ▾	CREATE DATE (GMT+3) ▾	EXPIRATION DATE ▾	DEAL NAME
A	\$722.48	Published	Unassigned	Aug 20, 2020	Sep 19, 2020	
L	\$654.08	Published	Unassigned	Aug 20, 2020	Nov 18, 2020	
L	\$685.58	Published	Unassigned	Aug 19, 2020	Sep 18, 2020	
H	\$54.97	Published	Michael [redacted]	Aug 17, 2020	Nov 15, 2020	
T	\$401.14	Published	Michael Marti...	Aug 14, 2020	Nov 12, 2020	
L	\$7,695.41	Published	D [redacted]	Aug 14, 2020	Nov 12, 2020	
G	\$2,751.21	Published	Unassigned	Aug 13, 2020	Nov 11, 2020	
P	\$507.34	Published	Michael [redacted]	Aug 12, 2020	Nov 10, 2020	

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11. Ads

Overview: HubSpot has an integration with Google Ads allowing you to track the ROI of your Facebook, Instagram, LinkedIn, and Google advertising.

Best Practices (videos and links):

Facebook ads training - <https://app.HubSpot.com/academy/2920140/tracks/27/238/1321>

2 min ads Training: Fundamentals of Digital Advertising <https://app.HubSpot.com/academy/2920140/tracks/91/487/2607>

Analyze ad campaigns in HubSpot <https://knowledge.HubSpot.com/ads/analyze-ad-campaigns-in-HubSpot>

2020 guide to ads in HubSpot <https://blog.HubSpot.com/marketing/advertising>

Good examples vs needs more development:

It looks like you haven't really fleshed out an ads campaign and only used it on one Facebook post. There isn't much to compare here.

Recommendations: For now, we can recommend that you set up a monthly budget that you'd like to spend on Google ads for attracting relevant leads. Once we have an idea on the kind of budget you're willing to spend on Google ads, we can discuss what kind of leads you want to attract, what kind of offers you want to place on google search results pages, the keywords you want to rank high for, etc.

12. Dashboards

Overview: Reporting in HubSpot CRM is built around the idea of dashboards. A dashboard is, quite simply, a collection of reports. At the top of any dashboard, you can easily change the dashboard's date range, customize who can access it, and drag & drop or resize the individual reports based on your team's priorities.

Best Practices (videos and links):

Best practices for building marketing dashboards <https://supermetrics.com/blog/HubSpot-reporting-dashboards#:~:text=Best%20practices%20for%20building%20marketing%20dashboards&text=Decide%20what%20you%20want%20to,combining%20marketing%20and%20sales%20data>.

9 dashboards that will help set you up for success - <https://blog.HubSpot.com/sales/sales-dashboard>

Lesson on dashboards and design <https://app.HubSpot.com/academy/2920140/lessons/726/3702>

Good examples vs needs more development:

Good - It's excellent to see a variety of reports in your dashboard. We can see the you analyze all types of data ranging on all fronts, from emails to visitors, device breakdown, traffic sources, blog views, web analysis, etc.

Need dev - if you want to promote more offsite links, use the url tracking builder, so you can see this referral traffic data in your reports <https://app.HubSpot.com/analytics/2920140/tracking-urls>

[Back to analytics tools](#)

Tracking URL Builder

[Create tracking URL](#)

Campaign: [All campaigns](#) [Edit columns](#)

UTM CAMPAIGN	UTM SOURCE	UTM MEDIUM	UTM TERM	UTM CONTENT	CREATED
Get Back to Business Promo	BizSense Digital Newsletter	BizSense Back to Business Ad 2020	None	None	Aug 20, 2020