

HubSpot Healthcheck: Before & After

A comprehensive audit and transformation roadmap for **IBE** — uncovering hidden gaps and unlocking the full revenue potential of their HubSpot platform.



Made with **GAMMA**

The Starting Point

HubSpot was being used effectively — but significant untapped potential remained. The platform supported core lead nurturing and Sales-Marketing alignment, yet **inbound strategy, automation depth, and data hygiene** were underdeveloped.

✓ What Was Working

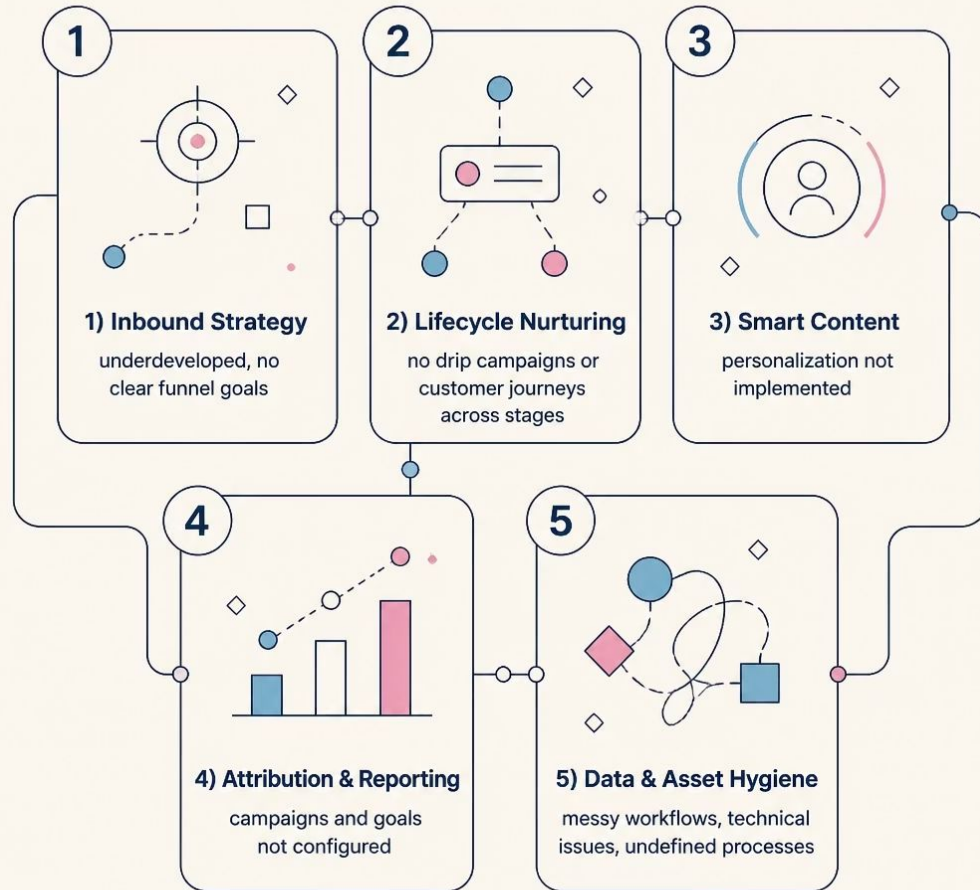
Lead nurturing, buying cycle alignment, and Sales-Marketing collaboration were in place.

⚠ What Needed Work

Inbound strategy, drip campaigns, smart content, attribution, and data organization.



Before: The Gaps We Found

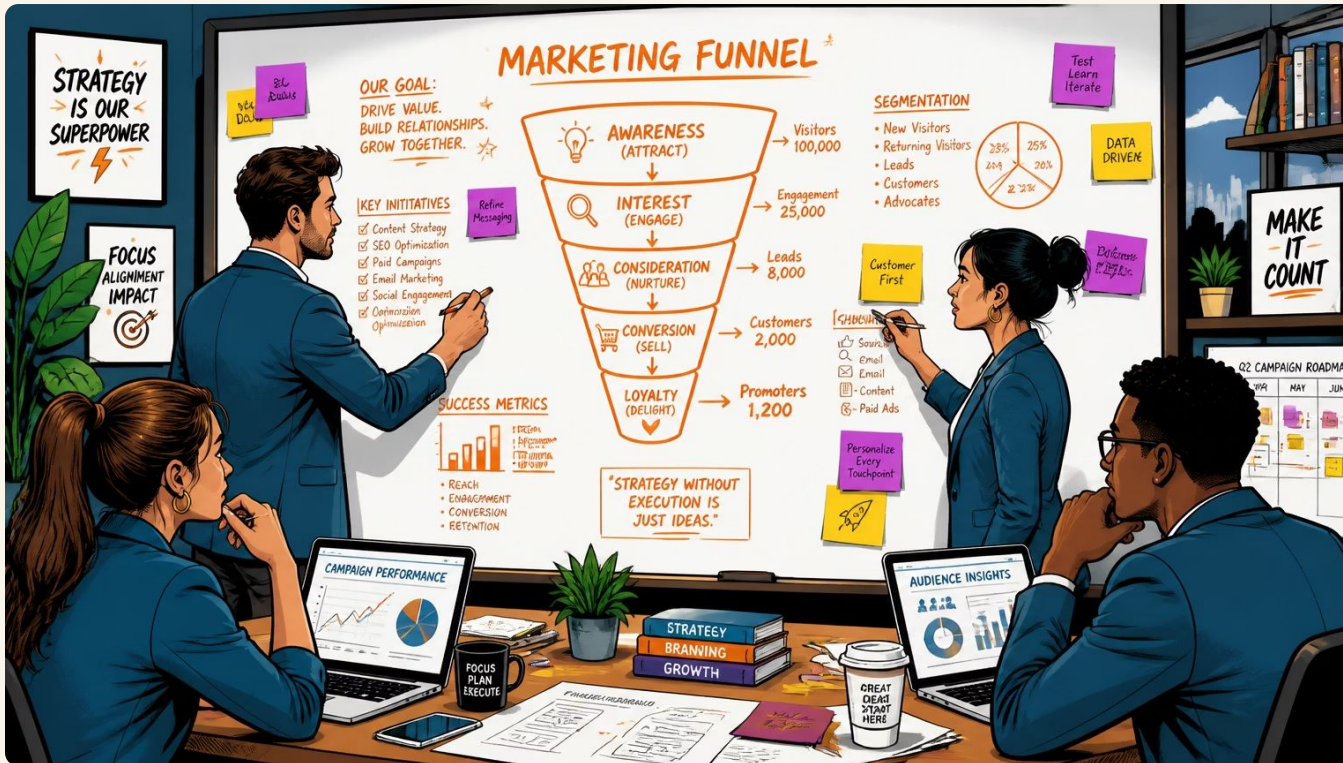


A Platform Running Below Capacity

Without lifecycle nurturing workflows, gated content, or campaign attribution, IBE was missing the connective tissue between marketing activity and revenue outcomes.

- 📄 The biggest opportunity: **no lifecycle-based funnel reporting** meant marketing couldn't prove its impact on deals.

Priority 1: Inbound Marketing Strategy



Setting the Foundation

The first and most critical step: **define inbound marketing goals and a structured plan.** This creates the blueprint for everything that follows — from content gating to lifecycle workflows.

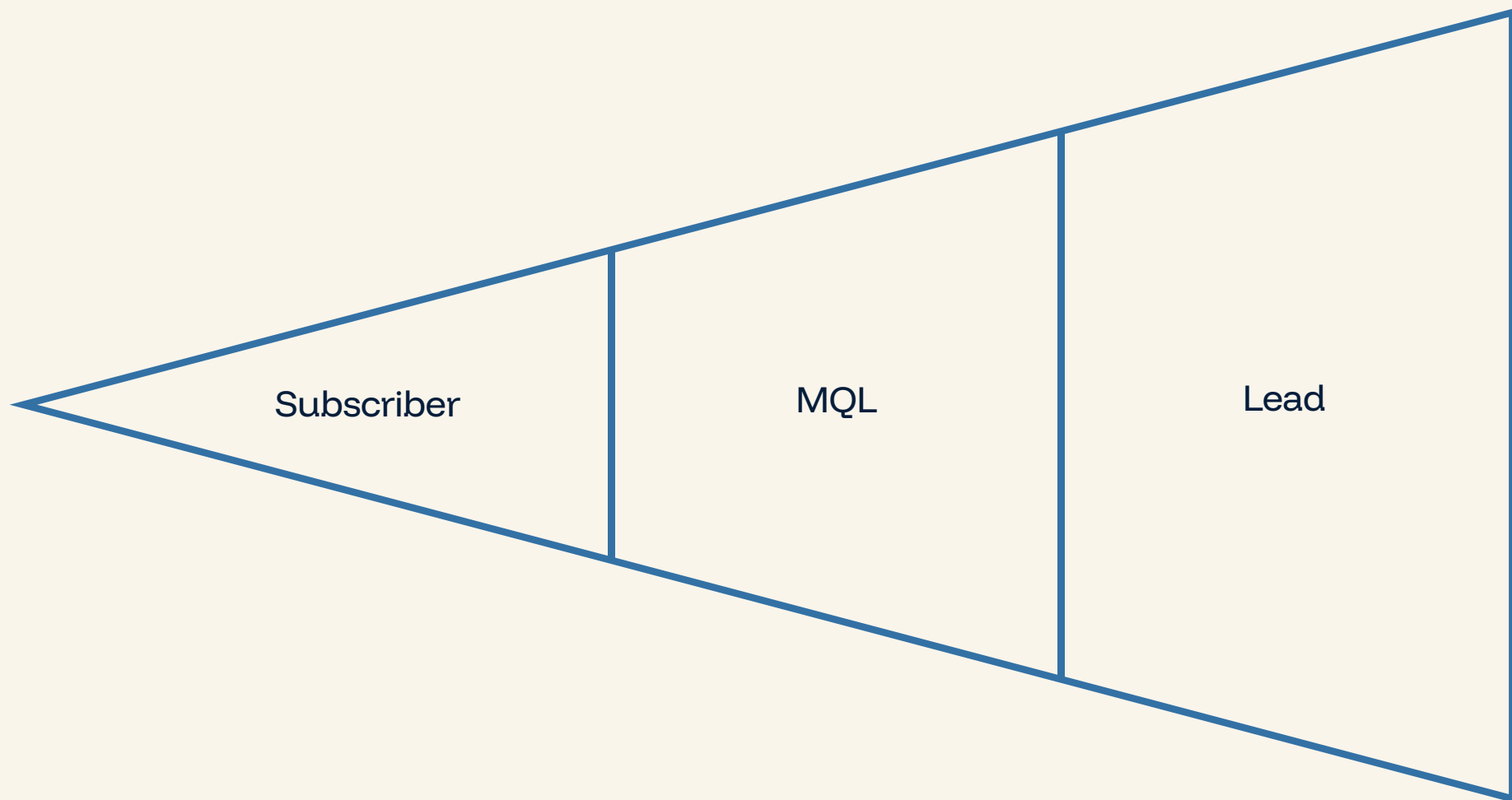
→ Define funnel goals by lifecycle stage

→ Map content assets to each stage

→ Establish KPIs for lead velocity and conversion

Priority 2: Lifecycle Nurturing Workflows

Automated drip campaigns and customer journeys were absent across lifecycle stages. Implementing these would **drive more qualified leads and increase deal conversions** without manual effort.



Each stage gets tailored messaging, smart content personalization, and automated triggers — guiding contacts toward conversion at every step.



Priority 3: Smart Content & Personalization

Generic content loses leads. **Smart content** adapts dynamically based on contact properties, lifecycle stage, and behavior — delivering the right message at the right moment.



Stage-Based Messaging

CTAs and landing pages that change based on where the contact is in the funnel.



Contact Personalization

Dynamic content blocks tailored by industry, role, or past behavior.



Conversion Optimization

Lead magnet CTAs on top-of-funnel pages to accelerate inbound growth.

Priority 4: Attribution & Reporting

From Guesswork to Clarity

Without HubSpot Campaigns and Goals configured, marketing couldn't tie activity to revenue. The fix: **full-funnel dashboard reporting** that shows performance by lifecycle stage and campaign.



Campaigns

Group all touchpoints by initiative for clean ROI tracking.

Goals

Track key conversion milestones across the buyer journey.

Dashboards

Real-time visibility into funnel velocity and revenue impact.

Priority 5: Data & Asset Hygiene

A clean, organized HubSpot instance is the backbone of reliable automation. This priority ensures **every contact type has a defined process** and every workflow has a clear purpose.



Workflow Cleanup

Audit and archive unused workflows.
Document active automations by
contact type and lifecycle stage.



Technical Fixes

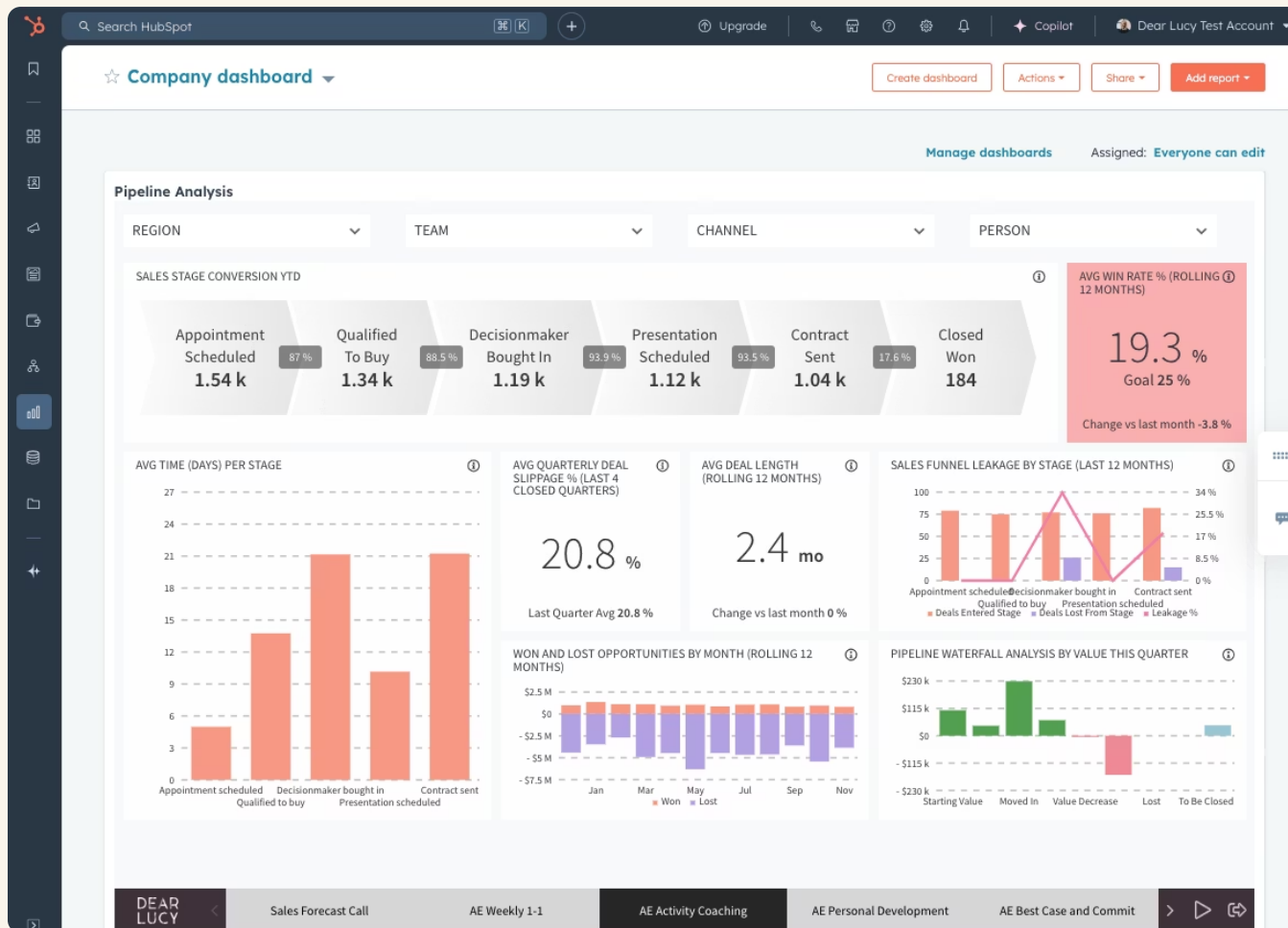
Resolve domain configuration
issues, tracking errors, and
integration gaps affecting data
quality.



Data Standards

Standardize contact properties,
lifecycle stage definitions, and lead
scoring criteria across the team.

After: The Transformed HubSpot



What Success Looks Like

Post-healthcheck, IBE's HubSpot becomes a **fully orchestrated revenue engine** — not just a CRM, but a strategic growth platform.

01

Inbound goals set, funnel mapped

02

Lifecycle workflows active across all stages

03

Smart content personalizing every touchpoint

04

Campaigns & dashboards proving marketing ROI

05

Clean data, defined processes, scalable automation

Your Next Steps

The healthcheck identified the gaps. Now it's time to act. Here's the recommended order of execution to maximize impact quickly.

- 1 — Phase 1 — Foundation
Set inbound goals, clean up data, fix technical issues.
- 2 — Phase 2 — Automation
Build lifecycle nurturing workflows and smart content.
- 3 — Phase 3 — Attribution
Configure Campaigns, Goals, and revenue dashboards.
- 4 — Phase 4 — Optimize
Iterate on top-of-funnel CTAs and funnel velocity.

✓ **Ready to get started?** Sales & Marketing Automation is here to guide every phase of your HubSpot transformation. SIGN UP: https://1.salesmarketingautomation.com/hubspot_healthcheck

