

Building a HubSpot Strategic Growth Engine Checklist

Most companies use only 30% of HubSpot's capabilities. This leaves time, revenue, and insights on the table. This checklist gives you specific opportunities to turn HubSpot into a true growth engine through goal alignment, improved data insights, and smarter automation.

6-Steps for Driving Growth

1. **Goals:** Align business objectives to CRM
2. **Refine:** Cleanse data and clarify processes
3. **Optimize:** Automate for efficiency and impact
4. **Win:** Lead change and drive adoption
5. **Track:** Measure what matters
6. **Heighten:** Continuously improve to scale sustainably

1. Goals

Align HubSpot to Business Objective

- ☐ Define annual business goals and KPIs
- ☐ Define department goals and KPIs (Sales, Marketing, and Service)

2. Refine

Align KPIs and Clean Data

- ☐ Align KPIs with core business goals
- ☐ Audit and clean data, if needed
 - ☐ Clean up contact ownership; use workflows to assign or create a triage list for "unowned" records.
 - ☐ Standardize custom property names and formats; delete duplicates and archive unused fields.
 - ☐ Merge duplicate contacts and companies using smart lists and bulk actions.

3. Optimize

Automate for Efficiency and Impact

- ☐ Create lifecycle-based lead handoff workflows that notify and assign leads dynamically.
- ☐ Use lead rotation and availability rules to balance MQL distribution.
- ☐ Trigger internal alerts when deals stagnate or high-value customers engage.
- ☐ Launch onboarding or welcome automations that reflect client type or region.
- ☐ Use score-based automation to prioritize reps' daily outreach tasks.

4. Win

Lead Change and Drive Adoption

- ☐ Regularly communicate the "why" behind the system
- ☐ Gather feedback and celebrate wins
- ☐ Nominate CRM Champions to share #HubSpotWins a Slack or Teams channel to showcase time savings and revenue impact.
- ☐ Provide role-specific onboarding paths with saved views, documentation, and playbooks.

5. Track

Measure What Matters

- ☐ Build dashboards for each user type. Examples include:
 - ☐ Executive
 - ☐ Sales leader
 - ☐ Marketing leader
 - ☐ Service leader
 - ☐ Performance dashboards for Sales, Marketing and Service team members

- ☐ Conduct quarterly optimization reviews to assess usage, results, and system needs.
- ☐ Track adoption metrics (logins, form usage, field completion) to identify friction points.

Example KPIs for Sales, Marketing and Services:

Sales KPIs

- ☐ Number of deals created per month
- ☐ Lead-to-customer conversion rate
- ☐ Average deal size
- ☐ Sales cycle length (days from first contact to close)
- ☐ Revenue per sales rep
- ☐ Percentage of deals closed-won vs. closed-lost
- ☐ Number of activities per rep (calls, emails, meetings)
- ☐ Forecast accuracy (projected vs. actual sales)
- ☐ Pipeline velocity

Marketing KPIs

- ☐ Number of new Leads generated
- ☐ Marketing Qualified Leads (MQLs) created
- ☐ Conversion rate from Lead to MQL
- ☐ Email click-through rates
- ☐ Website conversion rate
- ☐ Cost per lead (CPL)
- ☐ Website traffic and engagement metrics (sessions, time on site)
- ☐ Social media engagement (likes, shares, comments)
- ☐ Campaign ROI (revenue attributed to marketing campaigns)

Service KPIs

- ☐ Number of tickets created and resolved
- ☐ Average ticket response time
- ☐ Average ticket resolution time
- ☐ Customer satisfaction score (CSAT)
- ☐ First contact resolution rate
- ☐ Percentage of tickets closed within SLA
- ☐ Knowledge base article usage and helpfulness ratings
- ☐ Customer retention/churn rate

6. Heighten

Continuously improve to scale sustainably

- ☐ Integrate core tools (e.g., ERP, CPQ, ticketing) to eliminate manual data entry.
- ☐ Deploy [HubSpot Breeze Intelligence](#) for:
 - ☐ Data Enrichment
 - ☐ Buyer Intent
 - ☐ Form Shortening
- ☐ Set up [HubSpot Agents](#) to support goals related to:
 - ☐ Prospecting
 - ☐ Knowledge Bases
 - ☐ Content
 - ☐ Social Media
- ☐ Launch dynamic sales playbooks to reinforce messaging and shorten onboarding ramp time.
- ☐ Automate lifecycle follow-ups (e.g., renewal alerts, upsell nudges, re-engagement).
- ☐ Create annual and quarterly optimization roadmaps
- ☐ Reinforce what's working and evolve the rest

High-Impact Optimization Opportunities

Strategic Automations

- ☐ **Smart Lead Routing:** Instead of routing based only on form fills, create workflows that combine job title (fit), lead score (behavior), and time zone (timing) to send leads to the right rep at the right time.
- ☐ **Automate sales processes to:**
 - ☐ Create tasks when a deal moves to a new stage.
 - ☐ Trigger internal alerts for stalled deals over X days.
 - ☐ Auto-update close dates if a deal is inactive for 30+ days.
- ☐ **Personalized Journeys:** Use behavior-based branching (e.g., pricing page visits → send a case study).
- ☐ **Service Handoffs:** Automate handoffs from Sales to Service with tickets or Workflows.. Ex: when a deal closes, assign an onboarding checklist to the CSM.

AI-Powered Growth Acceleration

- ☐ **Enable Predictive Lead Scoring:** Activate HubSpot's predictive lead scoring to automatically rank contacts based on likelihood to convert, so your sales team can prioritize high-intent leads and reduce time spent on unqualified prospects.
- ☐ **Use AI Assistant to Draft Emails:** In contact or deal records, use the built-in AI assistant to generate contextual, personalized follow-up emails based on recent activity or notes—then edit and send directly from the CRM.
- ☐ **Set Up Forecast Risk Alerts:** Turn on AI-powered forecast risk indicators in your deal pipeline to flag stalled or at-risk deals using activity data trends—then automate internal alerts to prompt action.
- ☐ **Use Conversation Intelligence Summaries:** Enable AI summaries on recorded calls to quickly capture next steps, objections, and coachable moments.

Executive Reporting and ROI Communication

- ☐ Create executive dashboards for department leaders
- ☐ Stakeholder Storytelling: Use HubSpot's report commentary or external slides to narrate progress with metrics.

Key Metrics to Track

Review and adjust tactics based on the KPIs determined in Step 5: Track. Consider how each KPI levels up to these key outcomes.

Efficiency Gains Examples

Time saved through automation and streamlined handoffs

- ☐ Average time to complete key processes (e.g., lead assignment, deal handoff)
- ☐ Number of manual tasks eliminated or automated per month
- ☐ Reduction in average response time to constituent/customer inquiries

Revenue Impact Examples

Higher conversion rates and reduced sales cycle time

- ☐ Lead-to-customer conversion rate
- ☐ Average sales cycle length (days from first contact to closed deal)
- ☐ Total revenue attributed to automated campaigns or workflows

Team Productivity Examples

More output, same headcount

- ☐ Number of qualified leads managed per team member
- ☐ Number of campaigns or deals handled per month, per user
- ☐ Percentage increase in activities (calls, emails, meetings) per rep without adding staff

Data Quality Examples

More accurate, accessible, and actionable insights

- ☐ Percentage of contacts with complete and up-to-date data profiles
- ☐ Number of data errors or duplicates detected and resolved per quarter
- ☐ Frequency of actionable reports or dashboards accessed by leadership