HubSpot Optimization Roadmap Worksheet

Use this worksheet to align your CRM strategy to business goals throughout the year. Start with a strong foundation, then evolve your system quarterly to support scalable, measurable growth.

Phase I: Foundation

Focus: Annual Planning
Goal: Build a clean, aligned CRM platform that supports your business strategy.

Core Actions:

- ☐ Review annual business goals
- ☐ Set goals and KPIs for key departments (marketing, sales, service)
- ☐ Audit current HubSpot usage, workflows, and data quality
- ☐ Map goals and KPIs to CRM

Map Your Business Goals to the CRM

Sample:

Area	Goal / KPI	CRM Need / Feature Mapping
Company	Increase revenue 15% YoY	Track pipeline velocity, close rate, and deal attribution via dashboards
Marketing	3% marketing-sourced revenue	Show leading indicators: MQL volume, MQL → SQL conversion, influenced deals
Sales	Reduce sales cycle from 45 → 30 days	Track deal stage duration. Automate follow-up & task reminders
Service	Increase CSAT to 90%+	Automate onboarding. Collect feedback via surveys, and use ticket pipelines

denamico

Add Your Goals:

Area	Goal / KPI	CRM Need / Feature Mapping

Phase II: Strategic Action

Focus: Quarterly Planning
Goal: Address highest-impact gaps with focused automation, AI, and adoption initiatives.

Core Actions:

- ☐ Review annual plan
- ☐ Review last quarter's performance and CRM usage patterns
- ☐ Identify top 2–3 strategic priorities for the next 90 days
- ☐ Define success metrics for this quarter
- ☐ Clean and standardize data to support top priorities
- ☐ Activate or adjust automation, AI tools, or reporting aligned to goals
- ☐ Train and reinforce user adoption for key changes

denamico

Quarterly Priorities Planning

Sample:

Quarter	Strategic Priority	HubSpot Feature Used	Owner	KPI to Track
Q1	Automate lead handoff	Lead rotation workflows, lifecycles	Sarah Smith	25%+ MQL → SQL conversion rate
Q1	Improve new client onboarding	Workflow-based checklist assignment	Ben Wilson	60% completion of onboarding CSAT

Add your quarterly priorities:

Quarter	Strategic Priority	HubSpot Feature / Tool Used	Owner	KPI to Track

Phase III: Optimization & Scale

Focus: Ongoing Improvement
Goal: Evolve your CRM continuously to meet changing needs and drive ROI.

Core Actions:

- ☐ Monitor usage, adoption, and KPI performance weekly or monthly
- ☐ Refine priorities based on results
- ☐ Add new integrations or automations as business needs evolve
- ☐ Communicate wins and results to stakeholders

denamico

Optimization Tracking

Sample:

Area Improved	Optimization Made	Impact / Result	Notes or Next Steps
Sales Handoff	Lead rotation + rep notifications	2x faster follow-up, 15% higher conversion	Expand to demo scheduling
Customer Success	Onboarding checklist via workflow	25% increase in CSAT survey participation	Add automated renewal reminders

Add your optimizations to track progress:

Area Improved	Optimization Made	Impact / Result	Notes or Next Steps

denamico