

Mistake 1

No Clear Lifecycle Stages in HubSpot CRM

Symptoms to diagnose:

- ✗ Contacts pile up in one stage, most likely stage 1 i.e. Lead
- ✗ Sales struggling to prioritise
- ✗ Reporting is ineffective

How to fix it fast:

- ✓ Align lifecycle stages across teams
- ✓ Automate notifications to sales when contact progresses to MQL/SQL
- ✓ Dedicate time for team training to flesh out correct use of stages

Mistake 2

Poor Data Hygiene

Symptoms to diagnose:

- ✗ Duplicate contact or company records
- ✗ Reporting not reflecting real-time
- ✗ Email sends with personalisation errors

How to fix it fast:

- ✓ Use deduping tools and automated workflows
- ✓ Create required fields for form submissions and contact creation
- ✓ Implement quarterly reviews of data

Mistake 3

Lack of Marketing and Sales Automations

Symptoms to diagnose:

- ✗ Lead follow-up is poorly timed
- ✗ Sales don't know when to engage leads
- ✗ Undertaking tasks that can be automated

How to fix it fast:

- ✓ Automate lead assignment, tasks & notifications
- ✓ Create nurture workflows based on lifecycle stage
- ✓ Crafts a task automation to remind sales of hot leads

Mistake 4

No Reporting Strategy

Symptoms to diagnose:

- ✗ Real performance not reflected in dashboards
- ✗ Manual or inconsistent monthly reporting
- ✗ ROI can't be proven

How to fix it fast:

- ✓ Set your teams KPIs
- ✓ Create dashboards around goals
- ✓ Use custom reports to track full funnel performance

Mistake 5

Ignoring AI and New Technologies

Symptoms to diagnose:

- ✗ Manual content creation
- ✗ Missed opportunities for AI automation
- ✗ Marketing and sales tasks feel repetitive

How to fix it fast:

- ✓ Experiment with HubSpot AI's content creation, agents, and prospecting
- ✓ Use intelligent AI to streamline sales outreach
- ✓ Implement AI generated suggestions in email campaigns or landing pages to drive leads

Diagnosis is the first step in creating a HubSpot portal that truly makes an impact on your business - start implementing these quick fixes if your portal is experiencing any of these symptoms!