

HubSpot Optimisation

Cheat Sheet: 5 Quick Wins

Unmatched

✓ 1. Clean Up Lifecycle Stages and Lead Statuses

Why does it matter? Poorly defined stages create reporting and automation chaos. Do this:

- Align lifecycle stages with your actual buyer journey.
- Customise lead statuses to reflect actual sales process sub-stages.
- Remove unused/default stages.

💡 *If your team can't explain the difference, it's time to clarify and document.*

✓ 2. Automate Sales Handoffs

Why does it matter? Manual handovers lead to missed opportunities. Do this:

- Notify sales when Marketing Qualified Leads / Sales Qualified Leads are created.
- Auto-create tasks with clear deadlines.
- Send Slack messages for key actions (like form submissions).

💡 *Include all necessary information in tasks so sales doesn't have to dig for it.*

✓ 3. Build a Lead Scoring Model

Why does it matter? Focus sales efforts on high-potential leads. Use this:

- Engagement Score (activity-based) and Fit Score (profile-based)
- Set up simple thresholds: cold / warm / hot.
- Use workflows to auto-label and progress leads.

💡 *Merge scores into a combined score property to centralise insights.*

✓ 4. Create a Closed-Won Dashboard

Why does it matter? Visibility drives performance and motivation. Include reports on:

- Total revenue (by month/quarter/year)
- Deals won by rep and average deal size
- Win rate by source or lifecycle stage

💡 *Embed in Sales Workspace and automate weekly email sends.*

✓ 5. Start Using HubSpot AI Tools

Why does it matter? Free up time, fast. Start small, try out:

- Content Agent: build landing pages, emails, case studies
- Sales Assistant: help with follow-ups, call summaries

💡 *Start small. Track productivity after one week.*

Don't add more complexity to a messy CRM.

These **small wins** lead to **big shifts** in clarity, automation, and team performance.