

Purpose

The IBT Online HubSpot Gap Review is a structured assessment of your HubSpot environment to identify what's blocking ROI and define a prioritized plan to improve performance.

1. What we review (typical scope)

Portal health:

Hubs in use, key settings, objects, properties, lifecycle stages, naming conventions

Lead capture pathways:

Forms, tracking, notifications, assignment logic, handoff readiness

Data quality + segmentation readiness:

Completeness, duplication risks, standardization, cohort opportunities

Workflows + automation:

Nurture coverage, routing, recycling paths, conflicts/gaps, improvements

Campaign execution readiness:

Conversion paths (offer → landing page → follow-up → nurture → handoff) and message match

Reporting + dashboards:

Funnel visibility and pipeline outcomes (traffic → conversions → SQL → pipeline → revenue)

2. What you get (deliverables)



Findings summary: what's working + what's holding performance back

Quick wins you can action immediately

Prioritized **30–60–90 day roadmap** for implementation and ongoing management

Recommended operating cadence (so improvements stick)

3. What to have ready (helps us move faster)

If available:

- ✓ Which hubs you use (Marketing / Sales / Service / Content)
- ✓ Your top 1–3 goals for the next 90 days
- ✓ Lifecycle definitions (if documented)
- ✓ Leadership reporting expectations (pipeline, attribution, funnel conversion)

If you don't have all of this, we'll guide you.

4. What happens next

- 1 Confirm fit + scope (brief intake)
- 2 Schedule the review and request access/inputs as needed
- 3 Complete the Gap Review and document findings
- 4 Review results together and align on next steps
- 5 Map the roadmap into **IBT Online HubSpot Marketing Programs** if you want managed execution

Request your IBT Online Hubspot Gap Review or contact IBT Online for more help



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Implementing HubSpot Solutions for over 10 years