

HubSpot Regular Cleaning Checklist

It's time for a health checkup for your HubSpot system! Let's make sure that everything is organized, current, and optimized to make your sales and marketing effective and efficient.



- ❑ **Email authentication check** — Verify that email authentication is properly set up to improve email deliverability. Ensure DKIM, SPF, and DMARC records are correctly configured in your DNS settings.
- ❑ **Workflow audit and cleanup** — check all active workflows, starting with those with those HubSpot has marked as “needing review.” Assess performance and relevance, edit where necessary, and remove those that are no longer needed. Be aware of how your workflows connect to other assets, so that you don't trigger an unintended action (like emailing all your contacts at once from changing one workflow).
- ❑ **Form review** — Check forms for outdated fields or compliance issues. Make updates to improve user experience and conversion rates. Remove or consolidate similar forms (like those for whitepapers and webinars) as needed.
- ❑ **List management** — Review all contact lists, both active and static. Merge or purge duplicate or outdated lists to streamline audience segmentation. Be careful when merging or deleting lists, as it might affect campaign targeting or enroll contacts in list-triggered workflows. And make sure you're using proper naming conventions!
- ❑ **Property cleanup** — Evaluate all custom properties in your CRM for current use and relevance. Delete or consolidate properties that are no longer needed.
- ❑ **Email template updates** — Review and update email templates to ensure branding consistency and content relevance. Test templates on various devices and email clients to ensure compatibility.
- ❑ **CRM data health check** — Audit CRM data for accuracy and completeness. Clean up any duplicate or incomplete data entries. Avoid mass deletions of CRM entries without backups, as this may result in irreversible data loss.
- ❑ **Reporting and dashboard review** — Scrap unused reports or dashboards, create/edit reports to better meet your needs, and get clear on what you want to measure.
- ❑ **Check integrations** — Review all third-party integrations (e.g., Zapier, Zoom, Slack). Fix any broken integrations and remove any no longer needed, double-checking dependencies first to avoid disrupting workflows.
- ❑ **Chatbot functionality test** — Audit chatbots for performance issues or outdated information. Update scripts and chatflows as necessary to improve user interaction.
- ❑ **Social and ad account integration check** — Confirm that all social and ad accounts are properly linked and data is syncing correctly. Update access permissions and integration settings as needed.

Need a Hand? Consider hiring a HubSpot consulting firm like Simple Strat to ensure that all these tasks are completed quickly and correctly. Our experts can help you avoid common pitfalls and maximize your HubSpot investment.

