PYXIS GROWTH PARTNERS

HUBSPOT AUDIT

Can your team trust what HubSpot tells them?

An outside, item-by-item review of how your HubSpot account is set up and used today, turned into a short list of what to fix first.

Where it hurts

HubSpot accounts drift. Lifecycle stages get redefined by whoever needs a report, properties multiply, and integrations get added without a clear owner. Sales and marketing stop agreeing on what counts as a qualified lead, and leadership stops trusting the pipeline.

The audit shows where you stand before you spend more on the platform. It isn't a pitch for a big project: if the fix is a handful of changes your admin can make, we'll say so.

When it's the right time

- A new CRO, CMO, VP of Sales or RevOps leader needs a baseline before changing anything
- You just raised a round and the board expects pipeline reporting it can rely on
- Marketing and sales disagree on lead handoff and scoring
- You're planning target-account plays and aren't sure the data can carry them

What we review

Account-wide

- Lifecycle stages, MQLs and SQLs
- Lead follow-up
- License use
- Integrations, app security
- Properties, custom objects

Marketing Hub

- Emails, landing pages, forms
- Lead and account scoring
- ABM tools
- Campaign ROI tracking
- Handoff to sales

Sales Hub

- Lead management
- Sales workspace
- Pipelines and visibility
- Goals and forecasts

Service Hub

- Help desk ticketing
- Surveys and feedback
- Knowledge base
- SLA monitoring

HOW IT WORKS

1

Accept the partner invite

Pyxis joins your account as a Partner Admin, which doesn't use a paid seat.

2

Kick off in 30 minutes

We align on your goals, your teams and what you suspect needs attention.

3

We review your account

We review feature use, integrations, licenses and your data model.

4

Get your findings

Prioritized recommendations, usually within two weeks of kickoff.

What you leave with

Findings spreadsheet

Every item we reviewed, with its current state, the gaps we found and the recommended fix.

Executive summary

One to two pages of findings and prioritized recommendations your leadership team can act on.

Use them to fix issues in-house, brief your leadership, or scope a larger project.

Choose the depth that fits

Standard audit

Complimentary for qualified companies

For most companies running HubSpot. A full review of your account and each Hub you use.

Advanced audit

$1,500 per business unit

For results that need to reach an executive team or board. Everything in Standard, plus stakeholder interviews and an executive presentation.

Let's talk through your HubSpot account.

A 30-minute call to hear what's prompting it and recommend a depth.

BOOK A MEETING

meetwith.pyxisgrowth.com/meetings/parker

HubSpot Diamond Solutions Partner · In the ecosystem since 2012 · Accredited in CRM Implementation, Onboarding, Platform Enablement
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