Modgility

Integration, Analytics, and Feedback Checklist

(With Step-by-Step Instructions)

Integration:

Connect Sales, Marketing, and Service Hubs

1. Log in to your HubSpot account
2. Navigate to Settings > Integrations
3. Select the hubs to connect
4. Configure Data Syncing
5. Determine the data to sync (e.g., contacts, companies, deals)
6. Set up data syncing schedules
7. Test Integration
8. Verify data is syncing correctly
9. Troubleshoot any issues

Analytics:

Configure Analytics Dashboard

1. Navigate to Analytics > Dashboards
2. Select a pre-built dashboard or create a custom one
3. Add relevant metrics and KPIs
4. Track Key Metrics and KPIs
5. Identify essential metrics for your business (e.g., website traffic, lead generation)
6. Set up tracking for each metric
7. Schedule Regular Reports
8. Determine the report frequency (e.g., weekly, monthly)
9. Set up report scheduling

Feedback:

Configure Feedback Tools

1. Choose a feedback tool (e.g., HubSpot's built-in feedback tool)
2. Set up feedback forms and surveys
3. Gather Feedback from Customers and Teams
4. Share feedback forms with customers and teams
5. Encourage honest feedback
6. Refine Setup Based on Feedback
7. Analyze feedback data
8. Make data-driven decisions to refine your setup