The Ultimate Digital Experience Audit

WORKBOOK

HubSpot

We designed this workbook to work for you.

Whether you read it cover to cover or use it to systematically review your performance across digital categories, the intent is the same: to help you deliver a best-in-class customer experience.

Why? So you can grow better.

What's inside

Shifting expectations

A few years ago, most consumers were willing to settle for mediocre digital experiences. While they were frustrated with the extra steps and missed signals, they almost expected to stumble along the way.

Traveling from your website homepage, to their user login, to a support chat that moves to email — no way were all of those steps going to be equally personalized and well-timed. Instead, consumers grew accustomed to explaining and re-explaining their needs, settling into a latency that allowed companies to deliver a cobbled, sub-par digital experience.

Today, that forgiving attitude is gone. Your buyers and prospects have a fundamentally different relationship with digital spaces; consumer applications, streaming platforms, smartphones and other areas of elite, billion-dollar UI have permanently changed what we expect from the digital world.

Your buyers interact with these endpoints every day, and their patience for sub-par digital experiences and customer interactions has plummeted — just like yours. Combine buyers' growing expectations and the scope of competition in your industry and you can see the business-level risks in failing to deliver the digital experience your customers expect.

Risk of failure

Number of touchpoints
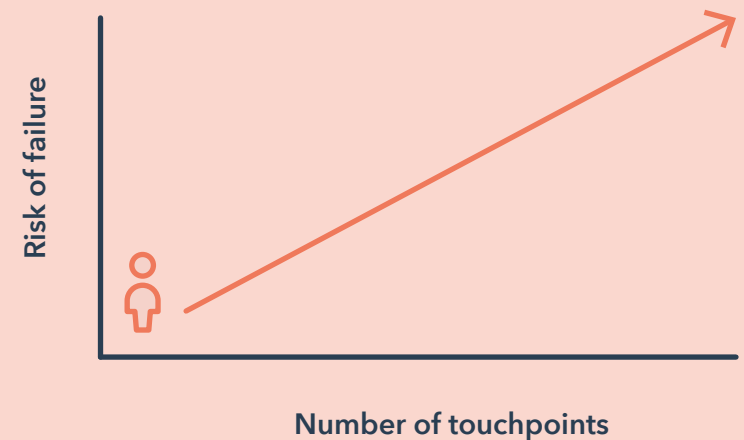
Evolving demand

Buying cycles have changed alongside these customer expectations. The availability of new digital touchpoints and a growing landscape of competing vendors gives buyers an unprecedented ability to pressure-test as they go – from pitting you and your features directly against other providers to carefully examining the quality and consistency of your digital delivery.

To put it simply, buyers have more options. Today's most successful companies are acquiring – and retaining – new business through the experience they provide their customers.

But a seamless digital experience isn't achieved by stacking up layers of complex tools. It's not supposed to slow customers down to marginally enrich their journey.

At its core, a best-in-class experience *removes* steps from a buying journey.

At its core, a best-in-class experience *removes* steps from a buying journey.

Rather than a customized path that winds through multiple systems, it should draw a straight line from where they are to where they want to be. It should bring buyers from a specific question to a contextualized answer – from curiosity to content – without them asking for it.

VS.

The natural response to this gap has been a complex, cobbled tech stack, with each tool designed to deliver a discrete part of the digital experience. As your organization scales, this cobbled toolkit has tangled into something that fails to deliver on customer experiences, back-end usability and – critically – top-line growth.

What's a best-in-class experience made of?

The digital experience we're talking about rests on five pillars. Each of them relies on the others; the entire buyer experience is only as strong as the weakest of these.

These pillars enable digital experiences across the following customer touchpoints:

Social media channels

Form submissions

Live chat/conversational tools

Sales and marketing outreach

Account management

Website

Commerce

Software/applications

Customer support

Sales enablement material and quotes

Messaging

Data

Reporting

Website

Automation

The Ultimate Digital Experience

How to Use This Workbook

Regardless of what platform you use to deliver digital experiences for your customers, this workbook is designed to help you identify where you excel — and fall short — as you strive to deliver a best-in-class digital experience for your prospects and customers.

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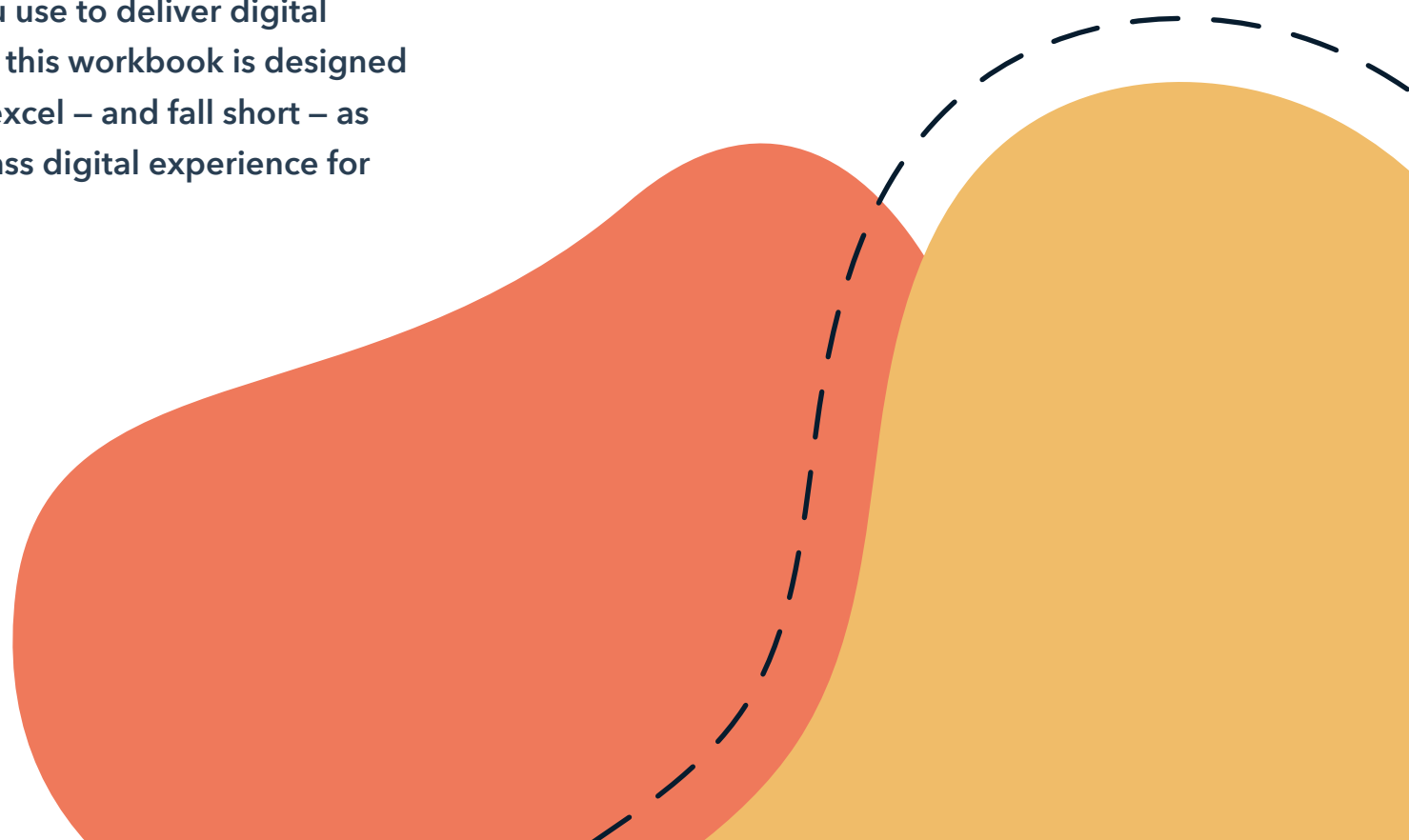
Scoring overview

Each of the five sections will help you self-grade for that digital experience pillar. Add up your score at the end of each section and see how they fit within these ranges.

○ *0-12 | Problem*
This pillar is doing significant harm to your ability to meet customer expectations for digital experiences.

○ *13-20 | So-so*
You're getting there, but this pillar is preventing you from delivering a best-in-class experience.

○ *21+ | Strong*
You're doing well here. Make sure you revisit consistently to incrementally improve your score.

FOLLOW THESE TIPS

Try to follow the audit in order
Avoid jumping to the pillar that you're most familiar with or know the most about at your organization. As the foundation that powers everything else on the list, **Data** is a key place to start.

Allow for diverse perspectives
If you plan to divide this discovery work across multiple teams, make sure stakeholders aren't just auditing the pillar within their focus area. You're likely to get richer, more objective analysis of your pillars if auditors don't audit their own tools and processes.

Set goals along the way
We recommend conducting this audit over a **30-day period**, and will guide you toward qualitative goals as you work through each pillar. If your sales motion has unique steps or features, you can augment these goals to include those steps.

Use the scoring matrix to prioritize next steps
As you plan to fill gaps in your digital experience, work to solve for the areas that yielded the lowest score first — those are probably the areas that risk harming customer experiences the most.

It takes about **30+ days** to conduct an audit

Phase 1

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

Phase 2

| 8 | 9 | 10 | 11 | 12 | 13 | 14 |

Phase 3

| 15 | 16 | 17 | 18 | 19 | 20 | 21 |

Phase 4

| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

Phase 5

| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

1 **Data**
2 **Reporting**
3 **Website**
4 **Automation**
5 **Messaging**

Data

HOW DOES DATA DRIVE A BEST-IN-CLASS DIGITAL EXPERIENCE?

It's no accident that data is first in this workbook. Without organized, accessible and actionable data, it will be hard to achieve the other four pillars. Start here and be sure to scrutinize this area of the audit.

In this context, 'data' is any and all information about a customer or prospect; from previous online interactions with your business to lead intelligence. Data allows marketers to personalize content and build relevant experiences for customers. It also allows developers to craft sophisticated online experiences based on known intent, traits, and areas of interest.

WHY IS IT SO HARD TO USE DATA TO CREATE SEAMLESS DIGITAL EXPERIENCES?

Probably because it's in a silo. Without a CRM and automation suite that's tied to your CMS, your customer data probably lives in one – or several – separate places depending on their lifecycle stage, recent activities or origination source.

These silos mean you can't get a clear picture of any customer, barring you from any insights into their behavior, preferences or unique needs. No chance you can personalize their digital experience without that at your fingertips.

AUDIT SCORING QUESTIONS

Total score

Total possible score: 25

Our teams are operating with the same data

Never **1**   **2**   **3**   **4**   **5**   *Always*

**Our teams leverage a centralized view
of the customer experience**

Never **1**   **2**   **3**   **4**   **5**   *Always*

We are able to use data to create dynamic content

Never **1**   **2**   **3**   **4**   **5**   *Always*

Our data lives in a single, comprehensive system

Never **1**   **2**   **3**   **4**   **5**   *Always*

**Our teams are aligned on critical data and
can access it the same way**

Never **1**   **2**   **3**   **4**   **5**   *Always*

AUDIT OPEN QUESTIONS   ?

Where are your data blind spots?

What teams have access to what information?

**What data are you struggling to collect or
pass between teams that is mission critical
to marketing, sales or services?**

**What data might conflict? Are there
multiple sources that are causing this
and if so, how can you condense them?**

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⊘ HOW TO FIX THIS

Low scores here mean you should be looking into the storage and accessibility of your data.

Consider where your data lives. If it's spread across multiple platforms and CRMs, is that by design or did your organization grow around the current setup? Start by consolidating your data locations and tightening up your approach to storage.

Aim to bring all of your customer data — from website activity to contact details to service ticket information — into one place. This is a big lift and shift that requires cross-functional buy-in, so don't be afraid to design a gradual transition as long as the end goal is consolidation.

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Reporting

HOW DOES REPORTING DRIVE A BEST-IN-CLASS DIGITAL EXPERIENCE?

Reporting allows marketers to optimize content around what is driving real business results. Whether your specific goal is to drive top-line revenue, increase trial sign-ups or maximize time-on-page, reporting will help uncover how to best achieve those goals. Reporting that drives strong digital experiences needs to be attainable and actionable in real time, by stakeholders across the business – not just marketers.

WHY IS IT SO HARD TO USE REPORTING TO CREATE SEAMLESS DIGITAL EXPERIENCES?

Reporting across systems is a full-time job. When data is stored in disconnected tools, pulling simple reports on performance takes longer and is usually more prone to human error.

AUDIT SCORING QUESTIONS

Total score

Total possible score: 25

Our teams can independently report on website
behavior without an analyst or outside support

Never   **1**   **2**   **3**   **4**   **5**   *Always*

We can easily run A/B or adaptive tests on our content

Never   **1**   **2**   **3**   **4**   **5**   *Always*

We can easily identify and triage SEO issues on our site

Never   **1**   **2**   **3**   **4**   **5**   *Always*

We can adapt quickly to the insights gained from our reporting

Never   **1**   **2**   **3**   **4**   **5**   *Always*

We can tell which pieces of content are generating
the most leads (or revenue) for our business

Never   **1**   **2**   **3**   **4**   **5**   *Always*

AUDIT OPEN QUESTIONS ?

What website reporting do you need to measure your
goals? Can you get it now? If not, what's missing?

What do you wish you could report on?

How long does it take you to build out different
reports? Which are taking too long and why?

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⊙ HOW TO FIX THIS

Low scores here mean you should be looking into the agility and business value of your reporting.

Start by ensuring you have reporting capabilities pre-built in a dashboard, so you don't need to pull data from scratch. This will help you answer complex performance questions immediately and allow you to pivot your digital strategy in minutes instead of days.

Establish basic attribution reporting so that you can tie marketing and sales activities to KPIs and business outcomes (like leads and top-line revenue). Set up some basic A/B or multivariate tests on key landing pages to practice the functionality and build some baseline data.

🎓

If you're new to reporting, HubSpot has some educational resources to get you started:

- Monthly Marketing Reporting Templates >
- How to Build and Analyze Marketing Reports >

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3

Website

HOW DOES WEBSITE DRIVE A BEST-IN-CLASS DIGITAL EXPERIENCE?

Your website where most buyers actually engage with your company. It's where they will have the seamless, data-driven, personalized experiences you're trying to create. Best-in-class websites solve for buyers at every stage of their customer lifecycle: they provide highly contextual resources for visiting leads, reflect earlier sales discussions for late-stage opportunities, and enable customers to navigate seamlessly through conversations and support functions.

WHY IS IT SO HARD TO USE YOUR WEBSITE TO CREATE SEAMLESS DIGITAL EXPERIENCES?

Your website might be separate from the rest of your platform — like an unchanging business card that looks identical to anyone and everyone — rather than an agile business tool. This might work for a small core of your buyers, a lack of data-driven personalization and follow-up could make your digital experience hard to remember among a range of other vendors.

AUDIT SCORING QUESTIONS

Total score

Total possible score: 25

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**Our marketers can create and edit
pages independent of a developer**

Never   **1**   **2**   **3**   **4**   **5**   *Always*

Our content is optimized for search

Never   **1**   **2**   **3**   **4**   **5**   *Always*

Our content abides by accessibility guidelines

Never   **1**   **2**   **3**   **4**   **5**   *Always*

It's easy to personalize our content with CRM data

Never   **1**   **2**   **3**   **4**   **5**   *Always*

**Our web experience is consistent across
all devices, pages and buyer touchpoints**

Never   **1**   **2**   **3**   **4**   **5**   *Always*

AUDIT OPEN QUESTIONS [?]

What areas cause the most user friction on your website?

**How do you treat customers visiting your website
differently than visitors and prospects? If you don't
currently, how would you in an ideal state?**

**Who needs to be involved to create a web page?
What guardrails are in place to make this possible?**

How long does it take someone to create a page?

Good   **< 2 hrs**   **2-8 hrs**   **> 8 hrs**   *Poor*

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⚠ HOW TO FIX THIS

Low scores here mean you should be looking into the user experience and back-end functionality of your website.

One key to driving digital experiences with your website is ensuring that it's easier to use for your team. Use native modules and get non-developers comfortable with your 'what you see is what you get' (or WYSIWYG) CMS editing interface. Give your team the time and space to get familiar here so you can evolve your site and respond to changes faster.

Using your CRM and customer database, examine who your customers are. What are their most common industries? What content interests them the most? What challenges are they expressing in form submissions and chat conversations?

With a clearer picture here, start to make incremental changes to your website to move in their direction. Add conversion points on high-traffic pages. Build industry- or role-specific sections of your site for them to self-navigate to content and messaging that's crafted for them.

Additionally, make sure your design experience is flexible and error-free. Test every page on multiple devices to make sure mobile and tablet versioning doesn't slow users down. Make a list of improvements needed as you QA across devices.

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Automation

HOW DOES AUTOMATION DRIVE A BEST-IN-CLASS DIGITAL EXPERIENCE?

Automation helps ensure actions taken by your site visitors are acted upon by your team. In addition to the long-term benefits of proper segmentation and targeting, automation can drive an immediate, high-value touchpoint with buyers who need immediate attention.

WHY IS IT SO HARD TO USE AUTOMATION TO CREATE SEAMLESS DIGITAL EXPERIENCES?

If your contact database isn't integrated into — or built on top of — your website and other digital spaces, it's unlikely that any onsite buyer behavior will make it into their contact record. That means little to no visibility into how they interacted with your company, preventing you from confidently enrolling them in any marketing automation.

AUDIT SCORING QUESTIONS

Total score

Total possible score: 25

We can create automation based on onsite behavior
Never   **1**   **2**   **3**   **4**   **5**   *Always*

We can easily integrate other tools and platforms into our automation
Never   **1**   **2**   **3**   **4**   **5**   *Always*

Our automation functions/performs well for people on various teams
Never   **1**   **2**   **3**   **4**   **5**   *Always*

We're able to automate or schedule out content updates in advance
Never   **1**   **2**   **3**   **4**   **5**   *Always*

We have a strategy to unenroll leads from automation once they're engaged with sales
Never   **1**   **2**   **3**   **4**   **5**   *Always*

AUDIT OPEN QUESTIONS   [?]

Where is the customer experience breaking? What BAD experiences are possible with your website and automation?

How is your lead scoring and sales outreach tied to automation? What are your strengths and weaknesses here?

ⓘ HOW TO FIX THIS

Low scores here mean you should be looking into the capabilities of your CRM and omnichannel digital experience.

First and foremost, make sure that any omnichannel action by your leads is instantly updated at their contact record in your CRM. Automation is all about response logic; 'if they do X, we will react with Y.' A proper response requires consistent tracking of their actions.

Look into building some foundational, automated workflows for your contact database. Here are some must-haves:

- Post-content-download email
- Post-form-completion email
  (especially a Contact Us or Demo request)
- Lifecycle assignment (automatically mark contacts based on where they are in the funnel)
- SDR/Sales notifications (when leads reach a certain threshold)
- Sharing support documentation (based on stated needs on Support Tickets)

Before you go live with any new workflows, comb through your marketing automation platform and ensure you have no old/irrelevant workflows that someone could accidentally trigger. If you have a range of old and new automation, give them all a clear, consistent naming convention so your various teams are aligned on their purpose.

5

Messaging

HOW DOES MESSAGING DRIVE A BEST-IN-CLASS DIGITAL EXPERIENCE?

By allowing you to speak directly to buyer segments (and, in some cases, directly to individual buyers), tailored messaging creates emotional bonds between you and your customers. It helps foster trust, service and selflessness.

WHY IS IT SO HARD TO USE MESSAGING TO CREATE SEAMLESS DIGITAL EXPERIENCES?

To get your messaging right at an individual level, you need to understand your audience at an individual level. This is a high-risk, high-reward strategy that can damage experiences if done poorly or inaccurately. Done right, personalized messaging can create long-term marketing relationships. But you need a crafted solution that unifies digital endpoints with customer data.

AUDIT SCORING QUESTIONS

Total score

Total possible score: 25

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Our messaging is seamlessly aligned across email and website touchpoints

Never   **1**   **2**   **3**   **4**   **5**   *Always*

Our website's chat functionality is a key business development/educational tool

Never   **1**   **2**   **3**   **4**   **5**   *Always*

We have unified brand messaging and product positioning on social and advertising channels

Never   **1**   **2**   **3**   **4**   **5**   *Always*

Service, Sales and Marketing are aligned on our product positioning and language

Never   **1**   **2**   **3**   **4**   **5**   *Always*

Visitors experience a tailored version of our content depending on their contact details

Never   **1**   **2**   **3**   **4**   **5**   *Always*

AUDIT OPEN QUESTIONS   [?]

Where are your value propositions most clear, accurate and up-to-date? What channels are the hardest to upkeep?

How would you personalize your messaging if you knew more about your prospects?

How do you message/personalize differently for customers vs. prospects?

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⚠ HOW TO FIX THIS

Low scores here mean you should be looking to consolidate your messaging and expand your capabilities.

Start by systematically reviewing each buyer touchpoint throughout their lifecycle, from lead to opportunity to customer. Are you describing things differently at different stages? How consistent is your product vocabulary and word choice? If there's too much liberty here, build simple documentation that teams can easily use to adopt the correct messaging.

Use your CRM data to dig into existing customers. If you see trends in industry or pain point, consider how your omnichannel messaging is tailored to those industries or pain points. Start with some basic **smart content** to individually personalize digital messaging based on known contact properties — this will let you message to one individual at a time, at scale.

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Putting it all together

Regardless of your score, diving headfirst into this audit means you recognize what's at stake with your digital experience. You see the upside to crafting a best-in-class experience for customers, and understand the potential it has to drive – or damage – the future of your growth. Ultimately, combining your customer data, automation and content creation tools into a crafted platform is the most effective way to deliver the experience your customers expect.

HubSpot:
CRM + CMS
+ Marketing
Automation

CMS Hub helps you build digital experiences powered by HubSpot's CRM Platform. By leveraging data across your content, you'll be able to build digital experiences that drive business growth.

Outcomes:

- Personalize content for new visitors and loyal customers easily.
- Use CRM objects to build dynamic content. Leverage automation to ensure your system of record and your system of content is always in sync.
- Seamlessly follow up with customers whenever they take an action on your website using HubSpot's email marketing & chat tools.
- Efficiently create content by allowing your developers and marketers to work together — not at odds with one another.
- Understand the impact of your efforts with real-time ROI reporting.

GET STARTED

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The HubSpot CRM platform makes it easy for your entire company to work together — from marketing, to sales, to customer service. Each hub is powerful alone, but they're even better together.