
Beyond Go-live:

How your team can keep
getting value from HubSpot

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YOUR SPEAKER



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- ▶ Leading Breckenridge, a UK-based HubSpot Partner agency helping ambitious businesses use CRM, RevOps and automation to create more deliberate, scalable growth.
- ▶ 14 years working with leadership teams to uncover hidden revenue across the customer journey by improving visibility, process, data quality and HubSpot adoption.

Today we're going to cover...

- 01 CRM drift – what is it and how does it happen?
- 02 Eight practical areas you can monitor to prevent it
- 03 How it all fits together and what to do next

Your business
doesn't stand still.

Neither should
your CRM.

Go-live is only the beginning.

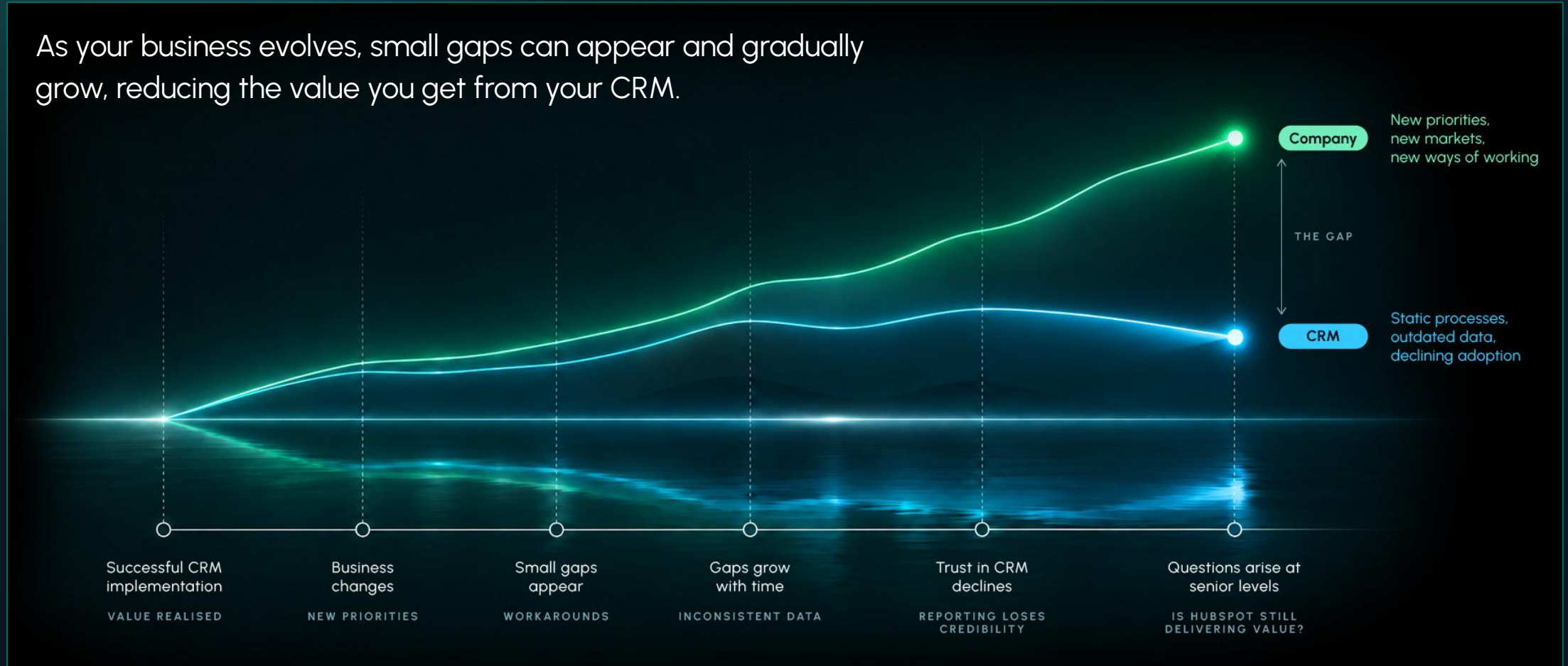
The CRM can be right at launch, but the business keeps moving and evolving.



The implementation project ends. The operating environment doesn't.

CRM rarely breaks overnight. It drifts.

As your business evolves, small gaps can appear and gradually grow, reducing the value you get from your CRM.



Small gaps add up.

How systems break over time: The story of CRM Drift

01

Successful implementation

HubSpot is fully implemented and is fully aligned to active business processes.

02

Business changes

Business priorities shift naturally over time, markets and personnel change.

03

Small gaps appear

As things start to diverge from the original CRM, people begin to implement "workarounds".

04

Gaps grow with time

Frustration mounts, user adoption declines, and overall data quality degrades rapidly.

05

Trust in CRM declines

Dashboard metrics and reporting suffer, leading to a loss in trust and credibility.

06

Questions arise at senior levels

Leadership concludes that the CRM is at fault, ignoring the failure to properly manage it over time.

Eight practical areas
to keep under review.

What can you do about it?

One framework. Eight areas to keep under review.

01

Strategy & ownership

02

Process

03

Data governance

04

Documentation

05

Training & adoption

06

Measurement & auditing

07

Continuous optimisation

08

AI & innovation

| 01 Strategy & ownership

Who owns the value you
get from HubSpot?

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Why it matters

CRM decisions need business priorities

What to look for

- Unclear ownership
- Reactive requests
- No roadmap

What you can do

- Assign ownership
- Agree outcomes
- Create a 6-12 month roadmap

| 02 Process

Do your CRM processes
still fit your business?

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Why it matters

Automation only helps if the process still makes sense.

What to look for

- Skipped stages
- Workarounds
- Ignored fields
- Awkward handovers

What you can do

Review the process first, map it out fully, then configure HubSpot around it.

Process first. Platform second.

| 03 Data governance

Can you trust the
information you're
working with?

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Why it matters

Reporting, automation, decisions and AI all depend on reliable data.

What to look for

- Duplicates
- Inconsistent definitions
- System clutter
- Reports that people question

What you can do

- Agree definitions
- Clarify ownership
- Remove duplication and clutter
- Check data quality periodically

| 04 Documentation

Could somebody else
understand how your
CRM works?

Is your CRM knowledge documented, or just remembered?

Why it matters

System knowledge should not reside solely in one person's head.

What to look for

- Undocumented workflows
- Unclear definitions
- Integrations nobody understands
- Decisions with no rationale

What you can do

Document what someone else needs to understand, maintain and safely make changes in the CRM.

Could somebody else pick this up and understand what's been built and why?

| 05 Training & adoption

Don't just show people
where to click.

Don't just teach people where to click.

Static Instruction

Software Training

"Here is how to create a deal"

Focuses exclusively on button-clicking mechanics and UI navigation inside the tool.

- Basic tool onboarding
- Standard static documentation
- Disconnected from business outcomes

Contextual Execution

Process Enablement

"Here is when, why, and what happens next"

Teaches the execution parameters that drive pipeline accuracy and data integrity.

- Mandated information requirements
- Exact pipeline triggers and gates
- Downstream workflow execution

| 06 Measurement & auditing

How do you know
when things are
starting to drift?

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Why it matters

CRM drift happens gradually – you need a way of spotting it before it becomes a major issue.

What to look for

- Inconsistent data quality, user adoption, system workflow errors
- Periodic reviews of system processes, automations and reporting reliability
- Longer term reviews of architecture, integrations, licenses and CRM roadmap

What you can do

- Create a simple CRM health-check rhythm
- Determine what needs to be monitored regularly, periodically and longer term
- Assess for business performance and system health, not just feature usage

How do you know when things are starting to drift?

Use a sensible review rhythm, without turning CRM management into a permanent audit.

Regularly

- Data quality
- User adoption
- Workflow exceptions
- Process inconsistencies

Periodically

- Process alignment
- Automations
- Integrations
- Reporting quality

Longer term

- CRM architecture
- Integrations and license usage
- Assess against CRM roadmap

The exact frequency will vary for different businesses.
The important thing is that somebody is looking.

| 07 Continuous optimisation

Don't just ask what's wrong. Ask what could be **better**.

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Why it matters

A stable and trusted CRM will be aligned with the business with opportunities to reduce manual work, improve handovers, make reporting clearer and allow teams to operate more effectively.

What to look for

- Points of friction
- Repeated manual tasks
- Duplicate data entries
- Slow handovers
- Processes that rely on somebody remembering to do something
- Reports that take unnecessary effort to produce

What you can do

- Build improvement into the way you manage the CRM
- Identify small changes that could remove friction or create more value
- Prioritise them against the business outcomes you've already agreed

Continuous optimisation
doesn't mean
continuous change.

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It means continually
being open to making
gradual
improvements.

Are the foundations
ready for what's now
possible?

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Why it matters

AI doesn't remove the need for the disciplines we've already discussed.

Using AI without getting the basics right just means you'll get poor results more efficiently.

What to look for

Start with the business problem, not the features:

- Where is time wasted?
- Might better information improve decision making?
- What processes might be automated?
- Is the data reliable?
- Are the processes clear?
- Is the context established?

What you can do

- Evaluate which new capabilities could solve a real business problem
- Test whether they're useful to your business
- Adopt or ignore? If it's useful, keep it; if its benefit is unproven, ignore it

Better AI starts with better CRM.

What happens downstream depends on the quality of what comes first.



If the foundations are weak, then AI doesn't remove the problem – it inherits the problem and amplifies it.

Bringing it all together.

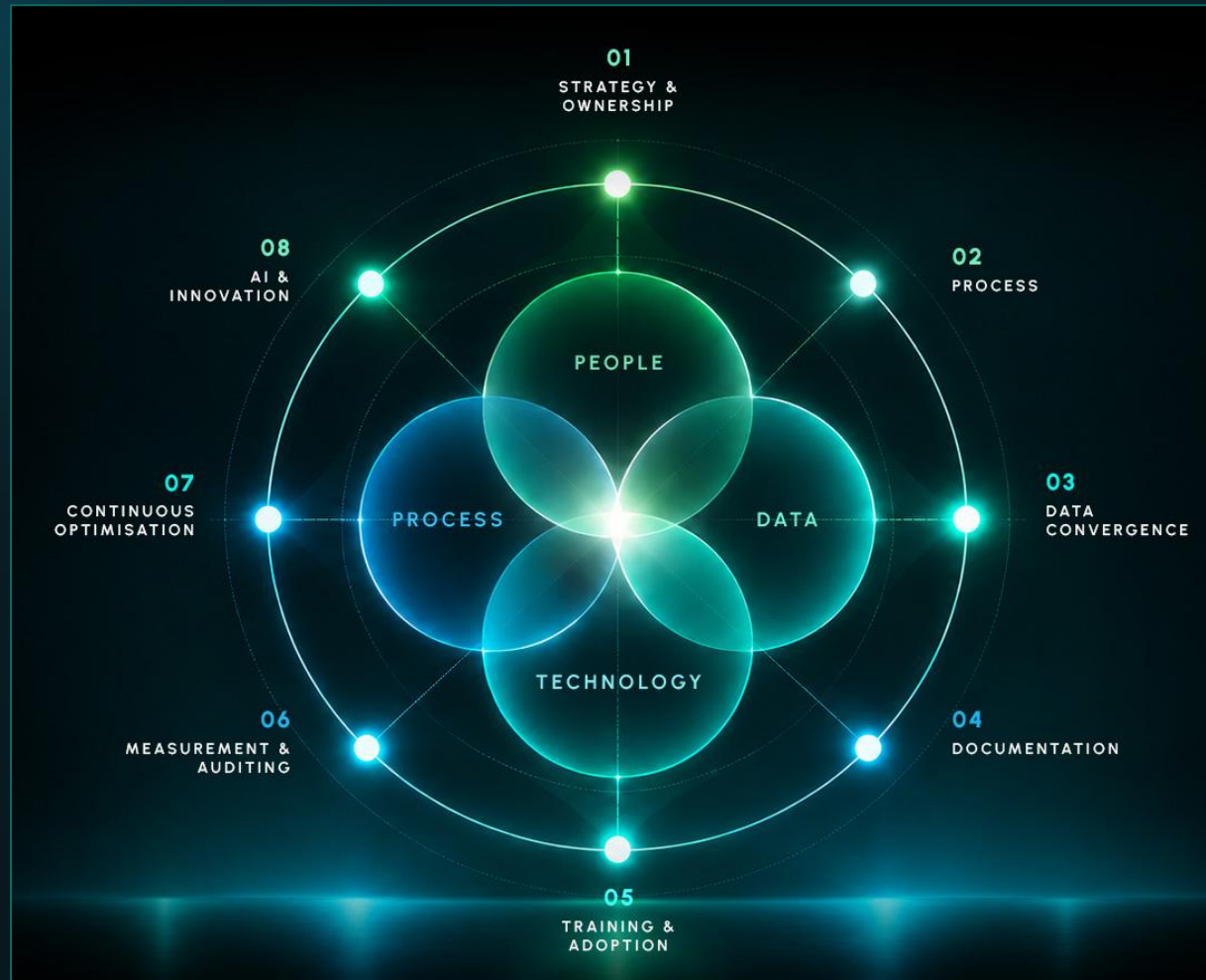
These aren't eight separate projects.

Innovation provides new opportunities to do things better

Optimisation keeps the system improving and evolving over time

Measurement allows you to spot drift before it becomes a problem

Training ensures that people use the system consistently



Ownership determines what you're seeking to achieve

Processes determine how the business needs to work

Data allows you to understand what's happening

Documentation protects the integrity of the system

This is where RevOps comes in.

It's not another project. It's an ongoing way of keeping the moving parts aligned.



You don't need to fix everything at once.

Really, don't even try! If you do, you'll quickly get overwhelmed and nothing will happen.

Start by working out where your attention will make the biggest difference.

Review your CRM against the eight areas we've covered today. For each area, ask:

Why does this matter to our business?

What are we seeing today?

What could we do next?

This will give you a practical starting point for deciding where to focus.

THANK YOU COMING TODAY

Any questions?

Not sure where to start?

We're developing a simple CRM Management Assessment to help you take a structured look at the eight areas we've covered today.

24 questions. Around 5 minutes.
A clearer view of what to do next.

We'll be sharing a link to our online assessment tool very soon – keep an eye on your inbox for a new email from us!

What should we cover next time?

Thanks for coming. We want these sessions to be useful to you!

We welcome suggestions for topics that you would like to cover in future events. They can be top-level or deep-dive, all suggestions are welcome! If you have specific suggestions, please add them in the chat.